

Decoding Moroccan Gen Z: An Analysis of Spanish Fashion Brand Perceptions in Morocco

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DOI: [10.36348/sjbms.2024.v09i05.001](https://doi.org/10.36348/sjbms.2024.v09i05.001)

| Received: 07.04.2024 | Accepted: 10.05.2024 | Published: 22.05.2024

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Abstract

Spanish fashion brands seeking to enter or solidify their presence in the Moroccan affordable luxury and fast fashion market face a unique set of challenges. This study highlights the critical importance of understanding the intricacies of Morocco's affordable luxury sector, including commercial and ethical considerations. Overlooking these differences can lead to strategic missteps. This article offers practical guidance for navigating the Moroccan market. Through a survey of potential Gen Z Moroccan clientele in Tangier and Gen Z Spanish clientele in Barcelona, the research explores brand perceptions and categorizes 10 Spanish brands along a spectrum ranging from ultra-fast fashion to luxury brands. Additionally, the survey analyzes how ethical values impact the Moroccan participants' purchasing decisions. Furthermore, the article emphasizes the importance of continuous adaptation for successful market penetration. This research provides valuable insights for Spanish fashion companies aiming to cultivate strong business relationships with Moroccan affordable luxury consumers.

Keywords: Marketing, Moroccan market, Gen Z, fast fashion, luxury brands, Spanish fashion brands, ethics, boycott.

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1. INTRODUCTION

Research shows that consumer perceptions of what constitutes luxury products vary across countries (Kapferer & Michaut, 2016). While many studies describe attributes of luxury products from a Western perspective (Mundel *et al.*, 2021), the literature on affordable luxury brands in Morocco is scarce. Although Morocco is geographically near Spain, differences in culture might impede Spanish brands from succeeding in the Maghrebi country. In 2023, the total volume of Moroccan-Spanish trade surpassed 20 billion euros, up +7% compared with 2022 (OEC, 2023). Additionally, Morocco is one of the few markets in which Spain is the leading supplier, along with Portugal (Diez *et al.*, 2023).

Morocco, in relation to Spain, is a small market in terms of GDP, disposable income, and population, where pricing is a key factor for the consumer's final purchasing decision. However, due to income inequality, market niches are developing products that are only accessible to segments of the population with greater purchasing power and in which the final price is not so

decisive (Diez *et al.*, 2023). Therefore, Morocco has become a key investment destination, largely because of the favorable quality-price ratio and the positive perception of the Spanish brand, which is a result of the huge Moroccan population in Spain (Bennani, 2021). Nevertheless, the Industrial Reactivation Plan (2021–2023), a protectionist policy, was developed in 2021. The foundation of this new approach consists in the implementation of an import substitution policy, the bolstering of Moroccan industrial capital, and the encouragement of exports (Ministère de l'Industrie et du Commerce, 2022). This study intends to highlight the importance of understanding ethical values and commercial aspects for a brand to thrive in Morocco. We have analyzed consumers' perceptions of 10 Spanish fashion brands in Morocco and Spain. By interpreting the differences in assessment of the same brands in both countries we intend to create a guideline for companies to take into consideration when either entering the Moroccan market or willing to expand their businesses there.

We have posed the following research questions:

1. What are the main reasons why Moroccan and Spanish Gen Z may assess Spanish marks differently?
2. How do ethics and cultural considerations influence brand loyalty in the Moroccan fashion market?
3. Do Spain and Morocco hold the same view on the strongest brand among those analyzed?

2. Types of Brands

Ultra-fast fashion is a subsegment of the fashion industry characterized by an exceedingly rapid production and commercialization cycle compared to traditional fast fashion. It is also the cheapest of all types of fashion. This expedited process is achieved through extensive technological integration across the design and manufacturing stages. While fast fashion is already known for its swift turnaround times, ultra-fast fashion represents a significant acceleration within this model. However, this emphasis on speed often comes at the expense of environmental sustainability. The Chinese brand Shein is the largest ultra-fast fashion (Shadel, 2022).

fast fashion can be found on streets close to the most luxury brands, the trendy showcases of H&M, Zara, and Forever 21 feature designs similar to the high-priced luxury brands but made with lower quality and sold at much lower prices (Amatulli *et al.*, 2021; Yoo, 2023).

Bridge fashion or affordable luxury is a concept that became popular in US business writing at the beginning of this century. The Boston Consulting Group first coined the term "affordable luxury" in 2002 while discussing premium items (Mundel *et al.*, 2021). Specifically, the survey highlighted chocolate as an expensive good that started to be seen as a reasonably priced luxury. Although bridge brands often utilize higher-quality materials and construction compared to mass-market brands, they may not reach the level of craftsmanship or use of exclusive materials found in high-end luxury goods. Another characteristic of affordable luxury is that these brands are typically sold through department stores, dedicated brand stores, and some high-end online retailers. This creates a more selective distribution strategy compared to mass-market brands, but less exclusivity than high-end luxury boutiques. Some examples of brands in the affordable luxury segment include Coach, Michael Kors, Kate Spade, and Yves Saint Laurent (Mundel *et al.*, 2021, Walley & Li, 2015).

Luxury brands such as Chanel, Louis Vuitton, and Gucci, are brands that feature high-end materials and unique craftsmanship. This fashion is related to scarcity and exclusivity, is a hedonic experience is a social marker (Diallo *et al.*, 2021).

3. Generation Z

Generation Z is defined as those who were born in the 1990s and raised in the 2000s through the most significant changes of the century and who live in a world with the web, internet, smartphones, laptops, networks, free access, and digital media (Ribeiro Daquila, 2024). The social web has been part of Generation Z's education, and the digital world is important to their identity. Their existence is more linked to technology and the digital world than that of any previous generation since they were born and raised in it; for this reason, they are also called Screenager – adolescents of the screen (Álvarez Ramos *et al.*, 2019, Ribeiro Daquila, 2023).

Social media is a crucial aspect of Generation Z's existence, and they have a casual, direct, and distinctive communication style. They are a generation that values DIY. According to research (Schawbel, 2014; Dangmei and Amarendra, 2016), Generation Z is less money-driven than Millennials and is more entrepreneurial, trustworthy, tolerant, and open. Four out of five of your favorite brands are technology companies. They are abandoning traditional corporate jobs in favor of content creation, and have even devised a new vocabulary inspired by algorithmic guidelines (Briggs, 2022).

4. Ethical Values and Brand Fidelity in Muslim Countries

In early December 2023, Zara's campaign 'The Jacket' triggered a boycott against the brand (Katanich, 2023) as the campaign supposedly supported Israel in the Israel-Palestine war. In order to understand the boycott of Zara, it is helpful to know its historical context. The Israel-Palestine conflict dates back to 1917 with the British Balfour Declaration that decided to give a small part of Palestine to the establishment of the State of Israel (Harms & Ferry, 2012). In 1947 the USA and UK issued 100 thousand immigration certificates for Jews to migrate to the new state of Israel. In this same year, Britain handed Palestine to the United Nations, which proposed the partition of Palestine and the assignation of 56% of its land to Israel. The following year Israel fought and illegally took over 85% of Palestinian lands. Many Palestinians were either killed or displaced due to this war (Harms & Ferry, 2012). Regarding the most recent war that started on 7th October 2023, Israel has killed, as of 25th March 2024, at least 32,333 Palestinians and wounded 74,694 (Motamedi & Siddiqui, 2024). Arabs did not remain indifferent and declared boycott campaigns of the brands that supported this war. In the fashion field, the Spanish fashion brands Zara and the German Puma were the most affected. The former is due to its support to Israel in the campaign 'The Jacket' and the latter to sponsor the Israeli soccer team (Katanich, 2023). We will focus on the Zara case, as it is one of our 10 investigated brands in this study. Zara's campaign featured on its website and App mannequins with missing limbs and statues wrapped in white, resembling

the wrapping of the dead bodies of Palestinians. As we can see in the figures below, social media did not forgive the positioning of Zara regarding such a sensitive theme.

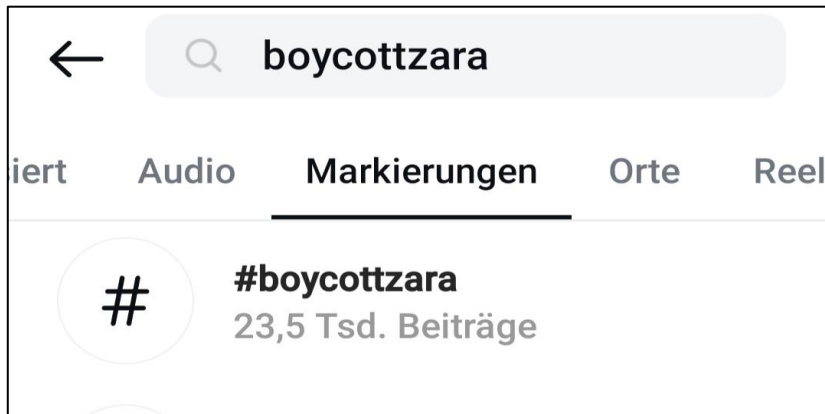


Figure 1: Number of the hashtag #boycottzara on 20 March 2024 on Instagram

As we can see in Figure 1, 23,5 thousand hashtags promote the boycott of the Spanish brand.

There are other hashtags such as #boycottzara widespread on this platform.

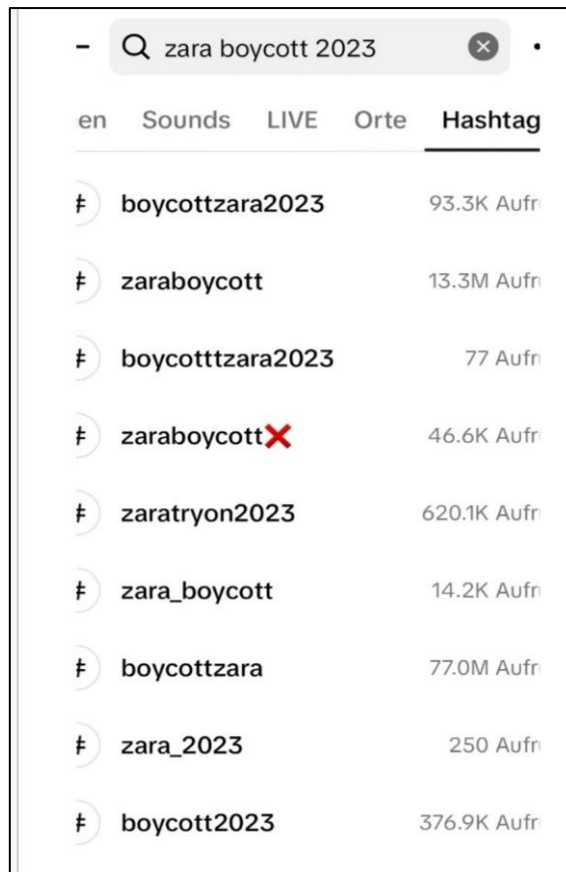


Figure 2: Calls for boycott of Zara on TikTok

The various hashtags calling for a boycott of Zara on TikTok can be observed in Figure 2. There are

over 20 different hashtags that represent more than one million objections to Zara’s ‘The Jacket’ campaign.



Figure 3: Disapproval of Zara's campaign on X

As we can observe in Figure 3, a user is extremely shocked by Zara's racist campaign and demands that the company should fire its head designer. Zara pulled out the campaign named 'The Jacket' after the boycott started and apologized (Aljazeera, Dec. 2023). However, the boycott and demonstrations in front of and inside Zara stores continued worldwide.

5. Spanish Fashion Stores in Morocco

Zara, founded in 1975 in Galicia, Spain, is the largest constituent company of the Inditex group (Inditex, 2024). Zara is the leading fashion brand in number of stores with 5 branches in the country: two in Casablanca and one branch in Marrakech, Tangier, and Agadir. The first store opened in 2004 in Casablanca (Soto, 2004). Pull&Bear, which also belongs to Inditex, possesses two stores in Casablanca and one in the capital city of the country, Rabat. Oysho owns three stores, two in Casablanca and one in Rabat. Massimo Dutti possesses three stores, two in Casablanca and one in Tangier. Mango possesses two stores, one in Casablanca and the other in Marrakech. Balenciaga opened in 2022 in Casablanca at the Morocco Mall a 220 m² boutique located in the luxury zone (Le matin, 2022). Adolfo Dominguez owns a store in the capital city. Although there are no boutiques of Bimba y Lola in Morocco, the branch in Seville, the closest to the Maghrebi Kingdom, receives Moroccan tourists who travel exclusively to buy in their store (De Benito, 2023). Tous and Loewe do not have stores in the country.

6. Commercial Considerations

Although Modern Standard Arabic (MSA) is the official language in all Arab countries (Ribeiro Daquila, 2022 p. 319), French is the business language in Morocco, so a company intending to do business in

Morocco should have all the documentation translated into French. An international enterprise does not need a local partner to constitute a company in Morocco and in two weeks a company may be constituted (Diez *et al.*, 2023). One must keep in mind that in public administration one would need a representative who speaks either French or Arabic. Although the minimum wage in Morocco is around 290 euros, the final cost for a worker is far from this value. In addition, in order to dismiss a worker, severance pay is high and it is calculated gradually. If we are dealing with damages, for instance, it is necessary to pay one and a half months for each year worked (Diez *et al.*, 2023). In Morocco, capital entry is encouraged while its exit is extremely controlled (Del Pino, 2021). Regarding customs and to avoid delays and blockages, the regulations must be known before any shipment. Make use of reliable and recognized freight forwarders (Diez, 2023).

7. METHODS

Sixty interviewees answered a questionnaire tailored for this study. There were both quantitative and qualitative questions.

6.1. The Participants

30 male Moroccan Gen Z participants from Tangier, aged from 20 to 27. All of whom are working or working and studying. All participants were employed; seven owned businesses such as restaurants and coffee shops, one had a telephone store at the shopping mall Ibn Battuta, one was a policeman, and the remaining were employed by other companies.

30 Spanish participants, 22 female and 8 male respondents from Barcelona, aged from 18 to 23. All of them are students at a business school. Fourteen female

and four male students were employed at the moment of the interview.

7.2. Procedures

The interviews were first administered in January 2024 in front of the shopping mall Ibn Battuta in Tangier, Morocco. Customers who were both leaving or entering the mall were invited to participate as long as they were 18 to 27 years old and were employed as the purchasing power of the sample was taken in consideration. They started by answering a four-question socioeconomic questionnaire and signing the consent form (see, Appendix A). Subsequent to this short questionnaire respondents provided their responses assessing the 10 analyzed brands (see Appendix B). Finally, participants completed a questionnaire regarding the logo and prices (see Appendix C). The interview was once again administered in Barcelona in March 2024, the only difference is that question 4 in Appendix A concerning how much the respondent earns was excluded from the questionnaire. In Appendix B, the questions in Part II concerning the logo size and prices were also disregarded.

8. RESULTS AND DISCUSSION

Concerning the Moroccan participants, after completing the questionnaire in Appendix A, Zara obtained high ratings before the unethical campaign. Six participants rated it three stars, 15 Participants rated it four stars, and nine participants five stars. However, after 'The Jacket' campaign, while only one participant maintained the initial 4 stars, 23 participants rated it one star, and six rated it two stars. Pull&Bear is another brand in vogue in the kingdom. Despite not having a store in Tangier, only two participants did not know the brand. Its rating ranged from 3 (6 participants) to 5 stars (5 participants). The reason why it was rated 5 stars was that there are not many counterfeit garments apart from hoodies, so participants (and their friends) know that the product is authentic; has good quality materials, and is not overpriced. Although Pull & Bear also belongs to Inditex, Zara's group, the boycott did not affect the brand as Pull & Bear was not directly involved in the incident and Moroccans may not know that Pull & Bear and Zara belong to the same group. Balenciaga completes the set of Spanish brands that are known by the majority of participants. Only one participant did not know it. The brand received six five-star ratings. However, one participant awarded it one star expressing that the collection has a weird style and sometimes flashy colors, 'It is not elegant, they take advantage of their fame to produce outrageous products'. Mango, Massimo Dutti, and Adolfo Dominguez are known by around 50% of interviewees. Mango obtained five three stars and eleven four stars. Massimo Dutti, despite owning a store in front of Zara in Tangier, is not as popular as the Inditex leader, it received a one-star rating and 15 four-star ratings. Adolfo Dominguez, known by 15 participants who unanimously awarded the brand four stars. Finally, Mango obtained seven three stars and eight four stars.

Oysho, known by 9 participants was rated three stars by 6 participants and four stars by three participants. Tous was known by one participant who happened to have bought one bag of the brand for his girlfriend while traveling to Barcelona. The same occurred to Bimba y Lola, known by one participant who also rated the brand 4 stars, 'My sister has one bag of Lola'. Loewe was not known by any participants.

Regarding the Spanish participants, an analysis of their ratings revealed that four brands are considered luxury brands: Loewe (rated 5 stars by 5 participants), Tous, Balenciaga, and Adolfo Dominguez (rated 5 stars by 4 participants). These four brands' lowest ratings were Lowe 4 stars (one female and six male participants did not rate the brand); Adolfo Dominguez 4 stars; Balenciaga 1 star by one female participant, 3 stars by one participant, and the remaining rated 4 stars; the participant reported rating it 1 star because Balenciaga was selling a Scotch tape bracelet for 3 thousand euros and that she could buy a Scotch tape for three euros and wear it. Tous was rated 4 stars and one male rated it 4.5 stars. Massimo Dutti (Inditex group) received 26 four stars and four three stars. Oysho, which is another brand of the Inditex group, received the following ratings: 14 three stars, 10 four stars, and one five stars. The female participant who rated Oysho 5 stars is a professional bodybuilder who said that Oysho has everything she needs for her sport and a good quality price. Four males and one female did not rate the brand.

Zara's ratings were more varied, ranging from two stars (rated by 14 participants) to four stars (rated by 6 participants). One male participant awarded Zara a rating of 4.5 stars. Only one female participant rated it five stars because she loved the design, the good quality of materials, and its fair prices. When asked why interviewees rated Zara 2 stars, participants expressed their disapproval of labor exploitation carried out by the brand and the idea that fast fashion is not good for the environment. Mango's ratings varied from 1 star (2 participants) to 4 stars (3 participants); 3 participants rated it 2 stars, and the remaining rated the brand 3 stars. The reasons for the low ratings (1 and 2 stars) were that interviewees either did not like the style and design or did not agree with the fast fashion industry principles.

Regarding the logo on products, exclusively analyzed among the Moroccan participants, 60% would prefer Zara's jacket without the logo. Balenciaga's logo on the blue bag was enjoyed by 50% of the participants. The most appreciated logo was Massimo Dutti (80%), due to its discrete size. Regarding the size of the three logos, no participants would like it to be bigger, but many would prefer Zara's and Balenciaga's to be smaller. Some participants reported that big logos seem like fake products. Morocco has a strong counterfeit fashion industry of most brands ranging from Nike to Dolce & Gabbana. Only one participant expressed that Adolfo Dominguez's logo could be a bit bigger. He would pay

10% more to have a bigger logo on his suit jacket. Finally, concerning how much participants would pay for the three products, Zara's jacket would receive from 100 to 180 euros. Balenciaga's bag from 100 to 150 euros, and Adolfo Dominguez's suit jacket from 120 to 190 euros. A similar jacket, 'the leather biker jacket', is found on Zara's website for 100 euros, which means that Moroccans are willing to pay even more than the real price. Balenciaga would need strong marketing or price reduction to enter the Moroccan market as its bags cost from 850 euros to 3000 euros. Adolfo Dominguez's jacket cost from 159 to 259 on the brand's website, a similar price as the estimated by the Moroccan participants. These prices are high when compared to the salaries of our participants, six of them indicated that they earn a minimum wage (300 euros), 16 indicated earnings from 301 to 600 (see, Appendix A), and only seven participants earned from 601 to 900. One participant did not indicate his income.

9. CONCLUSIONS

This research has investigated the perceptions of Generation Z in Morocco and Spain towards Spanish fashion brands as well as the challenges brands seeking to enter or solidify their presence in the Moroccan luxury market may face.

Our findings highlight significant discrepancies in brand perception between the two nationalities. Ethical considerations, particularly concerning brand actions, were found to be a critical factor influencing brand loyalty among Moroccan Gen Z. The controversy surrounding Zara's 'The Jacket' campaign exemplifies this point, as Moroccan perceptions of the brand significantly declined following the incident. Similarly, Spanish participants disregarded labor exploitation and fast fashion industry conduct.

Furthermore, the study revealed a distinction in how luxury brands are viewed. Spanish participants attributed higher ratings to specific brands, including Loewe, Tous, Balenciaga, and Adolfo Dominguez, which were generally perceived as possessing superior quality, prestige, and ethical practices. Conversely, Loewe, Tous, and Bimba y Lola are not popular in Morocco. The fact that these brands do not possess a branch in Morocco may be the main reason for their anonymity.

In conclusion, this research underscores the importance of cultural considerations and ethical brand conduct in the Moroccan fashion market. Spanish fashion brands seeking success in Morocco must prioritize ethical production practices, social responsibility, and brand image cultivation that resonates with Moroccan Gen Z's values.

By understanding the complexities of Gen Z's brand preferences in Morocco, Spanish fashion companies can develop targeted strategies to cultivate

brand loyalty and achieve sustainable growth in this dynamic market.

It is important to note that the limitations of this study include the sample size and the focus on two specific cities. Future research could benefit from a larger and more geographically diverse sample to explore the evolving preferences of Gen Z. Additionally, investigating the influence of social media on brand perception within this demographic would be valuable. Another limitation was the inability to interview female participants. As the interviewer was a male, culturally addressing females might be disrespectful or intimidating for females in Morocco.

We believe this study offers valuable insights for both academics and industry professionals interested in understanding the Moroccan fashion market and the preferences of Gen Z consumers.

Funding: "This research received no external funding."

Informed Consent Statement: Informed consent was obtained from all subjects involved in the study.

Conflicts of Interest: The author declares no conflict of interest.

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Appendix A Socioeconomic questionnaire

1. Are you between 18 and 27 years old?
2. Are you working at the moment?
3. What is your occupation
4. Please, mark below your salary range if you do not mind.
Minimum age (300€) 301 to 600€ 601 to 900€ more than 901€

I, _____ here give my permission to Dr. Jean Pierre Ribeiro Daquila to quote my responses in a scholarly research paper. I understand that this work is for academic purposes and that my anonymity will be preserved. I waive any claim for copyright to this material should the research ever publish it in a scholarly journal or in an online format.

I hereby give my permission in the form of my signature below.

Signature _____ Tangier, ____ of January, 2024.

Appendix B Spanish brands

1. Based on social status, quality, and prestige of the brand, rate them from one to five stars. Being one star related to lack of quality, cheap products, ultra-fast and massive production, and poor worker exploitation. On the other extreme, five stars mean the best quality, social status, respected workers, and an extremely prestigious brand. Leave it blank if you do not the brand.



+



Regarding Zara, do you know about its campaign “The Jacket” regarding the war Israel/Gaza? If so, rate it before this campaign (how good was this brand for you before this incident) and after this incident.

Z A R A



MANGO



BIMBA Y LOLA



P&B
PULL&BEAR



LOEWE




TOUS



2. Which item of each pair do you prefer?

A)





B)



C) (Explain to participants that the difference is the brand on the pocket, as the other one inside the jacket is present in both jackets.)

C)



