

Women's Fashion Consumption in Saudi Arabia

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Abstract

This study investigates the influence of the sociocultural factors affecting the fashion and clothing consumption of Saudi women. It is a multidisciplinary study that combines fashion and consumer behaviour approaches in order to define and explain the collective sociocultural norms that underlie the patterns of women's fashion and clothing consumption in Saudi Arabia. It applies a mixed-method approach as a strategy for data collection, with primary data gathered through observation, a face-to-face questionnaire completed by 654 respondents and interviews with local retailers and experts in the fashion market.

The analysis of the empirical data revealed significant findings related to consumption patterns and the characteristics of the local market. It identified that there are two main systems that define fashion consumption in female Saudi society. Each system operates in a different social setting (public and female-only social settings) that requires communicating or establishing a specific value or a set of values to meet social expectations. The research findings also indicate the structure of the market and its operational system used to respond to consumer demands. In the light of these findings, theoretical models were developed to define the particularities of fashion consumption in Saudi Arabia as outcomes of this study. This study could have a substantial influence in academia as it provides a broader insight into fashion consumption behaviour in Saudi Arabia compared to that available in the existing literature. It could also help retailers and investors to understand the particularities of Saudi women's fashion consumption in more depth. This understanding could be applied to develop strategies to meet Saudi women's fashion demands.

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Declaration

The material included in this thesis represents the researcher's own study and it has never been submitted for any other qualifications.

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Chapter 1: Introduction

1.1 Introduction

This research examines Saudi women's clothing and fashion consumption. It focuses on analysing the unique collective sociocultural particularities that influence the consumption of fashion and clothing. Studying fashion consumption in Saudi Arabia provides an insight into the context in which meanings and values are communicated through fashion. This will lead to a clear definition of the process of consumption behaviour by women in Saudi Arabia, including the individual's motivations for communicating specific meanings through fashion in order to construct a fashion identity that meets social expectations. In addition, an analysis is undertaken of the local market to identify its strengths and/or weaknesses in relation to its understanding of and willingness to satisfy these consumer demands.

This research applies a multidisciplinary approach. It combines cultural and social theories that emphasise the role of collective norms and social values that underlie the sociocultural system: this system then forms the patterns of fashion consumption in a particular context. Studying this context involves analysing the meanings that are transmitted and communicated through clothes as signifiers of social values. The research also integrates approaches from consumer behaviour and marketing studies in order to define the structure of the local fashion market.

This chapter states the research problem, research questions, aim and objectives. It also discusses the motivations for conducting this research. This is followed by a brief discussion of the methodology adopted to fulfil the research requirements. Finally, a detailed structure of the presented thesis is provided.

1.2 Research Problem

Saudi women's clothing and fashion consumption is radically different from other global patterns. It is a dichotomous consumption structure, as Saudi society is

characterised by a strong cultural identity that reflects a deep adherence to Islamic values and local norms. This is evident from the emphasis on Islamic modesty as a fundamental principle of the female dress code that requires the black *abaya* to be worn in public. However, this consumption pattern, arguably, is deeply contradictory due to the demand for Western fashion to be worn underneath the *abaya* in exclusively female environments. This sociocultural contrast is a unique characteristic of this society where there is a coexistence of fashion consumption patterns. On the one hand, an Islamic visible identity is communicated through how women dress in public while a hidden reality of fashion consumption is evident through what women choose to wear underneath the *abaya* in private environments.

Saudi Arabia is considered to be one of the largest emerging markets for Western fashion. Imported Western fashion dominates more than 90% of the local market and a significant increase in the demand for Western fashion is evident in market reports (Euromonitor International, 2016). On the other hand, the role of the local Saudi fashion industry in supplying the market is minimal and a further reduction of the local industry is expected (Al-Bogami, 2015). Therefore, it can be argued that there is an inverse relationship between the increasing demand for Western fashion and the decline of the local fashion industry. The current study will examine this characteristic to discover the obstacles that prevent this industry from responding to market demands and playing its role as an innovative cultural industry.

1.3 Research Motivations

The study of women's fashion and clothing consumption in Saudi Arabia is fascinating for several reasons. One of the initial motivations for conducting this research is derived from the researcher's academic background and work experience as a lecturer in the Department of Clothing and Textile at Tabouk University in Saudi Arabia. This experience led the researcher to identify two particular issues related to the consumption and production of fashion in Saudi Arabia.

Firstly, there are two extreme views of Saudi women's attire which are commonly found in Saudi culture and the broader historiography. The first one is based on the assumption that the dress code of Saudi women, as a representation of Saudi normative values and visual identity, has been undermined by a process of Western liberalism that employs globalisation and its supportive ideologies to negatively affect Islamic cultural identity. This view emerged during the period of the Islamic movement between the 1980s and 1990s and was propagated by Islamic fundamentalists. On the other hand, some Saudi anthropologists argue against the obligation of the *abaya* as the only visual constructor of Muslim women's identity. They consider the practice of veiling through the wearing of the *abaya* as a political enforcement that destroyed the regional identity of fashion or as a socio-religious obligation used to signify gender segregation and maintain moral values.

From the researcher's own perspective, although each of the previously mentioned perspectives has a logic behind its assumptions, both views are subjective and lack impartiality. However, Saudi women's clothing and fashion consumption is not limited to the practice of veiling in public. It can be objectively studied by gaining access to the subjective views of Saudi female consumers themselves as a fundamental source of information. In doing so, it is possible to define how Saudi women interpret the meanings they communicate through clothing and fashion consumption behaviours in different social settings. Some of these meanings might be defined according to adherence to a broader system of sociocultural values that include Islamic modesty, while others may be constructed to establish an individualised fashion identity in order to meet social expectations.

Secondly, there is an inverse unequal relationship between the increasing level of fashion consumption in Saudi society (Assad, 2007) and the limitation of the local fashion and clothing industry in terms of size and contribution to the local clothing and fashion market (Al-Rajhi et al., 2012). Therefore, investigating the operational system of the local market, including its strengths and weaknesses, will help to identify opportunities to develop the local fashion industry. This may also suggest

recommendations for the educational system to design effective training courses that qualify people to work in this industry.

As a Saudi researcher studying women's fashion consumption in her own culture, this is expected to play a crucial role in providing a balanced analysis of the particularities of the system of women's fashion consumption in contemporary Saudi society.

1.4 Research Questions, Aim and Objectives

Based on the issues identified above, a series of research questions were identified.

- 1- Are there any characteristics of women's fashion consumption that are particular to Saudi society?
- 2- What are the main values/meanings that are communicated through clothing in Saudi society?
- 3- What is the influence of the hegemony of Islamic identity on the consumption of clothing and fashion in Saudi Arabia?
- 4- What is the impact of imported globalised fashion on the Saudi dress codes?
- 5- How does the Saudi social context, including social life, social norms and social groups, influence the consumption of fashion?
- 6- Is there a contradiction between the influence of the Islamic cultural identity and social norms in driving the consumption of clothes?
- 7- How does the fashion market work in Saudi Arabia?
- 8- How do social codes of consumption influence the structure of the market?
- 9- How well do retailers understand market demands?
- 10-What role does the local industry in Saudi Arabia have in fulfilling the demands of local consumers?

The aim of this research is to analyse, understand and define the sociocultural factors influencing Saudi women's fashion and clothing consumption behaviour.

The objectives to be fulfilled in this research are:

- 1- To investigate the sociocultural elements that influence Saudi women's fashion behaviour.
- 2- To understand the characteristics and structure of the Saudi women's fashion and clothing market.
- 3- To establish models of the Saudi women's fashion consumption behaviour.
- 4- To produce recommendations for the industry, retailers and education that can help them to respond to the market demand, based on the understanding of the models of the fashion system.

1.5 Saudi Arabian Cultural Context

Saudi Arabia is a developing country in the Middle East. It has been characterised by its blended sociocultural structure of Bedouin tribal traditions and the Islamic law or *Sharia* that forms the unique identity of the country as well as its people (Al-Munajjed, 1997; Al-Dossary, 2012; Lee, 2014).



Figure 1.1: A map of the Kingdom of Saudi Arabia.¹

Politically, King Abdul-Aziz Aa'l Saud established the Kingdom of Saudi Arabia in 1932. Since then, the country has never been directly colonised under any of the Western political systems (Sallam and Hunter, 2013). In the 1930s, the King

¹ Retrieved from https://commons.wikimedia.org/wiki/File:Saudi_map.jpg [Accessed 11-7-2016]

succeeded in unifying militant tribes under one community: the religious beliefs and the tribal traditions fitted into a social network that defined the new Saudi national identity. The political system of the country is based on an absolute monarchy under the house of Aa'l Saud.

Al-Hazmi and Nyland (2012) argue that the cultural identity of Saudi Arabia is constructed upon three main components: religious identity, tribal identity and national identity. Saudis' views of themselves and the society's values and traditions are transmitted and inculcated via the ideological discourse of these three systems.

1.5.1 Religious Ideology in Saudi Arabia: Islam and Lifestyle

Saudi Arabia is the birthplace of Islam: all Saudis are Muslims and it is a religiously conservative country. The majority of the Saudi population follow the *Sunni* doctrine, while a smaller proportion follow the *Shi'aah Mathhab*, based in the eastern region of the Kingdom. Since the establishment of Saudi Arabia, *Sharia* has been the only source for legislation. *Sharia* is the canonical law of Islam based on the *Quran*² and *Sunnah*³ (Long, 2005) that have been interpreted through *Fatwa*.⁴ Saudi Arabia and Saudi Arabians have always defined themselves as the guardians of Islam (Al-Harbi, 2015). The inherent qualities of Saudi cultural identity are formulated and characterised by the homogeneity of Islamic values (Metz, 1992). The centrality of the religious values to Saudi culture defines manners and lifestyle (Al-Shehry et al., 2006), which can sometimes be contradictory to the demands of social and cultural change (Al-Rebh, 2017a). The role of Islam not only includes the practice of Islamic rituals: its role fundamentally influences certain levels of the national

² Quran is the Holy Book of Muslims.

³ Sunnah is the teachings of the Prophet transmitted through oral and written tradition.

⁴ *Fatwa* is a formal religious consensus or statement by a member of the Saudi Permanent Committee for Scientific Research and Guidance or an officially qualified Islamic cleric. It authorises or forbids a specific action or behaviour based on a scrupulous analysis of the Islamic sources. This statement is usually delivered after a formal request by an individual Muslim or organisation and/or when required due to the emergence of a personal, social, cultural, economic or political situation which might have an undesirable impact on the Islamic teachings.

economy, politics, morality, social life, commercial transactions, and individuals' attitudes, behaviour and social relationships.

The Islamic ideology of Saudi Arabia relies on the theological philosophy of Shaikh Mohammad Bin Abdul-Wahhab, which is known as *Wahhabism*. *Wahhabism* is an Islamic reformation that emerged in 1744 and adopted the principles of the *Hanbali*⁵ School of Islamic thought (Commins, 2015), which was developed upon the philosophy of Islamic fundamentalism (Vassiliev, 2013). The primary aim of the *Wahhabi* movement was to unify Saudis under a monotheistic umbrella to eradicate the spread of aberrant behaviour that is associated with polytheism (Al-Dossary, 2012). Moreover, this Islamic reformation was not only religious: it reconstructed the system of social values and individual attitudes to represent Islam and true Muslims. Al-Rebh (2017a: 279) argues that Saudis prefer to be called *Salafis* rather than *Wahhabis* due to the derogatory nature of the term *Wahhabi*, which is associated with intolerant fanatics in many cases.⁶ Arguably, although there are no fundamental differences between *Wahhabism* and *Salafism* in terms of the theological ideology, the term *Salafi* seems to be widely used to indicate people with a higher degree of religious affiliation in Egypt and Jordan, and therefore, the majority of Saudis might prefer to be called *Sunnis* due to its tolerance and substantiality as an Islamic *Mathhab*. In addition, within an Islamic lens, following or adopting one of these contemporary Islamic schools of thought might be considered as religious factionalism, which is forbidden in the Quran.⁷

⁵ In Islam, there are four Sunni Jurisprudence thoughts: Hanafi, Shafi'i, Hanbali and Maleki (Al-Rebh, 2017a: 279).

⁶ The term *Salaf* represents the first three generations of Muslims, which includes the Prophet's companions, their successors and the next generation of the successors' successors. Wagemakers (2016) defines *Salafism* as "the type of Islam whose adherents claim to follow an idealised group of early Muslims known as 'the pious predecessors' (*al-salaf al-salih*, hence the name "Salafism") as closely and in as many spheres of life as possible" (p. 2). Therefore, *Salafi* refers to the Sunni Muslim sect that strictly follows the traditions of the *Salaf*. *Salafism* as an Islamic movement was developed in Egypt during the 19th century as a response to Western imperialism (Mahmood, 2011). However, Al-Buti (1988) argues that *Salifism* is a temporal period that includes the first three generations of Muslims and it should not be considered as an Islamic school of thought.

⁷ See Quran, Surat Al-Room (The Romans): verse 32.

By the time of the establishment of the Kingdom, the religious authority was traditional and anti-modernity, and was also strictly against secularism and Westernisation (Al-Dossary, 2012). One of the many reasons for this rejection was the association of the West with the extravagant consumption of luxury goods (Al-Radihan, 2006), which is considered to be against the principle of Islamic modesty as a fundamental value of Muslims' consumption. Al-Rebh (2017a: 279) states that, while Muslim neighbouring countries were undergoing modernisation and social change, theocratic dominance was increasing in Saudi Arabia, especially from the 1940s to 1960s. Religious clergy apply the conservative Islamic principles as a template to control different aspects of the society (Al-Rebh, 2017a).

In 1940, a number of Saudi clerics founded an independent monitoring committee called *The Committee for the Promotion of Virtue and the Prevention of Vice* (Al-Mutaim, 2017). This organisation is officially and unlimitedly empowered to ensure compliance with Islamic behavioural precepts in public such as enforcing the conservative dress code of women, ensuring gender segregation and ensuring the closure of shops during prayer times. This committee is never known by local Saudis or foreigner residents as *religious police*, which is a term prevalent in Western media (Le Renard, 2014: 174): it is called *Al-Hayya'a* (the committee), or *Mutawwaen* (the clerics). Due to a number of unacceptable incidents of encroachment upon the public's freedom by members of this committee, a Royal Decree was issued to decrease and limit the authority of members from this committee in April 2016 (BBC News, 2016). To date, public opinion has been divided between proponents and dissenters about the social benefits that can be achieved by mandating this committee to apply further social control or moderating its authority.

Another phase of Islamic revival took place in the 1980s–1990s, known as the Awakening or *Sahwa*. This movement was intellectually proposed, planned and led by a plethora of Saudi Islamic clerics influenced by the ideology of the Muslim Brotherhood (Haykel et al., 2015). Muslim Brotherhood thought was established in Egypt in 1928 by Hassan Al-Banna (Al-Wedinani, 2016). Although this revival was

banned in Egypt during the 1970s, the Saudi government welcomed its members and recruited them in governmental institutions. These members were also offered leadership positions to develop the Saudi educational system based on the Islamic perspective. Therefore, the framework in which the national curricula are designed is significantly influenced by the thought of the Muslim Brotherhood (Al-Otaibi, 2014; Al-Saif, 2014; Al-Wedinani, 2016).

Al-Muzini (2017) argues that due to the truthful status given to the Islamic figures who guided this movement, *Sahwa* thought indisputably succeeded in moulding the way in which values and behaviour are radically defined. The philosophy of this revival treated women as a victim of the Western cultural threat and a source of social corruption. This orientation devoted significant effort to standardising the social position of women based on the notion of fear for women and fear from women (Al-Muzini, 2017). This can be linked to the misperception of women as an 'erotic creation', as argued by Jawhari (2007). In fact, this view contradicts the Islamic concept, especially in modern Islam, that recognises the role of women in constructing and transmitting piety (Turner, 2010). Due to this perception of women in *Sahwa* ideology, permission from a male guardian was required for travelling, university registration, applying for a job, receiving a treatment or opening a bank account. Also, women were prohibited from driving their own cars. They were also enforced, during the period of *Sahwa* between the 1980s and the late 1990s, to present themselves in public, if it was necessary to be there, wearing a conservative form of Islamic dress including the black *abaya* with a full black face cover, black head scarf, black gloves, black socks (Lacroix, 2011: 61) and flat black shoes.

This approach is argued to be anti-modernity and anti-liberal, as both are assembled, according to *Sahwa* philosophy, under the umbrella of secularism which is believed to be an intellectual product of Westernisation that is against Islam. However, Islam is a tolerant religion that does not deny the need to take steps towards sociocultural development in Islamic societies within a defined matrix that

does not breach or contradict any of the Islamic principles. Islam also allows ideological and behavioural variations within the Islamic context. In contrast, Islamic movements in Saudi Arabia, as argued by Al-Rebh (2017b), engrain the belief that there is only a singular set of sociocultural values that should be followed to be a good Muslim, which is often radically defined. Islam deplores all sorts of extreme and unjustifiable bigotry towards people and concepts.

- **Gender Segregation**

Gender segregation is deemed to have a significant role in defending and maintaining Islamic morality in Saudi Arabia (Al-Munajjed, 1997; Forney and Rablot, 1997; Lindholm, 2002; Jawhari, 2007; Al-Hazmi and Nyland 2012; Le Renard, 2014). It is a practical method to protect and ensure women's chastity by preventing any unnecessary direct communication with the other gender which may result in forms of sexual temptation, or what is called *Fitna* (Metz, 1992). This seclusion of women is also considered to be a protection of Muslim women's privacy. *Purdah* – the curtain or physical division in houses that is used to socially separate men from women – is evidence of this seclusion (Forney and Rabolt, 1997: 56). Gender segregation can be easily identified in different forms of social systems. The educational institutions are strongly based on the single-sex system; working environments are often divided to separate male from female workers; each house has two entrances, one for men and one for women, and there is also a guest room for women and another for men (Al-Hazmi and Nyland, 2012).⁸ Also, in public places such as restaurants, there is a separate section for males and another one for families. However, some authors such as Zant (2002) and Al-Hazmi and Nyland (2012) argue that gender segregation is a traditional norm rather than a religious order. This also might be related to social confusion about two Islamic concepts: *Kholwah* – which represents the state of being with a person from the opposite

⁸ This system of gender segregation is applied to all educational institutions in Saudi Arabia except for one university called the KAUST University, which was established for international students. However, due to the controlling Islamic traditions that are against the mixing of genders or what is called the co-educational system, this university received much social and cultural criticism.

gender in a secluded or private place and is banned unless with a *mahram*⁹ – and *Ikhtilat* or intermixing between genders in social places, which is acceptable in shopping malls and hospitals.

1.5.2 The Social Fabric of the Saudi Society: the Dominance of Tribal Identity

A homogeneous nomadic form of territory is predominantly applied when defining Saudi society. Al-Zahrani (2010) demonstrates that until 1975, the majority of the Saudi population were nomads and the general social fabric of the society was fundamentally based on tribalism. However, tribal people or Bedouin are no longer nomadic due to the social change influenced by the socio-political strategy of urbanisation that aimed to sedentarise the tribes in civilised communities through developmental social projects (Samin, 2015). Tribal belonging and the possession of tribal genealogy is considered to be a prestigious trait in Saudi society (Le Renard, 2014: 176). Due to this fact, Saudi citizens define their identity by their bloodlines before anything else (Maisel, 2014). As a result, tribal traditions formulate several aspects of Saudi Arabians' lives, attitudes and behaviour. Al-Dossary (2012) argues that the indigenous individuals who belong to Saudi Arabian tribes have succeeded in maintaining their own tribal norms and values, including tribal costumes. However, some authors put forward an opposite argument, such as Akers (2001) and Maisel (2014). Both argue that due to the dramatic change in Saudi society, the influence of tribal traditions on Saudis' behaviour has been marginalised due to various reasons such as the sudden oil wealth. Another reason for the decline in the dominance of tribal traditions relates to the possible dichotomy between the Islamic teachings and the tribal mentality (in some social aspects related to class and women's position). Islamic ideology supports the principle of human equality, which contradicts the notion of tribalism that is based on racial discrimination. The adherence to tribal norms was infused with belonging to a unified national identity.

⁹ *Mahrams* are the unmarried men due to close blood kinship.

For a long time, the social fabric of Saudi Arabia has consisted of the coexistence of two main lifestyle patterns: Bedouin and *Hadar* (Abbas, 2009). Therefore, *Hadar* is another fundamental component of Saudi Arabian society. The term *Hadar* is defined by Al-Dossary (2012) as referring to the people from settled communities with a non-tribal lineage. The term is also used to refer to migrants from neighbouring Arab countries such as Yemen (Al-Ajmi, 2007). The population of *Hadar* varies from one province to another: however, the tribal population is larger.

Here, it is worth mentioning the crucial role played by migration and regional diversity in formulating the Saudi sociocultural identity. According to De Bel-Air (2014), Saudi Arabia is ranked second in the world for hosting foreign people: it is one of the most popular destinations for migrants. This is due to the availability of employment opportunities offered by governmental institutions as well as the private sector. Due to the flexible process of Naturalisation in the 1950s–1960s, migrants to Saudi Arabia, either from Arab or non-Arab countries, officially became a fundamental constituent of the Saudi social fabric. There is also no doubt that Muslim and Arab migrants played a significant role during the period of economic transformation of Saudi Arabia, as they contributed to the development of the institutional infrastructure during the 1970s (Kapiszeweski, 2006). Despite the fact that all of the naturalised migrants were Muslims, their influence on the local identity can sometimes be viewed critically as a cultural threat (Al-Ahdal, 2015).

A different type of cultural influence occurred with the establishment of Aramco¹⁰ in Saudi Arabia in 1938. Jungers (1995) argues that, since then, Saudis have experienced confrontation with Western values that threatened their local culture. Jungers (1995) does not deny the possible objections or even rebellion that might occur when Western culture is presented in a society where an opposing cultural pattern is dominant. However, due to the presence of American culture in Saudi society and the exposure to Western industrialisation, people had to moderate its

¹⁰ Formerly known as *Saudi American Oil Company* and officially known as *Saudi Arabian Oil Company*.

impact to align with the traditional lifestyle and aspirations. Therefore, although the society remains religiously and culturally conservative, Saudi Arabia is no longer a closed society. The stability of the traditionally conservative nature of the society was slightly moderated after the oil exploration in 1938 due to the cultural exchange synchronised by the arrival of American expeditions for oil excavation purposes. Bakovlev (1979) states that:

“The West is the key to change in Saudi Arabia.” (p. 2)

Therefore, the exposure to Western as well as other Asian, Arab and Islamic cultures was caused by the initiation of economic and political transformation. Eastern, Western, Arab and non-Arab people participated in developing the infrastructure and undoubtedly have affected various levels of the cultural identity of the Kingdom.

1.5.3 Regional Diversity

According to Montagu (2015), Saudi Arabia is characterised by its wide regional diversity, as it is officially divided into 13 managerial regions (see Figure 1.1). Despite the fact that all of these regions share a wider sociocultural system, there is a nuance in terms of adherence to the cultural norms, based on regional identity and geographic zone. Accordingly, Saudi society can be divided into five main regions, as some regions can be culturally grouped in one regional context. These regions can be presented as: *Najd*, *Al-Hijaz*, *Al-Ahsa'a* or *Ash Sharqyyah*, *Al-Shamal* and *Aseer* or *Al-Janoub*.

Najd: This region is located in the heart of the Arabian Peninsula. The Arabic term *Najdi* refers to people belonging to this region. *Najdis* can be described as groups of Arab nomadic tribes who used to continuously travel between different locations of the desert seeking water and pasture. Pastoralism was the traditional resource of the *Najdi* economy (Ibrahim and Cole, 1978). The history of Riyadh (the capital of the Kingdom) shows that until the 1960s, Riyadh was a traditional city where the Royal Family and politicians resided. Now, Riyadh is viewed as an ideal model of

Arab modernisation. Modernity, in its visual meaning, is embodied in skyscrapers, huge commercial entities and the large number of modern shopping malls that display Western fashion brand names. However, the cultural identity of this region is predominantly conservative (Rabolt and Forney, 1989). In addition, there is a dominant social conception that defines Saudis who belong to this region as wealthy people who enjoy a luxurious lifestyle (Al-Dossary, 2012). Therefore, in this city, the embracing of both the Bedouin identity and modernity can be easily identified in several domains of Saudi life (Al-Dossary, 2012).

Al-Hijaz: This region is located on the west coast of the Kingdom. It encompasses the most sacred places in the Islamic world, which are Makkah and Al-Madinah. Therefore, it is globally renowned as a religious destination for millions of Muslims every year who go there in order to perform religious rituals including *Hajj* and/or *Umrah*¹¹ in Makkah. Also, Muslims come to visit the Prophet's mosque and his grave in Al-Madinah as a religious ritual. Since the establishment of Saudi Arabia, these two cities have become a place of settlement for non-Saudi Muslims after performing the Islamic rituals. The reason for this is economic and relates to the availability of work opportunities (Al-Dossary, 2012). Another motivator might be due to the religious value this region holds, as Muslims may wish to enjoy a spiritual feeling by choosing this region as a place of residence. Another important part of this region is *Jeddah*, the gateway to the western region of Saudi Arabia (Long, 2005), which is also considered the centre of religious trade and commercial exchange. Therefore, the cultural identity of this region has been developed by the intermingling of different cultural values originating from the coexistence of different ethnicities including Arabs, Asians and Africans. For this reason, the regional identity and the demographic structure of *Hijaz* is more cosmopolitan and multicultural than that of *Najd* (Long, 1997; Yamani, 2004).

¹¹ *Umrah* is a religious ritual that can be performed any time during the year.

Al-Ahsa'a or Ash Sharqyyah: This region is located on the east coast and it is the central location of Saudi black gold, especially in Ras-Tanura, the largest export terminal in the world for oil production (Al-Dossary, 2012). After the exploration of oil in the 1930s, people from this region had direct social contact with American experts in the oil industry. Therefore, this region is similar to *Hijaz* in terms of the exposure to various forms of social exchange with foreigners from different cultural backgrounds. In addition, the population of this region shares unique cultural values with other Gulf neighbours. This includes, for example, the celebration of *Gergean*, which is a traditional festival that starts on the 15th day of Ramadan. This event is mainly for children to express their happiness at completing the first half of the month of *Ramadan* after being encouraged by their parents to start practising fasting. Nowadays it has become a family festival as mothers and young women share the celebration by wearing a modest style of colourful embroidered dresses. However, celebrating this festival in some other parts of the Kingdom is not socially acceptable and it can be somewhat inadmissible and counted as heterodoxy, as suggested by some religious clerics such as Ibn-Jebreen (2004).

Al-Shamal: The cultural identity of this region reflects a strong adherence to tribal Arab norms. This region includes Al-Jouf and Tabouk.

Aseer or Al-Janoub: This region is located in the southern part of Saudi Arabia with a direct border with Yemen. People belonging to this area are also characterised by their strong cultural norms and tribal values. One of the most visible forms of their cultural identity is the uniqueness of the dress code for both men and women that distinctively differentiates them from others in Saudi society (Yamani, 2004).

Each of the above regions has its own regional and/or tribal identity, which differentiates it slightly from other regions but within the dominance of the shared wider cultural context.

1.5.4 What's New in Saudi Arabia: Vision 2030

On 25 April 2016, a formal decree was issued by the Council of Ministers of Saudi Arabia under the chairmanship of the Custodian, King Salman A'al Saud, to reveal a new National Development Plan. This plan is called *The Vision 2030* and was proposed by the Deputy Crown His Highness Prince Mohammad bin Salman A'al Saud (the Chairman of the Council of Economic and Development Affairs).

The oil industry has been the main source of revenue for the national Saudi economy for decades; however, this Vision aims to reduce the economic dependency on the oil industry. For this reason, the Vision gained widespread attention from local and international media. Some of the objectives of this Vision within the local domain are:

- To introduce innovative local industries.
- To maximise the value of local investment from 40% to 65%.
- To establish funding programmes for local projects with a direct impact on the national economy.
- To increase the value of local exports.
- To enhance Saudi nationals' employability, to reduce the percentage of unemployment from 11.6% to 7%.

This ambitious national Vision is not entirely economic, as its objectives also target different sectors of the society. Al-Rebh (2017b: 304) argues that the Crown Prince, as the founder of this Vision, has brought non-envisaged change to the country. Some elements of this change have not always been welcomed by the religious critics, such as the establishment of the General Authority for Entertainment in May 2016 that organises activities such as mixed-gender concerts. Attending, performing and organising these events is considered, in the religious view, to be prohibited behaviour.

In addition, this Vision aims to activate the role of women in terms of their contribution to the social development plan. This Vision resulted in a notable improvement in Saudi women's freedom and rights. For example, on 17 April 2017, men's guardianship role was officially reduced, as the King instructed the governmental institution to nullify the stipulation of women requiring a guardian's agreement to receive education or apply for a job. Moreover, another Royal Decree issued on 26 September 2017 provided for women being permitted to drive a car according to the Islamic principles, to commence on 24 June 2018. Also, on 12 July 2017, the Ministry of Education agreed to include physical education as an official curriculum subject in girls' schools. On 2 October 2017, Saudi girls' universities permitted the use of smart mobile phones. Also, football stadiums opened their gates to women for the first time in the history of the Kingdom on 12 January 2018. This indicates historical change which may be an ongoing process during the period of planning before 2030.

1.6 Historiographic Positioning

The literature on Saudi women's fashion and clothing consumption is very limited. A number of studies that investigate fashion consumption in Saudi Arabia suggest that there is an existing gap in the knowledge about its sociocultural context (Katz, 1986; Tuncalp and Yavas, 1986; Rabolt and Forney, 1989; Al-Dabbagh, 2006; Fatany, 2007; Tawfiq and Ogle, 2013). In order to bridge this gap, this research set out to examine the role of the sociocultural context on fashion consumption in Saudi Arabia.

Few authors have discussed the cultural significance of changes in Saudi women's dress. Recent Saudi history suggests that there were two stages of clothing change: the first one occurred during the period of the political establishment of the Kingdom of Saudi Arabia when there was a significant change from regional dress codes to the *abaya* as outer attire, for the purpose of identity unification. This is considered by some scholars such as Yamani (1997) to be a form of disintegration of local dress identity by obligating an identical dress code to be adopted as a visual

definition of the national identity. The second sudden transition in Saudi women's fashion behaviour was from the traditional dress to Western fashion, during the 1970s. This was mainly caused by the oil wealth and the exposure to different fashion systems (Yamani, 2004; Al-Dossary, 2012). This is perceived by Islamist fundamentalists as undermining the Islamic identity through the lens of Western imperialism. Le Renard (2014) argues that most of the studies on Saudi women's dress espouse the Western discourse of women's oppression due to the dress code functioning as a form of gender segregation in Saudi society. This perspective usually reflects the opinion of developmentalists as well as feminists that relates women's position in a particular culture to the level of advancement (modernity) and traditionalism (backwardness) of the targeted society. Therefore, it can be said that this perspective persists in literally or figuratively emphasising the idea of women's liberalisation that is usually attributed to dress code and social interaction between opposite genders, especially in Saudi society. However, all these views are based on ideological positioning rather than an empirically based understanding of the views of the female social actors.

Also, there is a limited number of studies dealing with the subject from a socioeconomic point of view. This perspective defines Saudi fashion consumers as prestige seekers through the conspicuous consumption of luxury fashion, such as in Aqeel (2012) and Marciniak and Mohsen (2014). This perspective emphasises the role of economic factors in facilitating the adoption of consumerism and its associated ideologies (Assad, 2007). It also reflects the perspective of marketing reports that identify Saudi Arabia as an attractive emerging fashion market that is entirely dominated by foreign imported products (Assad, 2007; Vel et al., 2011; Euromonitor International, 2016). Usually, this perspective treats the subject circumspectly, especially when discussing cultural elements such as the role of religion in influencing consumption behaviour. Although these studies are considered a valuable contribution to knowledge in the field of consumer behaviour in Saudi society, they are based on very limited research evidence.

A number of scholars have pointed out a glaring omission in studying aspects of Saudi society. For example, Shoult (2006) identifies a lack in studies that analyse Saudi consumer behaviour and he relates this issue to the lack of investment in research that focuses on this distinctive culture. However, he generally defines Saudis as young high-spending consumers. Also, Al-Sudairy (2017) argues that one of the issues related to the study of Saudi women is the lack of interest among Saudi intellectuals in documenting such knowledge. She also emphasises that due to the scarcity of literature explaining aspects related to Saudi women in a sociocultural context, a negative stereotype was constructed about their lives, including the conceptualised perception of being submissive and marginalised. Tawfiq and Ogle (2013) argue that there is ambiguity regarding Saudi women's lifestyle and behaviour due to some cultural challenges including the notion of privacy and the high level of impenetrability into Saudi women's private environment, which is considered an obstacle that might hamper researchers. Hamdan (2005) and Al-Sudairy (2017) stress that addressing any study regarding Saudi women fundamentally requires an empirical analysis of the influence of cultural identity and socioeconomic conditions on the subject of investigation. Al-Subaie and Jones (2017) also highlight that studies that target Saudi women must take into account the existing heterogeneity that characterises Saudi culture, which can be approached by focusing not only on urban or cosmopolitan regions but also the regions that are traditional and strongly adhere to a defined cultural identity.

Clearly, the field is still a raw area of research and there are a number of questions that have not been answered yet. Consumers' own views about the role of sociocultural norms in influencing the fashion behavioural patterns that communicate values through clothes in both public and private social settings in Saudi Arabia have never been investigated in a way that explains how signifiers are constructed through vestimentary codes. Applying a multidisciplinary approach that integrates elements from social and cultural studies is an indispensable way to identify the influence of sociocultural factors such as religion, social traditions and normative intellectual and/or emotional connections to particular values in different social settings. Defining the reality of Saudi fashion consumption from a

Saudi reflexive point of view will enable the production of meaningful knowledge that integrates Western fashion and behaviour theories based on an interpretation from the perspective of the consumer. Furthermore, due to the significant lack of research defining the structure of the local fashion market, this thesis aims to reveal the local market structure and the role of local industry, in response to understanding consumer behavioural patterns as well as their demands.

Fashion consumption is argued to be a system of established relationships between different aspects which together form a complete system of interactional activities. This includes interactions between the sociocultural identity that defines and localises meanings of fashion and the responsive behavioural patterns. Also, it involves the social interaction that takes place between society members via the wearing of fashion in order to communicate meanings. Through this system, an essential relationship is also established between the consumer and intrinsic or extrinsic features of the fashion product as a key value transmitter.

1.7 Research Methodology

In many academic disciplines, including the study of consumer behaviour and fashion consumption, a set of philosophical assumptions, beliefs, values, concepts and meanings interact to conceptualise a reality (McGregor and Murnane, 2010). This is called the research paradigm. A research paradigm includes the application of Positivist, Interpretive or Pragmatic approaches supported by deductive, inductive or abductive strategies. It also employs methods (qualitative and/or quantitative) and techniques that include questionnaires, interviews and observation.

This research applies a pragmatic mixed-method strategy in order to obtain the essential qualitative and quantitative data to address the research questions. This approach provides opportunities to improve the quality of the collected data, so that the research findings can effectively contribute to knowledge. In addition, applying mixed methods as a research technique is argued to be an effective strategy that

helps the researcher to obtain in-depth insights and broaden the scope of the research topic (Johnson and Onwuegbuzie, 2004) by combining quantitative and qualitative data.

The primary data of this research were obtained through a face-to-face consumer questionnaire which was chosen as the main primary tool for data collection. A pilot study that targeted 60 Saudi consumers from two regions (Tabouk and Jeddah, 2014) was undertaken in order to understand the general perspectives and consumption patterns of traditional and Western clothes as well as to examine impressions of the local market. The in-depth consumer questionnaire obtained data from 654 Saudi women through multiple-choice and open-ended questions. The questions were developed to gather information that would enable the researcher to identify significant frequencies (quantitative data) that indicate a common behaviour and/or a dominant influence. This is supported by the consumers' own interpretations (qualitative data). The consumer questionnaire was undertaken separately through different periods (from 2015 to 2016) to cover different regions of the Kingdom including Al-Jouf, Tabouk, Al-Madinah, Jeddah, Riyadh and Dammam.

Non-participant direct observation of how Saudi women use fashion and clothing in different social settings was applied as a supportive research method to describe fashion consumption in different public settings and female-only gathering milieus. The observation was undertaken in order to explore fashion consumption in real-life settings as a daily routine. This helped to obtain behavioural information (what participants do regarding fashion consumption) that can be combined with or compared to attitudinal data (what participants think regarding different fashions) obtained through the consumer questionnaire. Also, an observation of the fashion market was undertaken in order to demonstrate the main segments of the market as well as to identify any issues associated with the offered products and services.

Interviews as a research method were also conducted (during different periods from 2014 to 2016) to follow up the consumers' responses. For example, interviews

were conducted with five shop owners/retailers and a fashion designer in order to gather essential data about the market, including its segmentation, the specifications of each segment, and more importantly how these retailers understand and respond to the consumer demands. Moreover, the researcher conducted an interview with a representative from the Chamber of Commerce in Jeddah. In order to follow up issues directly relating to education that emerged through the previously conducted interview, it was essential to interview two academics from the field of fashion and clothing. This was an advantage of adopting a pragmatic mixed-method strategy that allowed a flexible research process.

The last stage of the primary research was conducted in order to obtain feedback for the purpose of validation. Evaluation of theoretical models, developed in the light of the research findings, was undertaken by specialists in the field of the Saudi fashion market as well as the field of social behaviour. Although these models received notably positive feedback, minor changes were required through the process of evaluation, and therefore the models were adapted accordingly for more effective application.

The application of mixed-method research enables different gaps in the field of Saudi fashion consumption behaviour to be covered more effectively. The approach helps to mitigate the research limitations that can be caused by dependence on one single method in a narrow research approach. The applied wider scope in which this research has been conducted represents an inclusive approach that provides an understanding of fashion consumption in Saudi Arabia as a system that is operated by consumers and different categories of suppliers.

1.8 Thesis Structure and Overview of the Chapters

The thesis is structured as follows:

Chapter 1: Introduction

This chapter introduces the research topic by stating the research problem, motivations and research questions. Also, it demonstrates the aim of the research and its objectives. In addition, this chapter provides a brief background of fashion and clothing consumption in Saudi Arabia. The chapter also discusses the adopted research methodology and the structure of the thesis.

Chapter 2: The Socio-Psychological and Social Context of Clothing

This chapter reviews the existing classical and contemporary theories that are related to the socio-psychological and social context of fashion. The aim of this is to understand the role of fashion in constructing identity and communicating social values such as individuality and conformity. Also, this chapter analyses theories on cultural identity and the role of local culture in contrast with globalisation in influencing the way in which consumers respond to a particular market.

Chapter 3: The Cultural Context of Clothing

This chapter discusses the Saudi context of fashion consumption and the wider Islamic dress code. It also considers consumption and buyer behaviour in marketing theory, to examine further the factors that influence the consumer's behaviour.

Chapter 4: Methodology

This chapter explains every step that has been taken during the research journey. It includes a clarification of the research philosophy and the proposed conceptual framework, including a schematic presentation of the adopted methods. This is followed by a detailed description of the primary research that has been undertaken to cover different regions of the Kingdom, with justification of the importance of each chosen method.

Chapter 5: Research Findings Related to the Saudi Fashion Consumer

This chapter presents the results related to Saudi consumer behaviour which have been obtained through the observation and the consumer questionnaire. The key results are highlighted through discussing the qualitative and quantitative data, including the particularities of fashion shopping, and consumer preferences and motivations.

Chapter 6: Research Findings Related to the Saudi Fashion Market

In this chapter, a demonstration of the data related to the Saudi fashion market will be provided. This includes the structure of the local fashion market and the operational system of each segment of the market. The chapter also identifies the main issues that emerged from the analysis of the empirical data.

Chapter 7: Outcomes, Model Development and Recommendations

This chapter introduces the theoretical models that have been developed in order to holistically explain the patterns of clothing and fashion consumption in Saudi Arabia. This chapter also aims to define the structure of the fashion market, by integrating results from different stages of the primary research. The chapter also suggests some recommendations that have been theoretically developed with the intention of being presented to decision makers, investors and retailers.

Chapter 8: Conclusion

This chapter examines the research aim and objectives against the research outcomes. It concludes the main themes of the research and recommends possible opportunities for further research in the field of clothing in Saudi Arabia. Moreover, it underlines the significance of the research for academia.

1.9 Summary of the Chapter

In this chapter, the dichotomous nature of the Saudi women's fashion system has been highlighted and particular issues related to clothing consumption were identified. Based on this, research questions were established and a research aim and objectives were developed in order to answer these questions. A brief discussion of the limited literature on fashion consumption in Saudi Arabia was given, in addition to a consideration of the research motivations. The research methodology approach and strategy was presented. A detailed structure of the thesis was also provided to explain what has been included in each chapter.

Chapter 2: The Socio-Psychological and Social Context of Clothing

2.1 Introduction

Following the subject-specific research background provided in Chapter 1, this chapter reviews the theoretical approaches related to fashion consumption from a broad sociocultural and socio-psychological approach. It considers fashion theories and consumer behaviour theories in order to understand the role of fashion in constructing identity and communicating social values such as individuality and conformity. Also, this chapter analyses theories on cultural identity and the role of local culture in contrast with globalisation in influencing the way in which consumers respond to a particular market.

2.2 An Overview of the Field of Clothing and Fashion

A substantial amount of academic research different disciplines has focused on the interpretation of clothing and fashion (Roach-Higgins, 1993). Clothing and fashion styles are viewed as shared artefacts of the society's material culture that hold condensed symbolic social, cultural and individual values. For instance, the intellectual, political, social and cultural identity of any group as well as the self-identity of individuals are significantly constructed and interwoven through clothing (Barnard, 2002; Battisti and Dahlberg, 2016). Different classical and contemporary theorists have been interested in this field and produced valuable literature about fashion from different theoretical and practical perspectives. This includes economics, sociology, psychology, anthropology and material culture (Rudd, 1991: 24; Crane, 2000).

Psychologically, the adoption of a particular style of dress can be viewed as a socio-psychological phenomenon. It emphasises the concept of individuality and the role of internal motives in constituting the form of self-identity that defines an individual's own perceived image about him or herself (Bem, 1972). This

constitution of the self signifies the role of the individual's perceptions, beliefs and attitudes in formulating a pattern of fashion behaviour. This establishment of self-identity is presented in a social context, and therefore it is influenced and judged by others' beliefs, perceptions and attitudes towards the adopted fashion (Johnson and Lennon, 2014). This approach explains the dynamics of different sets of motivations and responses that operate in a systematic process to define or predict the adoption of specific fashion.

Socially, clothing and fashion styles are visible behaviours which are usually employed to construct an identity that allows the consumer to fit into a particular layer of the social hierarchy (Rose et al., 1994). Several social dynamics, such as affiliation, conformity and social status, operate to establish or communicate social values through the consumption of clothes. Roach-Higgins and Eicher (1979: 18) argue that people symbolically communicate their membership of a community through clothing, which ties myriad values of the society together. Kaiser (1985) emphasises the need for social conformity via dress to ensure social acceptance and approval, which satisfies the need for equality and the perception of being like others. Social values are also derived from the need for warm personal relationships with other members of society to enhance the sense of belonging (Rose et al., 1994). McGhee and Teevan (1967) elucidate that this need for social belonging usually displays a conformist pattern of dress behaviour. Festinger et al. (1952) note that societies with a high level of cohesiveness apply more pressure on their members to signify uniformity, as a low level of tolerance towards deviation is dominant. In contrast, Vernetto (2004) demonstrates that clothing is a reflection of a change in the social order and therefore is a benchmark for understanding the process of societal development.

Culturally, clothes that are worn daily by ordinary people have the potential to reveal important cultural facts about a particular society (Cunningham and Lab, 1991). Clothing as a non-verbal language communicates symbolic values that indicate an individual's cultural identity. A chain of meanings and values of cultural identity can be communicated through clothing as a type of non-verbal language

that reflects the shared culture of religious beliefs, ideas, traditions and rite of passage (Cunningham and Lab, 1991). Clothing, within a particular sociocultural context, adheres to a set of systems that constructs personal, social, economic and religious meanings (Sapir, 1931; Barthes, 1983; Crane, 2000; Barnard, 2002). These meanings can be expressed through cues and symbols that must be compatibly constructed as concepts and similarly shared by the members of a cultural group (Kaiser, 1985: 185). However, these meanings differ from one society to another and might be interpreted differently within the same cultural context (Manawa and Ndamba, 2011).

Economically, clothing and fashion are considered to be one of the innovative industries that have an active role in the economy (Crane and Bovone, 2006). Fashion is a system that involves cooperation between professionals' knowledge and workers' skills in different niches of the industry to produce a tangible fashion product (Kawamura, 2005). Fashion as an industry attracts people from marketing and technology disciplines to investigate possible advanced techniques that can be used to improve product quality and develop marketing strategies and distribution methods.

Each of the above approaches correlates with the other approaches. Therefore, this study integrates elements from psychological, social, cultural and economic fields to formulate a theory that provides an inclusive substantive definition of fashion consumption in Saudi Arabia.

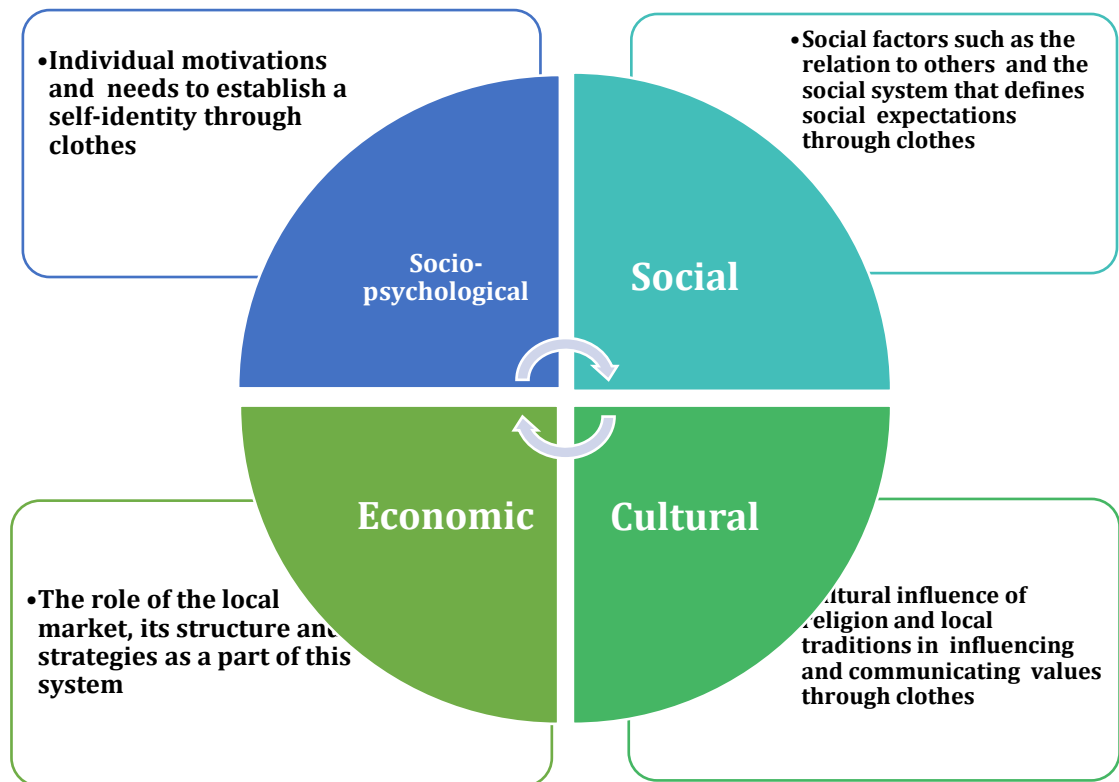


Figure 2.1: The integration of fashion and clothing fields in this research.

2.3 The Socio-Psychological Context of Clothing and Fashion

People develop their own identity by engaging in social interaction, applying different patterns of verbal and non-verbal behaviour (McNeill, 2018) to make a desirable impression on others (DePaulo, 1992). Tice et al. (1995) argue that an individual's constitution of self-identity is the process through which he/she obtains an identity associated with particular qualities in order to be perceived positively by others. Clothing and fashion items are examples of objects that effectively define self-identity and control the perceptions of others about the established self-image (Peluchette et al., 2006). Phau and Lo (2004) indicate that a consumer's purchasing behaviour is usually congruent with his/her self-image definition.

Bem (1972) introduced the theory of self-perception that primarily argues that people define themselves according to their understanding of their personal traits, which in turn fuels their ability to assess the appropriateness of their behaviour in

a particular social context. The route people follow to form inferences about others is equivalently applied to form a self-conception. When studying the role of dress in self-perception, scholars have utilised this theory to investigate the correlation between the adoption of a particular form of clothing and presenting a set of perceptions about the individual's self-image. This consequently influences the way in which others evaluate the presented identity. Stone (1962) discussed how an individual constructs their desired self-identity as a social behaviour to convey meanings to others through their appearance. This construction is processed through three stages:

- The self-evaluation of the appearance of clothing that should support the actualisation of the desired self-identity (programming stage).
- The social acceptance of this appearance through others' reactions that indicate its appropriateness (reviewing stage).
- If the first and the second stages coincide, the self-identity will then be validated (establishment stage). On the other hand, if the first two stages seem to be contradicted, the self-identity will be modified or redefined (Stone, 1962: 92).

Self-perception expressed through a clothing item is subject to others' opinions, which may support or reject its establishment based on the application of social normative parameters. Therefore, seeking a positive social evaluation is motivated by the need for self-verification, which can only be approved by members of the community (Stets and Burke, 2014). This social interaction is derived from a psychological process that motivates the use of symbols and/or objects to allow individuals to fit within a certain social category (Solomon and Schopler, 1982). These symbols are usually elements of clothing such as its colour, design, style or adornments that are used to transmit meanings to express particular values of self-identity. Each society has an array of expectations and values to be approached through the established dress identity (McNeill, 2018: 2).

In the same vein, the behaviour of establishing a particular dress identity can also be analysed in the light of the Theory of Reasoned Action. This theory was developed by Fishbein (1963) and is one of the most influential contributions to the cognitive school of thought. This theory was proposed to explain the correlation between the consumer's attitude and behaviour. The attitude towards behaviour is defined by Fishbein and Ajzen (1975) as "*an individual's positive or negative feeling regarding performing the target behaviour*" (p. 216). This feeling is constructed upon several variables such as beliefs and perceptions. It demonstrates the components of an individual's attitude, which are: the strength of beliefs about behaviour and the individual's perceptual evaluation of possible consequences that are likely to happen as a result of employing a particular behaviour (Fishbein and Ajzen, 1975). Attitude is developed through a systematic process of different phases of learning (Rudani, 2009). Politz (1958) argues that an individual's attitude is the predisposition of the consumer prior to purchasing or consumption. Although attitude influences behaviour, its influence is not always guaranteed in all patterns of behaviour (Pachauri, 2002). The consumer's attitudes are mentally developed abstracts that embrace the system of beliefs and evaluations. For this reason, it is argued that attitudes are difficult to scrutinise in a direct way. Schiffman and Kanuk (2004) suggest three elements of attitude to be considered when studying consumer behaviour:

- 1- Cognitive (beliefs about the perceived characteristics of a product)
- 2- Affective (feelings and emotions towards an object)
- 3- Conative (intention towards the behaviour of adoption).

Despite the fact that these elements operate at a micro individual level, their constitutional process is affected by the local culture that confirms the attitude (Pratkanis and Aronson, 1994). On the other hand, subjective norms consist of normative beliefs that are defined according to the individual's own perception about how key people, who belong to the individual's community such as family members and friends, may perceive, approve or disapprove of the behaviour (Ajzen, 1991). The subjective norms also include the motivation to comply with the

behaviour by constructing behavioural intention that can be measured to predict the potentiality of undertaking a specific human behaviour (Fishbein and Ajzen, 1975). This theory is also known as the theory of 'persuasion'.

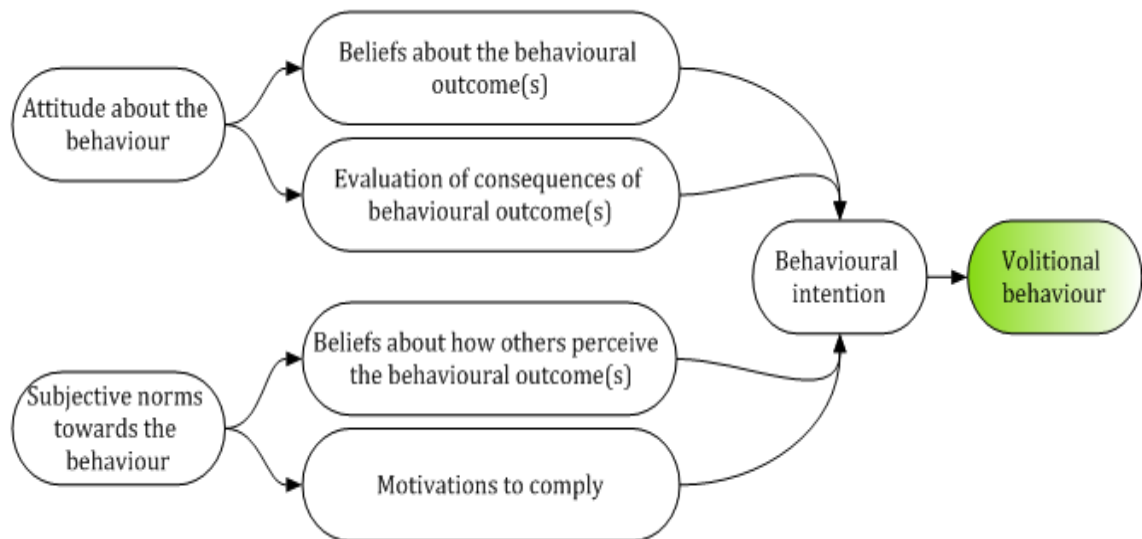


Figure 2.2: The Theory of Reasoned Action (Fishbein and Ajzen, 1975).

Applying this framework to consumer behaviour studies means that if an individual has a positive attitude towards an object/product that is supported by optimism about how influential or significant others will perceive the purchasing/use of this product, then it is likely that the individual will buy/use this object.

Employing this perspective to predict the likelihood of adopting a particular fashion item can be explained as follows:

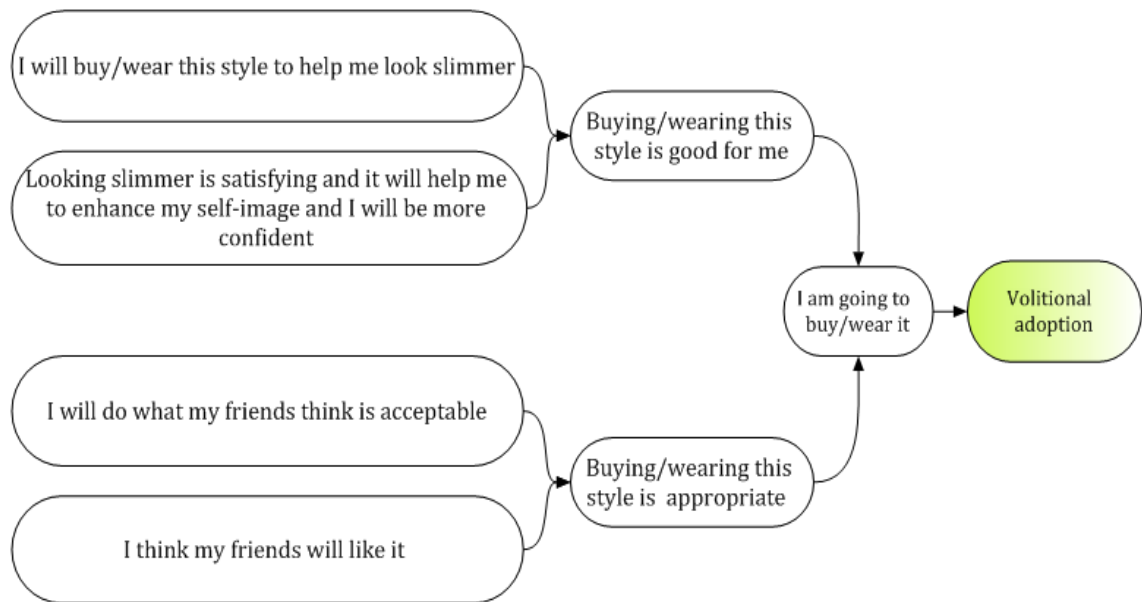


Figure 2.3: The application of the Theory of Reasoned Action to fashion adoption.

Therefore, the proximal cause of adopting a particular fashion or a new trend, in the context of this theory, is the intention to adopt it. This behavioural intention is determined by a mental interactive process to evaluate the sought-out benefits based on the consumer’s attitude and subjective norms. The result of this evaluation can be revealed via an empirical summative analysis of the obtained weights of numerical values given to each aspect.

Despite the usefulness of this model in explaining human behaviour, Sniehotta et al. (2014) criticise this theory for its parsimony caused by the exclusive concentration on rational reasoning that disregards the unconscious influences on human behaviour. For example, the role played by emotions and anticipated affective behaviour were not considered in the context of this theory, as argued by Conner et al. (2013). However, individual emotions can also be influenced or developed upon the opinion of others, pre or post the process of consumption. For instance, an individual might be encouraged by the surrounding community to adopt a particular (but not personally preferable) fashion. Due to the positive evaluation of behaviour which takes place when others conclude their opinion about its appropriateness, positive emotion towards this fashion might develop to satisfy the psychological

need for compliments. Therefore, the concept of the opinion of others that has been highlighted in this model can be applied not only to predict the behaviour, but also to explain existing fashion behavioural patterns in a sociocultural context.

McNeill (2018) explains how the decision about what form of clothes to purchase or wear is motivated by different categories of the self. For example, women who are characterised by a high degree of self-monitoring have an extreme level of self-consciousness that enables them to control the way in which their desirable self-image is positively perceived (DePaulo, 1992). Sirgy (1982) identified the emotional need for self-esteem as a powerful motive for establishing an identity through dress. Self-esteem can be achieved when an individual's evaluation of their self-identity is congruous to the reaction of others (Leary and Kowalski, 1990).

Guy and Banim (2000) were attracted to exploring the role of women's dresses in defining the self. In their study, they demonstrated that three dimensions can be applied to women's self-definition through the worn dress. The first perspective emphasises the concept of "*the one I want to be*" by utilising appropriate items of fashion to construct a positive impression of the presented appearance. The second perspective is "*the one I fear I could be*", which may occur due to an inadvertent choice of dress that might be perceived as a negative self-presentation. For example, wearing a dress that exposes the imperfection of a woman's body indicates a failure in achieving the desirable presentation of the self and it might even diminish the ability to convey a positive self-image. The third perspective is "*the one always I am*", which reflects the usual dynamic of women wearing clothes to define themselves (Guy and Banim, 2000: 321).

Johnson et al. (2014) argue that Guy and Banim's (2000) three perspectives of the self could be considered when analysing the behaviour of the plus-size women category, who sometimes struggle in their social self-presentation. This can be due to the lack of available fashionable clothing. The *Huffington Post* (2013) reported that plus-size women often complain about a disappointing ignorance of their position as fashion consumers. They also criticise the social misconception which

assumes that they are less trendy, and as a result targeting this market is believed to not be profitable. The reason for this phenomenon can be referred to the argument by Kaiser and Garner (2003) and Pandarum and Yu (2015), who state that the fashion industry has changed from tailor-fitted apparel to mass-produced apparel. These researchers argue that the current system of sizing in the fashion industry is standardised and developed according to the standard measurements of an ideal model as representative of all consumers. Garments produced according to this pattern will then be produced in a range of different sizes based on a set of grade rules provided by the size chart. Solomon et al. (2016) discuss an interesting emerging behaviour related to plus-size women. They argue that due to the strong relationship between an individual's appearance and self-confidence, consumers may consider cosmetic surgery to enhance their appearance. Liposuction and weight loss surgeries are the most common procedures that are considered as a recourse to enhance their body image and enable female consumers to be involved in fashion.

2.3.1 Self-Image and Clothing Style

McGuire et al. (1978) explained that when people spontaneously describe themselves according to what they wear, they access the memory of self-knowledge that mentally categorises semantic content and makes associations between different terms and various appearances. Therefore, clothing items are considered to be a reflexive definition of an individual's traits due to the fact that they activate stereotypical knowledge that links concepts and visual items.

Research by Hannover and Kühnen (2002) studied the role of clothing and dress in influencing the description of the self. The study acknowledged that the style of clothing produces and stereotypes a particular mental classification perceived about the wearer by himself/herself as well as by others. For example, an established link was identified between the wearing of jeans and the state of being casual. In the study, individuals who wore jeans used particular adjectives to describe themselves such as clumsy, tolerant and casual.

On the other hand, the same study illustrated that people in suits and formal styles described themselves as strategic, neat and cultivated. In addition, the study discussed that people may behave in accordance with the stereotyped perceptions about what they wear. For example, people who wear formal clothes may try harder to obtain social achievement or work success (Hannover and Kühnen, 2002). Similarly, the first impression others may have about an individual in the workplace is influenced by the way in which he/she expresses himself/herself via their clothing. For instance, casual dress reflects friendliness but unprofessionalism, which is associated with negative self-perception at a later stage of assessment. By contrast, formal clothes contribute to achieving positive self-perception as they indicate professionalism, trust, authoritative skills and productivity (Adomaitis and Johnson, 2005; Peluchette and Karl, 2007; Karl et al., 2013).

2.3.2 Self-Image and Clothing Colour

In 2007, Elliot and Maier introduced the *colour-in-context* theory, which determined the socio-psychological system of colours that transmits several inferences. This theory conceptualises colour as a meaning symboliser due to its visual function of conveying particular inferences that have been paired with various concepts through the process of learning, social interaction and personal experience (Arik et al., 2016). For example, the colour red represents a variety of emotions such as sexuality, caution and danger (Johnson et al., 2014).

Johnson et al. (2014) argue that due to cultural differences, the study of the symbolic system of colours and its implications for clothing should be addressed in a cross-cultural context as the symbolic meanings of colours vary from one society to another. Wong and Westland (2018) argue that although colours can express invariant meanings, those meanings might vary depending on the context or cultural differentiation. For example, in China, white represents death while in U.S. society it is a representation of purity and the establishment of the relationship, as symbolised by the colour of the bride's dress; black on the other hand is the colour of mourning (Rosman et al., 2009: 97).

One of the initial studies that investigated the impact of dress colour on the behaviour of the wearer and the impression of the viewer was conducted by Frank and Gilovich (1988), about two decades prior to the development of the colour-in-context theory. They demonstrated the role of the colour black in football players' uniforms in affecting the behaviour of the players compared to others wearing coloured uniforms. Players in black uniforms were perceived as aggressive and they were actually behaving aggressively. This was attributed to the common association between the colour black as a transmitter of some unpleasant meanings such as death in some cultural contexts (Rosman et al., 2009: 97). Therefore, in this case, colour has multiple roles as it influences the behaviour of the wearer on the one hand and the impressions of the perceiver on the other hand.

When studying the cultural identity of the dress of Hijazi women, Yamani (1997: 62) briefly mentions that the colour black, in this particular cultural context, is associated with elegance if selected to be worn for a wedding party. However, it can be only worn by married women as it seems to be inappropriate for young unmarried women, who are socially encouraged to wear bright colours. Furthermore, out of social courtesy the colour black is never worn in a hospital visit as it is associated with bad omens and is worn to express condolence and mourning. Yamani (1997) also argues that due to the hegemony of the religious ideology, women may express condolence in a coloured dress in some regions of the Kingdom. Some Islamic scholars such as Ibn-Uthaimen (Fatwa 47488) considered wearing black for mourning as a form of objection to God's will. Also, particularising the colour black for condolence is religiously considered as heresy as it has no relation to any Islamic thought.¹² Therefore, based on Yamani's discussion (1997), the colour black has an ambivalent symbolism in the *Hijazi* context. It communicates the concept of elegance in wedding parties but is acceptable to be adopted on a limited basis by married women as well as being worn by Hijazi women for mourning.

¹² This is in the Islamic Sunni doctrine.

Similarly, Shirazi (2003: 98–101) articulates the colour scheme in a number of posters and stamps of *Shi'i* Iranian women in black. She explains that the colour black was applied to signify mourning as well as martyrdom during the period of the 1970s–1980s. By this time, political change was ongoing, including the Islamic revolution against the *Shah* and his agenda, in addition to the war with *Sunni* in the Iraq state.

Kayser et al. (2010) and Guéguen and Jacob (2013) studied the function of the colour red in women's dresses as a vibrant stimulus in affecting the way in which others perceive those women. Both studies reached a similar conclusion that indicated that sexual intent was associated with women in a red dress when being evaluated through the eyes of the opposite gender. In addition, a red dress does not only affect the first impressions of the perceiver; it also affects the perceiver's behaviour towards the wearer. For example, male perceivers may behave more freely towards a woman in a red dress and may ask them intimate questions. However, wearing a red dress is perceived as a sign of lower sexual fidelity and higher sexual receptivity when women are being evaluated by other women, as suggested by Pazda et al. (2014a) and Pazda et al. (2014b). Women in this case are expected to be perceived negatively due to derogatory remarks made by others according to their stereotyped conceptions of the colour red.

The above discussion highlights the process of the conceptual construction of the self as well as the implementation of different typologies of the self to be expressed or avoided under various circumstances. Also, it illustrates how several aspects of clothing such as the style and colour transmit a set of symbolic meanings that contribute to providing a definition of the self in an individual context that is validated by the wider social system. To sum up, fashion has a strong psychological role as a second skin that defines the individual's self-identity through the implications of colour, style or brand.

2.3.3 Establishing the Self through Fashion in the Context of Saudi Arabia

Tawfiq and Ogle (2013) employed an interpretative approach to study how Saudi women construct their self-identity through dress in private female milieu. The study intended to compare and contrast the roles of traditional versus Western dress as two items that transmit contradictory values in influencing the way in which Saudi women make sense of their self-image. In order to achieve the aim of the research, the authors interviewed 15 married women residing in two cosmopolitan cities: Jeddah and Al-Madinah. The study took an interactional and dramaturgical approach following the socio-psychological tradition. Goffman's (1959, 1967) dramaturgical analysis, introduced as theory to explain the social interactions in theatrical performance, and Guy and Banim's (2000) theories of self-definition were applied as a framework to understand Saudi women's self-presentation.

Tawfiq and Ogle (2013) acknowledge a hegemony of salient censorious behaviour associated with gathering events to be a common characteristic of Saudi society. The state of being surrounded by judgemental women might be considered as a challenge for establishing the desired self-image. The study significantly attributed the impact of others as looking glasses that tell the consumer how to dress and who to be. The concept of others constructing Saudi women's sense of self is divided into two dimensions, *specific* and *general*. Specific others include female family members and friends. Husbands and in-laws are asserted to have an influence on conceptualising the ideal concept of the self that should be presented through a particular dress identity (p. 285). The general others embrace the wider impact of mass media and the fashion industry on the adoption of a particular pattern of fashion.

The research also highlights a natural, neither supportive nor undermining, role of traditional dress in constructing the desired self-image in the female-only social setting. The study confirmed that all of the participants substantiated its role as an element that buttresses the establishment of the desired identity (p. 284) as a

signifier of religious and cultural values. The study argues that traditional dress has been associated with the concept of modesty and traditional celebrations such as Ramadan and pre-wedding bridal customs, and is markedly preferred for holidays (p. 384). The aim of wearing traditional dress, according to the study, is to “*pay homage to long-honored beliefs and way of life*” (p. 248). This finding indicates a lack of alignment with other authors such as Rabolt and Forney (1989), Yamani (1997, 2004), Long (2005), Al-Dabbagh (2006), and Fatany (2007) regarding the predominance of Western fashion in Saudi Arabia.

Although the authors discuss the concept of modesty in the light of the participants’ own perspectives, the study does not provide a clear conclusion about how this concept is being conceptually or practically interpreted by Saudi women. Modesty was treated as a core principle of fashion in the private sphere by all participants. On the other hand, the study mentions that due to the critical lens of others, some women might dress modestly in the presence of religious women even if the pattern of their consumption behaviour does not usually reflect the concept of modesty (p. 286). In addition, the study does not differentiate categories of female-only environments, for example, formal working/studying institutions, social gathering occasions or weddings.

The literature about the socio-psychological role of fashion in defining the individual’s self-identity shows that this identity often aims to ensure alignment with the social context of others and the values that construct the symbolic meanings of fashion. These values are communicated through a system of signifiers and denotations.

2.4 The Social Context of Clothing and Fashion

It has been argued by Barthes (1983) that an entire system of identities, social relations, meanings and values can be communicated through fashion. However, clothing and fashion items can sometimes create contradictory meanings as they signify social values such as uniformity and conformity but at the same time

establish social boundaries (Battisti and Dahlberg, 2016). Barnard (2002: 182) argues that the clothing system is complex and can be ambivalent. It is a phenomenon that communicates contradictory meanings (Bauman, 1991) that are assigned to different categories such as liberation and subjugation. Mackinney-Valentin (2017) explains how the concept of ambivalence has been paradoxically applied as a core principle in social theories of fashion and status. This concept identifies the dichotomies in different contexts of fashion, including temporality vs. constancy, collectivism vs. individuality, secularity vs. faith, freedom vs. constraints, masculinity vs. femininity, young vs. aged, superiority vs. inferiority, traditionalism vs. modernity, and conformity vs. insurrection (Davis, 1994: 18).

Simmel's Fashion Theory (1957) is one of the initial theoretical frameworks that defined the social role of fashion in establishing social equality due to its systematic cycle that is based on imitation. However, fashion also inspires the concept of social segregation by grouping individuals according to their social stratum and isolating them from others. As a response to Simmel's Fashion Theory, Blumer (1969a, b) explained the dynamic of fashion as a process he named *collective selection*. This author argues that the production and adoption of a particular fashion is not a social response to the need for class division; instead, it satisfies the need to be in fashion as a social phenomenon. Gutman and Mills (1982) expound that within a fashion system there are three core segments that indicate the level of consumer engagement: leaders, followers and anti-fashion or independents. This view is supported by McNeill (2018: 96), who argues that people adopt fashion to avoid the social fear of being judged non-fashionable.

2.4.1 Class, Status and Fashion

The primary aim of establishing social status via the consumption of fashion is to define the individual's position in the social hierarchy (Kaiser, 1985: 364). This is motivated by intertwined personal and interpersonal motives. Social class is an existing reality that indicates the individual's position in the hierarchy of the social system. As suggested by Coleman (1960, 1983) and Iftikhar et al. (2013),

consumption behaviour is highly dependent on class status as each class has its own values to maintain through the adopted consumption pattern.

In the literature, there are different classifications of social class. For instance, Sivadas (1997) divided social class into five main categories: upper class, upper-middle class, middle class, working class and low class. However, Coleman (1960, 1983) argues that class stratification should be suggestive not inclusive due to the reason that class is an estimated conceptual category rather than a measurable and precisely defined group/entity when analysing consumer behaviour. Weber (1978) highlights three concepts as parameters for class segmentation: economic factors (wealth and property ownership), political factors (the possession of power and the ability to achieve goals regardless of social oppositions) and social factors (prestige and respect, regarded by others as a result of a particular social position).

Bourdieu (1984) argues that the social-class structure is complex due to the fact that it comprises cultural systems that specify the adopted taste and lifestyle for each of these classes. He states that people tailor the conceptions about themselves based on their position in the social hierarchy. In Bourdieu's theory, social class is conceptually linked to habitus. Bourdieu (1990) defines *habitus* as:

"...durable, transposable dispositions, as principles which generate and organize practices and representations that can be objectively adapted to their outcomes without presupposing a conscious aiming at ends or an express mastery of the operations necessary in order to attain them." (p. 53)

The concept of habitus is symbolically generated by the social interplay which forms the sociocultural norms that guide the individual's perceptions and behaviour (Navarro, 2006: 16). Therefore, habitus reflects the individual's membership of a broader group/class that will influence his or her tastes. Applying this notion to consumption behaviour, different social classes can be defined according to the adopted taste. Bourdieu (1984) also argues that people compete to gain social distinction on the basis of their ability to judge the suitability of a cultural artefact

such as music and fashion according to the class-based criterion of taste. Taste is “*an acquired disposition to differentiate and appreciate*” (Bourdieu, 1984: 466), which in this vein means a judgement standard that can also be classified into class identity groups. The sociocultural background of upper class has a particular standard of conception and practice that forms a unique taste that might not be readily accessible by low and middle-class people.

Although class is usually covered from a sociological perspective, the application of the concept of social class attracted the attention of marketing scholars. One of the initial research studies in this field was by the *Chicago group* who applied this factor to investigate the behaviour of American consumers. Their study showed that American consumers from different classes pursue different goals when purchasing furniture and clothing items (Coleman, 1983). For example, the consumption of the upper-middle class reflects high taste and quality while lower-middle-class consumers pay attention to conformity. The study also identified that modernity and quantity are the main goals of consumption among upper-lower-class consumers.

A personal approach was discussed by Han et al. (2010), whose research indicated that consumers who belong to a high social class buy rare, unique, imported reputable brands while middle-class consumers are rational, intelligent and spend money on quality products. Low-class consumers usually tend to bargain to a greater extent (Hamilton, 2009). Vel et al. (2011) argue that consumers who belong to a high class or consumers who have a comparatively high disposable income spend more of their resources on luxury and status products. These products are usually characterised by distinctive qualities and higher prices. Williams (2002) found a direct relationship between consumers’ income and the evaluative criteria of the product. He states that low-income consumers pay more attention to utilitarian and objective criteria while consumers from the high-income class are expressive and attribute more importance to the subjective criteria of the product.

A strategy by upper-class clothing consumers was discussed by Brooks (1981: 269), who pointed out that:

“The most effective status seeking style is mockery of status seeking... thus the well-to-do wear blue jeans, even worn and threadbare, to proclaim that one is socially secure enough to dress like an underpaid ranch hand.” (cited by Coleman 1983: 269)

In this sense, the individual's search for status is not limited to the behaviour of conspicuous consumption; it can also be achieved through parody display and mocking status objects. Jeans that are made out of denim, which is considered to be a cheap material, is an ideal example that explains this issue as it is now produced by famous status brands and also adopted by people from different social classes including the elite. Coleman (1983) argues that the influence of social class has declined since the 1970s as alternative variables emerged such as subculture, lifestyle, ethnic and racial groups. This was concurrent with the opposition to the Vietnam War that caused different levels of breakdown inside each social class. He also gives an insight into the origin of the concept of lifestyle that categorises consumers into groups by signifying broad elements such as individuals' or families' expenditure of money. The typology of lifestyle can also be based on narrow elements and subdivides consumers according to particular shared characteristics such as hobbies or sports interests (for example, jazz fans or runners). Therefore, lifestyle brings together people from different social classes and unifies them under one group. It also subdivides individuals who belong to the same social class into subgroups. However, the notion of consumers' lifestyle is argued to be an essential element of social class by Myers and Guttman (1974).

Furthermore, Brooks (1981) highlights that the increasing phenomenon of the visual confusion of high and low-status signifiers in public space may reduce the influence of social status. In his work *Showing Off in America*, Brooks applied Veblen's theory of conspicuous consumption to explain the change in the manners and values of contemporary American society.

From another angle, the role of fashion as a badge of high status is limited to the pre-industrial era, as there was a gradual movement against class boundaries as argued

by Davis (1994: 58). Status items such as luxury brand names are no longer exclusive to those of the upper class (Vel et al., 2011; Pham and Nasir, 2016). Due to the disposable income of the emerging middle class, the demand for luxury fashion is increasing among different categories of social classes (Kauppinen-Räsänen et al., 2014). Crane (2000) also argues that the Industrial Revolution has eliminated the role of social class in clothing consumption behaviour. For example, during the late 19th century, there was a gradual decrease in clothing prices, which became cheaper and more accessible for people from the low social stratum. Clothes became an indulgence also for the poor. Women who belonged to the working class used to spend their earnings on fashionable clothes and women from upper classes dedicated a substantial amount of the family's income to buying fashionable clothes (Crane, 2000).

"People who have more money also spend more money." (Wilkie, 1994: 76)

The received income determines consumers' consumption. Tregarthen and Ritternberg (2000) and Kotler and Keller (2016) stress that individual income is an index used by marketers to identify the purchasing capability of existing consumers. In addition, income is an indicator that can be utilised to predict the intention of a potential consumer to purchase a particular brand. Therefore, understanding consumer behaviour entails considering the value of his/her income.

The amount of money that can be allocated to purchase a product is directly proportional to the consumer's income (Williams, 2002). For instance, consumers with low income or limited financial resources may not be able to afford life essentials (Darley and Johnson, 1985) and might also look for lower-quality products due to their cheaper prices. This category of consumer may also include some students and unemployed people (Fyfe, 1994). Thus, the consumer's income affects shopping frequency and the quantity of products that are bought in each shopping trip. However, marketers should not ignore any possible change in the domestic or global economic climate that might negatively influence consumers' appetite or capability for purchasing. This includes, for example, an increase in the

level of unemployment, inflation, reassessment of tax charges and the possibility of introducing new financial policies for particular items, reduction in employees' wages and any other economic conditions that might have a direct impact on consumer behaviour.

Regarding Saudi women's economic prowess, Hashem (2007: 131) comments that about 70% of bank assets in Saudi Arabia are owned by women, which accounts for 40% of the national wealth. This can be linked to the increasing employment of women in the governmental sector, which exceeded 1.5 million in 2008 (Al-Dossary, 2012). Undoubtedly, this factor had a direct impact on women's expenditure in general.

2.4.1.1 Conspicuous Consumption

This involves possessing and displaying expensive prestige items as a sign of wealth which can only be accessed by a particular class of society characterised by elitism. The term conspicuous consumption has been defined by the Longman American Dictionary (2000: 296) as "*the act of buying a lot of things, especially expensive things that are not necessary, in a way that people notice*". This value is obtained through materialism and ostentation (Veblen, 1899; Wong and Aaron, 1998). Prendergast and Wong (2003) stress that the state of possession of luxury material items leads to a feeling of happiness and social success as people are then able to approve of the actuality of their social position.

Veblen's argument (1899) pointed out the effective role of wealth in adopting conspicuous patterns of consumption. Wealthy people are highly motivated to buy luxury goods including fashion in order to exhibit their wealth. The ability to pay higher prices for functionally comparable items is a signifier of wealth, which consequently paves the way for establishing a distinctive social status (Bagwell and Bernheim, 1996) and/or to preserve an existing one. According to Veblen (1899: 123), one of the most powerful illustrations of wealth is the expenditure on clothing and fashionable dress. Veblen (1899: 125) also illustrated that the function of dress for people in the leisure class is to exhibit wealth rather than physical comfort. In

addition, he argued that conspicuous consumption in dress must combine quality and quantity. Veblen discussed the fact that quality is a subject of consumer consideration as exhibiting pecuniary strength can occur through buying expensive materials such as golden yarns or Pashmina to weave a scarf. In addition, there is an established link between the price of the fashion product and the perception of its quality, as discussed by Tellis and Gaeth (1990). The study demonstrated that consumers use price as a judgement tool when evaluating the quality of a particular fashion product. Therefore, applying price as an indicator of quality can determine certain levels of status (Vigneron and Johnson, 1999).

However, Duesenberry (1949) argues that the adoption of conspicuous consumption does not only depend on the consumer's own standard of spending but is highly dependent on a comparison of spending standards between people within the same community. Competitiveness, imitation and social comparisons are fundamental forces that lead to an adoption of what he called "*conspicuous consumption*" (Patsiaouras and Fitchett, 2012). The surrounding social environment has a significant role in enhancing the consumption of expensive fashion as a visual item of prestige. This is supported by Bearden and Etzel (1982) who stated that the consumption of luxury goods that are publicly displayed is expected to be conspicuous due to the role of others. According to Campbell (1995: 42), in Veblen's philosophy, the role of others in affecting the consumer's behaviour is pivotal as it operates in two different directions. The first direction is that individuals are motivated to be engaged with certain levels and patterns of consumption to have a sense of equality or even primacy when comparing themselves with others. The second direction is when others evaluate the success or failure of the consumption as a social reaction.

2.4.1.2 The Consumption of Uniqueness

The concept of the individual's demand for uniqueness emerged from the Theory of Uniqueness by Snyder and Fromkin (1977). According to this theory, the individual tends to distinguish himself/herself from other members of the same community,

especially when the conception of the self is presumed to be threatened by the existence of similarity to others. This need is significantly influenced by the Theory of Social Comparison by Festinger (1954). People seek self-esteem through distinguished behaviour that does not contradict the wider social context (Tian et al., 2001). The establishment of a unique individualised identity requires constructing a personalised style through the consumption of novel and unique material items (Kron, 1983). The need for uniqueness emerges from both personal and interpersonal motives under the effect of snobbery (Leibenstein, 1950). The systematic effect of snobbery results in two outcomes (Vigneron and Johnson, 1999: 5):

- 1- **The behaviour of adoption:** this starts when a novel fashion product is being socially introduced as an item of prestige that is possessed by a limited number of consumers (Rogers, 1983).
- 2- **The behaviour of rejection:** this can be indicated when the elite reject a particular pattern of dress if it has been adopted by the mass population (Mason, 1981; Rogers, 1983).

“For certain innovations such as new clothing and fashion, the social prestige that the innovation conveys to its wearer is almost the sole benefit that the adopter receives. In fact, when many other members of the system have also adopted the same fashion... may lose much of its social value to the adopters.”
(Rogers, 1983: 215)

Thus, the consumption of luxury fashion is a social phenomenon that has been symbolically associated with wealth and aristocracy (Chevalier and Mazzalovo, 2008; Han et al., 2010). It is also driven by the emotional need for recognisability and distinctiveness (Phau and Prendergast, 2000). The scarcity, limitation and exclusivity of the prestige fashion item satisfies the need for uniqueness. This explanation of the fashion system was previously theorised by George Simmel (1957) who argued that increasing wealth undoubtedly nourishes the demand for new fashion. Therefore, the process of fashion is a form of a circular conflicting

interplay between people from the upper class and their craving for uniqueness and being socially distinguished, and on the other hand, the desire of people from the lower class to be like others by imitating them as an attempt to erase the social dissimilitude. Consequentially, fashion as a social product has a dichotomous role that discriminates and equalises members within the same social system. Figure 2.4 explains the lifecycle of fashion from Simmel's perspective.

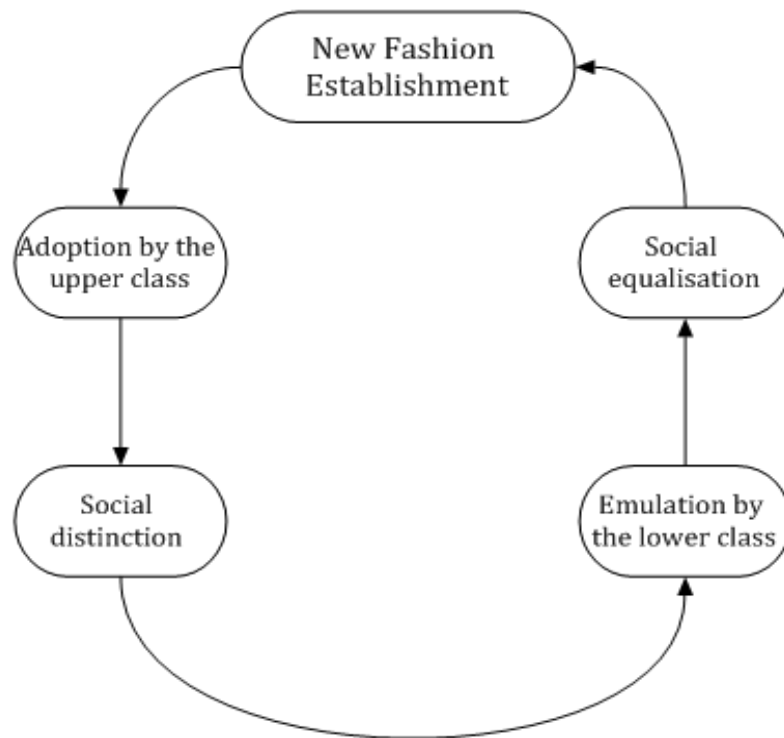


Figure 2.4: The dichotomy of the role of fashion through its lifecycle process.

However, Ziller (1964) argues that seeking uniqueness through the consumption of material goods is a risky process as an individual may fail to assume an appropriate manner when establishing the unique or individualised identity or behaviour. This behaviour may result in receiving social disapproval, especially if it breaches common social tastes, morality or traditions.

2.4.1.3 Saudi Women as Consumers of Luxury Fashion

Church (2011) argues that the consumption of luxury goods is an inherent deeply rooted tradition in Arab culture. Vel et al. (2011) mention that the extravagant

consumption behaviour of luxury items is associated with the tradition of exhibition. For instance, the history of the earlier Arab societies shows that Arab women used to wear fine silk dresses and belts made of pure gold and studded with unique stones to present a luxurious image (Chaarawi, 2017). In addition, Arabs used to decorate their horses and camels with gold chains in order to display wealth (Chaarawi, 2017). Therefore, displaying wealth through luxury items seems to be a social value of the culture. Vel et al. (2011) state that:

“In order to fit in this society, consumers believe that they should purchase luxurious items, the more expensive the item they wear, the better impression they will give out to others in society.” (p. 5)

Also, Sherwood (2000) described Arab women shoppers as well-educated and rich travellers. However, a study by Mouillot (2013) contradicts this view about the consumption of luxury fashion among Arab women. He argues that the wearing of the black *abaya* in public minimises the opportunity for desirable social self-differentiation, which can be achieved through participating in the phenomenon of luxury consumption. This assumption does not seem to be true, as argued by Church (2011), Vel et al. (2011) and Euromonitor (2013). They describe the predominant engagement of Arab women in the consumption of visible luxury logos. Arab women tend to buy styles that are examples of ostentatious ornamentation, such as handbags (Church 2011).

An exploratory research paper was written by Amani Aqeel (2012) to comprehend the factors motivating Saudi women consumers' decisions when they were buying luxury brands. A total of 20 Saudi women consumers living in Malaysia were involved as interviewees in order to gather the essential data for the research. The researcher suggests that there are three main factors influencing the Saudi women consumers' attraction to luxury fashion, which can be classified according to their potency as quality, uniqueness and emotional value (Aqeel, 2012: 189). She compares the results of this research with a number of studies such as Lee et al. (2006), who examined factors affecting Mexican college students' purchase

intentions regarding a US apparel brand; Kumar et al.'s, (2007) study titled *Indian consumers' purchase intention toward a United States versus local brand*; and Knight and Kim's (2005) study titled *Japanese consumers' need for uniqueness: Effects on brand perceptions and purchase intention*. The only difference between Aqeel's research and the above-mentioned studies is the position of the potency of the factors in the hierarchy of motivation. She suggests that quality is more potent as a factor for Saudi consumers (in Malaysia).

The limitation of the study is related to its dependency on the perspective of Saudi students who are temporarily living abroad; this means that the results cannot be generalised. In addition, the study does not indicate any demographic information about the respondents that can be linked to their pattern of consumption. Also, despite the qualitative method of data collection and analysis, the study does not indicate the respondents' demographics or specify any brand names or the type of luxury products, for example, fashionable branded clothing, bags, make-up, shoes or jewellery, each of which has its own unique definition in terms of luxury and may vary in different cultures. Moreover, the results of the research are presented without an interpretive discussion defining the meaning of each factor to provide a deeper investigation of its dynamics. Also, none of the possible influences of personal or sociocultural factors are mentioned in the study.

Marciniak and Mohsen (2014) conducted a research study to investigate the extent of homogeneity in motivating and driving the consumption of luxury fashion in the Gulf States. The research developed the prestige-seeking framework suggested by Vigneron and Johnson (1999). It identified the existence of the conception of distinctiveness, uniqueness and scarcity as significant values communicated through the consumption of luxury fashion brands. These values are attributed to the social pressure to own luxury fashion brands, which forces some people to apply for loans just to be able to afford these items that are considered to be necessities.

The research also demonstrates that a number of factors caused the growth in the consumption of luxury fashion among Arab women (in a general inclusive context

of Gulf women): the considerable level of the nation's wealth, betterment of women's social position, stable or increasing disposable income, and the developed infrastructure of modern retail (Business Monitor International, 2010). Also, it is mentioned that the luxury fashion retail sector is growing in Saudi Arabia and that famous brands such as Christian Dior and Burberry entered the market through a joint venture (Church, 2011).

This research is a useful contribution to the field of the consumption of luxury fashion in the Gulf region; however, a limitation is that it is based on a very limited number of consumers (only eight in total from different Gulf States) who belong to affluent families and are temporarily living in the UK. Therefore, generalising the research findings to establish a framework that defines women's consumption of luxury fashion in the Gulf region is not possible as the behaviour of other consumers from other positions in the social hierarchy might be different due to the dissimilarity in economic affluence – and also their consumption behaviour may be influenced by Western culture.

2.4.2 Fashion and Social Conformity

Although the Theory of Social Comparison by Festinger (1954) supports the need for individualisation to boost an individual's self-esteem, it demonstrates that people's attitudes in most circumstances are formulated to conform with the majority of the members belonging to the same social system. People communicate their membership of a group by communicating their shared attitudes and behaviour. Vigneron and Johnson (1999: 6) note that although people seek prestige, they need to fulfil the sense of conformity as a social value. Therefore, an individual may adopt an expensive brand during the weekdays as a signifier of prestige but during the weekend, the same person tends to wear a modest brand in order to fit in with the standardised social context. Individuals present an identity that is defined within the social context in order to be evaluated through the symbolic meanings they express. The social identity is then accepted by members of the community, which can be called "*social reality*".

Solomon and Rabolt (2004: 19) state that *“Fashion is a form of collective behaviour, or a wave of social conformity”*. Conformity is a key social value that is motivated by the internal need for acceptance (Kaiser, 1985). McGhee and Teevan (1967) argue that the need for community affiliation produces conformist behaviour, as cohesiveness influences the dynamic of group interaction. Schachter (1951: 191) states that *“The strength of the pressure toward uniformity that a group can experience on its members will vary with the cohesiveness of the group and the relevance of the issue to the group”*. Therefore, the value of uniformity is desired, especially in cohesive communities that are less tolerant of deviation (Rose et al., 1994).

The conformity of group members can be reflected through the use of fashion and clothing as a visible pattern of consumption (Hawkes, 1994). People can communicate their membership of different communities through dress (Rose et al., 1994). The aim is to maintain a harmonious relationship with community members (Compton, 1968). Thus, within a social group, there is usually a sense of uniformity in terms of dress, which can be defined according to different considerations such as age, gender and religion (Battisti and Dahlberg, 2016). However, Battisti and Dahlberg (2016: 7) argue that although certain levels of conformity can be achieved through a uniform dress code for ethnicity, profession or gender, there is always a space for freedom to make a statement about the personal self. There is a fundamental influential role of reference groups in making sense of social conformity (Festinger, 1950). Embaya (2010) argues that consumer behaviour is influenced by aspects related to people from the surrounding social groups. The consumer is a member of different groups that vary in terms of identity (Blackwell et al., 2006). As a member of a group, the consumer behaves in a manner that ensures the fulfillment of essential social meanings such as conformity and belonging. According to Ajzen (1985), individuals evaluate the possible social consequences that might be perceived by influential others before employing any behaviour. The reason for this is to maintain the feeling of conformity and acceptance, which in turn strengthens the level of social security among the group

members. The consumer may also avoid adopting a behaviour that contradicts the dominant social norms, to prevent criticism by group members.

2.4.2.1 The Influence of the Reference Group

The concept of reference group was introduced by Herbert Hyman (1942). In the field of consumer behaviour, the reference group is considered to have a fundamental influence on consumer behaviour (Escalas and Bettman, 2005). A reference group is defined by Thompson et al. (2017) as “*the group that people refer to when evaluating their personal qualities, circumstances, attitude, values and behaviour*” (p. 145). Therefore, a reference group can be a person or a group of people who form a model of appearance or behaviour based on shared beliefs, values and norms and may also guide and assess other members of the social group. Also, the reference group is considered to be a point where social comparison starts and can be a source of product/brand information (Embaye, 2010).

Furthermore, the reference group can be positive where people have aspirations to join it or it can be dissociative and be associated with negative values, meaning that it is rejected (O’Shaughnessy and O’Shaughnessy, 2004). Some individuals enhance their social position and boost their self-esteem by associating with successful communities (Felson and Reed, 1986). The degree to which the consumer is affected by the reference group depends on the consumer’s susceptibility and the strength of his/her established relationship with the group members (Kotler, 1997). Schiffman et al. (2008) argue that there are three main categories of reference groups: normative, comparative and indirect reference groups.

2.4.2.1.1 Normative Reference Group

This category can be defined as the intimate influential group such as family that undertakes the process of constructing the framework that defines the values, symbolic codes and attitudes that guide consumer behaviour. Immediate family members play a significant role in embedding these values from the consumer’s childhood onwards. This includes the conventions of appropriate dress for

particular occasions (Schiffman et al., 2008) or the classification of the priorities of spending (Brassington and Pettitt, 2006).

The influence of the family may vary depending on several considerations such as the identity of the cultural contexts to which the consumer belongs. A comparative study by Childers and Rao (1992) investigating the influence of family on consumer behaviour in the United States (individualistic) and Thailand (collectivistic) suggested that family in collectivistic cultures has more power over the individual's decisions. According to this study, due to the nature of extended family in Thailand that exposes the consumer to a larger number of relatives, consumers are likely to develop a form of family identity that reduces the influence of peers. However, in the United States, it was evident that referents/peers from outside the family are more likely to have a greater influence on consumers from nuclear families.

In collectivistic Arab societies, family is considered to be the initial social system that operates to maintain a positive response to the normative cultural values and traditions (Barakat, 2005). Therefore the Arab family has a great impact on constructing an individual's Islamic attitudes and formulating his/her behaviour. In Arab families, the success or failure of any of the family members affects the family as a whole. This could have an impact on social status. Sexual misbehaviour of a female member destroys the reputation of all members of the family or even the tribe (Barakat, 2005). This also applies to females' appearance in the public sphere. For example, any positive or negative symbolic meanings resulting from the consumption of a particular clothing or fashion item directly affects the reputation of the family (Vel et al., 2011: 4). This cultural characteristic might affect women's choice of clothing and fashion.

2.4.2.1.2 Comparative Reference Group

This group comprises particular neighbours and friends who have a direct social connection with the consumer (Schiffman et al., 2008). This category usually adopts a lifestyle that is apparently admirable and likely to be imitated by others. Therefore, this reference group does not participate in the process of value construction;

instead, it influences the way in which the consumer expresses a particular ingrained value through imitation.

The influence of this category of reference group is controversial. For example, consumers may experience a feeling of deprivation (negative self-evaluation) when they identify a gap between what they have compared to their reference group (Thompson et al., 2017). This feeling results from a process of self-evaluation based on social comparison. Many studies identify the role of the comparative reference group on the adoption of luxury goods (Kotler, 1997; Schiffman et al., 2008). For example, consumers are more likely to consider the perspective of the comparative reference group when purchasing conspicuous products or brands that are socially conceptualised to be status signifiers. On the other hand, reference groups can offer a sense of gratification (positive self-evaluation) for members of lower socioeconomic status (Singer, 1981).

2.4.2.1.3 Indirect or Inspirational Reference Group

Unlike the previous categories, the indirect reference group refers to people who are unlikely to be met in real life and have no direct contact with the consumer (Schiffman et al., 2008). This reference group includes celebrities, social leaders and even well-dressed attractive individuals in public. Due to the impact of celebrities as an indirect reference group, companies seek their endorsement as a marketing strategy to promote a product or transmit a promotional message. This can be via a promotion in the media or an endorsement on their official social media accounts (Lantons, 2015). The reason for this can be attributed to the fact that consumers usually want to copy the behaviour of their heroes.

The *opinion leaders* or *trendsetters* in a particular field of consumption can be embraced under this category of reference group. As argued by Lantons (2015), fashionistas are considered to be trendsetters as they are usually trusted and have knowledge about the brand; therefore, consumers take their advice seriously.

To sum up, the consumer is influenced by different categories of reference groups when communicating the social values of clothing and fashion. These groups impact certain levels of the consumer's attitudes and behaviour at different times and under different circumstances. However, the consumer usually evaluates the benefits that might be achieved from a reference group before adopting behaviour to fit in with the acceptable behavioural pattern (Ajzen, 1985) assessed by those who offer status or other social advantages such as acceptance. In addition, this influence of the reference group can be temporal or permanent. Applying this to fashion, Schiffman et al. (2008) give an example of a person who works for a conservative lawyer who requires her to dress modestly and adopt a conservative dress code during working hours. The same person may change the mode of her dress to a revealing style after work.

2.5 Cultural Influence on Consumption: General Overview

Culture is the lens through which consumers evaluate the suitability of consumption behaviour as it filters consumers' perceptions of what is considered to be appropriate behaviour (Belk et al., 2005). It comprises a system of consequences about adopting a behaviour that is against cultural norms. As a result, consumers may reject adopting a particular fashion due to deliberations that are guided by cultural elements, including those related to religious considerations.

Hofstede (1991) views culture as a process of *mind programming* that helps individuals to distinguish themselves from others based on the sets of values and beliefs that are shared by the society members. This *mind programming* constructs the system and the criteria that define the appropriateness of a particular behaviour in a specific cultural context. The collective cultural pattern of behaviour is an outcome of the norms and beliefs that have been transmitted and learned through different stages of an individual's life (Assael, 1992; Mokhlis, 2006a). Also, this collective behaviour reflects the society's cultural identity and the system of values (Hofstede, 2001) that continue to exist in order to maintain the stability of the culture (Schwartz, 1992). Iline and Simuforosa (2016) demonstrate that cultural

identity differentiates one nation from another, and the uniqueness of a nation is manifested through the way in which individuals behave in conformity with the matrix of their culture.

Religion is a fundamental element of cultural identity and has a great impact on individuals' attitudes and behaviour (Belzen, 1999). Mokhlis (2006b) states that in its cultural context, religion is considered to be a unified system that pervades the society's values through the religious beliefs that formulate individuals' cognitive systems as well as the society's ideological identity. Religion has been defined by Schmidt et al. (1999) as:

“systems of meaning embodied in a pattern of life, a community of faith, and a worldview that articulates a view of the sacred and of what ultimately matters”
(p. 10)

Some theorists such as Karl Marx (1912) have a negative perspective about the cultural impact of religion on individuals and societies. The Marxian view discusses religion as a controlling tool that has been applied by the governing class in order to subjugate the working class. Similarly, the *Subtraction Theory of Secularisation* (Casanova, 1994) argues that the decrease in people's level of religiosity due to the increasing spread of secularism since the 17th century is constant and inevitable and may cause a disappearance of religious impact on different aspects of people's lives.

On the other hand, other scholars such as Weber (1930), McMurry (1978), Gorsuch and Smith (1983), and Pargament and Hahn (1986) stress the positive role played by religion in terms of social decorum, problem solving, maintaining self-esteem and moral sublimity. Moreover, the ubiquity of religion influences the consumption choices in some societies, which may question the validity of the assumption of the *Subtraction Theory of Secularism* (Mokhlis, 2006b). Wuthnow (1998) emphasises that even in secular societies, religion still interweaves into different aspects of life. Lord and Putrevu (2005) argue that the notion of acquisition is strongly driven by

religion, which evidently leads to specific patterns of consumption in a world where 80% of the population affiliates to different religions (Pew Research Centre, 2015). Being a member of a religious community fuels the consumer's need for self-esteem, belonging, cohesion and affiliation in order to form the identity that defines a group's particularities (Greenfield and Marks, 2007). For this reason, consumers usually attempt to communicate their religious affiliation as a dimension of the wider cultural identity through different consumption patterns (Minkler and Coşgel, 2004). Religion as an intrinsic source of culture symbolises the meanings of material objects (Sandikci and Ger, 2009), which can go beyond their basic functions.

Al-Hyari et al. (2012) highlight a point that individual behaviour can sometimes be influenced by what is called the '*xenophobia*' of others who belong to a different cultural background, especially when there is an intellectual conflict based on religious considerations (Reeves, 2003). In Hofstede's theory of cultural dimensions (1984), different cultures are categorised in terms of dimensions of power distance, uncertainty avoidance, individualism and collectivism and masculinity and femininity. In collectivistic cultures that are classified by a high level of uncertainty avoidance (applicable to Saudi Arabia), they usually have strict rules, and therefore social behaviour in these cultures reflects a high degree of cohesive response to these rules in order to avoid the risk of social criticism. Moreover, in these cultures, any behaviour, product or brand that is considered as a threat to the society's values is strongly avoided (Doole and Lowe, 2003). Therefore, one of the actions a consumer may take in response to an implicit or explicit cultural threat to Islamic values is boycott. Boycott has been defined by Friedman (1985) as:

"...an attempt by one or more parties to achieve certain objectives by urging individual consumers to refrain from making selected purchases in the marketplace." (p. 97)

A pertinent example that illuminates the impact of religious values was reported in the *Daily Mail* (December 2013) when an online sex-shop called '*Karaz*', which means cherry in Arabic, was launched in Palestine in 2013 targeting Muslim couples

in the Middle East. Although the entrepreneur was granted with an approval from the religious authority with some provisos to ensure that no prohibited promotions are applied (such as displays of lingerie on a model or pictures of semi- or fully naked women), this business faced marketing problems in terms of consumers' acceptance of this form of product. The reason for this is the stereotyped view towards sex in the Islamic culture as part of an intimate sanctified marriage relationship.

Another reported case was when Amazon, the famous online commercial store, displayed a picture of a model in a short transparent dress with Islamic face cover named as '*sexy Saudi abaya*' on their website. Due to this promotion, the website received a lot of complaints and criticism from Muslim consumers in the United Kingdom. Muslim consumers expressed their indignation and accused the website of being disrespectful of one of the Islamic values: the dress code. Muslims around the world consider the female's *abaya* as a main component of the Islamic identity that emphasises the principle of modesty. It is also linked with Muslim females' identity, which was misused and abused through this action. In response to this tidal wave of Muslim complaints, Amazon removed the item from the website immediately and warned the seller against displaying any similar item in the future (Ali, 2016).

From another angle, Mathras et al. (2016) note that some religious beliefs, especially those related to the acceptance of impermanence, can reduce the individual's materialistic desires to possess luxury brands as a signifier of status (Zhou et al., 2010). In this sense, ethical consumption is viewed as an opposition to the notion of materialism. This view is supported by Muncy and Eastman (1998), who comment on an inverse correlation between consumerism and ethical consumption.

On the other hand, a direct relationship between consumerism and materialism has been established. For example, Lu and Lu (2010) highlight that consumers may behave unethically in order to reflect a particular social value via exhibiting a high degree of materialism. Therefore, materialism is considered to be an unethical

phenomenon that negatively influences consumer behaviour (Belk, 1985; Sharma, 2011). Wuthnow (1995) argues that the reason for this is that materialism penetrates the individual's soul to marginalise the emotion of gratification and augment the eagerness for hedonism that can be achieved by acquisition. However, within the context of consumer behaviour, being involved in a purchasing activity that violates religious values or moral norms may create a feeling of guilt (Burnett and Lunsford, 1994). Due to this unpleasant emotion, consumers tend to avoid any purchasing activity that might be counted as unethical behaviour to avoid this feeling.

Wuthnow (1995) discusses materialism as a characteristic of the American consumer culture and states that:

"...materialism is not only shaping how we live but the way we think as well... Materialism draws us into its logic not so much by convincing us that material goods are preferable to helping the poor, but by persuading us that we can help them best by buying luxury goods for ourselves... It influences our consumer tastes and our preference... It permits advertisers to sell us more goods, not less, by emphasizing the virtues of high-quality goods that will last, biodegradable goods that will not pollute the environment." (p. 15)

Therefore, materialism refers to an ideology that focuses on individuals' attachment to material possession. It also underlines people's social position based on their possession of material goods. For example, a high level of materialism can be identified in the pattern of consumption adopted by consumers from a low-income class (Ying, 2016). Consumers from a low socioeconomic class feel under pressure to buy more products and face burdensome debt as a result (Ponchio and Aranha, 2008). Elliott and Leonard (2004) argue that this behaviour of developing an intense orientation towards acquisition can be attributed to the insecurity and self-doubt that might be associated with the feeling of being in a lower social position than others, especially among younger generations.

Materialism generates an urgency on the part of an individual to signify their social status through conspicuous consumption to satisfy the desire for distinction (Fournier and Richins, 1991; Vigneron and Johnson, 1999; Wang and Wallendorf, 2006). Flynn et al. (2016) argue that status consumption is one of the core aspects of materialism. For a society, being characterised as a materialistic consumer culture is often a feature of negative discourse (Tatzel, 2002). This notion might result from the longer-term focus by religion on the primary disadvantages of materialism. Wang and Wallendorf (2006) explain how materialism drives a tendency for dissatisfaction with products, especially those used as status signifiers, stating that:

“Materialistic individuals’ persistent aspiration for better possessions and unmitigated desires to satisfy status through objects may dictate continuous upgrading of their symbolic possessions.” (p. 506)

Materialism leads to a continuous process of material acquisition that is fulfilled through overspending or overshopping (Flynn et al., 2016). Also, materialism has been associated with two key concepts –happiness and success – as ultimate goals of materialism (Ying, 2016). Sharda and Bhat (2018) highlight that consumers assert their success to themselves and to society by the means of acquisition, which in turn results in a degree of happiness.

In Islam, the notion of materialism is treated in a context that refers materialistic inclinations to several forms of human behaviour such as the affection for wealth (Quran, Surat Al-Adiyat: verse: 8). Also, the Quran (Surat Al-Takaathur: verse: 1–2) indicates the human desire for possession, which sometimes leads individuals to indulge in conspicuous consumption. However, relevant psychological goals that can be expressed or achieved through the adoption of materialism such as egoism, boasting and pride are considered to be disapproved behaviours in Islam (Quran, Surat Al-Isra, verse: 37; Surat Al-Hadid, verse: 23).

Although Islamic beliefs argue against the immersion in materialism in terms of directing consumer behaviour, moderation and modesty as core principles of

Islamic consumption tend to reduce and refine the influence of materialism rather than nullifying it. Islam conflates spirituality and materialism in order to formulate a balanced philosophy of life that satisfies both sides. Therefore, the Islamic philosophy of consumption constitutes the framework that defines Muslims' behaviour in relation to aspects such as extravagance, waste, material pretension and parsimony (Shaikh et al., 2017). One of the key principles of Islamic consumption is moderation. Moderate consumption helps to establish social equality by obliterating class differences, which in turn prevents the feeling of destitution that others from a lower social class might have. It also decreases the possibility of social envy, which results from a feeling of inequality in Muslim societies (Shaikh et al., 2017).

However, Turner (1994) highlights an existing complexity when defining the influence of secularising the system of religious meanings on consumer culture in Islamic societies, arguing that:

“While sociologists of religion have regularly commented on the problem of meaningfulness in contemporary society, seeing the crisis of meaning as a direct consequence of the secularisation of religious values, it is more appropriate to start at the level of the pluralisation of life-worlds with the proliferation of consumer lifestyles as the basis for the fragmentation of religious belief and values. Consumerism offers or promises a range of possible lifestyles which compete with, and in many respects contradict the uniform lifestyle demanded by Islamic fundamentalism... the symbolic meaning and function of consumer items are complex and unstable.” (pp. 90–91)

2.5.1 Globalisation and Local Culture

“Globalisation is a process whereby goods, information, people, money, communication, fashion (and other forms of culture) move across national boundaries.” (Eitzen and Zinn, 2009: 1)

Globalisation has brought different parts of the world close to each other, due to advanced information technology, the development of communication methods, facilitated transportation, transactional policies, flexibility in trade regulations and exploitation of resources (Dahiri et al., 2014). The exchange of ideas and the easy access to information has influenced both consumer culture and retailers. Perraton et al. (1997), Humphrey et al. (1998), and Baldwin and Martin (1999) point out that the reduction of cross-nation tariff barriers (trade liberalisation) resulted in increasing international trade flows and multinational economic investments. This widened the context of the local market and allowed consumers to be exposed to a variety of international goods. However, globalisation is a multifaceted ideology that has sociocultural aspects which can go beyond its economic definition.

Huang et al. (2010) assert that the influence of globalisation leads to a convergence of different cultures of the world. Due to globalisation, consumers are easily exposed to other cultures via different communicative channels such as travelling, advertising and media. Therefore, homogeneous desires and tastes may be identified in consumer behaviour around the world (Al-Hyari et al., 2012), as a result of the use of technology (De Mooij and Hofstede, 2002). In this sense, the influence of globalisation seems to eliminate the role of cultural differences in defining consumer behaviour in a particular social context. This seems to be influenced by the emergence of brand communities and consumer tribes, which have been discussed by Cova et al. (2007).

Globalisation theories usually apply velocity, hybridity and multiplicity as the main elements that influence the degree and impact of globalisation on different nations (Ritzer and Stillman, 2003). However, the argument about the impact of globalisation on consumer behaviour is complex and problematic. It challenges the local sociocultural traditions and ignites competition between local and global values. Triandis (2006) argues that media, advertising and advanced technologies have been employed to pave the way for cultural colonialisation, since the mid-1980s, through consumption behaviour in developing countries. This is due to the contemporary association between globalisation and the concept of

Americanisation or McDonaldisation (Ritzer and Stillman, 2003), especially in European, Asian or South American contexts (Kuisel, 1993). Americanisation is the propagation of U.S. patterns of economic, social, cultural and industrial forms across the entire world (Williams, 1962). This trend towards Americanisation has been developed upon the Marxian philosophy of cultural dominance and economic imperialism (Ritzer and Stillman, 2003). It emphasises that the exported American commodities and media is a crypto-imperialist threat to local/national cultures.

Therefore, the impact of globalisation might be considered as an opposition to the local culture as some may argue that the identity of the group might be lost when society members fall victim to globalisation and the associated ideologies of Westernisation, materialism and consumerism. Tomlinson (2003) points out that there is an assumption that globalisation is a destroyer of local culture. He attributes this argument to the notion where cultural identity is considered as a fragile collective treasure that needs protection against external threats. Therefore, the spread of Western ideologies such as consumerism, materialism and capitalism which permeate through globalised channels such as media and advertising may threaten the cultural identity of local communities in non-Western cultures. Therefore, globalisation, in this context, is perceived as an ideology that tends to weaken local values by spreading a universal identity that is constructed according to Western values. For instance, Al-Gahtani (2004: 34–39) encapsulated a pessimistic perspective about the impact of globalisation on the Arab world by explaining the possible impact of the global economy and culture on the local economic and cultural identity. However, within the Saudi context, Al-Dossary (2012) states that the influence of globalisation is limited and only affects economic aspects and he considers that Saudi society retains its Arab Islamic culture.

Another argument emphasises that it is less likely for the local cultural identity to be easy prey for globalisation (Tomlinson, 2003). Kaldor (2004) highlights that political systems make a considerable effort to strengthen the cultural identity of the state through the construction of national identity and citizenship. National identity is a reflection of the nation's history, culture, values, traditions, beliefs and

geography. These can be ingrained through the individual's cognitive process that is influenced by media, the educational system and family. There is no doubt that all of the previous elements have an influence on the consumer's perceptual as well as behavioural patterns (Clark, 1990). Another perspective by Han (1988) and Dahiri et al. (2014) contends that about three decades ago and before the spread of globalisation, consumers were more patriotic towards the distinctiveness of local cultures and domestic products, which is not the case in today's situation.

Within the Asian context, Schütte and Ciarlante (1998) argue that due to the influence of globalisation, Asian societies are moving towards modernity, which does not necessarily mean replacing the local identity with a Westernised one. Although consumers may superficially appear to adopt a universal pattern of consumption, consumers in Asian countries are still distinctive from Westerners (Schütte and Ciarlante, 1998). Also, Solomon et al. (2016) argue that the Western pattern as a framework of consumer culture is no longer dominant. Consumers in non-Western societies do not only emulate Western styles but reflexively respond to the cultural meanings of branded objects and redefine them to signify similarities or variants of their own culture. Therefore, this behaviour might provide a meaningful interpretation of the consumption of international brands in a specific local culture. It also led to the emergence of the phenomenon of *glocalisation*. Consumers as self-creating agents can construct an identity of appearance that adapts international brands in a way that also expresses the local cultural identity. For example, a Gucci scarf can be used by a Muslim woman as a hair or face cover.

2.6 Summary of the Chapter

There is extensive literature on fashion consumption theories. For example, fashion and clothing are perceived to be a mirror that reflects the individual's attitudes, beliefs and perceptions that constitute their self-identity. In addition, fashion has a social role as a phenomenon that combines two contradictory dynamics: uniformity and individualisation. Each dynamic occurs according to the individual's response to the social requirements in different circumstances. The concepts of uniformity

and individualisation can be examined in relation to fashion consumption in Saudi Arabia in order to identify their influence in public as well as women's only social settings. In addition, the conceptual structure of the approach that is developed by Fishbien and Ajzen (1975) that argues the influence of the subjective norms on the development of consumer's attitude and behaviour towards a particular fashion will be applied in a way that investigates the role of others and their opinion in influencing the way in which Saudi women respond to the social requirements related to fashion consumption.

Also, this chapter gives an overview of culture as a factor that affects consumer's response to different products provided in Muslim markets as well as highlighting the role of globalisation in contrast with the local culture in influencing the consumer behaviour. In the next chapter, the influence of the cultural identity is examined in relation specifically to Saudi dress and the value of modesty as an Islamic principle of clothing. In Chapter 3, consumption is considered in relation to the economic and marketing theory approaches to analysing buyer behaviour.

Chapter 3: The Cultural Context of Clothing

3.1 Introduction

Fashion, when applied to clothing, reflects the cultural mechanism that constructs ideologies and the perceptual interpretations behind each dress code. It conveys cultural symbols and tells the story of social and political change in different contexts. Therefore, a detailed discussion of the wider Islamic dress code with a specific focus on the Saudi cultural context is provided in this chapter. In addition, this chapter focuses on analysing fashion consumption from the disciplines of economics and marketing, to consider the factors that influence the consumer's behaviour.

3.2 Revealing and Attraction vs. Modesty and Decency

Within a sociocultural context, values and messages are transmitted through revealing and concealing clothes. Revealing, provocative or immodest styles of dress transmit different perceptions about the wearer (Sproles and Burns, 1994). Barnard (2002: 57) notes that revealing clothes indicate immodesty and exhibitionism that is argued by some theorists to be a primary stimulus of fashion in order to attract others' attention to the human body rather than repel it.

Rudofsky (1947) and Laver's (1969) argument against the concept of modesty is overt in this context. Both authors attribute the function of women's dress to revealing the body rather than concealment and associate this with the need to sexually attract the opposite gender. Through the adoption of immodest dress and revealing clothes, women keep their mates perpetually attracted. This argument has been linked to the "*the theory of the shifting erogenous zone*" (Barnard, 2002: 58). This theory confirms a continuous alteration in the concept of the sexuality of different parts of the female body during different historical periods and different cultures, which in turn reflects the change in fashion (Laver, 1969: 241). Steele and Kidwell (1989) espouse the same perspective, as they state that:

“Do women dress to attract men? Certainly, women’s clothing has frequently emphasized female sexual beauty, through selective concealment, exposure, exaggeration, and occasional titillating cross-dressing. But it is true that sex appeal is the primary purpose of women’s dress.” (p. 42)

Also, Rudofsky (1947: 22) assumes that the practice of face covering is an attempt to hide the identity of the individual rather than fulfilling a religious or spiritual purpose. He even goes further to discuss the Muslim veil as being analogous to the carnival costumes and face masks that people wear on occasions where licentious behaviour is likely to be practised under the auspices of anonymity. According to his assumption, the only concern of Muslim women is to cover the face and not the body. This is an explicit assumption that conceives Muslims’ veil as a social guise used to support anonymity, which in turn expedites illegal sexual behaviour.

The researcher argues that this perception is offensive and undoubtedly constructed upon a weak understanding of Islamic modesty as the fundamental element that refines the morality behavioural matrix of Muslims. Muslims’ dress code is not only a face cover: it is a full context of beliefs, attitudes, behaviour and material culture.

Cahoon and Edmonds (1987) and Abbey et al. (1987) studied the impact of wearing revealing clothes on the perceived image of the woman who wears them. According to their argument, although women in revealing clothes can be described as more attractive and sexy, the adoption of revealing provocative clothing is more likely to construct a perception linked to negative traits such as sexual appeal, being unfaithful as a partner, and being more likely to be raped. Also, a study by Workman and Freeburg (1999) concluded that wearing revealing clothes maximises the possibility of being sexually harassed. The previous studies are based on the theory of objectification by Fredrickson and Roberts (1997) that focuses on objectifying, with evaluation describing the appearance of an individual’s body. Women, in this vein, have been objectified as sexual creatures for whom the main function of dress is to apply the principles of seduction and attractiveness. This is an offensive

conceptualisation of both men and women, as the studies by Rudofsky (1947) and Laver (1969) depicted human behaviour in a context that defines women as seductive while men are to be seduced. Their view is critiqued by Barnard (2002), who states that:

“Arguments that stressed modesty as a function of fashion and clothing emphasized the humanity of the wearer; arguments that stress immodesty tend to emphasize the animality of the wearer.” (p. 57)

On the other hand, the discussion of modesty as a primary function of dress has emanated from religious ideologies. Some of these ideologies emphasise its spiritual principle while others conceptually associate it with visual denotation. For example, Flügel (1930: 57) argues that in Judaeo Christianity, greater emphasis is given to the soul than the body as it is presumed that hiding the human body nurtures the sense of the soul's salvation and self-abnegation, reducing the penchant for body luxury adornment which is considered prejudicial to this fundamental principle.

By contrast, Rouse (1989: 8) suggests that the concept of modest dress revolves around the human cognition that physically associates nudity with shamefulness. He argues that particular parts of the human body are considered to be shameful and therefore should be covered. In this vein, the behaviour of concealment of the human body through the means of clothes has been linked with the need to fulfil the principle of decency in order to avoid sinning and associated shameful attitudes.

Despite the existence of conceptions of shame, nudity, modesty and decency that can be explicitly transmitted through dress, there is no standardised model to define the normative meaning of modest clothes to be applied to all forms of societies (Roach-Higgins and Eicher, 1965: 10). The meaning of modest clothing varies from one culture to another (Hollander, 1993: 83). Barnard (2002: 55) argues that the interpretation and behaviour of decency through the use of clothes differs even within the same culture. The reason for this is that modesty is a learned behaviour that does not emanate from an innate sense (Roach-Higgins and Eicher, 1965;

Rouse, 1989). It is an outcome of the contribution of different cultural and social elements that construct the normative quality of acceptable behaviour in a particular society. Thus, the understanding and behaviour of modest dress as a symbolic denotation of decency complies with social agreement. For instance, Polhemus and Proctor (1978: 10) explain how the Masai woman customarily presents herself in a great level of nudity by wearing a small leather skirt that only covers the private parts of her body. However, she would feel significantly ashamed if anyone saw her without her brass earrings. In this circumstance, the definition of shame is not associated with the body parts, which is common in most cases. Therefore, it can be said that modesty is intuitively a quality that can be interpreted, understood and practised according to the system that has been defined in a sociocultural context.

3.3 Islamic Definitions of Women's Modest Dress

In the Quran, there are two verses that emphasise modesty as a code that defines Muslim women's dress.

"And tell believing women that they should lower their glances, guard their private parts and not display their adornment [zinah] beyond what [it is acceptable] to reveal, they should let their head scarves [khimar] fall to cover their necklines ..." An-Noor (The Light) verse (31), pp. 258–259.

"Prophet, tell your wives, and your daughters, and women believers, to make their outer garments [jilbabs] hang low over them so as to be recognized and not insulted..." Al-Ahzab (The Joint Forces) verse (59).¹³

¹³ **Note:** due to the fact that the Holy Quran was revealed in the Arabic language, the above verses present a translation of the meaning of the Quran, and therefore they should not be considered as actual Quranic texts. Also, in Islam, there is a rule that does not permit a Muslim to interpret the meanings of the Quran according to his/her own understanding unless he/she is officially qualified from an Islamic institution and fully trained by Muslim scholars or *shaikhs* (Boulanouar, 2006). Due to this reason, the researcher here attempts to logically interpret the concept of Islamic modesty

In Islam, modesty is physically associated with the Arabic term *awrah*, which is defined by El-Guindi (1999: 142) as “*inviolable vulnerability*”. However, she argues that *awrah* cannot only be defined in terms of the materiality of the woman’s body: in the Quran, *awrah* also indicates the concept of privacy. From analysing extensive Islamic literature related to this issue including Islamic scholarly books and recorded lectures, it can be summarised that there are two main definitions of Muslim women’s *awrah* within the female’s milieu:

- 1- Defined in a context that forbids exposing and looking at particular parts of the body that includes the area between the naval and the knees (*awrat nazar*). This is agreed in the four main Islamic creeds, which are Shafei, Maleki, Hanbali and Hanafi. There is no Islamic text that led to a consensus about this topic; it is drawn upon the analogy of the *awrah* of Muslim men in front of other men. However, it is argued by the majority of Muslim clerics that this definition does not permit the wearing of clothes that only cover this particular area as they repeatedly stress that women should always dress modestly as wearing immodest or revealing clothes indicates dispensable abhorrent exposure of the body which leads to depravity and breaches Muslim decency.
- 2- A more fundamentalist approach defines *awrah* to include the entire body except the parts that are normally exposed such as the hair, face, neck, arms, legs and the upper part of the chest. This definition is based on eradicating the suspicion about women’s *awrah* in female settings, as proponents argue that the delimitation of *awrah* to be from the naval to the knee became a dubious pretext to wearing immodest clothes in a private women’s

based on the existing legitimate juristic interpretation *tafseer* produced by religious scholars. This explanation highlights the main elements associated with the notion of modesty that define Muslim women’s identity.

environment. Hundreds of fatwas respond to questions that are concerned about wearing immodest clothes at female gatherings (Fatwa115965, 2008).

Muslim women's *awrah* in the context of the opposite gender is categorised as the following:

- 1- In the presence of *mahram* or men who are unmarriageable people for reasons of incest such as a woman's father, brothers, grandfathers, father-in-law, sons, nephews and uncles with a direct brotherhood with the parents, women are allowed to show their hair, face, neck, arms, legs and the upper part of the chest. Any other parts of the body, including the back, abdomen and thighs are strictly prohibited to be revealed in front of any male.
- 2- In public and in front of any other *non-mahram* men, even with those who are related through blood such as cousins and in-law males, women are asked to modestly cover their entire body with the exception of the face and the hands (Al-Albani, 2002) or with the inclusion of the face (Ibn Baz, n. d and Ibn Othaimeen, n. d).

The wearing of the face cover or *niqab*¹⁴ by Muslim women has been a matter of dispute between scholars from different Islamic schools of thought through different historical periods. Some view it as a religious obligation (such as in the *Hanbali* school of thought) while others consider it as a symbol of moral excellence. Covering women's heads with the head scarf as an obligation is agreed upon by all Islamic scholars. However, it seems that there is no consensus regarding the face covering. This lacuna caused a dispute about the obligation of wearing the head scarf, not just the face cover. Although Roald (2001: 271) identifies a slight variation between Islamic scholars in terms of the obligation of Muslim women's face veil, they all unanimously signify the obligation of the head covering as a core principle of Muslim women's dress code. They are also all in agreement about the criteria of

¹⁴ Niqab is a cloth that is used to cover a Muslim woman's whole face or with the exception of the eyes.

the Islamic dress style. A Muslim woman's garment should meet the following primary characteristics:

- To include the whole body except the face and hands.
- To be loose enough so it does not outline the shape of the female's body.
- Muslim women's clothes should be opaque and not transparent to avoid any visibility of the female's skin.
- Not imitating men in their dress as women should be proud of their femininity and not be seeking to imitate men in what they wear as a form of pride about their gender identity.
- Not imitating others from different religious faiths to maintain the values of the Islamic identity.
- Not to be a dress of fame. Establishing social status, fame or vanity by wearing an extravagant type of fashion either in price or style is strictly prohibited, due to its negative impact in creating a social caste, which consequentially leads to vainglory and envy between Muslims.

Kimar and *jilbab* are idiomatically used as the main tangible objects that define the Muslim dress code that epitomises the female's rectitude (see definitions in Section 2.6.3). The establishment of these forms of dress was not concurrent with the origination of Islam as religious practice; they were widely used by Arab women during the pre-Islamic era (El-Guindi, 1999). The term *hijab* has been metaphorically mentioned several times in the Quran to indicate the concept of partitioning. Only one time does this term directly refer to Muslim women's dress. As mentioned, the only two terms that are used as definite indications of Muslim women's dress are the *jilbab* and the *khimar* (El-Guindi, 1999: 139). Through the Islamic lens, due to the fact that exposing adornment *zinah* or beauty is an intrinsic feature in women, selective beauty items are permitted to be exposed to satisfy this desire but not in a manner that breaches Islamic morality (Ash-Sharawy, 1991). Some Islamic scholars define the apparent adornment *zinah* to include the ring and the traditional Arabic eyeliner or *kohl* such as Ash-Sharawy (1991), while others, such as Ibn Othaimen, limit it to the outer Islamic garment.

Roald (2001) argues that despite the consensus of Islamic scholars about the obligation of women's clothing covering, there is no consensus regarding the actual method of covering. Therefore, Muslim women may adapt any dress to meet the religious requirements. Muslim women's clothes also differ from one country to another, according to several considerations. For example, in Egypt women wear a loose-fitting floor-length garment called *jalabyyah* and a head scarf (El-Guindi, 1999: 143) while Moroccan women wear *gellaba*, which is similar in terms of its design to the *jalabyyah* but with an attached hood (Davis and Davis, 1999). This garment is a unisex form of clothing in Morocco. Moreover, Malaysian women wear a long skirt and long-sleeved blouse with a tight neck and cover their hair with a head scarf (Lie, 2000: 33). In Pakistan, women wear *shalwar kamees*. In Saudi Arabia, women wear black *abaya* when in public. Therefore, the fundamental purposes of Islamic modesty is to represent piety, maintain sexual morality, gender identity and to unify the visual code of Islamic values. Therefore, there is no fixed standard of design that should be strictly applied to all Muslims as different Islamic societies have different views of modest dress. However, these restrictions do not necessarily negate essential elements like style, beauty and elegance (Muhammad, 2008). Islam as a source of decency encourages its followers to look elegant, clean and to dress beautifully.¹⁵

3.4 Historiography of Muslim Fashion and Modesty

Since the 1970s, and more particularly after the Iranian Revolution in 1979, scholars have studied the subject of Muslim women's veil as a dress code (Abu-Odeh, 1991). This attention significantly intensified following the incidents of 9/11. A wide range of discursive discussions was established by Western scholars in order to define the particularities of 'Others' (in this case Muslims), or by the 'Others' themselves to analyse the cultural, social and intellectual significance of the practice of women's veiling. Muslims' veiling has a multifaceted dynamic in constructing the ideologies of Muslims' visual appearance and identity. The term *veil* has been used as a standard term in the literature to indicate the face cover and the head scarf *hijab*.

¹⁵ See the Holy Quran, Surat Al-Araaf (The Heights) verse 32.

This term has to be read with caution due to the looseness of its usage. The Muslim women's veil can be read from various angles by adopting different approaches that reflect feminism (calling for an egalitarian society eliminating gender boundaries, by liberating women from traditional restrictions), fundamentalism (religious statements defining permissible behaviour) or activism (symbolising the autonomy or subjection of identity during colonial or national transformation).

Middle Eastern feminist scholars such as Fatima Mernissi (1991) and Leila Ahmed (1992, 2011) argue that veiling and the figure of veiled Muslim women are metaphors for Western articulations of Islamic identity as an opposition to Western ethnocentrism. Some scholars argue that Muslim veiling is an indication of overt hostility to the West and a rejection of its values (El-Guindi, 2005; Shirazi and Mishra, 2010; Ahmed, 2011; Lindholm, 2014). The practice of veiling is also viewed as an exclusion from modernity and perceived as confined to Islam. El-Guindi (1999: 10) highlights that veiling has been used to indicate beliefs about sex, subordination, gender boundaries and oppression which can be disproportionate to its significance as a religious practice in the Middle East and Muslim countries. The paradox is that the women's veil is not limited to the Arab or Islamic culture – its origin predates Islam:

“A Muslim woman takes the veil just as does a nun”. (Crawley, 1931: 76 cited in El-Guindi 1999)

“Muhammad did not introduce the costume of veiling”. (Stern, 1939: 108)

Applying gender approaches to the documentation on Arabic traditions and archived photos, it is evident that the use of the head and face veil is not exclusive to Arab women. Arab men in many tribal areas such as Muslim Berber use their head cloth to cover their mouths (Palmer, 1926). This practice of covering serves a number of purposes such as preserving the anonymity of the individual's identity, protection from harm caused by enemies from other tribes and from meteorological factors such as winds loaded with dust. Moreover, Arab men who belong to tribes

from the peninsula adopt it as a sign of manhood. Therefore, it can be argued that although veiling holds religious meanings to be attached when defining Muslim females' identity, it has been culturally applied in the Arab culture to dichotomise its dynamics as an emblematic definition of gender identity. However, the debate about veiling usually emanates from its status as an obligated practice for women rather than a choice of sartorial behaviour.

Also, the veil has been widely used and even obligated for class differentiation. For instance, in the ancient Persian Empire, the veil was exclusive to noble women as a symbolic class identifier and slave females were not allowed to wear it (Driver and Miles, 1935: 407). Similarly, in urban areas of Egypt in the 1910s, this phenomenon was linked to belonging to the upper class regardless of the religion of Islam (El-Guindi, 1999: 178). Even Coptic women in Egypt used to wear the veil. However, due to the influence of the missionary, women started to desist use of this practice.

Turner (1994: 91) explains how the women's veil was used to signify opposition to the socio-political regime of the Shah in Iran during the Iranian Revolution in 1979. Moreover, it had a functional practice as an item that helped women to hide their individual identity when taking part in a secret mission. After the revolution, the veil in Iran became a signifier of the commitment to Islamic fundamentalism. Shirazi (2003: 7) documented that contemporary Iranian history witnessed political stages in which the meanings of the veil were altered and redefined. For example, in the 1930s the veil was abolished by the Shah due to his personal perspective about the veil as a visual symbol of backwardness. This status had diametrically changed due to the introduction of the new political ideology of the Islamic Republic of Iran.

The introduction of the feminist philosophy to Arabic culture emerged from Egypt with Qasim Ameen in 1899. The message behind his publication *Women's Liberalisation* provoked vociferous controversy among members of the conservative society. Although this movement apparently called for wider cultural and social reformation to activate women's role, its philosophy was in favour of Europeanising Egypt as well as other Muslim countries. An opposing opinion was

put forward by Harb (1900), an economic theorist who supported the cultural movement of women's liberation but through education rather than changing the practice of veiling that defines the Islamic identity of Egyptian women. He predicted the pernicious social impact of the sudden transformation of Muslim women's dress code on the state's (Egypt's) Islamic identity. He had an intellectual dispute with Amin and his view of the veil. This theoretical battle of feminism in Egypt was followed by an active revival led by Huda Shaarawi (an Egyptian feminist) in 1923. Shaarawi removed her face veil as a cultural object signifying class boundaries in Egyptian society. Ironically, hundreds of protestors followed her behaviour (Lamb, 2002: 146). However, in her memoirs (1986), she explained that her action was a reaction against some cultural norms that are associated with the way that women's dress is defined as a form of seclusion as well as the notion of class segregation, not as a rejection of Islamic values.

Turner (1994) also states that the veil was adopted in Egypt by university students to serve two purposes. The first one was to avoid sexual harassment due to its symbolic values linked to purity and chastity. The second purpose is that it helped to obviate the possibility of social rejection and disrespect by other students from upper classes who are economically able to afford Western luxury fashion as a status symbol. However, Turner (1994: 92) highlights the emergence of fashionable forms of the veil among upper-middle-class women in Egypt. This phenomenon can be defined as an aspect of the 'Islamic bourgeoisie' as suggested by Abaza (1987). Therefore, there is a multiplicity of meanings perceived through the symbolic cultural items of Islamic fundamentalism. In her article 'Shifting Landscapes of Fashion in Contemporary Egypt', Abaza (2007) traced different emerging fashion trends in the Egyptian fashion industry by contrasting three forms of fashion that coexist in Egypt: Islamic chic, ethnic chic and Western chic. Abaza explains how traditional and Islamic clothes have shifted from being a symbol of austere resistance to Westernising the local Egyptian identity to indicating inclusion and the aspiration for social elevation that emerged due to the attempt at embourgeoisement throughout the contemporary history of Egypt. She also argues that the consumption and production of different trends was influenced by the

society's mainstream in various historical stages including the migration to the Gulf Region and the intellectual and commercial openness during Sadat's control. She attributes the new adoption of the Islamic look to what she terms a '*prosperous Saudified petro-Islamised look*' (p. 288).

A similar approach that examined this Saudi impact was undertaken by Moors (2007) who analysed the shift in women's outdoor styles in the capital of Yemen (San'a) by examining the *Salafi* thought affecting women's sartorial practices. Moors (2007) discusses the adoption of different categories of women's Islamic attire and face cover items such as *sharshaf*, *balto*, *abaya*, *khimar* and *niqab* among Yemeni women. The article reflects a strongly emphasised influence of the Saudi's *Salafi* ideology and the juristic prescriptive inferences of women's veiling by Saudi clerics through the publication of booklets that are widely spread in the Yemeni culture, affecting the mode of establishing the Islamic identity through outdoor clothes.

In some Arab countries that were under the control of the Baath's party during the 1960s and onwards such as Syria and Iraq, veiling was outlawed (Kahf, 2008: 31). However, due to the influence of Islamic movements, the veil came back to the sociocultural scene. Lama Abu-Odeh (1991) analysed the practice of the veil as a social phenomenon that was adopted by Arab women due to the influence of the contemporary Islamic (fundamentalist) movement. A study by Abu-Odeh (1991) on the veil was undertaken: it is not based on academic traditions, but as she states, it is rather a personal reflection about the veil (p. 1527). As a feminist, she defends Arab women's freedom of seductive sexual presentation that allows them to flirt: however, the women she interviewed did not perceive the conceptual framework of sexuality within the same context. In Arab societies, sexuality is demonised. Her normative assumption about veiling as a form of disempowerment in Arab societies did not become self-evident: it rather paradoxically metamorphosed into contexts of subversion and liberation (p. 1531). She posits Muslim women's veiling both as an oppressive cultural object that reflects the system of Islamic masculine patriarchy and as a liberating scheme allowing women to benefit from education and join the labour force without being socially or sexually harassed.

However, Boulanouar (2006: 152) and El-Guindi (1999: 31; 137) argue that the obligation of the head cover as a signifier of Islamic modesty does not diminish women's sexuality as it does not indicate a female's celibacy. They argue that the ideology of Islamic morality does not propose a tension between women's sexuality and veiling: in Islam, sexuality, devotion and flirtation are part of the etiquette of the marital relationship. Azzam (1996) signifies that the practice of the Muslims' head cover and the face veil is motivated by internal factors based on sincere Islamic convictions aiming to express the piety of Muslim women and full respect of Islamic values. This interpretation can be related to the observation by Baron (1997), who notes the effort that Ameen (1899) paid in order to force his wife and daughter to desist wearing their face veil but he failed. Azzam (1996) also notes that the wearing of the head cover does not denote any form of religious radicalism or anti-Westernism.

In the Turkish context, veiling was forbidden by the secular politics of Mustafa Kamal Atatürk in 1925 (Bullock, 2002). The Turkish feminist Yeğenoğlu (1998) examined the veil as a tract of fantasy and discourses of national and gender identity in a critique of Said's Orientalism (1978). She argues that the veil of Oriental and Muslim women signifies a pattern of exotic, mysterious, seductive, sexual and dangerous identity that has been stereotyped in Western discourses and travel texts. Yeğenoğlu (1998) discusses the contradiction between traditional masculine nationalism that signifies the veil and liberal feminist colonialism that aims to unveil Muslim women to be able to penetrate the interior of their identity.

"...then we can see the veil, that sartorial matter, as not something that is external to the identity of Muslim women, but as a fundamental piece conjoined with the embodied subjectivity of Muslim women. If we cannot comfortably assume that her body is inside the veil or the veil is something that is outside of her body and hence does not function merely as a body cover, can we then think of bringing this body outside the veil (as colonial or imperial feminism desires)..." (p. 119)

Despite the inclusiveness in establishing an inextricable link between the body and the veil in the context of colonialism, her publication lacks a clear argument to explain the contradictory dynamics between the latent and manifest ideologies that constitute the veil in its materiality and/or abstractive context.

In an Asian cultural context, a comparative lens study was undertaken by Wagner et al. (2012) to investigate the practice of wearing the veil in Muslim-majority (Indonesia) and Muslim-minority (India) countries. The study concludes that Muslims' identity in societies where Muslims count as a minority is derived from two contradictory pillars: fundamentalism and the influence of adhering to bigoted religious ideologies on the one hand and a rebellion against endemic prejudice on the other. This collision resulted in an exaggerated visual definition of their religious identity. By contrast, in Muslim-majority communities, the wearing of veiling items is not a contested issue and is considered a matter of convenience, modesty and fashion rather than symbolising religious values. However, it can be argued that freedom of the contextualisation of identity in both Muslim-majority and minority cultures might be affected by a dominant unified system that essentialises the practice of veiling as a taboo or permitted behaviour. For example, establishing the identity of the minority Muslim women in France might be hindered due to the political law banning the veil (Wing et al., 2005). In this context, Muslims have to obey the law that views the veil as an alien religious regime. Therefore, the specifications of their visual identity is not a matter of choice; it instead should be modified to align with the wider political or legal context.

In her study about the consumption of luxury Western brands that represent sexual appeal among Kuwaiti women, Al-Mutawa (2013) points out a new Islamic habit of fashion consumption. The emergence of this Islamic habit aimed to achieve a balance between Islamic modesty and sexuality. This resulted in the birth of a hybrid or crossover fashion identity that comprises local values and Western discourses. She called this fashion identity *Modestly Sexy*. Fashion clothing in this case was modified to represent the required values of honour and modesty and also signifies a level of status and sexuality. This study confirms a neutralised form of behaviour

that comprises contradictions in terms of symbolism. Therefore, due to the existing cultural diversity and the influential role played by globalisation, it can be argued that combining the influences of both cultural identity and globalisation may form a hybrid identity that defines the adopted pattern of consumption. Researchers such as Ger and Belk (1996b) demonstrate that international brand identity may operate differently in societies with a strong adherence to cultural values. They argue that the consumption of Western symbolic products including fashion in non-Western societies is usually adapted, as consumers tend to generate a hybrid pattern in order to suit the local culture.

Emma Tarlo (2010) insightfully investigates the dynamics of Muslims' dress in multicultural urban cities in the United Kingdom. Tarlo explains the complex system of political, social and personal factors that influence the practice of veiling to indicate the visible identity of Muslim women in Britain. In the introduction of the book *Visibly Muslim*, she emphasises the role of the media in purveying a stereotype that is acceptable by some non-Muslim British people about the way in which Muslim women dress themselves. This stereotype either victimises Muslim women and considers the veil as a form of patriarchal oppression or perceives them as exponents and adopters of anti-Western ideology to reject values of liberalism. Also, she discusses how British Muslim women are enmeshed in the British social system but adopt Muslim attire to establish an Islamic identity. This process indicates a trans-cultural interaction that involves the complexity and controversy of fashion and faith, which highlights a struggle between multiculturalism and the acceptance of differences.¹⁶

Reina Lewis (2015) examines Muslim women's veiling as a fashion that prevails in global consumer culture. Her book *Muslim Fashion: Contemporary Style Cultures* is a product of 10 years of fieldwork that focuses on both WENA (Western Europe and North America) where Muslims are minorities and Turkey as a Muslim-majority

¹⁶ For further publications, see Tarlo, E. and Moors, A. (2013) *Islamic Fashion and Anti-fashion: New Perspectives from Europe and North America*. London and New York: A&C Black.

community that is influenced by secularism. One of the main points of her arguments is that the over-politicisation of Muslims' veiling, especially in Western cultures, not only resulted in public fear, but also has discouraged academics from developing a deeper understanding of the plethora of dynamics that interweave to influence, or be influenced by, Muslims' veiling as fashion (Jafari, 2018). Lewis argues that there is a traditional sentiment that perceives Islam and modern fashion as contradictory ideologies that cannot intersect. However, her work reflects a multidisciplinary approach that treats Muslim fashion as a form of commentary and as commerce. She provides an insight into Muslim fashion as a web of multiple systems of production, distribution and consumption which are restricted and/or supported by various individual and cultural factors. For example, in Britain, due to the high level of freedom of faith-related practices which is guaranteed by the law, Muslim women freely represent their Islamic identity while working in famous stores. By contrast, in Turkey, the Muslim-majority society, employment rules related to dress are influenced by secularism, which may restrict the practice of veiling.¹⁷

Harkness (2018) describes women's veiling (the *abaya*) in Qatar as a de facto system of masculine patriarchy. The author adopts a strongly feminist approach to examine the micro-practices of veiling when young females travel to Western countries as a form of non-verbal resistance against religion and the traditions that subjugate Qatari women. Although the author tends to use neutral terms when discussing this topic, describing veiling as a prison that ultimately limits the freedom of self-presentation may indicate a sense of provocation against cultural norms. She concludes her article by stating that:

"The hijab micropractices described in this article could lead to surface-level culture changes, such as revisions to existing sartorial customs. Ultimately, such shifts may facilitate Qatar's "empowered woman" narrative and further its

¹⁵ Also, see Lewis, R. ed., (2013) *Modest Fashion: Styling Bodies, Mediating Faith*. London and New York: I. B. Tauris & Co Ltd.

neoliberal agenda. Modifications of this variety would do little to alter the larger structural issues that oppress Qatari women, including patriarchy, institutional discrimination, harassment and violence. These powerful and deeply entrenched institutional structures, which continue to subjugate Qatari women economically, socially, and politically, may prove to be far more resistant to change.” (p. 17)

However, the gradual alteration of the ingrained ideologies of women’s identity and position in Arab and Islamic societies, including in Qatar, depends on the Qatari women’s own inclination to perceive this change on the one hand and the influence of this change on their family on the other hand. Family has been repeatedly named (by Harkness, 2018) as the constructed institution that executes patriarchal oppression.

To sum up, the analysis of the veil through the reviewed scholarly contributions to knowledge by Muslim and non-Muslim authors is rich in religious, ethnographic, gender and cultural details that are sometimes supported by vivid illustrative pictures. The heterogeneity in the way in which scholars analyse veiling is evident in different cultural contexts. The symbolism and the motivations of veiling which influence how Muslim identity is established and stereotyped vary from one society to another and from one historical period to another. The majority, if not all, of the reviewed literature about the practice of veiling mentioned Saudi Arabia only in a sentence that indicates either its conservative identity that obligates veiling by law or as a culture that exports the practice of the *abaya* as a lawful Islamic dress. This raises an issue of a fundamental irresolvable tension existing between the Saudi practice of veiling and modern or Western fashion.

3.5 Veiling in Contemporary Saudi Society

According to Luqmani et al. (1989), Al-Qasimi (2010), Le Renard (2014) and Harkness (2018), Islamic norms in Saudi Arabia obligate all females who have reached the age of puberty to be veiled in public by wearing a black *abaya* and the

face cover. The *abaya* has been defined by Al-Qasimi (2010) as “a black, wide, loose garment with large wing-like sleeves and an opening in the front with no fastenings” (p. 46).



Figure 3.1: The Saudi Women's *abaya*.¹⁸

Regarding the women's face veil, Kahf (2008:33) points out that the legal enforcement of the practice of the Saudi women's veil in the 1930s was a result of the intertribal alliance that tried to appease the religious sector by proposing the women's veil to be the lawful sartorial practice in public. The author also mentions that until 1979, Saudi women from rural areas did not use the face cover or the *abaya*. However, it is argued that some archived pictures of women from tribal areas located in the desert constitute evidence that the face veil was a common tribal practice during this period.

¹⁸ Retrieved from <https://delhi4cats.wordpress.com/2010/09/06/saudi-arabia-danger-of-the-abaya/> [Accessed 11-5-2017].

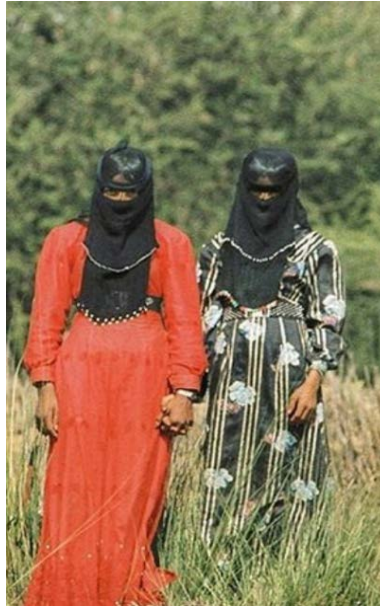


Figure 3.2: Saudi tribal women from a rural area (Bgaig) in the early 1970s.¹⁹

The Saudi author Fatany (2007) emphasises the negative image of the black *abaya* and the faceless Saudi woman in the Western media, which critically misrepresents their identity. She argues that although this prejudice might be linked to Islamophobia, it also has a strong link with the social presentation of Saudi women in black which misinterprets the truth of their social position and depicts Islam as a religion of suppression. Fatany (2007) adds that Islam obligates modesty to be a dress code but at the same time it does not require specific garments to define this code. Moreover, Fatany (2007) reproaches local designers for echoing Western fashion and not being able to offer Saudi women decent and affordable designs that meet the Islamic requirements. In her opinion, protecting traditional values by maintaining the Islamic modest dress code is not an individual responsibility held by the consumer: it is instead an interaction between different social dynamics including retailers and consumers. She also emphasises the significance of studying fashion design as an academic domain and suggests that the local Saudi fashion market should encourage Saudi designers to produce a new image of Islamic

¹⁹ Retrieved from https://www.instagram.com/p/BoAz0o_BeS0/?hl=en [Accessed 27-3-2017].

modesty based on combining cultural diversity and independence. The author seems to argue against the black *abaya* and face cover as she calls to replace this dress code with modest but modern attire to enable Saudi women to engage in a modernism defined by the local culture.

Although veiling was not the focal point of Fatany's work, her brief discussion of Saudi women's *abaya* is an initial and useful contribution. However, it can be argued that the call to change or redefine a local cultural symbol, especially one that represents religious meanings, might be perceived as a cultural threat and people who adopt the ideology of change may be considered as social enemies. Moreover, if this change is given an opportunity to be implemented, the social acceptance of the new dress code cannot be guaranteed. This is due to the fact that women's dress code in Saudi Arabia has a profound importance as it represents the Islamic identity of the state.

Another piece of academic research focusing on the changes in the *abaya* in the contemporary Saudi society is that of Al-Kheder (2011). He discusses the multidimensional influence of the oil boom in the 1970s, the wealth produced and the national movement towards social modernisation on Saudis' lives. This transformation, somehow, influenced the intensity of adhering to the sartorial specifications related to the *abaya*. During this period, some Saudi women started to wear a transparent but black *abaya* that is placed on the crown of the head and lifted up to the buttocks in a way that shows the clothes that are worn underneath the *abaya* as a new adopted trend in public which continued until the late 1980s. Also, during the period between the 1970s and 1980s, women's jeans and Western fashion were first introduced to the Saudi fashion market. Despite the cultural rejection regarding adopting these Western fashions at that time, they gained considerable acceptance among Saudi females (Al-Kheder, 2011).

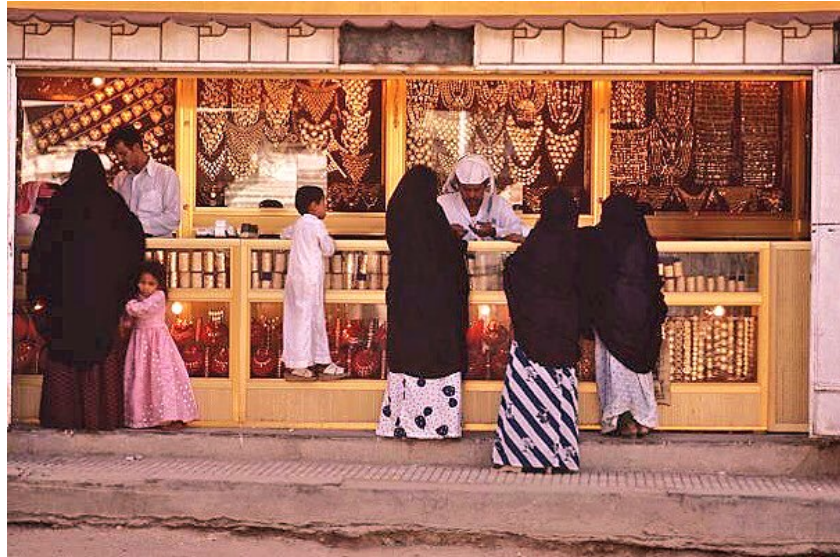


Figure 3.3: Saudi women from Al-Taif city shopping for gold in 1986.²⁰

The emergence of this style of *abaya* and the introduction of Western fashion to Saudi society were synchronous with the permeation of *Sahwa* ideology (Lacroix, 2011: 61). By this time (1980s to 1990s), the number of proponents of *Sahwa* was increasing and its principles caused a change in Saudis' attitudes (Al-Muzini, 2017). Therefore, these new trends in women's dress code were the main focus for this movement to be treated as a cultural threat that must be resisted (Al-Kheder, 2011). One of the main goals of *Sahwa* thought was to rectify women's attitudes and behaviour by reforming the social system of the communicative symbols of women's morality visual codes.

As a response to this phenomenon, the *Sahwa's* clerics utilised media including Saudi official TV and recording tapes to declaim against the adoption of Western fashion and what they considered as 'immodest' forms of the *abaya*. Al-Wedinani (2016) argues that the approved appearance of women in public was explained in a radical doctrinal perspective that influenced the way in which women define their Islamic dress code. Due to these religious declamations and admonitions, the

²⁰ Retrieved from <https://twitter.com/zmanjamel/media?lang=en> [Accessed 11-5-2017]

adoption of the transparent *abaya* started to disappear as women adopted a more conservative form of the *abaya* combined with a number of supplementary pieces such as black gloves and socks. It was imperative for Saudi females to follow this defined dress code in public in the 1990s.



Figure 3.4: A couple of Saudi women and a young girl in public, Jeddah 1993.²¹

Nevertheless, the process of change in the *abaya* did not end at this point. At the start of the year 2000, a new trend of *abaya* emerged: it was modernised and produced from opulent fabrics and embellished with beads, rhinestones, crystals and elegant black and colourful embroidery.²² This *abaya* also concerned the committee, who warned women who had adopted such an *abaya*, and they also compelled the Saudi Ministry of Commerce to ban this *abaya* from the market to prevent women from adopting it (Al-Kheder, 2011). Also, women who wear this style of the *abaya* used to be subject to public opprobrium by *Sahwa* ideologues, including society members and members of the official religious authority. The reason for this is that adopting such a style of the *abaya* was considered to be a form of social disobedience that breaches Saudi women's Islamic identity.

²¹ Retrieved from <https://twitter.com/zmanjamel/media?lang=en> [Accessed 11-11-2017].

²² See Al-Qasimi (2010); Lindholm (2013); DeCoursey (2017); Trainer (2017); Craciun (2017).

Furthermore, wearing this fashionable *abaya* was considered to reflect the influence of the introduction of advanced media such as camera phones and the internet, which were viewed as causing the growing problem of morality corruption (Al-Kheder, 2011). Ultimately, Al-Kheder argues that although the *abaya* as a religious symbol has gone through stages of social and religious debate regarding its appearance, it has not been replaced or changed substantially by its consumers in Saudi society (Al-Kheder, 2011), which is the case in some of the Arab Gulf countries. In her study titled '*Immodest Modesty*', Al-Qasimi (2010) argues that the concept of *abaya*-as-fashion was initially developed in Gulf countries. Later, this concept became a phenomenon that was exported to Saudi Arabia. Despite these social and religious opinions about the modern version of the *abaya*, Kaur-Jones (2011) states that it was developed further to form the concept of *abaya*-as-fashion. The *abaya*-as-fashion is an adjustment of the original, plain black style *abaya* into fashionable, and sometimes individualised, custom-made clothing pieces that suit the tastes of the consumer (Kaur-Jones, 2011). This trendy *abaya* has challenged the conventional form as it unobtrusively undermined the customary social obligation and religious identities symbolised by the conventional structure of the *abaya* (Lindholm, 2013). Al-Qasimi (2010) discusses the symbolic value of the Arab women's dress code by juxtaposing the traditional form of the *abaya* against the modern pattern of the designed *abaya* that has gained notable popularity among Arab women since the outset of the 21st century. The author does not deny that the new styles of the *abaya*-as-fashion can sometimes deviate from what has been obligated to be socially acceptable in Arab Gulf societies, including Saudi Arabia. In addition, the study argues that although the designed *abaya* has not completely displaced the conventional one, it disrupts its fundamental value as an aspect of the material culture that expresses Islamic modesty.

Due to the notable spread of this phenomenon among women in Saudi society, a *fatwa*²³ was issued in 2000 to literally expound the criteria of the judicial *abaya*

²³ Fatwa number 21352 by the General Presidency of Scholarly Research and Ifta'a in 2000. From <http://www.alifta.net/fatawa/fatawaDetails.aspx?language=en&View=Page&PageID=6424&PageNo=1&BookID=7> [Accessed 12-3-2015]

according to Islamic scripts. Based on this *fatwa*, woman's *abaya* should meet the following fundamental criteria:

- To be thick not transparent to avoid any recognition of the characteristics of the clothes that are worn underneath the *abaya*.
- To be loose in order to prevent outlining the female figure.
- To cover the entire body.
- To be plain and free from any sort of adornments to avoid gaining men's attention.
- To have small cuffs so it does not reveal the arms.
- To be opened from the front.
- To be placed on the top of the head not on the shoulders to avoid revealing the female's body shape.
- To be different from men's garments.
- To be distinguished from the dress of women from other faiths.

This *fatwa* emphasises that any *abaya* that does not meet any of these criteria should not be sold, bought or adopted.

Thus, the judicial *abaya* in the *fatwa* is proposed as a conservative form of Muslim females' dress that prevents males' attention and expresses the morality of Muslim women's identity when in public. On the other hand, the functional role of the designed *abaya* can be the opposite due to the application of innovative elements including the use of several materials, accessories and embroideries to express a distinctive appearance in public (Al-Qasimi, 2010). Moreover, considering this Islamic point of view, it can be argued that the tendency of modernising or refashioning one of the most intrinsic aspects of the Islamic Saudi Arabian cultural identity, which is the manifestation of the females' dress code, can be complex and problematic. Due to the parameter set of the Islamic restrictions related to the symbolism of veiling in Arab societies, creating a new fashion of the *abaya* is challenging and cannot be an easy mission. For example, some traditional qualities

of the *abaya* such as its black colour and its full length are ultimately preserved even in the fashionable designs of the *abaya* in order to gain sociocultural consent.

Regarding its black colour, after an intensive investigation, there is no statement in the *Quran* or *Hadith*, as the only source of Islamic legislation, which imposes the colour black to be a denotative element of Islamic dress code or Islamic feminine identity. According to Al-Munajjed (2002), Islam openly permits the freedom of the use of colours for women. There is only one text in *Sunnah* that commends the prudence of some *Ansari*²⁴ women in Al-Madinah wearing black garments as a behavioural interpretation of the *Quranic* verse of Muslim women's dress during the earliest Islamic era. The incident is narrated by Umm Salamah²⁵ in Abu Dawood's²⁶ collection of the Prophet's *Sunan*²⁷ to explain the meaning of the Muslim veil (Abbadi, 1968). However, these texts are free from any articulations that may indicate an implicit or explicit prohibition of the use of colour in women's dress; therefore, these texts are descriptive rather than legislative. In addition, *fatwa* number 65221 in 2005 agreed that there is not any specification with regard to the colour of Muslim women's dress, in private or in public, unless they are very likely to gain men's attention. In addition, colours that represent values referred to in other faiths than Islam or vibrant colours should be avoided, especially in the presence of *non-mahram* men. The only religious justification for the selection of black as the formal colour for the *abaya* can possibly relate to its visual characteristic as a total contrast to the colour white, which is religiously preferable for males' garments. Therefore, this textual analysis expands the potentiality of the selection of the colour black because of inherited sociocultural symbolism rather than its association with a religious value. This symbolism of black has been culturally crystallised as an essential quality of the Saudi *abaya*. The restriction to the colour

²⁴ Belong to Ansar Muslims: the local inhabitants in Al-Madinah who welcomed the Prophet and his followers (Al-Muhajereen) when they emigrated from Makkah.

²⁵ Umm Salamah is one of the Prophet's wives.

²⁶ Abu Dawood is a Muslim scholar who compiled the Prophet's Hadiths in a set of volumes known as *Sunan Abi Dawood*.

²⁷ *Sunan* is the plural of *Sunnah*

black is deemed to be a fundamental challenge for *abaya* designers (Al-Qasimi, 2010), as their designs could not be released from its ascendance.

During an interview with his Highness Crown Prince Mohammad Bin Salman conducted by Norah O'Donnell in March 2018 for the CBS show *60 Minutes*, he was asked about the obligation of the Saudi women's *abaya* and he answered that:

"The laws are very clear and stipulated in the law of Sharia (Islamic law): that women wear decent, respectful clothing, like men... this however, does not particularly specify a black abaya or a black bead cover. The decision is entirely left for women to decide what type of decent and respectful attire she chooses to wear." (CBS News, 2018)

One month prior to the Prince's statement (February 2018), Shaikh Abdullah Al-Mutlaq, a member of the Permanent Committee Council of the Senior Scholars²⁸ and an advisor of the Royal Court, issued a verbal *fatwa* that caused intense agitation in Saudi society (Sabq News, 2018). Shaikh Al-Mutlaq, via his weekly radio programme *Friday Studio*, explained that the criterion of Muslim women's dress was legislated in order to fulfil the high purpose of Islamic morality, which is modesty. He argued that the function of Islamic modest dress is to cover and the method of covering was legitimately specified by the *khimar*²⁹ and the *jilbab*.³⁰ Therefore, the obligation of the wearing of the *abaya* is limited to Saudi society as Muslim women in other Islamic countries wear different patterns of modest dress that definitely meet the criteria of the Islamic dress code. However, the pattern of the dress they adopt is significantly different to the *abaya*. His contention is that Muslim women can wear any form of dress as long as it meets the legislated Islamic specification of dress. He also signifies the role of the cultural specification of each culture that constructs the

²⁸ The Council of the Senior Scholars is the highest religious authority in Saudi Arabia. Its members are responsible for advising the King on religious matters.

²⁹ *Khimar* is an Arabic term that is used to describe Muslim women's head cloth that covers the hair, neck and chest with the exception of the face or the eyes, as argued by some Islamic clerics through Islamic history (Ibrahim et al., 2002: 159).

³⁰ *Jilbab* is a wide outer attire for women that is worn to cover the entire body in public (Ibrahim et al., 2002: 114).

symbols of the Muslim females' identity. Therefore, it would not be fair if non-Saudi Muslims were described as immodest women just due to the fact that they do not wear the *abaya*.

Later, there was negative public opinion and a great controversy against this *fatwa* in Saudi Arabia. This *fatwa* was interpreted by the public from both genders to be a call for taking off the *hijab* as part of a new political agenda involving liberalising the country. Al-Mutlaq, subsequently, had to issue a follow-up explanatory statement the next day to explain that he was not arguing against the wearing of the *hijab*, *jilbab* or the *abaya*, but he was explaining that symbolising the *abaya* to be the only acceptable Islamic dress code is not based on religious statement; it is rather based on social and cultural considerations. Therefore, Muslim women inside or outside of the Saudi Kingdom cannot be forced to wear the *abaya*, he said.

These kinds of public reactions towards any religious opinion that contradicts any form of social or cultural behaviour clarifies how some of these social customs and cultural traditions have been '*Islamised*' by turning them into religious values. Therefore, it can be said that the social law of Saudi society, in this case, is based on the rejection of some forms of intellectual analysis or a reappraisal that diverges from the traditionally stereotyped system in which behaviour and attitudes are defined. There is no doubt that Saudi society is going through a new era of social alteration which can be clearly identified through the consonant ideology that both political and religious authorities adopt to scrutinise and redefine Saudi women's public attire. Both official statements indicate an introduction of a new *laissez-faire* doctrine of individualism in terms of the construction of the Muslim women identity in Saudi Arabia. However, this change as a part of the Vision 2030 still relies on Islamic values to constitute the social system and adopts moderation as an approach. This Vision is not radically liberal as the institutional traditional values are still intact but are communicated and socially delivered in a moderate manner. This might be a sign of a reduction in the degree to which the conservative approach is dominating the society through the radical implementation of conservative

ideologies. The Crown Prince believes in the significance of the social change that is contingent on stimulating the ambition for change.

Due to the recent introduction of these changes, public opinion is divided between supporters and resisters. The society has been affected by radical conservatism for decades through the educational system, religious orations and media; therefore, some people in the society are deeply traditionalist, religious or conservative and their main concern is to maintain and protect the coherence and consistency of the Islamic identity. Within the Saudi context, modernity can sometimes be considered as a cultural threat linked to Westernisation. However, it is an essential requirement that can be tolerated to fit in with the Islamic ideology. On the other hand, there is a proportion of liberals or modernists who are influenced by the secular Western culture and therefore call for modernisation, which is primarily based on challenging some of the local social traditions such as those related to the social role of Saudi women.

To sum up, although the *abaya* has been a subject of discussion by Islamic clerics and social critics, the literature that is related to the practice of wearing the *abaya* in Saudi Arabia is notably limited. The layers of values the *abaya* represents as a component of Islamic material culture, a national dress code, a sector of the clothing and fashion system, and as a value of dress gender identity, suggest its fundamental position within Saudi society. Yet, the *abaya* has not been discussed in the context of the consumers' perspective.

The *abaya* is a part of Saudi women's everyday life: therefore, establishing epistemology about it as an object, practice/behaviour, market and its meaning according to Saudi women's thought is deemed essential. The reality about the *abaya* might indicate hidden meanings or individualised definitions beyond those religious values that are defined within the wider cultural context. Most of the existing literature that documents the practice of the veil and the *abaya* adopts a narrow scope that is usually reliant on the researcher's own assumptions and ideological positioning. Observation is usually applied to criticise the practice of

veiling as a form of oppression and inequality by applying political or feminist approaches to raise the issue of gender discrimination. In addition, some scholars usually neglect the role of the verbal interpretation by Saudi women of the meaning of these symbolic items of Islamic material culture. DeCoursey (2017) tried to approach this goal through her study about the *abaya* as a fashion article in the Saudi society. From her research, she concludes that the wearing of the fashionable *abaya* is accepted by young women although they have some criticisms about aspects of the design. However, she focuses on exploring attitudes toward the *abaya* by targeting undergraduate university students. This can be counted to be a limitation as it only highlights the attitudes of a research sample that has been defined by age and only represents the particularity of this age group: therefore it cannot be generalised to represent the attitudes of the whole female population. Youth and adolescence is the stage of the in-process constitution of an individual's identity at a cultural as well as individual level (O'Donnell and Wardlow, 2000). This suggests an overlapping role of individuality and sociocultural conformity (affiliation and harmonisation) in influencing behaviour and attitudes at this stage. In addition, Klepp and Storm-Mathisen (2005) state that young generations are more concerned about establishing a fashionable/trendy fashion identity, which can sometimes be considered as a rebellious breaking of the dominant cultural codes (Kjeldgaard and Askegaard, 2006). Also, the attitude toward the *abaya* might vary from one region to another due to the factor of regional identity. Therefore, to establish an inclusive epistemology about Saudi women's attitudes towards the *abaya*, a transregional study is required; otherwise the result is limited to defining the behaviour in a defined regional context. Although some may argue that subjectivity can be dominant in inferencing the meanings of cultural symbols, an equivalent influence of the adherence to the wider sociocultural context is also expected to be a key factor.

3.6 Saudi Women's Regional Dress

In Saudi Arabia, the types and shapes of clothes differ from one cultural zone to another and from one tribal area to another (Ross, 1981; Yamani, 2004; Al-Dossary,

2012). Due to the significance of the tribal/regional identity which characterises most of the regions in Saudi society, women preserve the dress code as a representation of their tribes' customs. The symbolic value of the colours, designs and decoration can be used as denotations to index particularities of a tribal identity. Each tribe/region has a unique dress code to differentiate themselves from women from other tribes. Therefore, traditional dress is considered to be a fundamental dimension of the tribal ethos (Ross, 1981).

The traditional dress of Saudi woman can be described as a maxi-length with long sleeved garment made out of patterned or plain fabric with different shades of coloured embroidery (Iskandarani, 2006) in some parts of the dress such as the neckline and/or the cuffs (Yamani, 2004). Katakura (1977), as one of the scholars interested in the Arab culture, pointed out that the identity of Bedouin women's traditional dress epitomises the concept of elegance.

Also, in her book *The Art of Arabian Costume*, Ross (1981) demonstrates the aesthetic value of the traditional dress of Saudi women as an element of the Saudi material culture. The book portrays the wide and rich variety of regional/traditional dress that is produced locally by professionals or housewives who are in the dress-making profession.

"It is surprising to hear people exclaim that it is a pity Arabian women always wear black. This is a very superficial observation, obviously the result of a false impression conveyed by the black outer cloak which women wear when venturing outside the home... the outer garment or mantle which Arabian women find fashionable today is plain black and unembellished. In the past, a townswoman's cloak was also black as a rule but embellished with gold embroidery and gold tassels... Women's social gathering in Arabia today further attest to a love for beautiful attire, as they are fashion shows in themselves." (pp. 12-13).



Figure 3.5: Traditional women's dress in Saudi Arabia from different tribal identities (South-East, Hijaz and Najd).³¹

Ross (1981) highlights the concept of modesty, as a mystique surrounding clothing consumption. She states that Saudi women combine modesty with haute couture to establish an ultra-feminine dress identity. She also illuminates the impact of social development on weakening tribal/regional differences in dress code (p. 21) and argues that the consumption of clothes by Saudi women shifted from traditional dress to international brands. The work by Ross (1981) was one of the initial contributions that covered the subject from an aesthetic perspective, based on the observation of the tangible elements of traditional dress. In reviewing this work it is evident that this author treated traditional dress as a form of cultural heritage that is continuing to disappear in the Saudi society as a practice due to the introduction of Western fashion.

In Chapter 9 of her book *The Cradle of Islam*, Yamani (2004) who is a *Hijazi* anthropologist discusses the significance of the *Hijazi* regional dress code³² as one

³¹ Retrieved from <http://www.mansoojat.org/costume20.html> [Accessed 2-5-2017].

³² The traditional form of *Hijazi* women's dress consisted of *zabun* (a long but not wide dress) and *sideriya* (blouse) to be worn under the dress, which had to be shown through a big opening in the dress neckline. This blouse is fastened by six buttons, which can be made out of silver, gold or diamond. For the head cover, the *Hijazi* women used to wear *middawwara* (a white head scarf).

of the main components of the wider context of *Hijazi* identity. The author mainly focuses on the influence of the new state's consolidation in the 1930s in leaving profound traces on the manner of dress in the western region of the Arabian Peninsula. According to Yamani (2004), the establishment of the Kingdom of Saudi Arabia was accompanied by the introduction of a homogeneous Saudi national dress, which was identical to the one worn in *Najd* (this applies to the garment worn by men). She argues that due to the distinction between the private and public environment in addition to the increased authority of religious control over women's dress in public, the dress code has succumbed to radical transformation. The author also stresses the role of the government in forcing women to wear the black *abaya* when in public, which is considered as an official sanctioned move against the *Hijazi* dress regional identity (Yamani, 1997: 57).

Yamani (2004) also points out that the dress code in Saudi Arabia, and especially in *Hijaz*, represents a continuous and complex interplay between several stages of political, social and economic change. She explains how Western fashion influenced Saudi women's dress beneath the *abaya* between the 1950s and 1980s. The 1950s, which she names *the period of openness*, witnessed the growing popularity of Western fashion among Saudi women, which was inspired by actresses in Egyptian films. The popularity of Western fashion reached its peak in the 1970s due to the wealth caused by the oil boom. Furthermore, luxury Western brands started to operate in the Saudi market during this period. However, she argues that the eagerness for unadulterated Western fashion started to decrease by the end of the 1980s as there was a wider attempt to assert the Islamic identity of women's dress in Islamic societies.

As Coleridge (1988) comments, during the late 1970s, Islamic values had a gradual impact on Western ones. Despite the two cultures initially embracing one another,

However, although *Hijazi* women have the same clothing style, wearing diamond or gold buttons is limited to people of high social class such as merchants.

the Islamic taste forced Western designers to modify their designs to meet the demands of the Islamic markets. Therefore, Saudi women enjoyed the benefit of displaying a cosmopolitan status by wearing Western brand names that were modified to meet the requirements of Islamic modesty. Due to this return to traditionalism, a new form of women's formal dress, *thoub*, was introduced to the Saudi market in the 1980s to be worn in female-only social settings. The *thoub* is a full-length long-sleeved garment which is very similar to the regional/tribal dress. The only differences are related to the country of origin, as the majority of items are imported, and the simplicity of designs compared to the original version of tribal dress. Women's *thoub* is often coloured and embroidered to be exclusively worn in private places. This pattern of dress was later perceived to be a national Saudi dress. However, it symbolises the wider Islamic Arab identity as it is the dominant style of dress in Palestine, Jordan and North Africa.

Yamani (2004) also emphasises the role of Western fashion in establishing or maintaining social status during the 1980s and 1990s in the *Hijaz* region. Before the establishment of the Kingdom, women used to borrow or rent expensive jewellery to wear at social gathering events to display their wealth. Wearing Indian and Bahraini jewellery to social gatherings was avoided as they are not counted as status items. They were only worn by foreigners such as Americans and Europeans who considered it as ethnic jewellery. Also, the quality of the buttons of the *sideriya*, which can be made out of gold, as mentioned previously, was utilised as a signifier of status and wealth. However, after the introduction of Western fashion to the Saudi market, it was symbolised as a status object. Shechter (2011) argues that Saudi Arabian society experienced an allure with the West by linking European fashion trends with modernity and elegance. Therefore, Western-oriented promotions succeeded in attaching plausibility and status to commodities (Luqmani et al., 1987). In an older publication by Yamani (1997) titled '*Changing the Habits of a Lifetime*', Yamani (1997) states that:

"...today, a woman must always wear a dress that is 'suitable' for the social occasion, to the status of the hostess and her guests and, most important, to

express her own social status. However, dress is not only an individual matter, but one that concerns the whole extended family, women as well as men. Men actively participate in the choice of a dress 'their' women wear because it reflects their social position and financial capability.” (p. 60)

Therefore, the consumption of Western-branded items does not reflect Westernisation but is practised with a view to establishing social status and signifying family wealth. However, Yamani argues that the adoption of Western fashion in Saudi Arabian society as a modern pattern of clothing consumption led to an elimination of visual regional affiliation and diluted the residual dress code of regional identity (Yamani, 1997, 2004). Therefore, Yamani (1997, 2004) included the *Hijazi* dress code under the umbrella of the victimised diluted regional identity. The primary and direct reason for this dilution is the impact of the Saudi unification while the impact of the Western fashion system was given less attention. In contrast, Yamani (2004: 151) herself asserts how the unique dress code of the *Asir* region still resists the cultural diffusion of identity. She relates this to the fact that *Asir* as a peasant community was largely independent from the Saudi government until the 1990s. However, it is historically evident from different sources that *Asir* was unified under Al Saud's administration in 1920 (Al-Nami, 1999). In other words, both regions were exposed to the same sort of political change.

Yamani's work on the *Hijazi* identity was criticised by a number of Saudi scholars, such as Al-Rashid (2005), as being an example of sophistry and for constructing arguments that are based on historical delusions. Al-Rashid (2005) demonstrates that Yamani's argument, in general, is a narrated personal opinion of the regional identity of *Hijaz* that has been treated as a victim of the political unification of the Kingdom. The region of *Hijaz* was presented as a separate part of the society with its own social life and religious beliefs that differ from those of other regions of the Kingdom.

Also, the researcher argues that wearing the women's black *abaya* in public during or after the period of consolidation seems to be for a deeper socio-political purpose,

which is establishing a unified national identity rather than nullifying regional identity. This may have helped in eliminating the tribal discrimination that might have increased the potentiality of the seceding attempts. Therefore, this unification is rather an endeavour for harmony between different tribal communities in order to form the context for contemporary national identity based on reciprocity between different local identities. Although there was a kind of enforcement to wear the *abaya* in public, there was no repression towards clothes that are worn underneath the *abaya*, which can include regional dress.

Ross (1981) and Yamani (1997, 2004) mainly depicts the impact of Western trends as an invasion that led to a reduction in the adoption of traditional dress. However, they do not clarify the values that make Western fashion more popular than traditional dress. Furthermore, these studies do not explain the way in which Western fashion has affected Saudi fashion consumption behaviour: for example, does this change indicate a change in shopping frequencies or the amount spent on fashion purchasing or does it simply reflect the adoption of taste/trends? Therefore, it would be useful to examine the issue of the predominance of Western fashion in contemporary Saudi society by analysing their associated symbolic values, in contrast to those associated with traditional dress.

3.7 Economic Context of Fashion: Fashion as a Market and the Consumer as a Target

Understanding consumer behaviour – i.e. the way in which individuals purchase and consume goods (Solomon et al., 2016) – helps retailers to understand consumer attitudes and to predict their reaction towards different products and services (Schiffman et al., 2010). Therefore, it helps the development of focused approaches towards the creation of a successful marketing strategy (Peter and Olson, 1996) and leads to efficient solutions to challenges and obstacles that retailers might face when dealing with a particular market (Engel et al., 1986). Thus, knowledge about consumers should be incorporated into every facet of planning, to identify threats and opportunities. In addition, this helps retailers to ensure that the product is

appealing to its target market. However, Blackwell et al. (2006) argue that understanding consumer behaviour should not be limited to developing strategies for marketing purposes: it should be employed to explain the wider cultural or social context to solve possible attributed problems and to bridge existing challenges.

The literature contains several definitions of consumer behaviour that have accrued over time due to the expansion of knowledge and the increasing interest in this field (Galalae and Voicu, 2013). One of the most cited definitions is by Solomon et al. (2006), who define consumer behaviour as:

“The process involved when individuals or groups select, purchase, use or dispose of products, services, ideas or experiences to satisfy needs and desires.”
(p. 7)

This definition illustrates the involvement of a series of interactions in the purchasing activity process, which includes looking for information, comparing, selecting, decision making and purchasing. It also indicates consumption, which involves use, re-use and disposal. It is comprehensive as it combines the stages involved in buying behaviour and consumption behaviour as both are conjoined under the realm of consumer behaviour. Ali and Wisniesk (2010) argue that in the early 1990s, a great emphasis was given to the consumer as an influential power in the marketplace due to the increasing spread of consumerism. The phenomenon of consumerism resulted in the emergence of a new socioeconomic trend that emphasises the consumer’s individuality and his/her unique propensity (Ali and Wisniesk, 2010). As a result, companies and business entities have been required to significantly recognise consumer demand and understand consumer behaviour to be able to effectively respond to this emerging trend.

3.7.1 The Process of Consumption Behaviour

Consumer behaviour is a systematic process of progressive actions that occur in several consecutive stages. A model was proposed by Engel, Blackwell and Miniard

in 1968 to explain a number of phases through the process of buyer behaviour and the influential factors that involve in each stage of the consumption. This model has been widely applied to study consumer behaviour. One of the objectives of this Model (Consumer Decision Process) is to help companies and retailers to understand the process of consumer behaviour by examining the integration of different internal and external variables that occur during the process of consumption behaviour (Engel, Blackwell and Miniard, 1968).

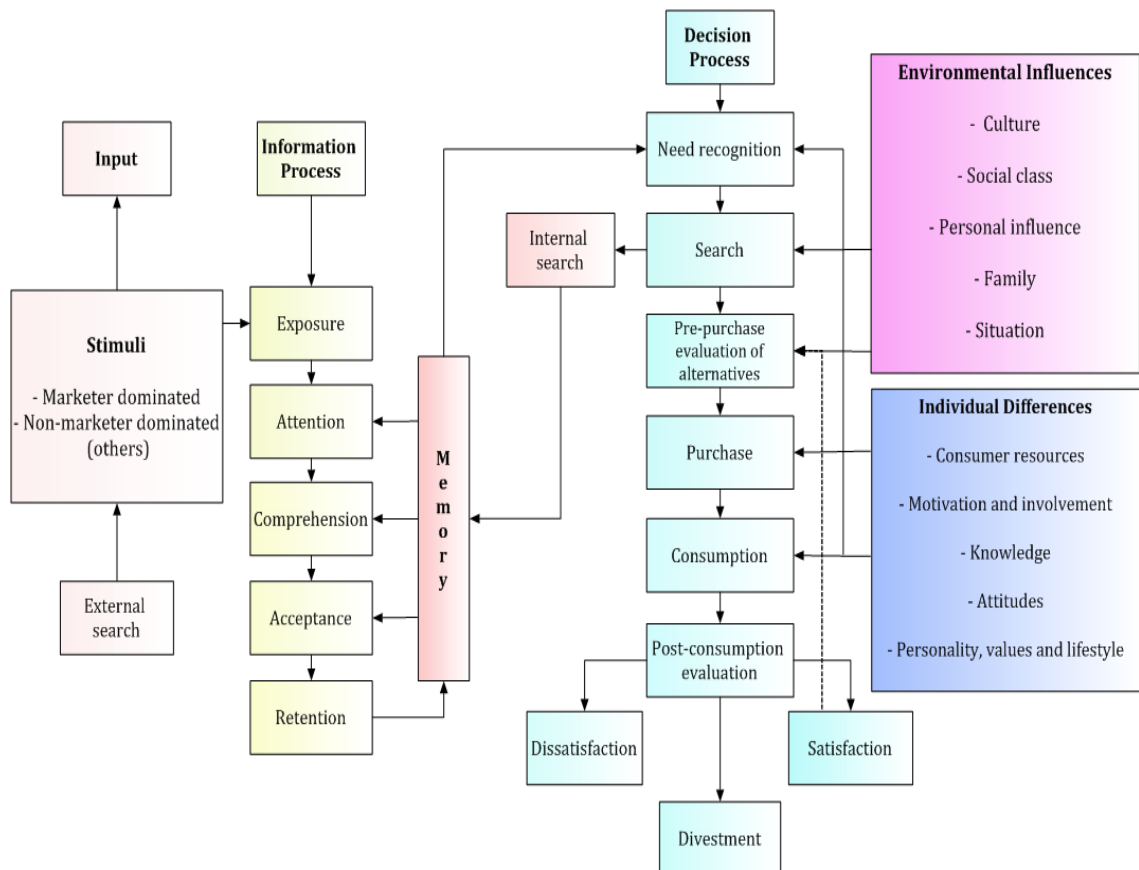


Figure 3.6: CDP Model by Blackwell et al., (2006: 85). This diagram was coloured for clarity in the 2006 version but otherwise it is identical to the original model in 1968.

This model also captures different activities that take place during this process in a defined schematic format that includes:

1- Need Recognition

The stage of *need recognition* occurs when the consumer identifies the situation of '*not having*' or when he/she compares between the characteristics of the owned item and the qualities of the desired one (Neal et al., 2006). This primary comparison leads to a state of problem identification in which the consumer realises a real or hypothetical need for a particular product. This recognition is a result of the influence of internal and/or external factors (Hawkins et al., 1998). When a consumer goes through this stage, the idea of purchasing will then be formulated.

2- Search for Relevant Information

The feeling of '*the need for*' motivates the consumer to look for information about the needed/wanted object, which can be undertaken in an active or passive manner (Schiffman et al., 2007; Wyer, 2008). Active searching for information includes the utilisation of external sources such as media, advertising and the feedback provided by other consumers to gather essential information about the desired product, while passive searching for product information involves the internal process of the individual's thoughts and personal experience about the benefits that can be obtained from buying a particular product (Rose and Samouel, 2009).

3- Evaluation of Alternatives

When the required information about the product has been obtained, the consumer undertakes a subsequent stage of information analysis to evaluate and compare alternatives. During this stage, the consumer considers various aspects of the product such as price, size and quality in order to make a decision for or against purchasing (Kotler and Keller, 2016).

4- The Moment of Decision Making (Purchasing)

This stage is considered to be the core phase of the process of consumer behaviour as it is the point when the consumer meticulously makes the decision over whether or not to purchase, based on information obtained in the comparison stage (Kacen and Lee, 2002). Therefore, it is the outcome of the three prior stages. This stage consists of two phases. During the first phase, the consumer selects one store over another. The second phase involves the consumer's in-store decision, which can be influenced by different factors inside the shopping environment such as product display (Blackwell et al., 2006).

5- Consumption and Post-Consumption

The process of the structural phases involved in consumer behaviour does not end at the point of acquisition. It creates another phase, which is the actual utilisation and consumption of the product. During this stage, the consumer constructs a perception of the whole experience from the identification of a need for the product to consuming it, or what can be called the post-purchasing phase (Neal et al., 2006). This conceptualised experience might result in new behaviour of repurchasing or avoidance. Also, it might lead the consumer to influence others' attitudes towards a particular product, market or service. For example, when a consumer feels that he/she has been victimised by misleading promotions, or if the product failed in meeting the consumer's demands, the consumer then plays a role of influencer. In this role, the consumer can impact others' opinions by sharing his/her own experiences and recommending against such a product through different communicative channels such as media or word of mouth (Solomon et al., 2016). On the other hand, a positive impression might develop after purchasing a product in several circumstances, for example, when a product successfully achieved consumer satisfaction due to its unexpected high quality compared to its low price. Also, during this stage, a level of consumer brand loyalty might be developed if the purchased product performs well in meeting consumer demand (Kotler and Keller, 2016).

Hawkins et al., (1998) argue that not all consumers pass through all of these stages as some consumers may skip or reverse particular stages which can be due to a lack of time in urgent cases of purchasing. Furthermore, consumers are affected by the type of products, including convenience, shopping or speciality products (Murphy and Enis, 1986). For example, a convenience product that the consumer customarily buys will not require the same time effort he/she spends on research and comparison when selecting a shopping product or seeking out a speciality product that holds a particular value (Murphy and Enis, 1986). Applying this to clothing items, hosiery for example is considered as a convenience product that can be bought from a supermarket during regular family shopping while other shopping clothing items such as jackets entail a stage of comparison of the product attributes. Consumers often make more effort to seek out the exact quality they desire to have when shopping for speciality goods due to the expected exclusivity of the product attributions (Easey, 2009).

Also, the consumer's involvement in these stages can be affected by the classification of clothing products. Consumers who look for classic clothes, which can be described as timeless and always acceptable styles such as coats and tailored women's suits, are less affected by seasonal styles. By contrast, fashionable clothes encourage consumers to be involved in seasonal purchasing (summer, autumn, winter and spring collections) due to the continuing slow change in style. This can also apply to fad styles that have a faster rhythm of rise and decline in acceptance and popularity among consumers (Easey, 2009). Consumers' involvement in these stages also varies according to their affective (emotional) or cognitive (mental/rational) response to different items. For example, the decision to purchase utilitarian products such as refrigerators involves a cognitive appraisal of the functional qualities and prices that are offered by different brands (Mukherjee and Hoyer, 2001). On the other hand, purchasing hedonic items that offer fun and enjoyment, which can be applicable to fashion, is affected by emotions (Zhao et al., 2011).

In addition, the post-purchasing phase includes a process of making decisions about the suitable method of disposal. When an item is no longer of use, the consumer has various choices for disposal:

- Store it to serve original or new purposes;
- Temporary disposal such as renting and loaning;
- Permanent disposal through throwing away or recycling (Solomon et al., 2016).

Due to the increasing concern about environmental issues associated with waste, international companies encourage consumers to increasingly practise socially responsible behaviour in environmental matters. For example, in 2011, the international company M&S offered a £5 voucher to consumers who bring unwanted old M&S clothes to the store and donate them to the Oxfam charity.³³ Similarly, H&M sponsors a programme of recycling used clothes from any brand and offers a 15% discount promotion to consumers who participate by donating their clothes to support this programme.³⁴

According to this model, a number of factors and determinants cause, control and shape an individual's behaviour related to consumption. These factors are discussed by Engel et al. (1995: 147- 154) and can be broadly classified into:

1- Individual Differences that vary from one consumer to another such as:

Resources: This category includes the individual's resources such as the availability of time, information and money about the product. The amount of money that can be allocated to purchase a product is directly proportional to the consumer's income (Williams, 2002). For instance, consumers with low income or limited financial

³³ <http://www.look.co.uk/fashion/get-a-%C2%A35-ms-voucher-when-you-donate-to-oxfam>
[Accessed 11-3-2013]

³⁴ <http://www.brandchannel.com/home/post/2013/02/21/HM-Garment-Recycling-Program-022113.aspx> [Accessed 2-3-2016].

resources may not be able to afford life essentials (Darley and Johnson, 1985) and might also look for lower-quality products due to their cheaper prices.

Knowledge: The consumer's response to a brand/product can vary according to his/her knowledge (Srinivasan et al., 2014). This knowledge combines the information stored in the consumer's memory regarding to the characteristics of the product, its use and functionalities which have been developed upon a personal experience or a particular beliefs as well as other information provided through advertising (Engel et al., 1995).

Attitude: The consumer's attitudes are mentally developed abstracts that embrace the system of beliefs and evaluations. The consumer's attitude signifies the favourability or disfavourability of particular object, concept or behaviour based on a personal evaluation of various attributes and possible consequences (Eagly and Chaiken, 1993). Attitude is developed through a systematic process of different phases of learning (Rudani, 2009). Although attitude influences behaviour, its influence is not always guaranteed (Pachauri, 2002).

Motives: All phases of the consumption behaviour are motivated by different needs and goals. The incentive to adopt a particular behaviour related to consumption mainly falls within two main classifications: utilitarian and hedonic (Engel et al., 1995).

Personality: The consumer's personality is the characteristic that formulates a person's character and differentiates people from each other (Robbins, 2001). The idiosyncrasy of an individual's personality traits has a direct psychological influence on his/her perceptions and behaviour (Stanton et al., 1995). This includes the consumer's attitude and emotions that emerge according to the influence of subjective beliefs and perceptions.

Values: This factor encompasses the individual's beliefs about the meanings of life and the accepted pattern of behaviour. Values can be defined subjectively or according to the dominant cultural context of a particular society (Engel et al., 1995).

Lifestyle: The typology of lifestyle can also be based on narrow elements and subdivides consumers according to particular shared characteristics such as hobbies or sports interest (jazz fans or runners) (Engel et al., 1995). Therefore, lifestyle brings together people from different social classes and unifies them under one group. It also subdivides individuals who belong to the same social class into subgroups.

2- Environmental influences

This category includes the influence of culture (see Section 2.5), social class (see Section 2.4.1) and family (see Section 2.4.2.1.1) on the consumer's consumption behaviour. It also signifies situational changes on affecting purchasing /consumption behaviour. Personal influences is another aspect that has been classified under this category to indicate the construction of the individual's identity through socialisation (Blackwell et al., 2006).

One of the main strengths of this model is that it has been the subject of a number of publications in the field of consumer behaviour such as Foxall (1990), Schiffman and Kanuk (2007), Peter and Olson (2008) and Solomon et al. (2016). Also, it is a widely applied model used to explain each stage involved in consumer behaviour which may embrace physical, cognitive and emotional processes. These processes have been adapted by scholars to investigate implications for fashion consumer behaviour and their possible influence on the fashion system. For example, Rahmati (2016) applied this model to study consumers' response to fast fashion. Also, Perry and Kyriakaki (2014) adapted this model to explore decision making regarding luxury fashion in Greece.

Erasmus et al. (2001) argue that this model is very restrictive. They consider that this model disregards other aspects that might be dominant in other societies. Therefore, they think that this model needs to be adapted in order to be relevant to different social situations. Loudon and Della Bitta (1993) criticised the vague definition of both individual differences and environmental influences.

It can be argued that although this model can explain the primary stages of consumer behaviour, the main factors that influence each of these stages cannot be generalised as a fixed system. This is due to the fact that each society has its own identity that may signify various levels of the adherence to particular values and traditions which in turn affect the behaviour of its individuals. Therefore, these influential factors should be redefined according to the characteristics of the market that is going to be examined. For example, the model focuses on family as one of the factors that are grouped under environmental influences. Although family is a crucial normative reference group, the strength of its influence may vary from one society to another. Both comparative and indirect reference groups are considered to have a great influence on consumer behaviour (Escalas and Bettman, 2005) and their influence may sometimes surpasses the influence of family in directing the behavioural pattern. Consumers' attitude towards a particular fashion can be based on their expectations of the possible outcomes occurred when others - who can be a family member, a friend or a job colleague - perceive and evaluate an adopted fashion in order to approve its suitability and alignment with the defined local values. This might also mean that although attitude causes behaviour, behaviour that occurs under a great influence of others can also develop an attitude that serves the values that have been established as a unified sociocultural behavioural pattern.

Reviewing the category of individual differences reveals that this model ignores some important aspects such marital status that has a significant impact on consumer behaviour (Srinivasan et al., 2015). Also, age has not been included in this model: this is a very significant dimension of individual differences that affects the way in which the consumer views the reality of a product or service when making a purchasing decision (Twigg, 2013). The factor of age may suggest an overlapping

role of individuality and sociocultural conformity in influencing behaviour and attitudes. For example, O’Cass (2000) identifies that older consumers usually have a low level of interest in fashionable items. On the other hand, Klepp and Storm-Mathisen (2005) state that younger generations are more concerned about establishing a fashionable/trendy fashion identity. In addition, gender has an influence on the way in which he/she behaves as a consumer (Buttle 1992) which was not considered in this model. Due to the fundamental differences between men and women in terms of sociocultural and psychological identity, they demonstrate different approaches (Koca and Koc, 2016) as consumers.

Another critique of this model is that it gives less attention to factors that are related to the product’s quality that can be indicated through various intrinsic and extrinsic characteristics of the product (see Section 3.7.2.1). There is no doubt that product is a fundamental aspect in the process of consumption and therefore, its characteristics should be linked with the sociocultural values they communicate or establish. Also, it should consider the consumer’s evaluation of the product’s success or failure in transmitting these values based on the provided qualities.

3.7.2 Qualities that Influence Consumer Behaviour

Gaur et al. (2015) argue that the consumer’s intention to buy from a specific brand can relate to what values this brand offers. Quality perception is an important aspect that retailers should consider in order to be able to compete in the market. The quality of an item has a definite influence on buying intention (Dodds et al., 1991; Castelo and Cabral, 2018). According to Syduzzaman et al. (2014), quality can be defined subjectively and therefore, there is no unified definition of quality. Rayman et al. (2011) state that:

“Product quality is the consumer’s judgment of the standard of performance for a product. The cues used by consumers to judge quality can be classified as either intrinsic or extrinsic.” (p. 66)

Judging the quality of an item is a continuous process. It starts with the pre-purchasing stage of evaluating the product's quality, which influences the purchasing intention, and it continues to the construction of a complete perception based on the experience of using the product. In turn, this impacts the decision regarding repurchasing the same product or trying another brand.

In the fashion market, Swinker and Hines (2006) confirm that consumers appraise the quality of a garment based on four factors:

- 1- **Extrinsic cues** such as price, country of origin and brand name.
- 2- **Intrinsic cues** which include the composition and tangible features of the garment such as the type, content and texture of the used material and sewing techniques. The durability of the garment material extends the utility of the product, which in turn maximises the potential of the consumer's satisfaction (Fletcher, 2012).
- 3- **Appearance cues** such as fashionable designs and aesthetic elements including colours, embroideries and printed images.
- 4- **Performance cues** that are attributed to a comfortable fit and whether or not it is easy care, wrinkled or pilled (Castelo and Cabral, 2018).

Thus, manufacturers and retailers have to analyse and understand the quality and value demands in order to satisfy the consumer and establish a high level of consumer involvement (Rosenau and Wilson, 2006). Dickerson (2003) highlights that a significant change in the priorities and demands of fashion and clothing consumers presents a challenge to the fashion industry. Solomon and Rabolt (2009) corroborate that due to the increasing demand in the fashion market, consumers may feel less satisfied about the offered products. In addition, Mühlbacher et al. (2006) argue that international competition and advanced technology have made achieving distinctiveness through an item's features increasingly difficult: therefore, satisfying the consumer can also be challenging.

3.7.2.1 Extrinsic Quality Factors

Extrinsic quality includes the values that are not physical constituent parts of the garment. Extrinsic qualities are those that have been allocated to the fashion item by the manufacturer or retailer, which include price, country of origin and brand image; these are frequently used by consumers as quality indicators (North et al., 2003). As these factors are related to values and perceptions of these values, they might differ from one culture to another. Therefore, the debates on these aspects will be discussed below as they will be considered in the primary research on fashion consumption process in Saudi Arabia.

3.7.2.1.1 Price

Price is the element that creates revenue for the company through exchange of the product or service provided. It is an aspect of the 4Ps marketing strategy that comprises product, place, price and promotion (Al-Salamin and Al-Hassan, 2016). A product's price is one of the incentivising factors that influence the consumer's purchase intention (Wong and Zeng, 2015). Often, consumers pay great attention to price when gathering information about the product during the pre-purchasing stage of consumer behaviour. Therefore, price affects the purchasing decision.

This influence of price can be referred to the classical economic theory (Marshall, 1890) that emphasises the rationality of consumers. They are held to always make purchasing decisions based on evaluating the suitability of the price compared to the product's performance in order to choose the optimal option.

Kotler and Keller (2016) highlight that, usually, consumers evaluate the product price against the attributed values, especially when other information on the product is not available. For example, the purchasing intention of purchasing is likely to be reduced when an unjustifiable high price is identified for an ordinary product. However, in the marketplace, low prices are often correlated with low quality (Lusk et al., 2007). Therefore, price is a great indicator of the product's quality, as suggested by Ovchinnikov (2011).

Goldsmith et al. (2010) argue that in fashion shopping, consumers are expected to pay more for values that are symbolised by famous status-laden brands. Therefore, status consumption increases the level of brand loyalty and consumer involvement in purchasing activities. As a result, this will lead to a lower degree of sensitivity towards price. However, despite the distinctive tangible and intangible qualities that are attributed to international brand names, a study by Al-Salamin et al. (2015) concludes that the high price of well-known brands prevents young consumers from purchasing due to the limited financial resources of this segment of the market in the eastern region of Saudi Arabia.

In a study by Castelo and Cabral (2018), it was identified that price might have less influence when shopping for fashion, as they state that:

“During the 1980s and into the 1990s, consumers tended to buy fashionable clothing without much consideration of the price of a particular brand. However, consumers today are generally more value-oriented, that is, they demand more than they can afford.” (p. 23)

3.7.2.1.2 Country of Origin: The Concept of the ‘Made in’ Label

The impact of the country of origin on consumer behaviour has been subject to extensive attention by scholars from different disciplines since its establishment by Schooler in 1965. Schooler (1965) developed the concept of ‘made in’ and signified its impact on consumers’ conception and evaluation of products. However, his study was only a statement of the existence of the concept and its significant impact on consumer opinion about products rather than focusing on investigating its system. Despite this fact, this study paved the way for studies that apply this concept to understand the way in which consumers stereotype the quality of local and international products in several cultures. Thus, the product’s country of origin is an influential factor that affects consumer behaviour and his/her cognitive purchasing protocol (Parkvithee and Miranda, 2011). It reflects the country’s image of superiority or inferiority, which is conceptually attributed to the product’s quality (Papadopoulos and Heslop, 1993). Maheswaran (1994) and Spillan et al. (2007)

suggest that consumers utilise the concept of the country of origin as a cue to judge the quality of a product or brand. Sharma et al. (2006) argue that the country's socioeconomic image influences consumers' attitudes and behaviour towards domestic and imported items in both emerging and developed markets. For example, a study by Usunier and Cester (2008) identifies a positive consumer perception when evaluating products that have been produced in developed countries as they are believed to be of better quality than those produced in developing countries. This is also linked to the regulations of safety standards and wage levels of production in Western countries. It can also be attributed to the use of advanced technology or to the stereotyped superiority of developed countries. For instance, Vel et al. (2011: 4) demonstrate that in the Gulf region, there is a widespread perception that products imported from Western countries are superior in quality to those produced in the Middle East and North Africa. It was quoted in Lewis's *'Muslim Fashion'* (2015) that:

"...the Middle East market is very loyal to their Middle East abaya designers. They will buy the Dior and Valentinos, but when it comes to abaya, they want someone who speaks Arabic and who is Arabic. [A design by a] British Asian originally from Pakistan they don't see that as luxury [because] their maids are Pakistani..." (p. 298)

This quotation indicates that a lower level of status is given to Asian fashion designers in the Gulf region. Ger and Belk (1996a, b) emphasise that in emerging markets, there is a predominant discord between imported brands and attributed ideologies of elegance, prestige and Westernisation. On the other hand, local production signifies simplicity and unattractiveness as attributes that lead to a preference for imported goods. Applying this notion to fashion products, European fashion, especially French and Italian, is in favour as it is stereotyped to be a signifier of status and elegance (Rashid, 2017).

Therefore, consumers may have different perceptions about several countries of origin, which in turn influences their purchasing intention. Symbolic values

attributed to the country of origin such as authenticity and status are considered to be informative indicators that have a great influence on consumer behaviour (Hong and Wyer, 1989). However, Papadopoulos and Heslop (1993) criticise the concept of '*made in*' as having a misleading agenda. The reason for this is the involvement of different countries through the process of international production. For instance, a product can be designed, assembled, manufactured and labelled in different parts of the world. Therefore, based on this assumption, the conceptualised image about the country of origin cannot always be sensible or valid. This can be applied to several brand names where the headquarters of a company is located in Europe but whose products are manufactured in Asia (Rashid, 2017).

3.7.2.1.3 Brand Image

Lantos (2011) argues that the concept of '*one size fits all*' no longer exists for most products/brands in the marketplace. This indicates the need for brand differentiation. For this reason, rivals' offerings differ in one of several ways that focus on the product's quality and/or quantity such as:

- Offering distinctive or better tangible qualities than those offered by the competitive brands.
- Developing a brand concept that psychologically positions it as being unique and different as intangible qualities. This can be via promoting the trustworthiness of the brand to enhance the brand image.
- Providing the market with multiple product line items that vary in terms of size, colour and style.

Tangible characteristics are not the only factors that impact the choice of the item. Yoo et al. (2000) comment that consumers' perception of quality can relate to concepts such as uniqueness or superiority that encourage consumers to purchase such a brand. One approach towards establishing a personal connection with consumers is put forward by Crane and Bovone (2006), who argue that it is common for small entrepreneurial fashion and clothing firms to adopt a strategy that enables them to have a face-to-face relationship with their customers. The aim of this

strategy is to estimate the tastes and attitudes of their consumers through defining and refining the symbolic values they communicate via the consumption of clothes. The success in satisfying consumer demand also depends on assessing the changes in existing values and identifying the emergence of new values. Therefore, fashion retailers need direct and indirect contact with potential consumers to be able to develop a symbolic sensibility which leads to successful valorisation (Entwistle, 2002).

Brand image comprises the consumer's perceptions and impressions about a brand (Hawkins et al., 2004). Positive brand image is usually constituted upon the unique advantages the firm has, such as reputation, popularity, reliability, trustworthiness and being capable of offering the consumer the best service (Kotler and Keller, 2016). Roth (1995) explains how some international brands create different brand images to suit different sociocultural contexts. For example, Levi's presented a social image in the U.S. market and a more individualised and sexual one when promoted in the EU market. Jain (1989) emphasises the role of a low level of competitiveness in standardising marketing activities including pricing, products and promotion. Also, Gereffi (1994) and Goldman and Papson (1998) argue that although the process of fashion production takes place in countries with low-wage standards, the symbolic meanings of each type of fashion is constructed in Western countries. Although the production of haute couture brands is now a global phenomenon, the main focus of the fashion system is within Western countries. Through different advertising methods, fashion companies transmit and attach the particular values of a particular lifestyle by implying a specific ideology. Therefore, consumer loyalty and their involvement with fashion brands might also be affected by their response to brand image.

The above discussed three extrinsic factors of product quality will be applied in the next stage of this research in order to examine their influence on fashion consumption in Saudi Arabia.

3. 8 Market Segmentation

Lantos (2011) defines market segmentation as:

“a managerial process that identifies groups of consumers who share similar or common needs and wants or problems to be solved as well as underlying motivations for marketplace behaviour.” (p. 33)

It is argued by Assael and Roscoe (1976) and Kotler (1997) that consumers demonstrate heterogeneity in their consumption patterns. Therefore, the process of market segmentation entails identifying, describing and understanding the common characteristics and heterogeneous demands of a group of individuals. These individuals may be already involved in brand/product consumption or they could be prospective/potential consumers. The aim of market segmentation is to classify and subdivide consumers into distinct and meaningful groups of individuals. These consumer groups are known as target markets. Sheth (2011) suggests that targeting emerging markets requires a reconsideration of different marketing aspects, including market segmentation, as some marketing activities may need various degrees of standardisation or adaptation according to different circumstances.

According to Dibb and Simkin (1997), Cox and Brittain (2004), Rudani (2009), Lantos (2011) and McDonald and Dunbar (2012), market segmentation can be constructed according to the characteristics related to the consumer or product.

Quinn et al. (2007: 411) state that: *“If we are to develop a broader understanding of marketing segmentation theory it becomes important to recognise influencing factors related to both consumers and the organisation.”*

Therefore, a valid market segmentation should be developed according to empirical data that has been collected from the consumers themselves alongside supporting information from the field experts. This will lead to a clear identification of the sub-

markets that classify consumers who similarly adopt a particular pattern of consumption (Dickson and Ginter, 1987).

To date, there is no single defined strategy for market segmentation. The market can be defined and divided based on the product aspects or the consumption behaviour (Wedel and Kamakura, 2000). In the numerous research studies that focus on discussing the appropriate variables to be applied when determining market segmentation, sophisticated multivariate approaches have been utilised for this purpose (Quinn et al., 2007). The practical application of these approaches is problematic and difficult due to their complexity, as identified by Dibb and Simkin (1997).

According to Dibb and Simkin (1997), Cox and Brittain (2004), Lantos (2011) and McDonald and Dunbar (2012), market segmentation can be constructed according to different aspects related to consumer or product characteristics. Some of these variables are illustrated in Rudani (2009) as shown in his chart below.

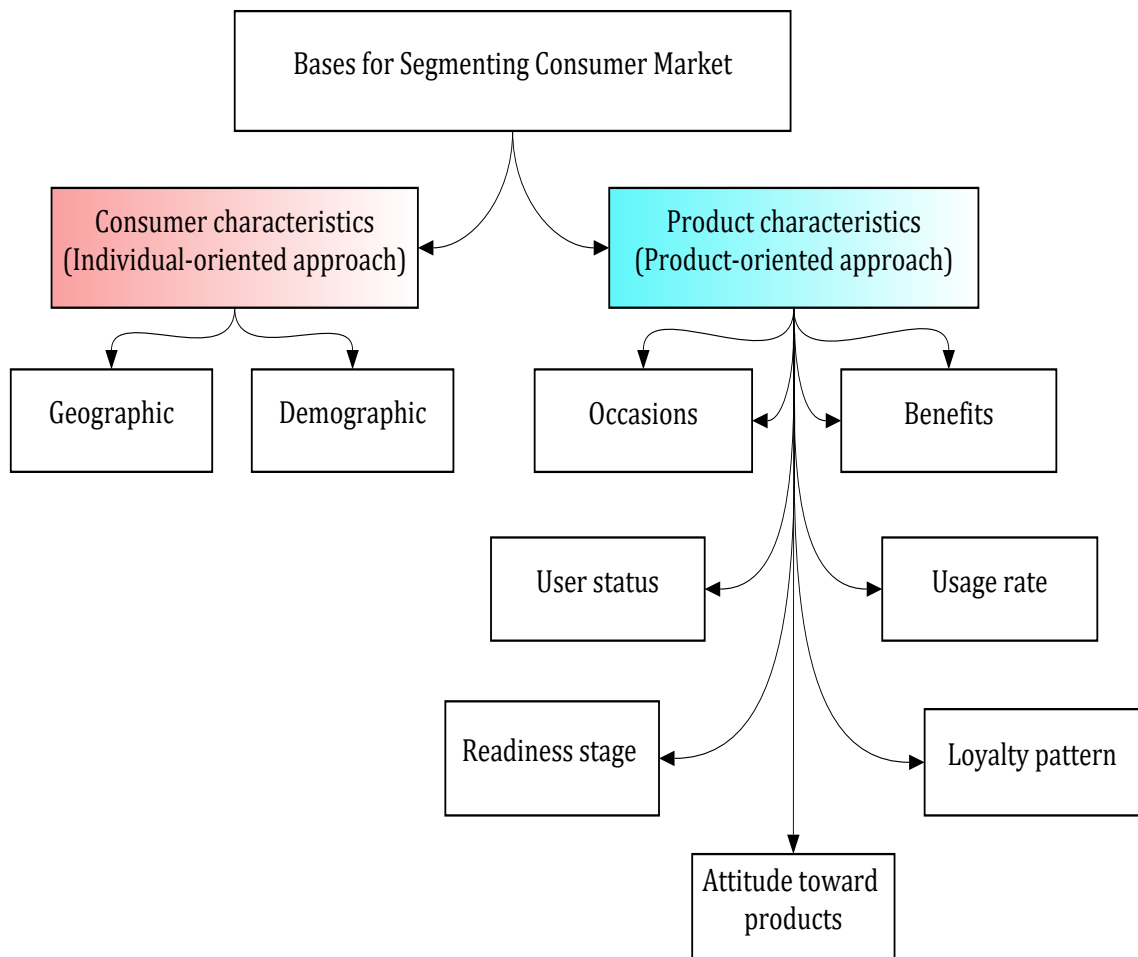


Figure 3.7: Bases for consumer market segmentation (Rudani, 2009).

The **consumer-oriented base** is associated with consumer characteristics such as the following:

- **Geographic Base** considers the identity of the place in which the consumer resides, such as urban or rural area and its regional location such as north or west.
- **Demographic Base** includes factors such as income, education, occupation, age and gender that have been discussed in the previous section.

Behavioural (product-oriented approach) can also be described as the consumer's response. This aspect includes:

- **Occasions** or festivals that create demand for particular products, such as weddings and birthdays. Therefore, this factor indicates products that are purchased and consumed occasionally.
- **Benefits** that are usually sought by the consumers from the purchased product are also considered when segmenting a market. These benefits include tangible and intangible qualities such as durability, performance or status.
- **User Status** explains the level of consumer involvement in a product/brand name, for example non-user, ex-user, potential user, occasional user or regular user.
- **Usage Rate** light, medium or heavy users. Light users are often high in number but low in the quantities they purchase while heavy users are the opposite.
- **Loyalty Pattern** divides consumers according to the degree of loyalty to a particular brand. Consumers can be classified into four main categories: hard loyal to only one brand, soft loyal to a limited number of brands, shifting loyal who shift from one brand to another, and brand switcher who have no loyalty to a specific brand and switch from one brand to another seeking variety.
- **Consumer Readiness Stage** classifies consumers according to their response to marketing elements such as price and promotion into unaware, informed, interested, desirous and intending to purchase.
- **Attitude towards Product** reflects the consumer's favouring or disfavouring of a product. In this vein, consumers can be grouped into enthusiastic, positive, natural, negative and hostile.

The approach of this model that focuses on both the consumer's characteristics and the product's characteristics can be applied to establish Saudi fashion market segmentation in the next stage of this research. However, some aspects need to be adapted in order to fit in the Saudi sociocultural context.

3.8.1 E-commerce as a Sector of the Fashion Market

Kotler and Keller (2016) define the market as “...a physical place where buyers and sellers gathered to buy and sell goods” (p. 29). They also identify a new movement in the marketplace that emerged as a result of globalised marketing and the use of advanced technology. This includes the transformation of the common concept of the market as a physical place for shopping. Kotler and Keller (2016: 38) state that new consumers can utilise the internet and commercial websites as a powerful source of product information. Consumers are now also able to communicate and purchase items on the move due to the numerous online shopping apps. Furthermore, the introduced social media channels allow consumers to share their opinions and express different levels of brand loyalty. Therefore, utilising technology in the market of different industries resulted in the phenomena of electronic commerce, social commerce and online shopping.

According to Turban et al. (2002), online shopping was first introduced as an electronic commercial application in the early 1990s. Its introduction has provided companies with a modern way of reaching consumers around the world. Moreover, it is considered as a competitive weapon for companies as its adoption in the business world was a necessity rather than an option (Feinberg and Kadam, 2002). An increasing number of different companies started to launch online shopping websites in order to maximise their benefits by communicating and serving the largest possible number of consumers. Rahman and Mahfouz (2018) state that the phenomenon of online fashion commerce is increasing globally.

Due to this fact, some scholars have studied this phenomenon within the Saudi context. For example, Al-Mousa and Brosdahl (2014) adopted a comparative approach to investigate the differences between online shopping in Saudi Arabia and the United States. The results show that only 16% of Saudi consumers compared to 68% of US consumers purchased apparel items online. This result was linked to the high level of perceived risk avoidance as a cultural factor that characterises Saudi Arabia, as proposed by Hofstede (1991). The issue of perceived risk was also

discussed by Shaikh et al. (2017) when investigating the acceptance of social commerce in Saudi Arabia. However, this risk is referred to as a generic feature that is perceived to define the cultural context of the society. Furthermore, it was inferred that there is a number of reasons behind the low involvement in e-commerce. Some of these reasons are sociocultural and relate to the conservative identity of Saudi society (Sait et al., 2004). Sait et al., suggest that there is a lack of internet access by Saudi females, and this issue needs to be addressed.

Another study by Khalil (2014) confirms that Saudis have a positive attitude towards online shopping. The study shows that 48% of Saudi consumers consider online shopping as a convenient shopping method that allows them to choose from unlimited brand names from around the world, saving time and involving less effort than physical in-store shopping. Also, Khalil (2014) argues that trust and security are the main factors to be considered by consumers when shopping online. This involves the level of safety and privacy when using credit cards and providing personal information to process an online purchasing order. However, the majority of the research respondents showed a high level of trust in online shopping.

Although these studies covered the topic of online fashion purchasing in Saudi Arabia in a considerable level of detail, the concept of associated risk and uncertainty avoidance was not clearly defined. In other words, the studies did not explain the dynamics of these factors nor did they attribute them as real experience or conceptualised attitude.

The regulations of e-commerce in Saudi Arabia were first introduced in 2008 and established the anti-cyber-crime law of punishments for fraudsters (Al-Ghamdi et al., 2011). In 2015, these regulations were developed further by the Saudi Arabian Communication and Information Technology Commission (CICT) in order to protect the seller and the buyer. This includes the security of the consumer's data and the accuracy of the displayed business information.³⁵ However, to date, these

³⁵ CICT Report (2015) The world fact book: Saudi Arabia. Retrieved 12 August, 2016, from <https://www.cia.gov/library/publications/the-world-factbook/geos/sa.html>

regulations have not been finalised (Helal, 2017). If a corporate website is to be established (any official business website) it has to be authorised by the CICT, who will register the website and record full information on the responsible parties for this website. If any customer makes a complaint about the website, the CICT can take up the complaints against the responsible parties. However, these regulations do not apply to Instagram and other social media sites. Much of the online trade in Saudi Arabia occurs through Instagram sites.

3.9 The Current Situation of the Clothing and Fashion Industry in Saudi Arabia

It has been identified that although Saudi Arabia has undergone stages of social development, the national developmental plans since 1970,³⁶ seem to fundamentally focus on the oil industry and show no attempt to move onto developing the fashion and clothing industry. Despite the fact that SABIC (Saudi Arabia Basic Industry Corporation) is a major industrial entity for polyester and synthetic fibres, these material resources have not been effectively utilised in order to develop the local fashion industry, as suggested by Al-Rajhi et al. (2012). In terms of micro-level industry, until May 2018, the registered local factories for fashion and clothing in the Saudi Industrial Property Authority³⁷ numbered only 20 in total; however, the governmental website does not identify which of them are for men's apparel and which are for women's or children's clothing. Moreover, no information about any of these factories is available, from any source, to indicate the size of the manufactory, value of production, the market share, product type or design. Furthermore, Al-Bogami (2015) highlights that the local fashion factories are threatened with closure due to the dominance of international imports and the inadequacy of local products. He also mentions another reason underlying the threat of closure of local fashion factories, which is the decision of the Saudi Development Fund to raise the criteria for financing local manufacturing projects.

³⁶ For full Saudi national development plans, visit: <https://www.stats.gov.sa/en/page/72>

³⁷ For the manufacturers' names, visit:

<https://www.modon.gov.sa/ar/IndustrialCities/Pages/factory.aspx?factoryId=6983>

In Saudi Arabia, the number of public or private fashion design institutions as an aspect of the broader industry context is also limited. Analysing Saudi university websites shows that some universities, such as King Abdul Aziz University, have an independent department for fashion design while in others, such as Tabouk University, fashion design is taught as a module included in the Home Economic Department. Hertog (2015) argues that, within the Saudi context, due to the lack of reliable industrial data, researchers may heavily rely on approximation when analysing a particular market. The analysis of the Saudi fashion industry revealed that there is a considerable lack of information on this market. In response to this limitation, further investigation of the local fashion and clothing industry is needed to identify the main points of weakness. Therefore, primary research was undertaken to address this issue. This will help to suggest possible solutions to enable this industry to influence the local fashion system more effectively.

3.10 An overview of the Saudi Clothing and Fashion Market

Since the 1970s, the Saudi fashion market has gained the attention of international fashion companies. The fact that it was one of the richest fashion markets in the world during the 1980s has interested authors such as Azzi (1980), who emphasises the role of the existing trade between the West and the Kingdom of Saudi Arabia in affecting Saudi women's dress. He explains how international brands such as Yves Saint Laurent and Christian Dior gained a notable position in the Saudi market when they first launched in Jeddah and Riyadh. The consignments of these branded clothes all sold out immediately after appearing in the market. Also, Alireza (1987) demonstrates the impact of Western designers on Saudi women's dress code as he explains how high-end fashion brands are used by Saudi women to enhance their appearance. Western labels and embroidered brand logos are combined with the wearing of the black *abaya* in public to establish a unique individual identity.

The fashion market in Saudi Arabia is now entirely dominated by foreign products and the market share of local production is significantly minimal (Assad, 2007). According to Al-Bogami (2015), the foreign investment in the clothing and fashion

market in Saudi Arabia accounted for more than 90% of the total clothing market, and an estimated total of 14 billion SAR (about \$4 billion). The presence of international brands in the Saudi market is increasing due to the increasing market demand for Western fashion. Despite recent socio-political issues, including Saudi participation in the ongoing Yemeni war and of course the reduction in salaries as a financial response to the international decrease in oil prices, women consumers' appetite for fashion shopping has hardly been affected (Euromonitor International, 2016).

Tuncalp and Yavas conducted a survey in 1986 to analyse the overall impression of Saudi consumers towards *Made in the USA* labelled items. By that time, the American marketing strategy was based on exporting clothes that are produced from colourful lightweight materials with high-quality finishing techniques. This strategy apparently reflects the American desire for ensuring a position in the new emerging market rather than planning a long-term merchandising strategy. The study showed evidence of a positive impression towards American-made products. However, Saudi consumers felt that American fashions lack prestige. In addition, the study mentions that Saudis found American products overpriced and that they did not really meet their needs.

A similar study was conducted by Katz (1986), and showed a notable price dissatisfaction towards American products that existed in the market. However, Saudi consumers in this study perceived American goods as status symbols, which contradicts the view of Tuncalp and Yavas (1986). This study also indicated that Saudi consumers are more concerned about price when making buying decisions; therefore, there is limited brand loyalty. Both Tuncalp and Yavas (1986) and Katz (1986) call for further investigation to define the Saudi fashion market segmentation under the influence of the local culture.

Another research study was undertaken in the late 1980s by Rabolt and Forney (1989) to investigate the Saudi women's fashion market. The primary goal of the study was to determine the potential market for American products in Saudi Arabia.

The study examined the role of independent demographic variables such as age, level of education, travelling, socioeconomic status, work, marital status as well as dependent variables including local norms, source of information and acquisition source on the consumption of Western fashion among Saudi women.

Rabolt and Forney (1989) indicate the advantage of understanding the consumption patterns of Saudi women in terms of the unique traditional cultural context that suggests strong adherence to local norms in terms of women's appearance and a strong economic ability to purchase Western luxury fashion. This point contradicts Katz's (1986) point about Saudi consumers, who argues that higher prices can sometimes be a clear indication of a product's quality and signify the distinction of a particular luxury brand identity. Also, in the Saudi case, it is argued that the high disposable income allows people a space of freedom in choosing between varieties of fashion products (Rabolt and Forney, 1989). The study also highlighted that Saudis are reluctant to accept change, especially if it targets one of their local values. Rabolt and Forney (1989) argue that the notion of a distinction between public places, where normative cultural presentation of the feminine identity is dominant, and private places may indicate that a heightened significance is given to the clothes worn beneath the *abaya*. Therefore, they recommend further research to explore this phenomenon from a non-Western perspective. They also stress the need to establish a segmentation framework to define the Saudi fashion market in order to help foreign companies who are wishing to sell to this market.

Reviewing Rabolt and Forney's article signifies its value and usefulness as one of the most referenced studies in the limited literature about women's fashion consumption in Saudi Arabia. However, the study was conducted in the late 1980s and the situation has changed since then, including population growth (when the research was undertaken in 1989, the population of Saudi Arabia was only 8 million). In addition, this research targeted 60 Saudi women in a hospital located in the capital of Saudi Arabia, Riyadh. The choice of the data collection location might not serve the purpose of the research as most of the respondents would likely be limited to patients and workers in the health sector, and are not representative of

the average characteristics of consumers as a research sample. Also, due to the regional diversity of the Kingdom (Al-Dossary, 2012), generalising the research findings to define the context of Saudi women's fashion consumption might be problematic as the consumption may slightly or significantly differ from one region to another.

Another study by Busnaina (2014) aimed to investigate the implications of brand identity in the Saudi fashion market. The Saudi Arabian market was selected due to its position as the largest lucrative fashion market for global brands in the Middle East. Firstly, the study mentioned understanding the unique cultural context as a key challenge for international fashion brands when operating in the Saudi market, which includes the role of religion, norms, values and traditions. Busnaina (2014) states that:

“Penetrating the Arab market is not a paved road, as Arab consumers are becoming very demanding, primarily due to the explosion of fashion, so it is not easy to achieve consumer satisfaction in these markets.” (p. 3)

The study concentrated on two main points. The first one is how international brands, namely Burberry, GUSS, H&M and Levi's, face the marketing dilemma of whether or not to adapt a particular brand identity to satisfy the Saudi fashion market. The study argues that the adoption of the marketing philosophy of *‘Think global! ...Act local’* by Wills et al. (1991) is a successful international strategy; however, adapting the brand image to target a particular market may lead to a negative influence or even a deformation of the original brand image (p. 2). Busnaina (2014), through structured interviews with agents of the mentioned brands, demonstrates that these international brands have various levels of adaptation and standardisation of different marketing activities. For example, fashion products are likely to be standardised or slightly adapted due to the fact that Saudi society in recent years has shifted to a Westernised pattern of consumption behaviour (Assad, 2007). However, the fashion products available and fashion promotion is designed according to Islamic restrictions as it is a compulsory requirement to present

products according to these restrictions in the Saudi market. For example, any imported garments must not include indecent pictures or any political or religious emblems such as the Saudi royal symbol (two intersecting swords with a palm in the middle), Quranic texts, the holy mosques, idols that are a symbol for worship, the cross and the six-pointed Star of David (Al-Dabbagh, 2008). In addition, there are strict regulations for promoting a product to meet the Islamic requirements in the Saudi market (Luqmani et al., 1989). This includes the proscription of the use of women's bodies to advertise fashion and the obligation of shading the shown parts of a woman's body in black in local and international fashion magazines.

The second aspect of Busnaina's study involved investigating how Saudi consumers perceive the image of international fashion brands. Busnaina (2014) applied a questionnaire and targeted 45 consumers, 23 of whom were female. The study asserts that Saudi women's fashion consumption is influenced by the Islamic teachings (p. 6). Moreover, it suggests that Arab consumers have a positive attitude towards branded fashion, especially Burberry, because of its role in establishing a prestigious status. However, the research sample is inadequate to enable general conclusions to be drawn. The research signifies the importance of understanding the cultural context of Saudi Arabian society as a key marketing strategy. However, the research does not explicitly or implicitly provide any details about particular garment types that might be influenced by culture, or marketing strategies which could be implemented. In addition, it only examines the consumers' perspectives towards a number of brand names with a brief explanation that does not indicate the product type, for example, clothes, shoes and accessories.

3.11 Summary of the Chapter

This chapter analyses the role of cultural identity in constructing ideologies and interpretations about fashion and dress code through the discussion of the historiography of the Islamic identity of the females' dress within the Saudi society.

Also, this chapter critically reviews the model of consumer behaviour established by Engel, Blackwell and Miniard in 1968 and arguments from marketing discipline relating to the influential factors that are involved in each stage of the consumption. As argued by Erasmus et al. (2001) this model will be adapted and will be considered in relation to fashion consumption behaviour in Saudi Arabia. Due to the indicated lack of information related to the Saudi fashion consumers, the market, its segmentations and operational system, Chapter 4 will discuss the research strategies employed to gather the relevant data.

Chapter 4: Research Methodology

4.1 Introduction

This chapter identifies, explains and discusses the methodology and research steps of the research project. The chapter includes an outline of the research design and explains the research philosophy that justifies the decisions taken about the adopted methodology. It also discusses the research strategies that have been applied to achieve the research goals. A detailed description of the process of data collection and the type of information obtained is also presented. Moreover, this chapter illustrates the empirical data analysis methods that have been used to interpret the research findings. Some obstacles and challenges that were faced through different stages of this research are also detailed.

4.2 Research Methodology

Burns (1997) defines research as a systematic investigation that requires a planned journey of data collection, analysis and interpretation in order to make sense of the research findings. The main purpose of this journey is to investigate, describe, explain, comprehend, predict and/or control social phenomena or human behaviour within different contexts (Mertens, 2005).

Grant and Osanloo (2014) argue that the theoretical framework is one of the key aspects of the research process as they stated that:

“The theoretical framework is the foundation from which all knowledge is constructed (metaphorically and literally) for a research study. It serves as the structure and support for the rationale for the study, the problem statement, the purpose, the significance, and the research questions. The theoretical framework provides a grounding base, or an anchor, for the literature review, and most importantly, the methods and analysis.” (p. 12)

The decision about the way in which the research framework is designed highlights the individual understanding about the nature of the established knowledge related to the research topic (Lysaght, 2011). The theoretical framework includes the structure that defines the philosophical, analytical and methodological approaches of the research (Eisenhart, 1991). Developing the research framework starts with a statement of the research problem that signifies the need for further investigation that might address this problem. Based on the research problem, the purpose of the research will then be defined and its significance will be highlighted. Yin (2012) argues that conducting a research project essentially requires development of the research question(s) based on the understanding of the research problem in order to provide substantial clues about the elements to be assessed.

There is an established link between the theoretical framework and the literature. Reviewing the literature leads to identifying any gaps in the field of study which in turn provides an opportunity to contribute to knowledge related to this field (Hart, 1998). Grant and Osanloo (2014) suggested that the researcher may criticise and adapt an existing theory as a guide that serves the research requirements. Theories can be applied to support the interpretation of the research data and to support the development of recommendations.

4.3 Theoretical Framework

Using a visualised presentation of the research aspects can effectively explain the organisation of the research concepts. Figure 4.1 illustrates the main aspects of the research framework that has been developed, in the light of the argument by Grant and Osanloo (2014) in relation to the process of designing a research theoretical framework.

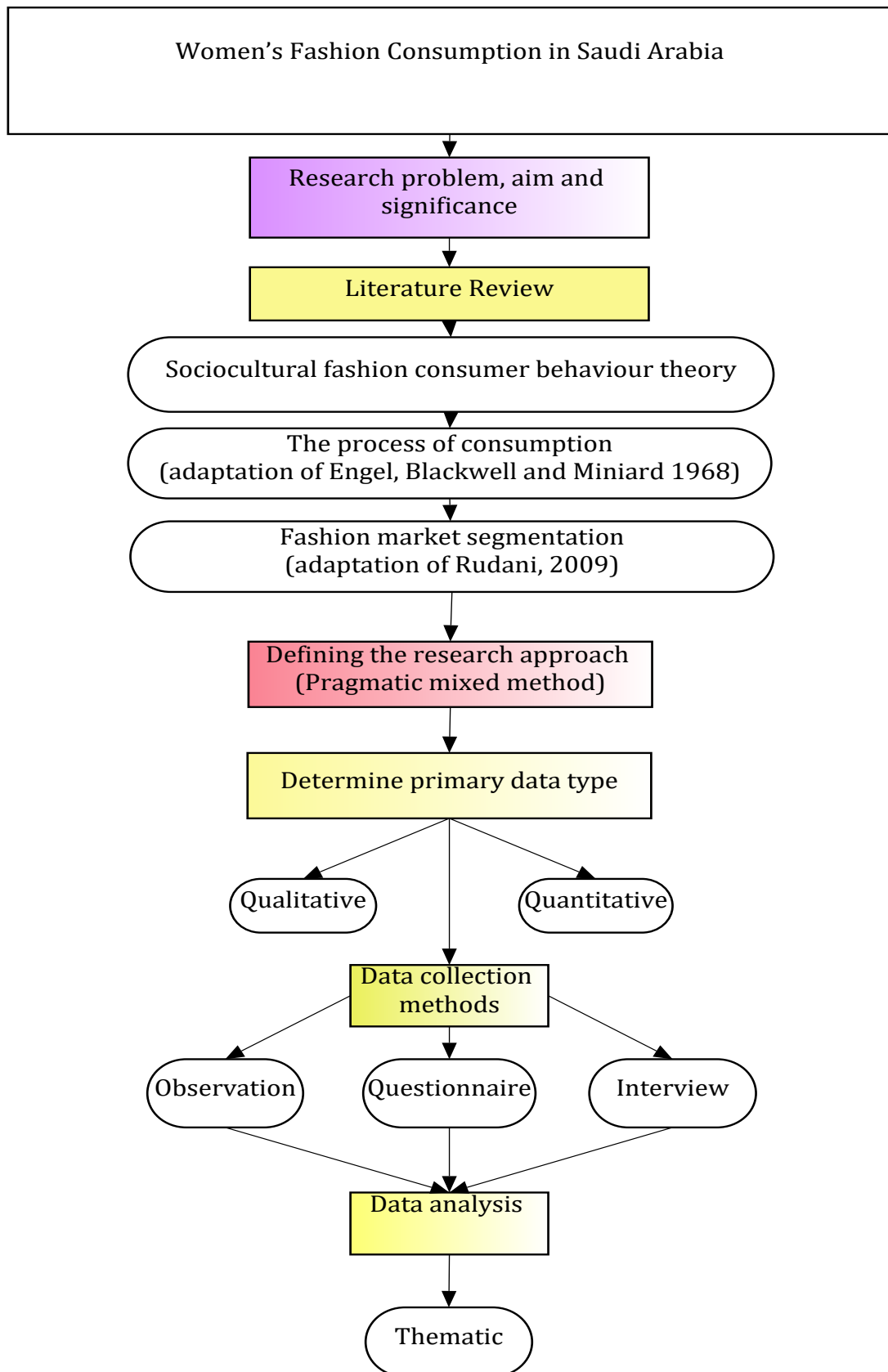


Figure 4.1: Research theoretical framework.

This research applies the primary stages of the buyer behaviour model by Engel, Blackwell and Miniard (1968) in order to explain the main factors that influence each stage of fashion consumption in Saudi Arabia. The socio-psychological approach applied to this study focuses on analysing the role of others including normative, comparative and indirect reference groups in influencing the establishment of the identity through fashion behaviour in Saudi Arabia. The key factors that influence each stage of the consumption are refined and categorised in relation to the Saudi cultural context, considering the Fishbien and Ajzen (1975) approach. The aim of this integration is to bring out the significance of the dominant sociocultural values and particularities of the society to establish the essential knowledge about fashion and clothing consumption behaviour in Saudi Arabia. Studying women's fashion and clothing consumption in Saudi society cannot result in useful conclusions if a narrowly defined approach is applied. Instead, the research should be undertaken by applying an approach that investigates the dynamics that constitute the behavioural patterns of fashion consumption.

Fashion theories suggest that the consumption of clothing and fashion is a system of value exchange (Kaiser, 1985). These values can be individual, social and/or cultural. In order to examine the system of value exchange, it is necessary to define the process of consumption to develop a clear explanation of the social behaviour associated with different fashions. Fashion is understood to be a language/ code used to communicate values and meanings (Crane, 2000).

The main issues that have emerged from the review of the literature related to Saudi fashion and clothing consumption can be summarised in the following points. These allow key factors to be defined.

Firstly, the *abaya* has been covered as an object of the Saudi material culture that was influenced by certain levels of the socioeconomic transformation in the 1970s and fundamentalist ideology in the 1990s (Al-Kheder, 2011). DeCoursey (2017) has also researched attitudes among young women (undergraduates) towards the *abaya* as an article of fashion. Although these are scholarly publications about Saudi

women's *abaya*, the attributed qualities, definitions and inferences of the *abaya* might vary in different demographic groups, which deserves investigation. In addition, different styles of the *abaya* (as a product) may be associated with different subsidiary functions in addition to concealment and Islamic modesty. The current study examines different classifications of the *abaya* in different regions across the Kingdom in order to identify the dominant pattern in each of these regions and the reasons behind it.

Furthermore, applying an Islamic approach about modesty as a principle of Muslim women's dress suggests two contexts of definitions that will be considered (see Sections 2.5 and 3.3). The first emphasises the practice of covering while the other one signifies moderation as an opposing ideology to materialism and extravagance. The study of Saudi women's fashion consumption would be comprehensive if the way in which they infer and communicate modesty in women-only places was also explored (this is an aspect of the current research).

Another identified issue is the dominance of Western fashion that, to some extent, replaced local dress (Rabolt and Forney, 1989; Yamani, 1997, 2004; Long, 2005; Al-Dabbagh 2006; Fatany, 2007). Although this statement is used to define the identity of fashion that is dominant among Saudi women, Tawfiq and Ogle (2013) argue that the traditional dress is popular and communicates the value of modesty when establishing the self-identity in female-only environments (see Section 2.3.3). It can be argued that due to the diversity of regions in Saudi Arabia, fashion and clothing consumption patterns may (significantly or slightly) vary according to the direct or indirect influence of regional identity. This includes the availability of fashion items and the collective regional norms that may influence the adoption of particular styles. This fact was not considered by the previous studies as they were usually based on observation or empirical data from a limited number of women from cosmopolitan cities such as Riyadh or Jeddah. Therefore, both views need to be examined by exploring the Saudi women's perspectives more broadly in terms of this pattern of consumption. Therefore, gathering data from women belonging to

different regions should positively influence the research results. The aim is to interpret the intrinsic and extrinsic qualities provided by Western and local dress.

The definition and classification of social settings has barely been touched upon before. This is crucially needed to link the characteristics of the social system that operates in each of them with the characteristics of clothing in each of these social systems.

The limited number of studies focusing on women's fashion consumption in Saudi Arabia did not consider fashion consumption as a process which consists of a number of stages influenced by various individual and sociocultural factors. This includes, for example, aspects influencing pre and post-purchasing behaviour such as social media, the shopping environments, preferred way of shopping, shopping frequencies and final disposal of clothing.

In addition, there is a lack of knowledge or analysis of the structure of the Saudi fashion and clothing market to explain the particularities of each segment. This study aims to provide a clear definition of the market structure and the fashion provided within each segment. Rudani's (2009) approach that combines integrates product's characteristics and consumer's characteristics is adapted to establish the segmentation of the Saudi Women's fashion market.

4.4 Research Paradigms

Based on the previous elements, the researcher then starts to apply particular paradigm(s) to the specific social phenomenon at the core of the study (Baran and Jones, 2016) to pave the way to answering the research questions. The choice of which paradigm to employ is always followed by decisions about the relevant research methods and supportive instruments/tools to use (Saunders et al., 2015).

A research paradigm can be described as a whole system of thinking (Neuman, 2011) that applies a set of traditions, approaches and methods (Babbie, 2011). It

also includes the researcher's motivation and expectations (Mackenzie and Knipe, 2006). Saunders et al. (2015) state that:

"The term research philosophy refers to a system of beliefs and assumptions about the development of knowledge. Although this sounds rather profound, it is precisely what you are doing when embarking on research: developing knowledge in a particular field. The knowledge development you are embarking upon may not be as dramatic as a new theory of human motivation, but even answering a specific problem in a particular organisation you are, nonetheless, developing new knowledge." (p. 124)

Therefore, the research paradigm is the philosophical frame that reflects the researcher's own beliefs regarding the way in which the research should be conducted in order to develop new knowledge. Also, it reflects the researcher's epistemological understanding of a particular phenomenon (Feilzer, 2010).

The debate about research philosophy is usually undertaken by contrasting the Positivist with the Interpretivist paradigm (Travers, 2001). Each paradigm has a different perspective towards viewing the reality of a social phenomenon.

Positivists aim to objectively discover observable and measurable social phenomenon or what is happening in real life by applying a hypothetico-deductive approach (Clark et al., 2000; Crowther and Lancaster, 2008; Greener, 2011). This philosophy requires quantifiable data to be collected through empirical observation, survey and/or experimentation to produce factual knowledge (Creswell and Creswell, 2018) that promises accuracy and unambiguity (Saunders et al., 2015). In Positivist research, one of the existing theories or laws that are believed to be governing the world is tested against a number of hypotheses (Crotty, 1998; Creswell and Creswell, 2018). The adopted deductive strategy in Positivist research uses the obtained data to verify or refute the theory that is under examination (Crotty, 1998; Saunders et al., 2015) according to statistical probability. In addition, the Positivist paradigm emphasises causality as it determines the influence of causes

on outcomes (Ramanathan, 2009). Easterby-Smith et al. (2008) explain that in Positivist research, the researcher/observer is independent and is not considered to be a part of the research as a high level of independence of the data from the researcher's influence is required. Dudovskiy (2018) argues that a Positivist approach is usually descriptive and may lack in-depth analysis: the provision of statistical data does not provide an understanding of motivations, meanings and the cultural significance of behaviour.

On the other hand, the Interpretive paradigm was established as a critique of the Positivist philosophy (Saunders et al., 2015). This paradigm emphasises the concept of subjectivity, personal experience and individual circumstances when studying a human behaviour which is believed to be purposive (Magoon, 1977; Bruner, 1990; Wills, 2007). The main argument of this philosophy is that humans are different from physical phenomenon due to the fact that they create meanings (Crotty, 1998). Therefore, this paradigm attempts to comprehend reality based on the view that knowledge cannot be neutral (Denzin and Lincoln, 1998), as the interpretation of meanings varies depending on the surrounding external factors (Krauss, 2005). Johnson and Onwuegbuzie (2004) argue that applying this approach to research has its significance in digging deeper to explore different motivations for a specific individual or social behaviour. The reason for this is that in an Interpretive study, the researcher accesses the participants' views, which subjectively construct different meanings based on individual experience and cognition (Saunders et al., 2015). Therefore, the researcher negotiates these subjective views in a social, historical or cultural context as these meanings are not imprinted on people: they result from interaction with others (Creswell and Creswell, 2018). In this paradigm, reality is constructed in a sociocultural context (Willis, 2007; Thanh and Thanh, 2015). Thus, as argued by Wills (2007), the Interpretivist paradigm is more inclusive and provides a comprehensive understanding of the situation (Morehouse, 2011). This is due to the fact that it generates knowledge that combines different viewpoints from different individuals: a "*series of individual eyes*" (McQueen, 2002:16). The Interpretive paradigm is usually associated with an inductive exploratory approach that integrates the identified meanings and patterns in order to develop a theory to

explain the phenomenon under investigation (Holloway, 1997; Haig, 2008; Saunders et al., 2015). However, Atieno (2009) highlighted the limitation of this paradigm:

“The main disadvantage of qualitative approaches to corpus analysis is that their findings cannot be extended to wider populations with the same degree of certainty that quantitative analyses can. This is because the findings of the research are not tested to discover whether they are statistically significant or due to chance.” (p. 17)

In order to bridge the vehement polarisation between Positivists and Interpretivists, Pragmatism emerged as an alternative philosophy for research (Miller, 2005; Onwuegbuzie and Leech, 2005; Morgan, 2007; Creswell and Plano Clark, 2011). Kuhn (1962) and Morgan (2007) highlight that Pragmatic research applies what works reasonably well, in terms of strategies and methods, to solve the research problem. Therefore, it allows the researcher considerable freedom from the limitations and constraints caused by the dichotomy between the Interpretivist and Positivist paradigms (Robson, 1993). Pragmatists argue that research is usually multi-purpose and adopting a Pragmatic paradigm is an effective strategy that responds to the research requirements regarding the type of data to be obtained. Due to its pluralistic nature, the Pragmatic paradigm enables the research to be flexible in terms of the process and selection of research methods (Onwuegbuzie and Leech, 2005). Pragmatists call for a convergence of quantitative and qualitative methods by emphasising the fact that these approaches do not differ at an epistemological level (Hanson, 2008). Moreover, Strauss and Corbin (1990) note that the adoption of the Pragmatic paradigm can be used to understand factors that are hidden behind a phenomenon or a behavioural pattern when only a little is known about it. This allows the researcher to explain the research aspects by correlating different theories using both qualitative and quantitative data as supportive evidence (Dubois and Gadde, 2002). Morgan (2014) states that

“Instead of concentrating on individuals as isolate sources of beliefs, pragmatists examine shared beliefs.” (p. 28)

The Pragmatic approach provides an insight into communication and determines the shared manner of making meanings of things (Tashakkori and Teddlie, 1998), as it focuses on producing the knowledge that provides explanations and understanding of a particular subject. Therefore, it enables the construction of a perspective that balances subjectivity and objectivity (Morgan, 2007). Pragmatic research combines the methodology of both Interpretivists' and Positivists' in a single investigation (Onwuegbuzie and Leech, 2005). The aim is to combine the data obtained by qualitative and quantitative methods. An in-depth exploration of the resulting explanatory descriptive dataset can result in gaining an understanding of the meanings from the perspective of the participants. Therefore, Pragmatic research utilises the data from one method to validate the data from the other method to ensure a valid representativeness.

Applying an abductive strategy is a common research practice associated with the selection of a Pragmatic approach. Richardson and Kramer (2006) and Haig (2008) argue that producing new knowledge requires factual premises that should be associated with logical explanatory inference in a cohesive process called abduction. Blaikie (2009) explained that in abductive research, the existing theories and the collected data are intertwined in a developmental creative process:

“Such research begins by describing these activities and meanings and then deriving from them categories and concepts that can form the basis of an understanding of the problem at hand...[emphasis added] the motives and intentions, that people use in their everyday lives, and which direct their behaviour.” (p. 89)

It applies the role played by social actors in order to conceptually construct the reality of a sociocultural pattern of individuals' lives (Chak, 2014). This requires gaining access to these social actors' world to investigate motives and reasons underlying several patterns of social behaviour. Adopting the abductive research strategy enables the researcher to answer 'what' 'where' and 'why' questions by moving back and forth between the inductive and deductive approaches (Shannon-

Baker, 2016). In abductively undertaken research, the indication of stability and recurrence of factual data prompts the movement to qualitative data for effective integration of the research findings and vice versa.

4.5 Quantitative and Qualitative Research Methods

McGregor and Murnane (2010) criticise the unfortunate practice of researchers interchanging the use of the terms *methodology* and *methods* as they refer to different aspects. They argue that while research methods are usually defined in terms of procedures and practices, the research methodology is the wider approach or the way of thinking that justifies the use of the chosen methods. Methodology is defined by Crotty (1998: 3) as “*the strategy, plan of action, process or design*”. Methodology can also refer to the system of collecting, obtaining, organising and analysing information (Polit and Hungler, 2004). In other words, the research methodology includes the full domain or map of the research while the research methods comprise the set of steps undertaken to move between different points on this map (Jonker and Pennink, 2010).

The research methodology varies according to the nature of the research principles and their requirements, which entail a practical application of data collection methods (Sarantakos, 1998). The choice of research methodology is usually made according to the nature of the research requirements, including the hypothesis, research questions or objectives, as each method fulfils a particular or multiple goals. Also, the research problem precedes the selection of a methodological approach (Dervin and Clark, 1987).

A research study can be quantitative or qualitative (Bryman, 2012). Quantitative research is based on defining variables and joining them together to formulate a hypothesis as a starting point for research. Therefore, it views data through a narrow specified lens (Brannen, 2003; Creswell and Creswell, 2018). It applies quantitative methods such as surveys and experiments to generate numerical data that is analysed via a Positivist lens (Hayes et al., 2013). Hopefl (1997) argues that

in quantitative research the researcher attempts to determine, predict and generalise the research findings. A quantitative approach is valuable when researchers aim to illustrate the regularities of a particular phenomenon (Bryman, 2012).

By contrast, qualitative research begins with a general definition of a concept that can be redefined and constructed through the research process (Crang, 2003). De Vos (2011) emphasises that qualitative research is often dialectic and should be supported by an Interpretive approach in order to investigate the participants' perspectives through interaction with the researcher. Qualitative research focuses on comprehending the way in which individuals construct their perspectives about meanings and objects in order to gain insights into the reality of the social phenomenon or individual behaviour (Holloway, 1997; Bryman, 2012).

Silverman (2006) emphasises the crucial role of the qualitative approach when studying an individual's values, attitudes and personal motivations. Narrative textual data is elicited that might not be possible to obtain or observe through a close-ended questionnaire.³⁸ Woodward (2006) notes that exploring social dimensions such as consumption patterns via face-to-face questions may cause anxieties that need affirmative explanations. Therefore, it is very likely that different complex social interactions will be experienced during research. This can be clearly seen when a participant tries to justify his or her behaviour, choices and/or opinions to suit social patterns that are culturally defined and locally adopted. Thus, it is worth providing participants with a full opportunity to express themselves in their own right. In addition, this requires the researcher to be non-judgemental and honest.

However, it is argued that both the qualitative and quantitative research approaches have limitations. For instance, when qualitatively studying the behaviour of a small

³⁸ However, it was evident from the researcher's own experience through this research that including follow-up open-ended questions such as 'why' or comments helped in gathering qualitative data through the face-to-face consumer questionnaire which will be discussed in the next section.

number of individuals, generalising the research findings may not seem logical (Creswell and Plano Clark, 2011). By contrast, when quantitatively analysing a social phenomenon found among a group of people, the understanding of one individual's behaviour will be diminished and limited. Therefore, mixed-method research was introduced to address the limitations of one method, which can be supported and offset by the strengths of another (Johnson and Onwuegbuzie, 2004).

Tashakkori and Teddlie (1998) argue that mixed-method research is the third methodological movement that emerged after the quantitative and the qualitative approaches. Mixed-method research can be defined in numerous ways; there has been a continuous development of various definitions in recent decades based on integrating different elements of research methods, design, process and philosophy (Creswell and Plano Clark, 2011). One of the initial definitions was put forward by Greene et al. (1989), who are authors in the field of evaluation. They defined mixed-methods research studies as *“those that include at least one quantitative method (designed to collect numbers) and one qualitative method (designed to collect words), where neither type of method is inherently linked to any particular inquiry paradigm”* (p. 256).

In a similar manner, Tashakkori and Teddlie (1998) defined mixed-method research as *“the combination of both qualitative and quantitative elements in the research methodology”* (p. ix). Also, Yvonne (2010) stated that *“Mixed method research has been hailed as a response to the long-lasting, circular, and remarkably unproductive debates discussing the advantages and disadvantages of quantitative versus qualitative research as a result of the paradigm wars”* (p. 6).

Therefore, mixed-method research requires integrating quantitative and qualitative methods within a single research study (Creswell and Plano Clark, 2011). This integration provides effective answers to the research question(s) in a more in-depth manner (Zhang and Creswell, 2013). In addition, the incorporation of a mixture of qualitative and quantitative approaches enables a deeper understanding to be obtained than would be possible using either approach in isolation (Creswell

and Plano Clark, 2011). For Reichardt and Cook (1979), the combination of quantitative and qualitative approaches seems to respond better to the requirements of research. The nature of the research itself and the expected outcomes play a significant role in determining the paradigm, type of data and the appropriate analytical techniques to be adopted (Denscombe, 2010). Terrell (2012) and Creswell and Plano Clark (2011) suggest that no complex issue can be exclusively studied using a single specific method. Also, Murshed and Zhang (2016) argue that investigating the diverse societal issues that combine to affect behaviour in a marketplace requires integrating both qualitative and quantitative approaches.

4.6 Research Design: Methodological Framework

Torraco (1997) argues that the application of theoretical framework is not limited to the statement of the research problem and significance, it also guides the choice of the research methods.

As the current study is one of the initial studies in the field of Saudi women's fashion consumption, the establishment of valid knowledge requires applying a paradigm that effectively responds to the research questions and solves the research problem. The process of defining, explaining and understanding the patterns of clothing and fashion consumption in Saudi Arabia essentially demands obtaining both empirical and qualitative data. Due to the complexity of the topic as well as the limitation of the available literature on this cultural context, applying a Pragmatic approach provides a level of flexibility in terms of mixing more than one of the research methods in order to obtain data that provides an in-depth understanding of fashion and clothing consumption in this cultural context. Therefore, this research adopts a mixed-method strategy that includes consumer questionnaires, interviews and observation to investigate the role of different social and cultural aspects (causes/motivations/inferences) in affecting fashion consumption and production in Saudi Arabia (effects/outcomes/behavioural patterns). This offers an opportunity to move between and integrate significant qualitative and quantitative data. This research does not aim to test any hypothesis or statistically measure variables in

order to validate or refute a particular theory. It is instead conducted in an abductive manner that enables the obtained qualitative and quantitative data to be integrated and related to existing theories to provide a picture of fashion consumption in contemporary Saudi society.

Blanche et al. (2006) suggest that to ensure that valid conclusions result from the undertaken research, the researcher should consider conducting a series of specific activities that can be defined as a *strategic framework*, or in other words, a research design. It is recommended that the research design should be presented with a detailed explanation of each element and stage of the research journey. In addition, Mackenzie and Knipe (2006) emphasise that the research design should be flexible so that it can adapt to any unexpected subtle or significant changes in the research direction. Blanche et al. (2006) argue that researchers should adhere to a logical and empirical planned process of data collection. In the current research, the researcher started collecting the key secondary research materials with a direct relation to Saudi women's fashion consumption, the market and industry as a form of background knowledge prior to the primary data collection. Talbot (1995) suggests that after the primary data has been collected and analysed, the researcher should then consider the existing knowledge in order to apply it to the research findings. Also, Polit and Hungler (2004) state that some researchers may conduct the literature review after the data collection phase, especially those who try to avoid being influenced by previous contributions in the same field of study. Although this argument has not been adopted as a strategy in the current research, recently published literature relating to the field of study was reviewed after the data collection.

The decision to administer a consumer questionnaire was made to obtain a solid grounding in factual data that indicates stability and recurrence which would then be validated by the qualitative data to identify the shared dialectical inferences of meanings and the dynamics of consumption across different regions of the Kingdom.

The questionnaire combined qualitative open-ended questions and quantitative close-ended questions, resulting in a large volume of qualitative information. This enabled a substantive integration of the obtained data to explain the patterns and values of fashion consumption in contemporary Saudi society.

In terms of defining the market, interviews were undertaken to examine how the Saudi fashion market is structured in order to respond to the consumer demand, as well as to validate the research outcomes. Observation was also undertaken to identify the characteristics of the market.

The knowledge produced by applying a mixed-methods approach (observation, interview and questionnaire) will have a positive impact in furthering the understanding of the sociocultural patterns of women's fashion consumption in Saudi Arabia. In addition, it will offer a clear picture of the operational system of the market by examining its ability to satisfy consumer demand. The following sections discuss the data collection process in more depth.

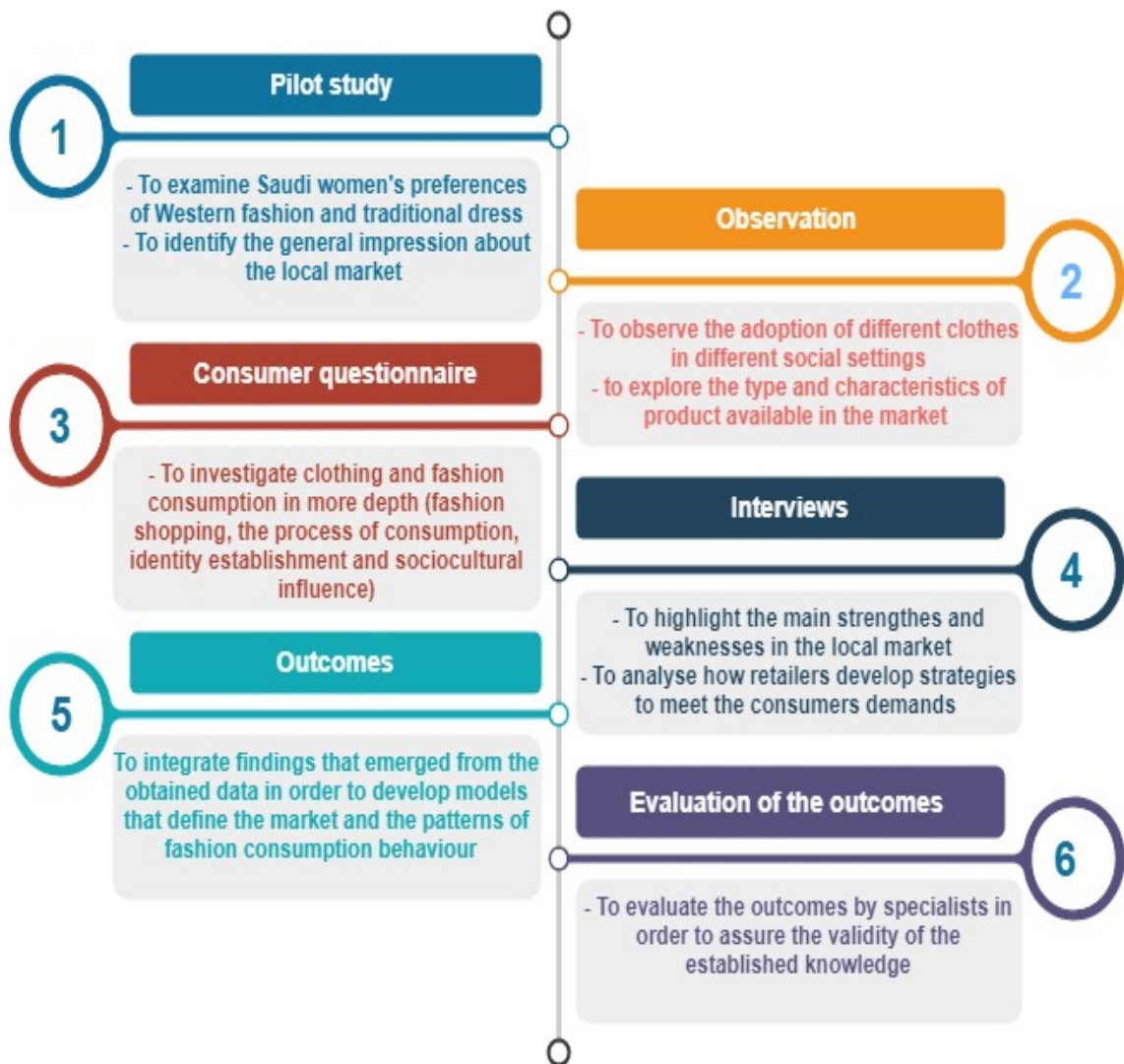


Figure 4.3: Research process.

4.6.1 Ethical Considerations

Research ethics constitute a strict moral obligation that has to be considered.

Walliman (2011) states that: *“There are two aspects of ethical issues in research:*

- *The individual values of the researcher relating to honesty and frankness and personal integrity.*
- *The researcher’s treatment of other people involved in the research, relating to informed consent, confidentiality, anonymity and courtesy.”* (p. 43)

The initial ethical consideration in the current research was to obtain ethical approval from the researcher's academic institution, De Montfort University, to protect both the participants' and also the researcher's rights. Official permission was obtained following the submission of a declaration of ethical issues. The second ethical consideration was ensuring that each participant gave his/her independent and absolute agreement to participate in this research by signing a consent form before any interview was conducted.

The third important ethical consideration was to determine the privacy of participants. Safeguarding privacy means that access to the participants' personal information is limited and secured by the researcher (De Vos, 2011). The fourth ethical aspect was to ensure confidentiality (Polit and Hungler, 2004) and anonymity (LoBiondo-Wood and Haber, 2002: 273). Hence, participants' perspectives are presented in this study anonymously, and their personal identity is not disclosed at all. All of the obtained information is used only for the purposes of the current research and will not be publicised or shared by others.

The final ethical consideration was ensuring the transparency and authenticity of secondary data. Therefore, each and every secondary piece of data discussed in this research is cited using the Harvard style of referencing. The researcher also endeavoured to ensure honesty, objectivity and carefulness when interpreting issues relating to Saudi female fashion consumers or the local market that arose through the research findings.

4.6.2 Pilot Study

"Do not take the risk. Pilot study first." (De Vaus, 1993: 54)

A pilot study can be defined as a smaller version of the main study that is conducted at an earlier stage of the research (Van Teijlingen and Hundley, 2001). Considering the pilot study as a starting point of the primary research has several advantages. One of these advantages is that it helps the researcher to test the feasibility and adequacy of a particular proposed research instrument. It highlights the deficiency

of a chosen research method in order to improve its effectiveness in achieving the research objectives (Thabane et al., 2010). In addition, it is an effective method for designing the research protocol because of its function in helping the researcher to recognise any potential problems and challenges that might be encountered during the next stage of the primary research. Another advantage is that gathering preliminary data via pilot research can reveal some unexpected aspects that are directly related to the research topic before embarking on the main primary research, which gives the researcher a wider overview of the subject.

Frankland and Bloor (1999) state that the role of the pilot study is to provide the researcher with a clear definition of the research focus. This in turn provides an opportunity to modify the research accordingly by discussing the primary outcomes of the pilot study (Hazzi and Maldaon, 2015). Baker (1994) suggests that the pilot study sample should generally consist of between 10% and 20% of the total research sample. The conducted pilot study for the current research consists of 60 female fashion consumers, which is about 10% of the total number of respondents in the next stage of the in-depth consumer questionnaire.

A short semi-structured questionnaire was administered in April 2014 to help to access some of the hidden facts about the market and fashion consumption. Women were interviewed in Al-Hijaz Shopping Mall in Jeddah and Al-Hokair Shopping Mall in Tabouk. Apart from age, other demographic aspects were not considered to be essential to control at this stage of the research. The 60 women were selected randomly following their verbal agreement to participate in this research. They also signed a consent form that indicates that the anonymity and privacy of their information would be protected. This pilot consumer questionnaire included four questions to be answered with yes or no supported by justifications (see Appendix 2).

The main focus of the first two questions was to determine whether or not Western fashion has a dominant role compared to traditional Saudi dress. The questions also aimed to identify any significant issues that influence the Islamic Saudi dress code

in general. The other two questions investigated the level of preference for Western well-known brand names as well as the consumers' impressions of the local clothing products. Surprisingly, consumers expressed great interest in participating in this research.

The questionnaire was administered in the form of an informal friendly approach with women during their shopping activity, giving them the freedom to express their perceptions of the local fashion market, including both negative and positive aspects, from the consumer perspective. Some of these questionnaires were administered straight away inside the shopping mall without the data collection having been arranged in advance while others were arranged ahead of the interview time. The participants are coded from **CA1** to **CA60** (see Appendix: 3).

The pilot study revealed the primary facts about women's fashion consumption in Saudi Arabia (see Section 4.3). Conducting the pilot study was useful as it highlighted different themes to be focal points for the main consumer questionnaire.

4.6.3 In-Depth Consumer Questionnaire

Bulmer (2004) argues that the questionnaire is one of the well-established research instruments that should be applied when gathering data about the characteristics of a particular behaviour or attitude. In this vein, applying a questionnaire when studying a sociocultural phenomenon helps the researcher to investigate the participants' beliefs and considerations that encourage or discourage them to adopt a particular pattern of behaviour. Therefore, in the current research, the consumer questionnaire was designed to explore and identify the system that guides the construction of identity and meaning through clothing and fashion consumption in Saudi Arabia.

The literature on research methodology reveals a debate about the use of both open-ended and close-ended questions when conducting research. Open-ended questions can sometimes be easy to develop and offer the participant a sense of freedom to

express his or her views independently to a non-judgemental interviewer (Foddy, 1993). However, researchers may face difficulties and struggle when analysing open-ended questions. On the other hand, close-ended questions might be more challenging to construct as they limit the participant's response by providing a number of alternatives to select from, but these questions are easier to analyse (Sarantakos, 2005).

Many researchers have suggested that integrating open-ended and close-ended questions strengthens the quality of the research (Haynes et al., 2007). Close-ended questions, including dichotomous and multiple options, provide accurate and precise factual data that can then be explained and justified according to the participant's own perspective when responding to open-ended questions. This focus on the participants' perspective helps to reduce the risk of the researcher's subjectivity influencing the establishment of new knowledge, which must be avoided to maximise the credibility of the research (Nonaka and Toyama, 2005), especially when investigating values and contexts. For this reason and also based on Bryman's (2012) recommendations, the questionnaire in this study was designed to gather qualitative and quantitative data, by using close-ended and open-ended questions. This offered a good opportunity for Saudi female consumers to express their thoughts and experiences in terms of fashion and clothing consumption more thoroughly. The purpose of this is to access the consumers' subjective interpretations of meanings and to indicate the significance of any dominant attitude or behaviour based on the frequencies of responses.

The required data were gathered through a face-to-face questionnaire. The decision about the mode of delivery of the questionnaire was based on many factors. Firstly, a face-to-face questionnaire was used to ensure the active engagement of the participant with the questions through an informal friendly conversation. This can be more effective than online surveys, where a lack of verbal communication reduces the clarity and effectiveness of inference and thus the reliability of the research. As McGurik and O'Neill (2005) state, face-to-face questionnaires help the researcher to ensure that participants understand each question accurately, which

in turn has a positive influence on the quality and clarity of the participants' responses to be validated. In addition, a face-to-face questionnaire facilitates following up the responses in the open-ended questions, to explain responses that have been answered with reservations or encourage a greater depth of response.

4.5.3.1 The Design of the Consumer Questionnaire

According to Sarantakos (2005), an effective questionnaire design should be sequenced in a logical manner to ensure a smooth and flexible transition between each section of the questionnaire. This avoids any confusion when moving from one question to another (see Appendix 4). Therefore, this questionnaire was designed along a number of axes, as follows:

The first axis requires gathering demographic information about the participant in order to establish a consumer profile. Demographic information helps to identify any possible link between a pattern of fashion consumption and a demographic factor.

The second axis includes questions that investigate the shared typical consumer shopping behaviour. This includes shopping frequency, time, places, average budget and shopping companions. The aim of this section of the questionnaire is to identify any distinctive behaviour that might have a significant influence on the market.

The third axis investigates the process of fashion consumption behaviour in Saudi Arabia and the key player in each stage of this process. This includes the role of factors involved in constructing the purchasing intention, inspirational sources, the influential intrinsic and extrinsic factors when comparing different items and the evaluation of the experience.

The fourth axis identifies the characteristics of clothes worn underneath the *abaya* in different female social environments. Also, it examines the influence of different individual and sociocultural factors on self-definition and identity establishment through clothing.

The fifth axis explores impressions towards the *abaya* and the values that Saudi women present through the wearing of it in public.

4.5.3.2 Questionnaire Test

The designed consumer questionnaire was tested among a number of Saudi women studying in Leicester, London and Birmingham as well as to women in Saudi Arabia to evaluate the clarity of the structure, the terms that were used and the suitability of its length. The consumer questionnaire was sent through WhatsApp groups to reach a wider audience to ensure a higher degree of accuracy in the results obtained through the questionnaire. Testing the questionnaire also helped the researcher to determine minor defects in its design and the use of terminology, which were modified according to the participants' comments.

4.5.3.3 Questionnaire Process

Although the Kingdom of Saudi Arabia is a unified country where its people generally share the same cultural identity, regional diversity and other divergences characterise each province of the Kingdom (Al-Dossary, 2012). This diversity may lead to possible differences in consumption patterns. Therefore, this research sought to gather information by targeting Saudi women from different regions across the Kingdom in order to compare and contrast the similarities and differences in clothing consumption behaviour.

Firstly, the consumer questionnaire was administered in four major provinces of Saudi Arabia: Madinah and Jeddah (both located in the western region of Saudi Arabia and sharing similar customs and traditions) and Tabouk and Al-Jouf (located in the northern region of Saudi Arabia and can be described as tribal and more conservative societies). Also, the consumer questionnaire was administered in Riyadh (the capital city of Saudi Arabia and a city with a dominance of tribalism and rooted traditions) and Dammam (located in the eastern region of Saudi Arabia and known for its historic social interaction with American people when Aramco was

first established in Saudi Arabia). This questionnaire was administered between 2015 and 2016.

It is worth mentioning that the research intended to undertake a consumer questionnaire in the southern region of Saudi Arabia to ensure full coverage and to be able to generalise the research findings. Unfortunately, this plan had to be cancelled due to the ongoing war with Yemen that started in March 2015. Although the war is not inside Saudi Arabia, going to this region is considered to be risky.

The questionnaire was administered in shopping malls and at all-female universities. For the consumers targeted in shopping malls, night time was an appropriate period for the research to be conducted, as this is when shopping activity starts. In addition, some of the respondents were met at airports such as Al-Wedjh Airport and King Abdul Aziz Airport. The questionnaire was undertaken in mall cafes and prayer rooms. Usually, these places provide consumers with a space of freedom as they are separated from men and the places are exclusive to women.

The universities chosen included the University College of Deba, the University of Tabouk, King Abdul Aziz University and Al-Jouf University. These universities are located in Tabouk, Jeddah and Al-Jouf. The research targeted students who prefer to stay a bit longer with friends and to have fun after finishing their exams or lectures. University employees who like talking about fashion and sharing information about their purchasing habits also participated in this research.

Note: In Saudi Arabia, due to the cultural policies of gender segregation, all-female universities are walled and guarded by a high level of security. Therefore, accessing any of them requires official agreement from the official headquarters. However, this task was expedited due to the membership of the academic society in Saudi Arabia.

Women were offered a reasonable time in which to express their preferences and to discuss different issues related to one of the most interesting topics for women, fashion. Although the research sample was selected randomly, the consumers'

opinions regarding whether or not they wished to participate in this research were fully respected. For ethical purposes, consumers were firstly asked to sign a consent form to indicate their agreement to participate in this research.

This questionnaire sought to encourage women from different age groups to participate in order to be able to give an inclusive conception of fashion consumption in Saudi society. This will give a broader understanding of motivations among different age groups. It is culturally argued that young adults and teenagers can be motivated to be rebellious and to break the dress code due to the psychology of age (Kjeldgaard and Askegaard, 2006). Analysis across a wide range of age groups will reveal whether there is different behaviour associated with various age groups.

Mobile phone was used to record the respondents' answers to the open-ended questions and notes were also taken throughout the conversation to enable follow-up questions and point out some answers that needed to be clarified. As the questionnaire included two types of questions (close-ended and open-ended), two types of analysis were also required. This research adopted statistical analysis for the close-ended questions and content analysis for the open-ended questions. Each questionnaire was directly transcribed after the event to ensure the preservation of all nuances of the consumers' comments and opinions. A high degree of caution was applied to maintain the accuracy and authenticity of the collected information and the emergent themes.

4.5.3.4 Sample Size

According to the Saudi Authority for Statistics (2016),³⁹ females form 49.1% of the total Saudi population (9,850,000). About 39% (3,841,500) are under the age of 20 while 61% (6,008,500) are older than 20. This research targeted Saudi women who are aged 20 and above through random sampling.

³⁹ Available at: <https://www.stats.gov.sa/en/indicators/10> [Accessed 11-11-2016].

Cochran (1977) suggested a mathematical method to calculate the suitable sample size to ensure a high level of confidence and a minor percentage of error. The researcher can then generalise the research findings to represent the behaviour of the population in a particular sociocultural context.

$$n = \frac{Z^2}{e^2}$$

- n = the sample size
- e = the acceptable margin of error = 5% (the standard level)
- Z = the level of confidence = 95% (the standard level)

Alternatively, there are different trusted websites that calculate the sample size based on the size of the targeted population. The researcher decided to adopt this method, choosing to calculate the sample size through one of these websites (Raosoft®). This required a quick manual task of entering numerical information about the population size and the level of confidence in order to calculate the margin of error based on the suggested sample size. A closer margin of error indicates a higher degree of accuracy.

The test results on the research sample through Raosoft® suggested 664 (-/+ 5%) as an exemplified sample size with a 99% level of confidence and a 5% margin of error. The sample size of this research is 654, which is within -/+ 5% and meets the suggested standard (see Appendix 5 for the sample size test result).

4.6.4 Interview

Interviews are widely used as a qualitative method. Boeije (2010) explains that interviews have an important role, especially those with specialists and practitioners in the field of study, in exchanging knowledge through the process of dialogue. Therefore, the primary aim of an interview is to make sure that the interviewee provides information on the relevant and significant contexts of the research to be used for the purpose of producing the new knowledge. Mason (2002)

highlights three forms of interview: intensive interview, semi-structured interview and unstructured interview. In the current research, a semi-structured interview was used as a tool for collecting primary data, as recommended by Charmaz (2006).

Usually, open-ended and adjustable questions are very likely to provide the researcher with a core interpretation of the interviewee's views on specific issues. Moreover, such questions are effective in helping the researcher to achieve a considerable level of depth when analysing entangled relationships between concepts. The semi-structured interview does not limit the conversation to predetermined questions to be answered by the participant. Instead, it provides him/her with the flexibility to freely talk, which facilitates the discussion of a number of emergent issues or themes; this has a positive impact on the research.

Rubin and Rubin (2005: 20) provide useful guidelines to help the researcher to develop an in-depth interview technique known as *responsive interviewing*. The guidelines focus on structuring the main open-ended questions very clearly, based on the research problem. They also suggest that questions should be categorised and grouped in sequential order to ensure a logical transition between concepts. Follow-up questions are also important to investigate aspects that emerge during the interview and which have not been prepared in advance. Due to the emphasis on open-ended questions, this guidance is underpinned by the perspective of the Interpretivist approach (Wahyuni, 2012).

The scheduled interviews contain questions on particular issues to be covered: however, as Bryman (2008) explains, interviewees have a great deal of leeway in their responses. Some questions might not be answered directly, and therefore the questions may need to be redirected and paraphrased. Therefore, if any issues emerging from the interview seem to be vague, the researcher is responsible for asking for clarification because if the researcher does not understand something said earlier in the interview, this may result in missing the importance of other things said later. Moreover, the researcher should avoid interrupting the interviewees when talking. The researcher should write down key issues and follow

these up later to maintain the storyline of the interview (Thomas et al., 2015). Preventing the use of leading questions that direct the responses either in intonation or in syntax needs to be considered to preserve the reliability of the research. Holstein and Gubrium (2004) discuss the use of active interviews, which is pertinent to this research. Active interviews do not coax people into preferred answers: they respond to considerations that emerge during the conversation. Consequently, the interviewer can indicate orientations and highlight linkages between the participants' interpretations, experience and attitudes.

Five shop owners agreed to participate based on a direct face-to-face request. In addition, an interview with a fashion designer was conducted to investigate the extent to which consumers matter in directing the identity of her designs. These interviewees were selected because of the popularity and reputation of their shops, as they were mentioned by some of the consumers during their interviews. The interviews with the shop owners and the designer initially focused on three main areas:

- The dynamics of their business including marketing strategies, suppliers, season sales and competitiveness.
- The characteristics of the available products and their efficiency in satisfying consumer needs.
- The established communication channels with consumers that enable them to understand the consumer demands and to identify any change in terms of tastes or preferences (see Appendix 12 and 13).

Also, a semi-structured interview was conducted with a representative of the Jeddah Chamber of Commerce and two Saudi academics in the field of fashion. The main aim of the interview with specialists was to examine points of strength and weakness in the industry, market and education as a whole system in responding to the consumer demand (see Appendix 14 and 15).

It should be mentioned that despite the fact that open-ended questions were used to obtain qualitative information about the local market, some of the interview questions were briefly answered and some of them were even skipped. Unfortunately, questions that required intensive and expanded answers were generally responded to with caution and dissimulation, and were given only very limited consideration by the interviewees. This might be due to the adherence to cultural values that limit conversational opportunities between males and females unless it is urgent or necessary. However, the first interviewee (**W1**) provided an intensive definition of the market segmentation supported by a valuable explanation of how each segment operates.

As suggested by Kvale and Brinkmann (2009), the finalised and checked interview questions were emailed to some of the interviewees beforehand while introductory meetings were planned with others to briefly discuss the questions and ensure their clarity before the actual interview took place. Each interview began by providing a brief introduction to the research and the aim of the interview. This was followed by emphasising the confidentiality of the given information and the anonymity of the interviewee's identity and position. A consent form was given for the participant to sign to signal his/her agreement to participate as participating in this research was completely voluntary.

Interviews were recorded to ensure there was no loss of data during the discussion: recording undoubtedly increases the accuracy of the data analysis. Also, notes (memos) were also taken during the interviews. These notes varied between observational, methodological and theoretical. As suggested by Schatzman and Strauss (1973), observational notes were taken to describe the environment of the interview including the place and the interviewee's impressions about the subject of the research. Methodological notes were also used to help in evaluating the suitability of the interview as a method of data collection by identifying concerns and issues that emerged during the interview through responding to the questions. Moreover, theoretical notes highlighted some core issues and themes related to the research subject. At the end of each of the interviews with specialists, the researcher

asked for any available secondary data such as supportive governmental, industrial and consumption reports or magazines which were kindly offered to be used as a source of secondary data. Wahyuni (2012) recommends that any interview should not last for more than one and a half hours. However, in the current research, some interviews took up to two and a half hours while others only lasted for 30 minutes or less.

4.6.5 Non-Participant Direct Observation

Shukla (2008) states that there is debate in the literature about whether to classify this method as qualitative or quantitative; it was originally developed for cultural studies and was then adapted to fit different categories of research. Jorgensen (1989) suggests that observation is an appropriate method to be applied when there is little known about a specific phenomenon. According to McKenzie-Mohr (2011), observation as a qualitative method enriches the research by providing valuable information that describes particular individual behaviour and the sequences of this behaviour. In addition, observation as a research technique helps to evaluate specific behavioural compliance.

DeWalt and DeWalt (2011) argue that observation is an effective qualitative research method when conducting sociocultural studies that require the researcher to take part in the daily activities, social interactions and behaviours of a particular society. It helps the researcher to describe, understand and explain both explicit and tacit aspects of people's life routines, daily activities, social phenomena and observable human behaviour in a particular society. Observing consumer behaviour in real-life settings helps the researcher to obtain behavioural information (what individuals actually do) that can be combined with or compared to attitudinal data (what they think they will do) that are obtained through a questionnaire.

Grix (2010) explains that observation can be participant or non-participant. The researcher believes that the practice of observation offers several advantages for the current research. It enhances the quality and interpretation of the obtained data.

Due to its effectiveness as a research tool, non-participant observation was implemented at all stages of the current research. The observation mainly focused on two aspects: firstly and most importantly, Saudi women's clothing and fashion behaviour, and secondly, the context of the Saudi fashion market.

During the observation of women's fashion market behaviour in different public and private environments, notes were immediately taken to avoid any loss of information. Moreover, this was useful when an interesting fact was identified, especially if it needed to be followed up in the consumer questionnaire or expert interviews. Also, photos as factual evidence were taken, using an iPhone (when allowed), of different malls for further analysis.

A number of shopping malls were selected as subjects for observation based on their popularity, derived through different conversations with the consumers. Also, the researcher tried to attain a balance between the number of old and more recent shopping malls to be observed. In relation to the observation of the women-only environments, this occurred via actual participation in social meetings and gathering events or through an invitation to a wedding or a party that was exclusively for women (see Appendix: 10 and 11). Also, the content of a number of official educational sources as well as fashion accounts on social media were observed to indicate any possible factor that might influence consumer behaviour and/or the market in general.

4.7 Analytical Approach

Following the completion of the data collection process, the raw data needs to go through a phase of data analysis with the application of the appropriate methods. Burns and Grove (2003) argue that the mechanism of data analysis is based on identifying the relevant data and organising it in order to facilitate interpretation. As mentioned earlier in this chapter, the obtained data combines quantitative data, which is basically numerical, and qualitative data, which usually consists of text or audio. Both types of data have to be stored, transcribed and cleaned up.

4.7.1 Data Storage

Since the collected data may include confidential and personal information about the participants, it is essential for the researcher to use a storage system that is accessible only to the researcher, as suggested by the Data Protection Act (1998) in the UK. When a researcher uses different sources of data, he/she must ensure that the data is stored in a well-organised archive for easy retrieval (Boeije, 2010; Wahyuni, 2012). A hard copy of the obtained data for this research was stored in a safe locked cabinet. Also, a soft copy was saved on a secure memory stick with a strong password to ensure a high level of security. To avoid the risk of data loss, another copy of the research data was saved in a secure passworded file on the researcher's own USB drive at DMU.

4.7.2 Transcribing and Translating

As this research was conducted in Arabic, translation was first required to be able to transcribe the data. Some researchers such as Bucholtz (2000) perceive transcription as an important analytical tool while others such as Johnson (2000) view transcripts as the actual research data. Bucholtz (2000) argues that there are two main categories of transcription: naturalised and denaturalised. Naturalised transcriptions contain features of written language that did not actually occur during the discourse such as punctuation and paragraphing while denaturalised transcriptions preserve the actual idiosyncratic features of the oral language (Bucholtz, 2000). Oliver et al. (2005) recommend adopting the denaturalised style to transcribe qualitative data in pragmatic or grounded theory research. This may be due to the level of transparency provided by the denaturalised style. Transcribing the data was done before the actual analysis, as suggested by Kvale and Brinkmann (2009). Firstly, the discourses were transcribed in handwriting form. Then, a typed Microsoft Word document was created to include punctuation, paragraphs and amended verb tenses. In addition, when essential to do so, some of the participants' actual discourse features were retained such as those indicating hesitation or confusion.

4.7.2.1 Note about Translation

According to Hazzi and Maldaon (2015), researchers are likely to face difficulties when obtaining data in a different language. The discrepancy in cultural values, beliefs and norms between Arab and Western culture can be responsible for the difficulties experienced when translating from one to the other language (Mareş, 2012). Diglossia is a linguistic fact that causes problems when translating from Arabic to English (Dickins et al., 2002). Diglossia can be defined as the existence of two or more varieties of the same language: one of them is normally formal and used for official purposes while the other one is colloquial. Since Saudi Arabia is a vast country with diversity in its regional population, some differences in terms of colloquial verbal expression were identified in different regions. Some of these colloquial expressions and accompanying regional accents are easy to understand while others are slightly complicated but understandable for a native speaker.

Questions included in the primary research were translated accurately and professionally from English to Arabic. To be certain of the research validity and to avoid any misunderstanding, the translation process should not be literal. Instead, it should be constructed based on a translation of the meanings of the originally used terms and intentions.

All of the research tools that were applied during the primary data collection were translated from English to Arabic by the researcher. In addition, the translation process was supported by a bilingual expert when needed. Translating the research material from English to Arabic was not problematic: however, when translating the collected data from Arabic to English, the researcher faced some difficulties due to the previously mentioned diglossia.

Moreover, it was identified that some terms that have been recently introduced and are widely used by Saudi consumers (especially among 20 to 35 year olds) have no

English synonym as they have no roots in Arabic either.⁴⁰ They have been added to the society's clothes lexicon as a social phenomenon. Therefore, in the translation sometimes some of these terms had to be interpreted according to their closest meaning in English instead of adopting a terminology approach.

4.7.3 Data Cleaning

To meet the ethical requirement of guaranteeing the confidentiality and anonymity of the research respondents, it was essential to delete any personal information that identifies the individual's identity. This information was replaced with unique codes assigned to each participant during the data analysis stage.

4.7.4 Strategies for Data Analysis

Argyrous (2000) states that quantitative data findings can be summarised and clearly presented through descriptive statistical tools such as graphs, tables and charts. To analyse the quantitative data of the consumer questionnaire, the responses were inputted manually into the computer software program Excel for the purposes of statistical analysis of frequencies. The numerical results were then linked with the consumers' textual responses in order to explain or justify these results according to the consumers' own views. However, due to the interdisciplinary nature of this research, it does not adopt the sophisticated mathematical methods and equations which are normally applied by Positivists to explain a phenomenon or to measure the relationship between variables. Instead, it quantifies percentages and frequencies that explain the different behaviour elicited by the consumer questionnaire.

⁴⁰ One of these terms is *kashkha'a*, which was used by the Saudi women to express the meaning of elegance and high taste in terms of the use of colours and styles. Another example is the use of the term *fallah*, which has been interpreted with the meaning of having fun. *Fashlaah* was also one of the words that was mentioned by the consumers more than 20 times, and is translated as embarrassment but it also indicated disgrace. Other words including *hailagi*, *baladi*, *arbaji*, *khalageen* and *mekhais* were translated as vulgar, and were used by the participants to describe some designers' collections (mainly El Badawi). All of the previous terms are newcomer terms and they have no roots in Arabic.

4.7.4.1 Thematic Analysis

In order to translate the obtained information from a raw form of data into significant findings, logical interpretation is required (Wahyuni, 2012). The main aim of analysing qualitative data is to signify inferences through a process of thematic analysis (Nowell et al., 2017). This can be achieved via dissecting and reassembling the collected information to establish meaningful knowledge (Boeije, 2010). Thematic analysis is a well-known approach for interpreting meanings that emerge from textual data. However, Sarantakos (2005) and Silverman (2011) suggest that this method can be used for both qualitative and quantitative data as the researcher can categorise the numerical data into a set of themes. Also, Bryman (2012) notes that this methodological approach can be applied to different forms of data.

Krippendorff (2004) explains that thematic analysis is an effective flexible tool that can be applied when the research has multiple objectives. It is a process that entails identifying themes such as patterns and/or practices in the obtained data which are believed to be important in explaining and addressing the research topic (Maguire and Delahunt, 2017). Braun and Clarke (2006) proposed two stages of thematic analysis: semantic and latent. At the semantic level, a descriptive approach dominates the analysis; Braun and Clarke state that “...*within the explicit or surface meanings of the data and the analysis is not looking for anything beyond what a participant has said or what has been written*” (p. 84). By contrast, the latent level of thematic analysis is argued to be deeper; Braun and Clarke note that it “...*starts to identify or examine the underlying ideas, assumptions, and conceptualisations – and ideologies – that are theorised as shaping or informing the semantic content of the data*” (p. 84).

Braun and Clarke (2006) recommend a number of steps to be followed when conducting thematic analysis:

- 1- **Gain familiarity** with the research data by reading and re-reading the transcripts.
- 2- **Generating initial codes** in order to reduce a great amount of data into small chunks of concepts/meanings by using labelling techniques (Greg et al., 2012). Boyatzis (1998) stated that codes are short statements that are used in order to indicate phrases that have similar meanings and group them together in a manner that serves the interpretation of the research findings. Boeije (2010) argues that in open coding, the researcher selects a number of themes that are repeatedly found in the research data. This can be followed by other stages of axial (grouping) and selective coding. Coding and organising data can be manual or by using advanced software such as Excel, NVivo, or ATLAS.ti (Maguire and Delahunt, 2017).
- 3- **Searching for themes** as a first step of developing a theoretical framework.
- 4- **Reviewing themes**, which includes modification and development of preliminary themes in order to ensure their usefulness and coherence.
- 5- **Defining themes** and identifying sub-themes and explaining how they relate and interact.

Saldaña (2015) explains the process of data coding in order to establish or test a theory as the following (see Figure 3.2).

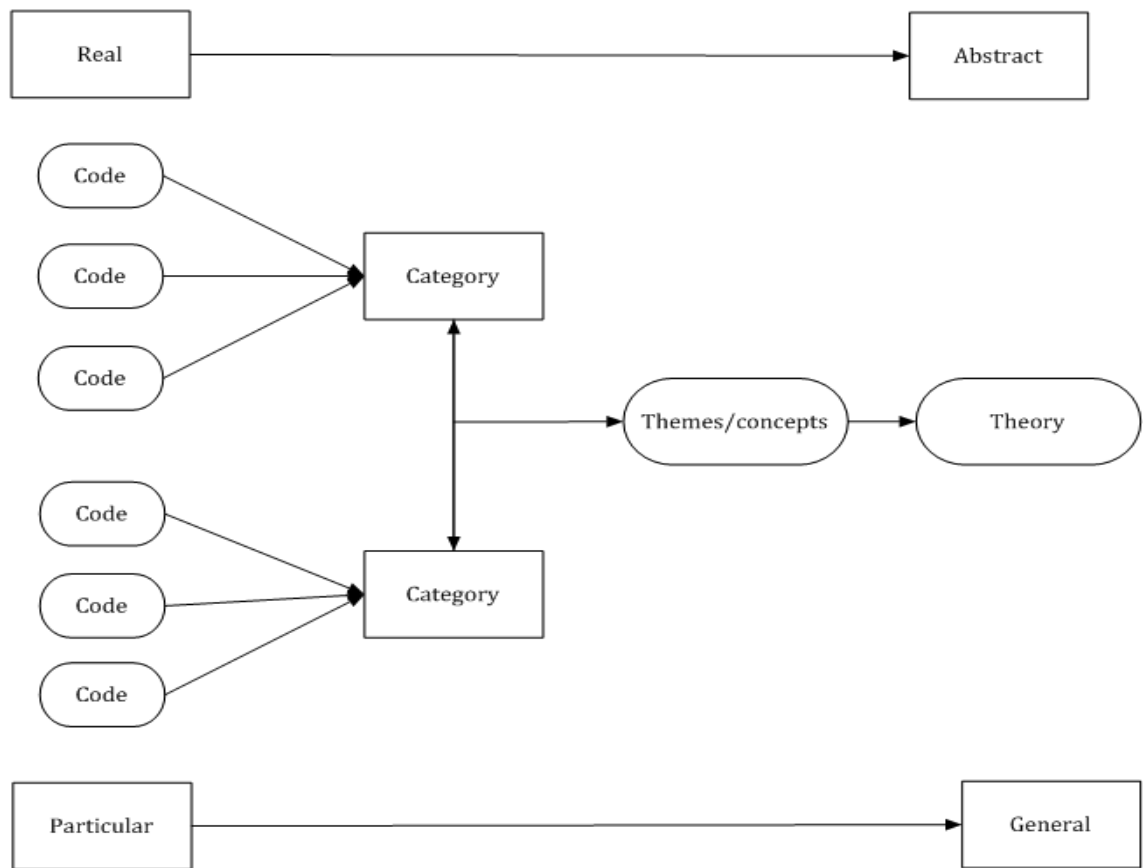


Figure 4.2: A streamlined codes-to-theory model for qualitative inquiry (Saldaña, 2015: 12).

In this research, a semantic descriptive thematic approach was applied to analyse responses to open-ended questions in the consumer questionnaire as well as the specialists' interviews. Martin and Rose (2003) argue that when participants are asked to freely express their personal perspective or explain their behaviour, they extensively use a wide range of terms and common phrases. The participants' spoken realisations of a particular attitude, behaviour, attribution, quality or issue can be aggregated into transcripts that help in identifying the regularities of a specific aspect (Thomas, 2004). This was supported by a level of latent thematic analysis to infer reasons and themes. However, the analysis did not involve generating a metric system that associate attributes and contents for example, 'black' and modesty. It taxonomises aspects according to social normativity as well as subjective stances.

Initially, it was decided that NVivo would be used for the analysis of qualitative data to enable an exhaustive treatment of the subject. However, when NVivo was used for data analysis, it became clear that this tool does not support the Arabic language. In the Arabic language, many terms can be used to indicate one concept and these terms vary from one Saudi dialect to another. Another limitation of this software is that although it provides visualisation of word trees that are useful to identify and classify themes, it is unable to establish a logical interpretation to link between the key words. In addition and most importantly, this tool relies on grouping terms that are linguistically similar rather than themes that are conceptually linked. Dullah at al., (2017) argue that many researchers tend to use manual data analysis to avoid the drawbacks of NVivo, which include its complexity and lack of interpretive ability.

Therefore, establishing a logical linkage between different social and cultural factors in this kind of research is a human task. Although manual analysis of qualitative data is time consuming, it can reinforce the research reliability by providing more supportive evidence that is based on the researcher's own observation of the consumers' and interviewees' expressions, which in turn strengthens the nature of the research outcomes. Various studies have affirmed the comparative edge of the content analysis method in terms of reliability: hence, the idea of using NVivo was dropped.

The process of textual data analysis took place according to the following steps:

- 1- As suggested by Speziale and Carpenter (2011), each interview or questionnaire was analysed individually by carefully listening to the full recorded conversation, correlating and comparing this with the notes that were already taken during the conversation to ensure accuracy. Some samples needed to be listened to more than once, especially when a contradiction was identified in the participant's answers. Full transcripts were produced based on this process.
- 2- Open focused coding and line-by-line analysis was undertaken using highlighters in order to highlight essential themes. Different colours were used for different

concepts: for example, purple was used to indicate personal feelings, emotions and motivations while green was used to identify religious, cultural and national implications. The colour blue was for statements that signify social considerations. The colour red was used where an issue, problem or particularity in the industry, market or behaviour was identified. Brown was used to highlight economic factors (see example in Appendix 8).

- 3- The main themes that emerged from the textual data, especially those which were repeatedly mentioned to signify particular values, were then categorised, grouped and linked through axial coding as suggested by Saldaña (2015). The aim was to conceptualise the dynamic of the market structure/the adoption of different patterns of fashion behaviour that are derived from different cultural and social variables. This stage included an intensive description and interpretation of the highlighted explicit and implicit aspects. An example of the process of coding and the integration of themes is provided in Appendix 9.

The analysed data were then prepared for the next stage, which was the establishment of models that link between different concepts and themes as a contribution to knowledge. These models were then tested by experts in the field of fashion and consumption behaviour in Saudi Arabia.

4.8 The Quality of the Research

Generally, the quality of a research study can be assessed through its reliability, validity (Cameron 2011; Patton, 2015) and credibility (Lincoln and Guba, 1985). Also, Meyrick (2006) signifies the importance of reflexivity in order to maintain the relationship between the research and the researcher.

4.8.1 Reliability

Joppe (2000) defines reliability as follows:

“The extent to which results are consistent over time and an accurate representation of the total population under study is referred to as reliability and if the results of a study can be reproduced under a similar methodology, then the research instrument is considered to be reliable.” (p. 1)

This quotation emphasises the concept of replicability of the research results. For example, in a questionnaire the stability of the individual’s responses can be determined through the administering of the questionnaire, which might be undertaken at different times (Charles, 1995). For qualitative research, other concepts such as neutrality, transferability, consistency and applicability are considered to be indicators of research quality (Lincoln and Guba, 1985).

4.8.2 Validity and Credibility

The trustworthiness of a research study is based on the factual data that have been quantitatively discussed (Lincoln and Guba, 1985). This will lead to the generalisability of the research findings, which in turn increases the trustworthiness of the research (Stenbacka, 2001). Tracy (2010) suggests that triangulation is an important indication of research credibility and transferability. Patton (2015) states that *“triangulation strengthens a study by combining methods. This can mean using several kinds of methods or data, including using both quantitative and qualitative approaches”* (p. 247).

4.8.3 Reflexivity

Charmaz (2006) emphasises that the researcher should be reflexive to maximise the research quality. Within a social or a cultural research study, there is the possibility of uncovering multiple realities or complex views that need to be interpreted using the researcher’s own judgement by avoiding subjectivity (Levy, 2003). The reflexivity of the researcher does not necessarily negate the validity of the participants’ perceptions. Through conversation, the researcher can observe the participants’ feelings, conceptions and experiences and integrate them objectively.

This helps to ensure the transparency of the collected data. Therefore, a reflexive researcher can interpret the usefulness of the research data to be able to theorise the findings.

Due to the large volume of qualitative and quantitative data established through the consumer questionnaire, an abductive process of correlating motivations and sociocultural meanings in order to explain the factual data could be undertaken with a great depth of analysis. This approach ensures a high level of validity and reliability. In addition, the sample size of the consumer questionnaire was tested with the Raosoft® software to ensure a high level of confidence that minimises the margin of error. The process of the analysis of the respondents' views with initial coding and thematic grouping is presented transparently in Chapter 5 and examples are provided in Appendix 8. The consumers' statements are presented verbatim to ensure a high degree of transparency. Themes that emerged through the analysis were treated in a reflexive manner. The opinions of the majority of the research participants were grouped as key themes but divergent views were also identified and discussed. As a part of the abduction process, themes that emerged were reflexively correlated with the quantitative data to assess the proportion of the responses that support or contradict their significance.

In addition, models that were developed in the light of the obtained data were tested by specialists and the received feedback was considered in order to validate the research findings. Ethical considerations were strongly acted upon in relation to the privacy of the participants' information and their right of freedom to participate, skip or refuse to reply to a particular questions (see Section 3.5.1).

4.9 Problems when Gathering Data in Saudi Arabia

Due to some considerations related to the Saudi cultural context, conducting a research study that requires direct contact with the public can be challenging and problematic. Some of the problems faced during the stage of data collection can be summarised as follows:

- 1- Taking photos of women in public was sometimes a challenge during this research, especially in conservative regions such as Riyadh, Tabouk and Al-Jouf. This arose when the researcher took photographs of shopping malls and fashion shops. Despite the fact that taking pictures of public places is allowed as long as it does not target governmental institutions with a high level of security, this action was monitored inside shopping malls by the security staff to ensure that photos of women are not taken by men. The possible reason for this is to protect people's privacy, especially women, even if they are fully covered by wearing the *abaya* and a face cover. From the experience through this research, taking photos in public can sometimes be considered as a suspicious action. This can also be linked to some of the local sociocultural considerations regarding the display of women's faces or bodies, which is also associated with family honour. Therefore, it can be said that a trust issue emerged with regard to people taking photos. Despite the observed freedom in the appearance of some of the Saudi women's profiles on social media such as Instagram and Snapchat, this behaviour is strictly unacceptable within Saudi society. The reason for this is that distributing or displaying a photo of a Saudi woman can sometimes be associated with an unpleasant reputation. Furthermore, at weddings smartphones are collected to prevent photos being taken during the party. Taking photos of Saudi women in private places to support the reliability of the research outcomes was considered but unfortunately such photos are not obtainable in Saudi Arabia due to the cultural considerations. Although there are not any direct restrictions against taking photos of women inside an exclusively female environment, the researcher always encountered complete refusal from the women themselves when they were asked if a picture of the garments they were wearing excluding their faces could be taken.

- 2- Due to the fact of gender segregation,⁴¹ starting a conversation with a man in a shopping mall for the purposes of research is usually viewed as unacceptable by the man himself and also by the surrounding people, especially in some regions of the Kingdom such as Tabouk and Al-Jouf (both are located in the northern region). This

⁴¹ According to the Global Gender Gap Report, Saudi Arabia is ranked 141 out of 144 in gender segregation.

might be linked to the conservative cultural identity of these regions that was noticed during the process of this research. Due to their tribal demography, both of the regions are characterised by a conservative cultural identity. For this reason, some of the appointments with male experts such as members of different governmental institutions, including branches of the Chamber of Commerce, were delayed and even cancelled, sometimes without prior notification. A relevant source from the literature is the work of Fastoso and Whitelock (2011), who argue that a researcher conducting a research study may be faced with a lack of support from companies, especially in Middle Eastern countries. This issue has already been noted by Al-Mansour and Kempner (2016: 883) and Al-Subaie and Jones (2017: 7) who interpreted the cultural restrictions regarding gender segregation in Saudi Arabia as a barrier that impedes female researchers from accessing important information resources through participating in strategic meetings.

- 3- The difficulty of following up with retailers who have already been interviewed was also one of the research challenges. This inaccessibility is due to the lack of business emails or other forms of online communication as well as a consistent refusal to answer business phone calls.

4.10 Summary of the Chapter

This chapter presented an overview of different research paradigms. A discussion of different methodological approaches such as qualitative, quantitative and mixed methods was also provided. Also, this chapter included a discussion of the chosen research approach and how it is expected to support the final outcomes of the research. This was followed by a justification of the chosen research methods and an explanation of the different stages of the research process that were conducted during the research journey to answer the research questions. The Pragmatic paradigm was employed in this research by using qualitative and quantitative strategies including questionnaires, interviews and observation. In addition, this chapter has provided a discussion of data analysis methods.

The following chapter presents the research findings as factual data that are supported by quotations from the respondents to highlight the key aspects that emerged through the process of data analysis related to consumer behaviour.

Chapter 5: Fashion Consumer Behaviour in Saudi Arabia

5.1 Introduction

In this chapter, an analysis is presented of the findings from the qualitative and quantitative data regarding fashion and clothing consumption. This includes the results from the observation of women's *abaya* in public as well as fashion in private female-only environments. It also includes data collected via the face-to-face consumer questionnaire.

A numerical analysis of the quantitative data gathered via the pilot and in-depth consumer questionnaires is presented in the form of graphs and tables in order to indicate the stability and recurrence of the consumers' responses. The qualitative data from the consumer questionnaire is analysed using a thematic analysis approach (see Section 3.6.4.1). The key terms that emerged from the consumers' quotations are highlighted as individual codes. Then, these codes are grouped and integrated into themes following the 'streamline code for theory' suggested by Saldaña (2015) (see Section 3.6.4.1). Each theme is discussed in a subsection. These themes will then be applied in Chapter 6 to develop the theoretical models, to explain the inferences of the values they communicate to enable a consumer to establish an identity through their choice of fashion and clothing.

5.2 The Results of the Consumer Behaviour Observation

As suggested by Shukla (2008), the observation was conducted to investigate Saudi women's consumer behaviour in a real-life setting. Implementing observation in this study enabled the researcher to collect data about how Saudi women actually behave rather than how they think they will behave in terms of fashion and clothing consumption. This also helped to compare the behaviours observed with the perspectives gathered through the face-to-face consumer questionnaire as a complementary research method. As mentioned in the previous chapter, the

observation was undertaken in a number of public and private environments (see Appendix 11).

5.2.1 The Abaya

From the first glimpse, all of the observed public places (especially during night time) were buzzing with women in black attire (the *abaya*): the only dominant cultural behavioural pattern in which the visible Saudi women's Islamic identity is transmitted. Although wearing the *abaya* is a requirement for pubescent women, some female children (aged 6 to 9 years) also wear the *abaya* in public and on their way to school. In the following sections, a broad overview of the types of the *abaya* observed will be provided, followed by a more detailed discussion of the influence of regional identity, the identity of the public setting and age on the adopted style of the *abaya*.

Some women were observed in a highly conservative form of a black *abaya* placed on the crown of the head with a long opaque full face cover, black gloves, black socks and flat black shoes. Others (the majority) adopted an absolutely modest, but less conservative, plain or very slightly decorated *abaya* with a black headscarf *tarha* or *misfa*. The adopters of this attire wrap a black headscarf around their face very tightly to ensure full concealment of their hair and skin. A *niqab* face cover that reveals the eyes through a narrow slit is also worn for face veiling. A minority of women adopt a fashionable *abaya* that is black or in a dark or pastel (light grey and beige) colour. These may include colourful embroidery and all have an open front that shows the clothes worn underneath the *abaya*, which included jeans and branded tops. Some adopters of this appearance loosely wrapped a flimsy but black headscarf in a way that shows their hair, while some others wrapped it around their head in order to cover their mouth and nose in a practice called *lithmah* or *litham*. In this practice of partial face covering, women are likely to show their eyebrows, hairline and cheekbones to display light or heavy make-up. High-heel elegant shoes or sports-branded trainers and a branded bag were highly visible and this may indicate what can be called a liberal interpretation of modest attire.

In March 2018, local Saudi media reported some pictures of Saudi women running through the streets of the historical area of Jeddah city, wearing a new trend of *abaya* that can be categorised as a *sports abaya* in a race that was organised by the Bliss Run team founded by a Saudi female citizen. As shown in Figure 4.1, this form of the *abaya* is not in black. Some sports *abayas* are designed with a hoody along with two circular vents for women’s feet at the bottom of the *abaya* in a baggy style that does not reveal the legs during running. This particular type was used for this event and it is not attributed as a significant sartorial behaviour in Saudi Arabia.



Figure 5.1: Sports *abaya*.⁴²

This use of the *sports abaya* was widely criticised, as observed on social media, as some Saudi purists perceived this behaviour as showing defiance and calling for a rebellion to breach the conservative norms of the Saudi Arabian cultural identity. Other commentators attributed their rejection of the style to its ‘ugly appearance’ that was satirically associated with a cleaner’s uniform.

⁴² Retrieved from <https://arabic.rt.com/society/931193> [Accessed 29-3-2018].

5.2.1.1 Regional Identity

The observation of women's attire in public indicates an established link between regional identity and adherence to the juristic specifications of the *abaya*, which was found to vary from one region to another. In cities located in the Tabouk and Al-Jouf regions, the majority of the observed participants wore a plain black *abaya* (the traditional conservative form that is placed on the crown of the head or the plain modest one that starts from the shoulders but with no adornments). On the other hand, in Riyadh, Jeddah, Al-Madinah and Dammam, the adoption of the conservative form of the *abaya* was hardly identified. The majority of women in these regions wore modest *abayas* but some others may dress in a fashionable *abaya* that reflects the modern or liberal form of an *abaya*.

Although Saudi Arabians share the wider context of the system of values, obedience to the collective local norms and normative reference group (family or tribe) in wearing the acceptable form of the *abaya* is more concentrated in smaller social communities. In cities located in small regions such as Tabouk and Al-Jouf, it is entirely normal for a specific behaviour to be easily recognised, judged and linked to particular values. Within this context, wearing an *abaya* that is considered to be immodest (according to the local collective definition of symbols and their values) could be associated with perverted immoral behaviour. The fashionable *abaya* in these conservative regions is perceived as immodest and a way to gain the attraction of men, and therefore, the adoption of this *abaya* is likely to be avoided in order to protect the female's reputation as well as the dignity of her family. The dominance of the social rules that are intensified in small social communities reflects the general Saudi mentality that links a woman's appearance with her family's honour. The commitment to family as a micro-patriarchy system means that Saudi women have an onus to present an appropriate appearance that avoids what can be counted as a stigma. In these two regions, the acceptable form of the *abaya* is defined in a context that implies the meanings of chastity and decency. A full revealing of the face is a dishonour that is forbidden. Adopting this ideology in interpreting women's

Islamic dress code is based on full obedience to Islamic teachings regarding the definition of Muslim women's visible identity.

In Riyadh, Jeddah, Al-Madinah and Dammam, the influence of the collective norms seems to be moderated. Although Riyadh is generally known for its strong pride in its tribal identity and adherence to normative tribal values, the wearing of the moderate *abaya* is widespread and the fashionable *abaya* can also be seen. This behaviour can be ascribed to the fact that these regions are cosmopolitan and exposed to different patterns of Arab and Islamic cultures that infused to formulate a more flexible definition of specifications related to women's attire in public. The *abaya* consumers in these cities are influenced by what can be called '*mutual assimilation*', whereby the local law regarding the wearing of the *abaya* is coherent with the presence of other Arabian Islamic communities who might define the modest dress code differently but in a normalised context. For this reason, local norms and normative reference groups are likely to be influenced by this mutual assimilation of different Islamic cultural values, in turn reflecting the flexible definition of the standards for an acceptable *abaya* as well as the female's entire appearance. However, this has not resulted in the development of a '*hybrid dress identity*' or '*Muslim fashion*' as a dominant behaviour in public. The *abaya* is the only lawful attire for women in all regions of the Kingdom.

It was also observed that there are a variety of practices by non-Saudi women regarding wearing the *abaya*. For example, in conservative regions, Arab and Asian (Philippine and Indian) Muslim nurses wear the black *abaya* and a *niqab* while non-Muslims wear the black *abaya* and a turban in public. In cosmopolitan cities, some Egyptian women were observed wearing the traditional Egyptian *jallabyyah* (a full-length long-sleeved garment) along with a colourful headscarf. A small number of women from Western societies were also observed in Jeddah and Riyadh wearing a simple *abaya* with no headscarf.

5.2.1.2 The Identity of the Public Setting

The style of the *abaya* was observed to differ according to the identity of the public environment. For example, wearing a plain, loose *abaya* when in supermarkets, local parks or when going to the mosque to pray during Ramadan is dominant due to its practicality and to avoid attracting attention in a mixed-gender social setting (women do not attend the mosque except during Ramadan, unless they are visiting Makkah or Madinah). As observed by the researcher, in some shopping malls and outside of educational institutions (when waiting for drivers or male guardians during home time), a woman would be reprimanded by the members of the *Committee* if she failed to meet the standards of the appropriate visual identity approved by them, which may also vary from one member to another. For example, some may reproach a woman for revealing her eyes while other members may abhor the status of women waiting outside and may ask the women to wait inside the mall or college until their drivers or guardians come. Furthermore, some of the schools and universities obligate students to wear the conservative traditional form of the *abaya*. In these institutions, female security members are responsible for checking the suitability of the students' appearance in order for them to be allowed to access the campus. In relation to this, a large poster of the Saudi men's traditional head cloth may also be placed on the outside wall of some educational institutions, as shown in Figure 5.2.



Figure 5.2: Poster about the *abaya* outside a Saudi educational institution.⁴³

The text on this poster translates as: “A man’s machismo is known from his family’s⁴⁴ *abaya*. A man who cannot cover his family in front of people is not able to control them at home. This is a fact that cannot be denied”.

In this way, the poster posits the appearance of the woman’s *abaya* as a normative model or identifier that defines the masculinity of her guardian male. The individual managerial behaviour, which the observation revealed in some schools and colleges, exists in all regions (at various levels) and emphasises the patriarchal system that characterises Saudi Arabian society. This system intellectually inculcates a connection between a women’s *abaya* and the honour of the family. However, this is not a dominant practice, as other universities and schools – such as King Abdul Aziz

⁴³ Retrieved from https://twitter.com/saad_alsuraihi [Accessed 23-7-2016].

⁴⁴ Within the Saudi context, the term ‘family’ is used to refer to female family members (wife, mother, sisters and daughters). For example, if a man says, “I am going to pick up my family from work”, he means his wife.

University – are more flexible in terms of rules regarding the *abaya* or the face cover. Therefore, this seems to be an individual behaviour of the institution's managerial system, not a mainstream requirement of the Ministry of Education. The official regulatory documents of the Ministry of Education emphasise the concept of modesty in students' and employees' attire in a way that does not particularise the *abaya* or any form of it as lawful females' attire when they attend educational institutions.

The content of the religious Saudi national curricula (at primary, elementary, secondary and university levels) was also analysed and a lack of religious lessons that explain Muslim women's dress code was identified. However, the observation conducted for this study noted a large amount of religious TV lectures and pamphlets regarding Muslim women's dress, and the topic was also presented directly in schools as part of the two-hour per week period of Social Activity Islamic teaching lectures, all of which were observed to participate in refining the establishment of a constitutional tradition of Islamic conservativeness of the *abaya*.

When attending social occasions such as weddings, the Saudi women observed often wore fashionably decorated *abayas*, some of which were no less attractive than the dress worn underneath. The *abayas* were then collected to be hung or packed in bags (to be labelled with the guest's name) by a lady hired for this job. In another social context, the observation also revealed that, generally, visits of consolation to those mourning a death require wearing a plain black *abaya* and a black headscarf during the visit. The clothes worn underneath the *abaya* should also be appropriate for this kind of situation – not bright colours, not decorated and not revealing garments.

Thus, although the *abaya* is the Islamic dress code that has been proposed to fulfil the requirements of Islamic modesty, different styles can be selected for different public spheres. Moreover, whereas some of the adopted styles are enforced by social control, others are more individual and can be selected to suit the social requirements of particular places such as at weddings.

5.2.1.3 Age

During the observation, age was identified as an influential factor that affects the chosen style of the *abaya*. For example, the women from the older age group (estimated to be from 50 to 60 years old) usually wore a conservative or plain *abaya* no matter where they were going or what region they belonged to. On the other hand, the younger age groups (teenagers and women in their twenties and thirties) adopted *abayas* that were pastel or dark coloured (plain not patterned) or decorated with shiny stones and embroidered with the logos of international fashion brands, such as Gucci, YSL and Chanel (regional differences applied in this case). The brand logo was usually placed on the cuffs as a chain of small repeated patterns or as a large, visible pattern made out of Swarovski stones and placed on the back of the *abaya*. This might have been an attempt to establish an identity that reflects social status or as a representation of loyalty towards a particular brand, which would necessitate getting a tailor to apply such logos, as these companies do not produce *abayas*.

The observations presented in this section indicate that Saudi women's self-presentation through the *abaya* is influenced by regional identity, the identity of the public setting and age. However, other individual factors, such as the subjective inference of the symbolic values of the *abaya*, the theoretical acceptance or rejection of the practice, and style preferences, can differ from one woman to another and therefore more information will be provided in the analysis of the in-depth consumer questionnaire.

5.2.2 Observation of Women's Clothes in Female-Only Social Settings

As the wearing of the *abaya* in Saudi Arabia is limited to public places, women in female-only settings adopt different forms of fashion. The next section identifies the main differences in the consumption of clothes and fashion in different categories of female-only social settings.

5.2.2.1 Official Institutions: Universities and Workplaces

Inside women's universities and workplaces, women take off their *abaya* and headscarf, neatly fold them and keep them in a particular bag during the working/studying hours. Some bags are exclusively designed for this purpose and are sold in the local market at affordable prices (usually 20 to 40 SAR). However, women who work in hospitals as doctors or nurses wear a medical uniform, which is usually a mid-length white garment with a full-length white skirt instead of the *abaya*, as hospitals are considered a mixed-gender setting. Receptionists in public hospitals keep their *abayas* on, as observed in this study. One doctor was also observed wearing tight jeans underneath an above-the-knee medical uniform and a *niqab*.

In most of the observed universities, students were requested to wear a modest uniform of a full-length skirt and a long-sleeved T-shirt. These regulations also applied to the school teachers. The wearing of mandatory uniforms in educational institutions is usually a strategy to cultivate an image of social equality and conformity. Although this may limit personal freedom in constructing an individualised identity, it does not nullify it. Women in female-only workplaces present an individualised sense of identity through the choice of branded handbags, accessories and shade of colour.

5.2.2.2 Formal and Informal Social Gathering Events

In Saudi society, gathering together is a sociocultural value. Women gather to congratulate a new bride, a new mother, a graduate, a recently arrived traveller, or the purchase of a new house. The social setting in which women gather for these purposes can be classified into two main categories: formal and informal. This categorisation is based on the nature of the personal relationship with the attendees as well as the size of the gathering event in terms of the number of guests.

In Saudi Arabia, formal gathering events usually take place in a house or hall that can host a large number of attendees who may be meeting for the first time. For informal gathering events, a smaller number (between 10 and 30 women) of close friends, relatives and neighbours gather in a friendly environment to celebrate an event or just to have fun. Due to the associated social characteristics of each gathering milieu, the motivations to wear the adopted fashions and their styles were expected to vary. Indeed, in informal gathering environments, the women were observed wearing trousers, especially jeans and leggings, and T-shirts or simple sleeveless dresses of different lengths. In contrast, in formal gathering events, the women appeared to be more concerned with their appearance and spent time looking in the large mirrors usually located in the entrance of each hall and house before they met others at the event. They wore Moroccan kaftans, different styles of dresses with vibrant and pastel colours, branded dresses, and formal trouser/skirt suits. Jeans were not widely observed to be worn by the women for formal events. Traditional dress was only worn by older women at both formal and informal social events. The observation suggests that attention has been given to modesty as a value that defines the dress identity and self-presentation in formal gathering events.

5.2.2.3 Women's Dress at Eids

During Eids, which are socio-religious festivals, Saudi women have to wear new clothes and visit relatives. They may have to visit more than one family on Eid days. As the observation revealed, women wear different fashion styles during Eid days, which vary from Eid-ul-Adha to Eid-ul-Fitr. For example, in the early morning of Eid-ul-Fitr, women begin the festival wearing new clothes under their *abayas* to attend the Eid prayers in the local mosques. These clothes include simple dresses as well as traditional dresses worn by older women. As women have to celebrate Eid with male family members and relatives (*mahrms*), they usually choose acceptable modest styles. In contrast, during Eid-ul-Adha, women may stay indoors and wear old clothes for packing the sacrificed sheep to be given away before changing into new Eid clothes. It is notable that a few women in their forties in the observed

sample wore traditional clothes as a visual reflection of the Islamic spirit that becomes dominant during Eid-ul-Adha.

Eid night celebrations can be held at home or in an '*Isteraha*', which is a house, farm, or villa located in a suburban area far from the commotion of the more inhabited areas. These places can be owned by the family or rented from an agent. On the Eid nights observed, the women chose styles that balanced luxury and simple elements. For example, a simple dress could be combined with a Louis Vuitton bag. No highly revealing clothes were identified during the observation. The most revealing style observed was a knee-length sleeveless dress.

5.2.2.4 In Wedding Parties

Eid is also a season for wedding parties: it is usual for Saudi women to attend weddings in the evening of Eids. Female wedding nights are a large celebration in Saudi Arabia. According to Al-Dossary (2012), these occasions are lavish and considered to be a social burden, as a Saudi husband has to pay for his wife's new dress each time she attends a wedding. Al-Dossary also states that each wedding requires a new dress that cannot be worn again on similar occasions (based on statements made by men).

In weddings, most of the women were observed moving around and dancing in elegant dresses of different shades of vibrant and pastel colours that reflected a unique taste. No more than three colours were combined in a dress. The majority of the dresses were customised, and appeared to be luxury but not branded. Swarovski stones and shiny appliques were also widely found on the dresses. Finally, no significant similarities between dresses or styles were identified; each dress had a unique, individualised identity.

The styles of fashion observed in wedding parties were less modest in terms of visual appearance than the fashion worn for other gathering events. Revealing clothes that show a woman's tattooed arms with *henna*, shoulders, back, cleavage

line, and legs were common styles and mostly adopted by women under the age of 50 (as estimated). This could be a characteristic of these events, which are exclusive to females and where the phenomenon of social comparison usually occurs. Therefore, establishing an identity that enhances the chance of distinction is an individual requirement to meet social expectations. This level of manifested behaviour of body display, enhanced by luxury fashion and freedom of choice, parallels the restrictions in public as well as the social system in other formal gathering events.

No regional differences were identified in terms of the adopted fashion in wedding parties for women under the age of 50. However, most women over the age of 50 adopted modest attire such as luxury versions of traditional dress in tribal regions like Tabouk, or elegant customised dress in regions like Jeddah and Al-Madinah. Women from this age group were observed wearing long-sleeved, full-length dresses of dark or pastel shades. These dresses usually consist of two layers: an elaborate lace or ornamented gauze layer over a satin silk base.

5.2.3 Summary of the Observation of Saudi Women's Clothing Behaviour

According to the results of the observation, the style of the *abaya* in Saudi Arabia varies depending on factors such as regional identity, age and the type of public place in which it is worn. The behaviour patterns regarding the clothes worn underneath the *abaya* in different social settings have also been identified as an important aspect of fashion consumption in Saudi Arabia. This tension between the sobriety of the *abaya* as a uniformed Islamic dress worn in public and wearing luxury, Western, or revealing clothes in female environments raises many questions. These include how Saudi women infer and communicate meanings and how this influences their fashion behaviour. These aspects need to be investigated from the consumers' own perspectives, which are discussed in the next section in an analysis of the quantitative and qualitative results from both the pilot study and the in-depth consumer questionnaire.

5.3 Results of the Initial Consumer Questionnaire (Pilot Study)

The following section presents the findings of the pilot consumer questionnaire (with 60 respondents) in the form of factual data supported by the consumers' quotations to interpret their perspectives of Western and local clothes worn under the *abaya*. The data for the pilot study was obtained from consumers aged between 22 and 36 years. Age was not identified as an influential factor at this stage. A level of thematic analysis was undertaken at this initial stage in order to define the broad pattern of consumption.

5.3.1 The Consumption of Western Fashion

Through the initial consumer questionnaire, it was identified that approximately 85% of the participants preferred to wear Western designs and/or brand names for four main reasons: to express the notion of modernity (6 respondents), to satisfy the desire for uniqueness (9 respondents), the quality of the product (3 respondents), and the variability of sizes (6 respondents).

- Do you buy/wear well-known Western styles and brands?

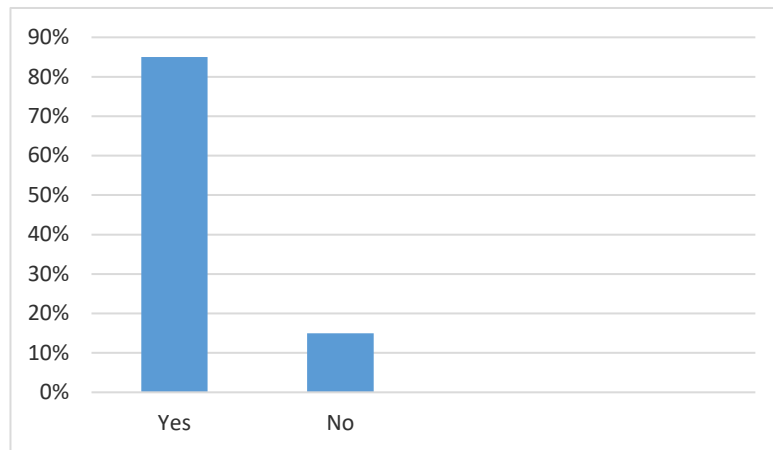


Figure 5.3: The preference of Western design fashion.

5.3.1.1 Modernity

Twenty respondents stated that they prefer wearing international, well-known fashion brands to transmit modernity that aligns with the modern Saudi lifestyle, as stated by CA43:

*“In my opinion, those Western brands are **modern** and **modest** as well. Therefore, they are suitable for formal visits, especially those with a limited number of guests.” CA1*

*“...ideal for **formal meetings**...**modern** and not over embroidered. Although we are required to dress modestly in **educational institutions**, this does not mean wearing traditional dress. I always find **modest** styles for work in various Western brands.” CA29*

*“...because it is **modern** and it suits today’s life.” CA43*

The quotations above indicate that the simplicity of the designs offered by Western brands meet the official requirements for uniforms in governmental institutions and they align with the social considerations regarding dress in formal gatherings. This supports the idea that wearing Western brands does not indicate an opposition to Islamic modesty in terms of appearance, and further suggests that different brands offer a variety of modest fashion items that suit particular social environments. In the latter two quotations, there is an indication of a convergence between the two mainstreams (Islamic modesty and Western fashion) instead of the theoretically established tension between them. One woman explained that:

*“In our society, wearing **Western** brands indicates a sense of **modernity** and **Westernisation** which can be considered a disgrace under some circumstances. Therefore, being modern, especially through the wearing of **revealing** Western clothes, can sometimes be a subject of criticism as it is*

*against Islamic modesty. However, I think women prefer to be criticised as being **modern** rather than being **traditional**. It is even a compliment for some as traditionalism can be associated with **being reactionary or anti-fashion**.”*

CA15

This 20-year-old university student revived the tension between Western fashion and local values of dress and revealed an interesting fact: she considered the traditional dogma about modernity as an extreme opposition to local identity. She stated that wearing revealing clothes is not always acceptable due to the perception that it is a behaviour which contradicts Islamic modesty and local norms. However, she argued that women might accept this criticism as a social compliment as it is usually delivered by women from the opposite side of the intellectual argument, one which represents traditionalism. Traditionalism, in terms of fashion adoption, is the notion and behaviour that refuses the substitution of the traditional dress code with a Western one. However, she defined Western fashion in the context of revealing clothes. The participant also noted that traditionalism as an adopted ideology or lifestyle can result in a negative social judgement of being anti-fashion.

The responses to this question indicate that Western-style clothes are adopted due to their simplicity, which is associated with the notion of modernity. However, this notion was interpreted differently by the respondents: some considered it to be about wearing revealing clothes, which is against local norms, whereas other women identified a relationship between modernity and modesty in the clothes worn in formal social environments.

5.3.1.2 Uniqueness

Twenty respondents stated that their fashion consumption was driven by the desire for uniqueness. Two consumers explained that:

*“In **weddings**, each woman desires to wear an **eye-catching** dress. Despite the **high prices**, this is a bit challenging for **luxury** Western brands as they produce*

*a number of pieces that have the same style which makes it impossible to have a unique **individualised** dress identity. Therefore, the style could be Western and a bit revealing but has to be designed and produced locally.” CA16*

*“...**limited editions** and the most **luxury** brand names such as Elie Saab can be a strong sign of an **individualised** dress identity. However, these designers only target celebrities as they are extremely **expensive**, and their designs sometimes look plain and do not suit Saudi gathering occasions. Although I can afford it, I would prefer my dress to be **customised** and designed by one of the local designers...I buy the fabric sometimes and discuss the design with my sisters.” CA57*

Uniqueness and exclusivity were fundamental motivations for the respondents' consumption of Western designs. However, an interesting fact is that 44 participants perceived the locally designed revealing clothes as a Western fashion. In this case, the identity of dress is defined according to its appearance (concealment or revealing as modest and Western, respectively) rather than its place of origin.

The responses presented above indicate that Saudi women make a statement of self-identity through a customised, unique dress that signifies distinctiveness, especially in wedding parties. Therefore, the concept of being different from others in terms of dress identity in female-only environments is dominant. Some of the participants highlighted that, when attending social occasions such as a relative's wedding party, they preferred to wear customised dresses designed either by a well-known local fashion designer or one of those located in the Gulf region, especially Dubai, in order to ensure a high level of uniqueness and to reach the maximum level of certainty that nobody else will be wearing the same design. The participants also noted that Saudi women sometimes travel to neighbouring countries to buy their clothes in order to avoid dressing similarly to other women, as explained by CA57:

*“If I do not find the dress that satisfies my taste in Saudi Arabia, **I travel** outside the Kingdom. Dubai is usually my destination.”*

This indicates that seeking uniqueness is manifested in social occasions. Uniqueness as a value of fashion in Saudi society can be interpreted in relation to Snyder and Fromkin's (1977) theory, which argues that individuals attempt to differentiate themselves from others belonging to the same community, especially when the conception of the self is presumed to be threatened by the existence of similarity to others (see Section 2.4). This can also relate to the dynamic of social comparison, which is a process that focuses on evaluating the ability of others to meet social expectations. Social comparison can sometimes consequently lead to a judgemental opinion regarding the level of adherence to the collective local norms or other values that may subjectively be inferred. However, within the Saudi context, meeting social expectations related to dress in wedding parties does not necessarily mean fulfilling the theoretical or practical definition of Islamic modesty. Moreover, social comparison fuels the concept and behaviour of social competition in which individuals establish a distinguished and unique dress identity.

5.3.1.3 Quality

Product quality was a reason given by 10 respondents for why they preferred Western products. Participants' physical evaluation of the tangible quality of the products usually included the features of the fabric and accessories used to decorate the garment, such as the application of metallic or plastic buttons, stones, ribbons, easy to fasten zips and also the quality of the finishing techniques. Commenting on Western brands, one respondent stated:

"...they are asli." CA11

Asli in the Arabic language is the term used when describing a genuine original object in order to indicate its high quality. When a product is described as *asli*, it means it has achieved a high level of consumer satisfaction.

A different consumer observed that:

*“Although most fashion products are made in China, the ones provided under the **well-known brands** have a **better quality** than those of unknown names. **Famous brands** would not take the risk and provide bad-quality products. This would reduce the brand’s loyalty.” CA13*

These quotations highlight the importance of the country of origin as an extrinsic influential factor that Saudi women consider an indicator of the quality of a product, which in turn impacts the consumer’s purchasing intention. In contrast, negative impressions of unknown Indian and Chinese companies that produce traditional and Western styles were also described by respondents. Some consumers mentioned that these products often suffer from poor stitching and finishing techniques. One respondent stated that:

*“...some of them are bought to be worn once and thrown away. It is a **waste** of money.” CA11*

Another woman observed how:

*“...women can guess the **quality** of a dress through the **appearance** of the fabric. I always buy **expensive** clothes that also look **expensive** even if I am wearing it only once.” CA14*

Although durability is a functional quality of dress, the respondents emphasised the significance of quality even with products that are sometimes worn only once. They identified visual characteristics of the fabric, such as its weight, colour shade, the softness of the surface, and the weaving techniques, as indicators of its quality. They also indicated a preference for soft, draped and delicate fabrics, to present feminine identity especially in summer occasions.

*“I prefer it to be light and **soft** even though the air conditioning is always on. Draped fabrics are more **feminine** for **weddings** as well as for **home**.” CA36*

5.3.1.4 Variety of Sizes

The final reason given by 10 respondents for their consumption of Western brands was the variety of sizes. The respondents noted that Western fashion brands offer a wide range of products that are able to meet the demands of women from different size categories. One consumer stated that:

*“...I am **overweight** and there is always something for me in **famous brand** names.” CA2*

Another respondent mentioned that:

*“The market suffers from the limitation of **sizes** offered by unknown brand names. To be honest, this is one of the reasons that might encourage women to have **weight loss** surgery, which was my case. I wanted to look trendy but I could not because of my **weight**... Overweight women might spend a week or more looking for a dress before the Eid day.” CA59*

Another highlighted issue was the challenge faced by overweight women in terms of sizes. However, this seems to be an international issue as reported by *The Huffington Post* (2013) in the case of the Western fashion market (see Section 2.3). This response demonstrates that this is also applicable to Saudi consumers who may consider weight loss surgery in order to enhance their body image and enable them to establish the desired self-identity through fashionable clothes.

5.3.2 The Consumption of Traditional Dress

The results of the pilot study show that 85% of the respondents do not usually wear traditional clothes. A number of meanings communicated through traditional dress were explained by 15% of the research sample.

- Do you prefer to buy/wear traditional-style clothes?

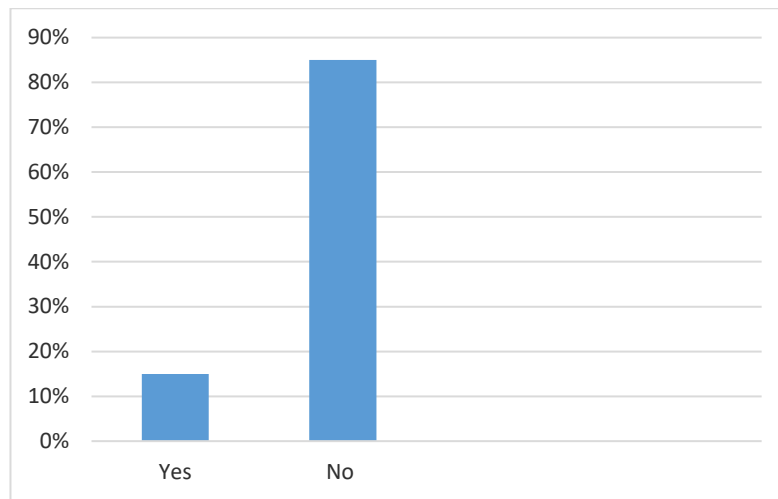


Figure 5.4: The attitude to wearing traditional clothing.

5.3.2.1 Traditional Dress and Islamic Identity

The responses to the pilot questionnaire indicate that traditional clothes are less popular than Western clothes among Saudi women. However, nine respondents (15% of the total sample) stated that they prefer traditional-style dress for one precise reason. This suggests that the adoption of traditional dress is not due to its tangible characteristics as a product, but because of the value it holds as a representation of the local culture, in which adherence to the Islamic value of modesty is dominant. Indeed, two respondents stated that:

*“...it is the representation of the **Islamic modest identity**.” CA50*

*“...the **modesty of Islamic dress** cannot be expressed through the wearing of tight jeans or sleeveless tops. They are definitely an intellectual threat.” CA18*

In this way, the responses reveal a relationship between Islamic modesty and traditional Saudi dress. The women who demonstrated a high adherence to the defined public dress code, which was observed through the conservative style of their *abaya*, emphasised that Western fashion is a systematic means of eroding Islamic identity. According to these respondents, dressing in a way that attracts

others' attention, regardless of their gender, is a clear breach of Islamic teachings regarding dress. This group of consumers signified body covering as the core element of Islamic modesty. It is notable that the women who presented these thoughts did not deny the dominance of Western fashion production caused by the advanced industry; nevertheless, they posited modern and/or Western styles of fashion as a cultural threat. This segment of consumers interpreted Western fashion as a different and opposing ideology of dress that should be avoided to ensure that the integrity of local values is upheld. In this sense, this group of women considered Western fashion to be an aspect of the theory of the global deliberate intrigue that seeks to destroy the local culture of collectivistic societies. Within the Saudi context, this notion notably emerged during the period of the *Sahwa* movement.

In relation to this, a follow-up question was asked: **What about garments that are designed by Western brands that meet Islamic modesty requirements?**

Some respondents noted that these garments are not only in opposition to Islamic principles due to their non-Islamic appearance, they are also inflated in terms of price. Therefore, buying these clothes should be avoided as the concept of Islamic modesty inhibits profligacy. The same respondents stated that they also avoid purchasing garments that are similar to men's clothes, such as jeans or trousers.

However, some respondents argued that the reason for the lower popularity of traditional dress is its price, which is often equivalent to or more than the prices charged by international luxury brands. Therefore, this might be a reason for the prevalence of Western fashion among Saudi women. Although this proportion of the market seems to be minimal, the opinion of its customers is significant, not only as clothing consumers but also as a possible influential reference group on the behaviour of others:

*“Even those who wear revealing clothes they must have a **traditional dress** in their wardrobes to be worn in particular situations... meeting **uncle and older brothers**... when I see them in revealing clothes I do admonish...” CA48*

The above-stated opinion highlights that the wearing of traditional dress is not limited to conservative or traditional women, as the respondent mentioned that women who adopt modern fashion also need to wear traditional dress for particular purposes such as in the presence of *mahrams*.

One respondent attributed her preference for traditional dress to its aesthetic value, which she argued reflects the inherited contemporary Arab and Islamic arts that involves the rich application of embroideries or the contrast of colours. The respondent also stated that:

*“It might not look modern but it is **beautiful**. Its shape, the **adornment**, the colours, details and the quality of the fabrics used make it **distinctive** from those plain Western ones.” CA33*

Some consumers demonstrated a moderate perspective towards traditional dress. They argued that the pride in their Islamic identity can be presented via different forms of modest dress. In this way, they adhered to the Islamic dress code, but believed that it is multifaceted. The visual presentation of Islamic modesty in a female environment can vary in terms of adopted style. For example, participant CA7 stated that:

*“**Islamic modesty is not limited to the traditional dress**. You can find modest designs in Western brands too.”*

Another participant explained:

*“Who said that I can’t be modest unless I wear the **traditional dress**? I am always **modest** but modern as well. Revealing or overpriced dress in front of other women is still counted as modest.” CA10*

5.3.3 General Consumers' Impressions of the Saudi Fashion Market

Although the Saudi fashion market provides consumers with a wide range of imported products, the pilot questionnaire responses highlight a degree of dissatisfaction with the local market for a large percentage of the consumers. Approximately 75% of the respondents complained that the retailers determine the market with specific products and limited designs for each season. This merchandise is usually imported from other Asian countries, such as India, China, Indonesia and Bangladesh. These products are then distributed to every single local fashion shop around the Kingdom, which makes uniqueness and distinctive self-identity through dress impossible.

- Is there any problem with the local market and/or the local industry?

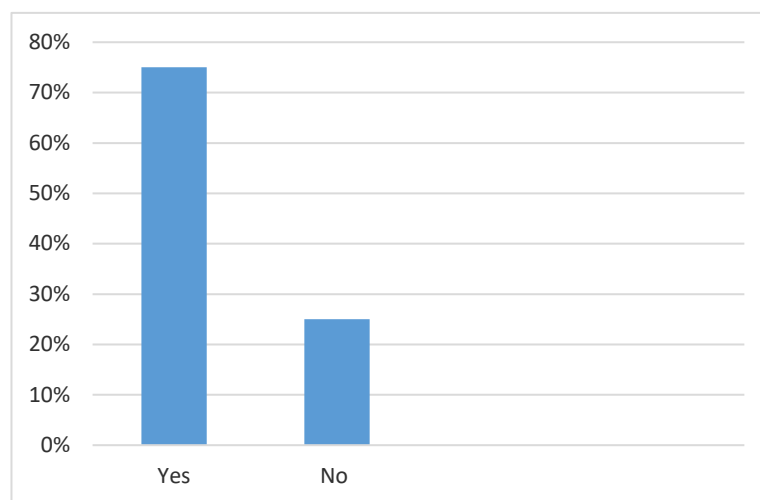


Figure 5.5: The general attitude towards the local fashion market.

Therefore, a common method to achieve the desired individualised identity is through the purchasing of luxury international brands with recognisable logos. Seeking an individualised dress identity motivates the consumption of international brand logos in educational and working institutions. One consumer noted being significantly influenced by the pursuit of individuality in her consumption of fashion:

*“...they are **all the same. Nothing special.** I like to wear something different even for my daily university routine. This is only through the consumption of logos.” CA5*

The second issue identified by the respondents was the limitation of the sizes available, which they stated is the case for the Saudi market in general. The consumers mentioned that it is hard to find the appropriate size of the desired designs of products imported from Asia. Furthermore, this issue applies for different categories of ready-made indoor clothes, including jeans, dresses, T-shirts and pyjamas. Four respondents stated that they sometimes need to modify clothes purchased from one of the local Asian tailors.

*“...**modifying** is easy and cheap but it is a time-consuming task for the Asian tailor as he always says”. CA15*

These types of modifications may be possible for minor changes in terms of garment size, such as shortening or tightening, but for a market in which 37% of consumers suffer from different degrees of obesity (Saudi Arabia is ranked the worst globally for obesity according to Sabq News, 2014).⁴⁵ This issue requires significant consideration in terms of offering the demanded sizes. Women from this segment (overweight) are compelled to customise most of their clothes, as mentioned by one of the respondents:

*“...the only thing I do not **modify** is my prayer garment.” CA59*

This suggests that the two main problems in the local fashion market in Saudi Arabia are limitation of designs and sizes. Moreover, these issues need to be addressed in order to meet consumer demand.

⁴⁵ <https://sabq.org/HPBvMb> [Accessed 12-12-2018].

To sum up, the results of the pilot questionnaire reveal some reasons for the preference of Western fashion. The respondents attributed this to factors such as modernity, uniqueness, quality and the availability of sizes. Traditional dress as a value of the local material culture is associated with Islamic modesty.

5.4 Results of the In-Depth Consumer Questionnaire

The in-depth consumer questionnaire covered Tabouk, Al-Jouf (located in the north of Saudi Arabia), Jeddah and Al-Madinah (located in the western part of the Kingdom), Riyadh (the capital of Saudi Arabia) and Dammam (located in the eastern region of the Kingdom). Each region's consumer questionnaire was administered separately. However, as the results of the qualitative and quantitative data show that there are no regional differences in almost all of the questions examined, the results have been integrated. In cases where differences did appear, the regional characteristics have been analysed. Results are presented in this section in the form of factual data and quotations. Quotations from respondents have been coded according to region (see Appendix 5). Each of these regional codes is followed by the individual questionnaire serial number from 1 to 654 to ensure anonymity (see Appendix 6).

At this stage, a substantive thematic analysis was undertaken to summarise each part of the consumer questionnaire. Throughout this section, each theme is first presented in terms of the quantitative data and its analysis, followed by the qualitative analysis of consumer responses. The abductive strategy applied allows the correlation of quantitative and qualitative data: a reflexive approach is adopted in order to assess the proportional significance of particular views.

5.4.1 Demographics of the Research Sample

Table 5.1 presents the demographic information of the research sample including region, age group, marital status, occupation, educational level and monthly income. In each case, the percentage of the sample is followed by the actual number of responses (defined as F= frequency).

Region	% (F)	Age group	% (F)	Marital status	% (F)	Occupation	% (F)	Educational level	% (F)	Monthly income (SAR)	% (F)
Al-Jouf	15.44 (101)	20 to 25	7.80 (51)	Single	44.04 (288)	Student	24.01 (157)	Primary	0	3,000 or less	30.43 (199)
Dammam	8.56 (56)	26 to 30	25.23 (165)	Engaged	16.05 (105)	Jobseeker	12.08 (79)	Secondary	0	4,000-7,000	13.46 (88)
Jeddah	24.31 (159)	31 to 35	30.12 (197)	Married	39.91 (261)	Teacher	21.41 (140)	University	98.01 (641)	8000-11,000	19.42 (127)
Al-Madinah	22.48 (147)	36 to 40	20.95 (137)	-	-	Nurse	18.04 (118)	Higher education	1.99 (13)	12,000-15,000	30.73 (201)
Riyadh	8.10 (53)	41 to 45	8.87 (58)	-	-	Housewife	9.17 (60)	-	-	More	5.96 (39)
Tabouk	21.11 (138)	46 to 50	5.05 (33)	-	-	Other	15.29 (100)	-	-	-	-
-	-	51 to 55	1.38 (9)	-	-	-	-	-	-	-	-
-	-	56 to 60	0.30 (2)	-	-	-	-	-	-	-	-
-	-	Above 60	0.30 (2)	-	-	-	-	-	-	-	-

Table 5. 1: Demographic profile of the research sample.

5.4.1.1 Regional Belonging

Women from Al-Jouf, Jeddah, Al-Madinah and Tabouk (about 83.5% of the sample), in the first stage of the questionnaire research during 2015, participated in this research with notable enthusiasm, especially after being informed that the discussion would be about fashion. However, during the second stage of the questionnaire research in 2016, the percentage of participants from Riyadh and Dammam was notably lower (about 17% of the sample), as some of the targeted women from these two cities showed a degree of hesitation before participating in the research, and a large number of women from these two cities refused to participate. This may have been due to their pride in their tribal identity and less interest in talking to strangers or due to security-related social or individual fear, resulting from a range of attack incidents and intensified violence that had occurred in the Arabian region since 2015: therefore, collecting data from people might be considered suspicious.

The respondents from tribal regions such as Tabouk, Riyadh and Al-Jouf introduced themselves with an emphasis on their tribal identity; they were also more cautious when expressing concepts relating to clothes that have a direct link to local norms. Moreover, the women from these regions expressed themselves using 'we' instead of 'I', which demonstrates a collective sense of culture. Women from Tabouk, Jeddah and Al-Madinah were more responsive to open-ended questions, telling stories and freely explaining their attitudes and behaviour towards different fashion than women from Al-Jouf, Riyadh and Dammam.

5.4.1.2 Age Group

The majority of the respondents (as presented in Table 4.1) were aged 21 to 35. This reflects the characteristic of youth that usually defines Saudi consumers, as suggested by Shoult (2007). This research also included the perspectives of women from older age groups. Although this percentage is not comparable to the percentage of the women from the younger age group, it was useful to gain an insight into the characteristics of clothing consumption in this group.

5.4.1.3 Marital Status

The participants' marital status varied, as shown in Table 4.1. Within this research context, 'single' was used to indicate divorced and widowed women as well as unmarried women, which made up the majority of the research sample. It is important to note that, despite the lack of research conducted on the impact of this factor on consumer behaviour in general and fashion consumption in particular, its influence was evident in this study and it did have a significant effect on participants' fashion consumption, as explained later in this chapter.

5.4.1.4 Educational Level

The women who participated in this research were well educated. All of them either held a first degree or were studying at a university as an undergraduate or postgraduate student. In general, Saudi women are encouraged to continue their education after finishing high school (Al-Sudairy, 2017). According to a recent official demographic survey conducted by the General Authority for Statistics (2016), gross enrolment in Saudi universities has reached 90.1%, and Saudi women make up 51.6% of university students in Saudi Arabia.

5.4.1.5 Occupation

The research sample included students, employees, job seekers and housewives. A considerable proportion of the respondents (24%) were university students. Some of them were studying at local Saudi universities and others were sponsored by King Abdullah's Programme for International Scholarship and studied abroad – in the UK, USA, Canada and Malaysia – and participated in this research during their annual visit to Saudi Arabia. Furthermore, 21.03% of the respondents were teachers.

5.4.1.6 Monthly Income

The results of the questionnaire revealed that the monthly income of Saudi women, especially employees, is considered high. About 56% of the respondents earned

8,000 Saudi Riyals (approximately £1,630 = \$2,135) or more per month. This type of income is usually earned by teachers and government employees. A considerable proportion of the participants' income in most cases was spent on luxurious goods, including fashion. This is supported by Al-Dossary (2012), who found that the concept of the household in Saudi society is defined and practised in the context of masculinity. Men as 'households' are responsible for providing the family members with life essentials as well as paying for the social requirements of a luxurious lifestyle. Thus, the husband would pay for the customised attire worn at wedding parties, where the social status of the household is represented, as well as the Summer and Winter clothing (*Kiswah*) that is bought on annual visits to major Saudi or international cities. Therefore, less financial pressure is applied on female family members unless they are in the position of head of the household due to temporary or permanent circumstances. University students also receive a subsidy from the Ministry of Education of approximately 1,000 Saudi Riyals (270\$) per month to encourage them to continue university education.

Defining the demography of the research sample enabled the researcher to confirm or reject the influence of these factors on the consumption of fashion in Saudi Arabia. It also established a demographic portfolio of the participants as a representative of the Saudi female consumer population.

5.4.2 Saudi Women's Clothing and Fashion Shopping Habits

The Table 5.2 presents factual data related to the habits of fashion and clothing shopping, including shopping frequencies, seasons, travelling for fashion and the budget for fashion shopping. The dominant proportions have been highlighted in bold.

Shopping frequency	% (F)	Shopping seasons	% (F)	Shopping time (day)	% (F)	Shopping time (week)	% (F)	Purchasing during sale	% (F)	Travel for shopping	% (F)	Average budget (SAR)	% (F)
Weekly	57.03 (373)	Ramadan	17.13 (112)	Morning	0.31 (2)	Weekdays	48.32 (316)	Yes	9.48 (62)	Yes	89.30 (584)	900 or less	22.17 (145)
Monthly	11.17 (73)	Eids	33.94 (222)	Afternoon	0	Weekends	51.68 (338)	No	78.75 (515)	No	10.70 (70)	1000- 1500	31.2 (204)
Seasonal	31.80 (208)	New AY ⁴⁶	29.36 (192)	Evening	99.69 (652)	-	-	Sometimes	11.77 (77)	-	-	1600- 2000	36.24 (237)
-	-	Winter	11.31 (74)	-	-	-	-	-	-	-	-	2100-2500	8.56 (56)
-	-	Summer	8.26 (54)	-	-	-	-	-	-	-	-	More	1.83 (12)

Table 5. 2: Saudi women's fashion and clothing shopping habits

⁴⁶ *AY represents academic year. Education is a dominant sector of employment, and the high proportion of young people who are students results in a general increase in the purchasing of clothes at the start of the academic year.

5.4.2.1 Fashion Shopping Frequency

Approximately 57% of the respondents shopped for new clothes almost every week. Frequent shopping for new clothes was identified as a result of a change in marital status, as mentioned by one of the respondents:

*“After **getting married**, I have to **visit** my **in-laws’** house every **weekend** and I have to wear a **new thing** in each visit... you know in-laws, always critical... that is why I **keep shopping** for clothes almost **every week**.” CT190*

Another consumer stated that it was also due to an increase in income associated with national economic changes:

*“The **economic affluence** and the **increase** in average **salaries** that are decreed by King Abdullah have significantly increased my purchasing times. Now I shop mainly **every day**.” CJ33*

The role of the introduced economic affluence is similar to the influence of the socioeconomic boom in the 1970s which led to the introduction of Western fashion into the Saudi market. The economic changes that occurred from 2009 to 2014 have increased the shopping frequencies for different fashion. Frequent shopping for clothes was identified by the respondents in the current study as a dominant behaviour of different demographic groups and not exclusive to a particular one group.

The behaviour of frequent weekly shopping for new fashion could lead to a phenomenon of accumulation rather than consumption, in line with Veblen’s argument (1899) about the conspicuous waste caused by conspicuous consumption. This indicates an influence of materialism, which is considered to be in opposition to Islamic modesty.

5.4.2.2 Shopping Period

The majority of participants identified evening as their preferred time for shopping. Some consumers highlighted a number of reasons for the preference of shopping during evening time:

"...evening is the only period of the day that I can use the family's car. In the morning, the driver is usually busy picking up and dropping off my siblings to school and also my mum and my sister to their workplace. I don't like to go shopping alone, which will be the case if I go in the morning." CJ300

"I am attending university in the morning. I also have to wait for any of my brothers to drive me to the shopping mall, and evening is the only time for this and it is more sociable too." CT311

"I teach in the morning, and so does my husband, therefore evening is the only time for my husband to go with me for shopping." CM183

"This is because of the hot weather. Although shopping malls are air conditioned, it is still hot during our long summer season." CT212

"Who would go shopping in the morning? It is so boring. Everybody has a job in the morning. I think shopping malls are empty in the morning." CM401

The quotations presented above indicate that there are four main factors which explain why Saudi women prefer to shop in evening:

- 1- The hot weather of Saudi Arabia, especially in the morning during summer time.
- 2- The time flexibility that guardians and/or drivers have in the evening.⁴⁷

⁴⁷ This factor is significant, as women have not been allowed to drive in Saudi Arabia and there is no public transportation such as buses: they have to wait for their guardians to decide the appropriate time for shopping, which is very likely to be in the evening, as mentioned by the participants. Other

- 3- The social atmosphere that is attributed to Saudi evenings, which encourages people to go out, gather together and shop.
- 4- The freedom in terms of time, as a considerable percentage of consumers attend university or go to work in the morning.

This may be similar to shopping behaviour in other Arabic societies: however, it may be different to shopping in Western cultures. The opening times of malls often extend until midnight (see Section 6.2).

Approximately 32% of participants stated that they shop for clothes during several socio-religious seasons. The most active fashion shopping season is the summer holiday (this is usually 16 weeks, from May until September). This includes Ramadan, Eid, wedding parties and also the preparation for the new academic year – as highlighted by a number of the respondents. Shopping for new clothes during these seasons is socially essential.

*“In recent years, **Ramadan and Eid have predated the school season.** It is really time consuming and also financially wearisome. I need to buy clothes separately for each of them.” CF1*

*“The months of **Ramadan and Eid** are for social gathering, which requires wearing a new thing each time.” CF7*

*“The **Eid** season always coincides with the majority of **wedding parties**; therefore, shopping for new clothes in this period is **doubled or tripled.**” CJ210*

*“Recently, the **summer holiday** has been very long. It is about four months. And as you know, when we say summer holiday we actually mean **wedding parties***

women use the family’s private driver or use approved taxi booking applications such as Kareem and Uber. This service is limited to big cities such as Jeddah and Riyadh. However, this situation may change after 26 September 2018, as women in Saudi Arabia will be officially allowed to drive. The primary data for this research was gathered before this change came into effect.

*and **Eid** days. Each of them is an individual festival so imagine when they come together. It is a huge shopping fest.” CT610*

However, some participants considered shopping a weekly routine. In these cases, the shopping behaviour was adopted as a strategy to be ready for any unexpected occasion, as explained by this consumer:

*“For me, fashion shopping is a continuous **activity from the start to the end of the year**. Sometimes I shop for clothes even if there is no need for them, to ensure that I have a variety of clothes for any **unexpected occasion** such as a birthday or graduation party. I benefit from the availability of nice designs in some months of the year, which can be unavailable when you look for them.”
CM219*

Interestingly, a considerable percentage of almost 79% of the respondents stated that they do not purchase clothes during sale seasons. An analysis of the respondents' quotations revealed a notable sense of distrust towards the discounts applied to clothing items: a number of consumers doubted the honesty of retailers regarding the sales prices:

*“Usually sales are **delusive** to get rid of clothes that have been displayed in the stores for ages. And what is funny is that the **price** can go **higher** during sale seasons.” CT610*

This may be associated with unethical issues related to the Saudi fashion market, which are discussed in the next chapter.

5.4.2.3 Travelling for Fashion Shopping

For Saudi women, shopping can be a core purpose of travelling. The participants' answers identified the following countries as the main destinations for Saudi consumers to shop for new fashion.

- **Dubai** (mentioned by 293 consumers).
- **Italy** (mentioned 23 times).
- **Spain** (mentioned 11 times).
- **Turkey** (mentioned by 83 consumers).
- **Lebanon** (mentioned 9 times).

Travelling for fashion shopping suggests a dissatisfaction with the clothing items available in the Saudi market and a preference for products sold in overseas markets due to their unique qualities that might not be offered by local retailers. This indicates the influence of the country's image in conceptualising and attributing particular qualities to fashion production. For example, Italy and more recently Dubai have become well-known global destinations for luxury fashion. Lebanon also has a long-established reputation of fashion elegance, particularly among Arab women, due to the fact that some of the key names of international fashion designers, such as Elie Saab, are from Lebanon. Moreover, the introduction of Turkish drama onto Arabic television in 2004 may have influenced the tendency to shop for fashion in Turkey, as highlighted by 83 of the respondents. The popularity of Turkish actresses among the Saudi community may play a role as an indirect reference group.

5.4.2.4 Budget for Purchasing New Clothes

The responses to the consumer questionnaire revealed that the average budget Saudi consumers allocate to shopping for new fashion is high. The majority of responses allocated a substantial amount of their monthly income to purchasing new clothes (from 1,000 to 2,000 SAR) and some consumers exceeded 3,000 SAR per shopping occasion. Two women noted a significant relationship between a large budget for fashion shopping and a feeling of pleasure caused by the financial ability to purchase items.

*“When I go shopping, whatever I like I directly buy. **I don’t bother about the price** because if I consider a particular budget this will definitely limit my shopping **pleasure.**” CF2*

*“Fashion shopping is more like a **pleasure** than a necessity. **I don’t mind paying any cost** for this pleasure. Honestly, I go back home with **a mountain of shopping bags** and I can’t even remember how much I paid.” CJ312*

Also, some women expressed a high degree of enthusiasm for spending on fashion without allocating themselves a particular budget, especially when shopping for dresses for social occasions. For example:

*“I usually **spend as much as I can afford** when buying a dress, especially if it is for a **special occasion**. I have to wear something that is suitable no matter what it costs.” CT11*

*“When you are looking for the best quality you have to **forget about the price**. **I don’t specify how much I am going to spend**, I’d rather wait until I get my **salary** and go shopping. Then, I will be sure I have enough money for any expensive dress or item that catches my eye.” CR601*

It is notable that a consumer’s monthly income is not the only economic source that facilitates this level of purchasing. Other financial solutions are also available for consumers in a financial condition that might negatively impact their ability to shop. These solutions were highlighted by a number of respondents:

*“I usually shop for clothes after receiving my **jammyyiah**, which is usually about 10,000 SAR (the average).” CJ105*

A *jammyyiah* is a financial plan that is agreed between a particular number of members. This plan is set up to cover a specific period of time, which is usually a full year or 10 months, depending on the total amount of money that is agreed at the beginning of the plan. One of the members is responsible for managing the plan and

collecting the money from the other members. The process of this plan is based on a member paying a specific amount of money at a particular date of each month. Then, the full amount of the collected money is paid to a different member each month until each member has had a turn. This kind of plan is very common among Saudi women because it meets the Islamic standard of financial exchange, as it is free of interest, which is not offered by credit cards.

*“Well, thanks to God that I don’t have a financial struggle when buying my clothes, even if I think it can be sorted in a couple of days by **applying for a loan**. I am a teacher and this not impossible.” CD486*

The participants’ quotations presented above indicate that Saudi women spend a lot on their fashion. The large disposable income given to women who work in government institutions, the monthly payment to university students and other facilitated financial options including loans and *jummyiah* are factors that motivate shopping for new clothes.

5.4.3 Fashion Shopping Atmosphere

Table 5.3 shows the consumers' responses about the preferred shopping type, places and people to shop with, as well as the adoption of online fashion shopping. High-end speciality shops, such as the tailor shops for customised luxury clothing, are sited within malls except for a few (e.g. the Blue Building in Jeddah) shops that are separate buildings (see Section 5.2).

Preferred Shopping Type	% (F)	Place of Shopping	% (F)	People to Shop With	% (F)	Online Purchasing	% (F)
Physical	98.93 (647)	Souq	1.22 (8)	Family	87.16 (570)	Frequently	0.15 (1)
Online	1.07 (7)	Mall	98.78 (646)	Friends	12.23 (80)	Monthly	0.76 (5)
-	-	-	-	Relatives	0.61 (4)	Rarely	1.53 (10)
-	-	-	-	Alone	-	Never	97.55 (638)

Table 5.3: The preferred fashion shopping atmosphere for Saudi women.

Approximately 87% of the respondents usually shop for new clothes with their family members. A major percentage (about 99%) preferred to shop for new clothes from shopping malls rather than the traditional souqs. They gave several reasons for this preference:

- 1- The easy access of service facilities in shopping malls, including restaurants, toilets, a prayer room and play areas for children.
- 2- The availability of international brand stores.
- 3- The higher level of quality of the clothing items sold in shopping malls.
- 4- The good organisation of the space.
- 5- Air conditioning.
- 6- The experience of a modern atmosphere in shopping malls, as inferred by respondents such as **CD486** who said:

*"...it gives me a **feeling** that I am in a modern **organised modern place**."*
CD486

This indicates that, for the reasons listed above, Saudi women prefer to shop for new clothes in shopping malls. It may also illustrate the influence of the notion of modernity implicated in the modern, well-designed malls that have reduced the popularity of the traditional souq.

5.4.3.1 Online vs. Physical Shopping

The empirical data shows that physical shopping is significantly preferred by approximately 99% of the research sample. Some women expressed the significance of physical shopping as an opportunity for entertainment and going out. Fashion shopping was also described by some respondents as '*Saudi women's national sport*':

*"It is a chance to **see people** and to lose **some weight** as well."* **CJ105**

*"I think **physical shopping** is the **easiest sport** for me."* **CD113**

In relation to online fashion shopping, despite its growing popularity as a global shopping phenomenon, it does not seem to be widely adopted by Saudi women consumers. Only 1.07% of respondents preferred to shop online, compared to 97.55% who have never bought or will never buy fashion online. As discussed in the literature review (see Section 3.8.1), a number of studies have identified factors such as concepts of uncertainty avoidance and perceived risk to be the main reasons for the society's mainstream to avoid online shopping. This was also made evident in the current research by the participants' responses. However, in this research, a precise definition of risk or uncertainty is developed. A trust issue is clearly identifiable in the quotations presented below, in which respondents are explaining why they do not shop for clothes online.

*"I do not trust online websites. I had a **bad experience** with them once when I bought an expensive watch and I paid about 2500 SAR for it but it was **never delivered.**"* CT5

*"Despite my craziness about online fashion blogs and **Instagram fashionistas'** accounts, I have never thought... might be **swindlers...waiting for ages to have my items delivered**, this is if they have been delivered to me."* CR15

*"Buying clothes online is full of **hazards**. You may **lose your money** or **receive the wrong items.**"* CJ24

*"...we **prefer to see the item** before buying it. **We cannot trust anybody** or **anything but my own eyes.**"* CF19

*"It is a very **long process** and I do not have patience."* CR185

This perception about online shopping could be linked to the cultural dimension of uncertainty avoidance, which Al-Mousa and Brosdahl (2014) and Khalil (2014) consider to be significant in Saudi society. However, the questionnaire also revealed other reasons that influenced the respondents' perceptions of buying clothes online.

One of the primary reasons that emerged was the involvement in a real online shopping experience that left a negative impression in the consumer's memory. This means that these women might not have been influenced by the factor of perceived risk to begin with, and indeed may have had a positive attitude towards online shopping which motivated them to try it. However, the negative perception about online shopping is a result of the evaluation of the experience, which is undertaken in the post-purchasing phase of consumption behaviour. Therefore, an establishment of a negative attitude towards the behaviour is based on an actual experience not just the perception of uncertainty that prevents the adoption of online shopping, as suggested by the previous studies. The following quotations support this argument:

*"...the **sold items were not refundable**. Once I bought an evening dress from an **Instagram** account but I didn't like it. I contacted the account holder to let her know that I would like to return the dress and have my money back but she **refused**."* **CM46**

*"Online websites are such **burglars**. My daughter paid that lady from **Instagram** but we received nothing."* **CT81**

Another reason identified by participants was the lack of trusted e-commerce websites and the sophisticated design of the existing ones:

*"There is **not plenty of websites** and choices. All I know is **Namshi.com**.⁴⁸ Although it is not easy to use, anyone buying clothes online would probably do it through this website."* **CT63**

Furthermore, the low level of adoption of online shopping could be a result of a lack of consumer knowledge regarding e-shopping, as some participants were not aware of it at all, such as the respondent who stated that:

⁴⁸ Namshi.com is a well-known online fashion shopping website in the Middle East.

“What does online shopping mean?” CM30

Other barriers to clothes online shopping discussed by the respondents included (see Appendix 8):

- Payment systems, as some bank cards do not support online payments and are limited to use at ATM machines.
- The absence of physical objects, which can generate doubt about their quality due to the inability of examining the tangible quality of the product.
- The less-developed infrastructure in Saudi Arabia that barely uses house numbering and/or regional post-coding, which makes the accuracy of delivery difficult.
- Weak ICT infrastructure.
- Accessing international online shopping websites can be sometimes limited due to language barriers.

Some consumers reported aspects that could be considered advantages of online shopping in Saudi society. For example, the consumer quoted below perceived online shopping as a way to maintain Muslim women’s morality and avoid behavioural aberration, as she extensively explained:

*“I believe that **online shopping can be an Islamic solution for women shopping** to avoid men’s harassment, which is very common among young people. Let me clarify that for you. In the Quran, Allah said in surah Al-Ahzab: ‘And abide in your houses and do not display yourselves as [was] the display of the former times of ignorance’. It is a command for women to **stay at home** and **not to show** their beauty to strangers. We are all Muslims; however, look at women in shopping malls these days: full make-up, tight, decorated and coloured abaya and attractive looks, then they say ‘We have been harassed by men’. If they dress **modestly**, the men will not look at them. In addition, shopping online can avoid molestation by drivers. It will be a restful pattern of*

*shopping and an **Islamic** one in terms of its system as a shopping method.”*

CM99

Other women emphasised the convenience of online shopping and its role in saving time and reducing traffic. However, within the Saudi market, it appears that physical shopping – especially for fashion and clothing items – will not easily be replaced by online shopping for the reasons discussed in the light of consumers’ responses.

Despite Saudi consumers’ competence in using technology and social media platforms (Sait et al., 2004), barriers and challenges that prevent women consumers from adopting online fashion shopping do exist.

5.4.4 The Process of Fashion and Clothing Consumption

Table 5.4 summarises the stages of buyer behaviour and fashion consumption in Saudi Arabia.

Shopping intention	% (F)	Search for information via	% (F)	Evaluation of alternatives	% (F)	Post-purchasing (Affect)	% (F)	Post-purchasing (Disposal)	% (F)
Planned	51.38 (336)	Websites	4.43 (29)	Price	4.13 (27)	Yes	100 (654)	Re-use	8.87 (58)
Instantaneous	48.62 (318)	Social media	35.17 (230)	Brand name	15.14 (99)	No	0	Re-sell	0
-	-	In store	40.53 (265)	Country of origin	11.77 (77)	Individual level	81.96 (536)	Give it to charity	50 (327)
-	-	Fashion magazine	1.22 (8)	Durable material	6.88 (45)	Social level	18.04 (118)	Recycling bank	0.0
-	-	Asking others	18.65 (122)	Comfort	4.89 (32)	Leave a review	2.90 (19)	Throw away	0.92 (6)
-	-	-	-	Exclusivity and uniqueness	48.78 (319)	Word of mouth	15.14 (99)	Store	40.21 (263)
-	-	-	-	Colour	3.06 (20)	-	-	-	-
-	-	-	-	Embroidery	2.90 (19)	-	-	-	-
-	-	-	-	Care instruction	2.45 (16)	-	-	-	-
-	-	-	-	Ethics	0	-	-	-	-

Table 5.4: The process of fashion consumption behaviour.

5.4.4.1 Purchasing Intention

As presented in Table 4.4 above, the shopping intentions of approximately 51% of the research respondents were planned. This segment of consumers associated their need recognition for new clothes with the expectation of upcoming social events, as mentioned in the following quotations:

*“I decide to buy **new clothes** for each new event, such as Eid, wedding, or visit. I like buying new things for **each occasion**. Oh, **social life**.” CF1*

*“**I always feel I need** new clothes, especially if the ones I have are worn more than once in front of the same people. I don’t mean **social occasions** but university.” CT10*

The perspectives of these two consumers suggest the role of gatherings as a main characteristic of Saudi social life in motivating women to buy new clothes for each occasion. Furthermore, the elicited data suggest that Saudi women do not present themselves in female gathering milieu wearing the same attire they have worn before. One consumer highlighted other factors that cause this continuous recognition of the need for new fashion:

*“The need for new clothes is a **continuous process**. There is a **change** of everything: **body size**, occasions, **fashion**, and all of these force us to shop for new clothes regularly.” CM125*

However, approximately 49% of the respondents stated that they decide to go shopping for new clothes instantaneously. They linked this to the need to fulfil psychological goals, identifying that shopping for new clothes can relieve depression or change a boring life routine, and can also provide respite before an upcoming season with a busy schedule of occasions to attend. Some consumers also said that they shop for new clothes to occupy their spare time:

*"I go shopping whenever I feel **bored** even if there is no need. Buying new clothes **cheers me up.**" CT190*

Based on these results, it can be argued that, in Saudi Arabia, the recognition of the need for new clothes is significantly associated with the social value of gathering together. Gathering together implies the use of fashionable clothes as symbolic signifiers to transmit meanings that help in achieving particular social or individual goals. Moreover, it fulfils emotional needs for many consumers.

5.4.4.2 Clothing and Fashion Information Search

The Saudi women who participated in this research utilised different sources to gather the fashion product information before purchasing, including social media accounts (35.17%), websites (4.43%) and fashion magazines (1.22%). Approximately 19% of the research sample preferred to ask trusted friends within their social network for essential information or their opinion about a desired fashion item. Access to different information platforms on social media allows women in Saudi Arabia to gather information about different products through the accounts of fashion businesses on Instagram and Snapchat. A notable perspective identified in the responses is that Saudi women do not necessarily access social media to obtain knowledge of product features for the purpose of comparison, but rather as a source of inspiration for new fashion:

*"I usually access some **celebrities'** social accounts to get **inspiration** for a new style. Especially those who are known for their **elegance. Reviews and comments** can make me aware of what is in fashion and **how people think about it.**" CR78*

*"I access a number of **fashionistas'** accounts regularly **to know** what's in fashion every day. I can also read the comments to know how others, especially relatives, perceive this fashion." CT188*

*"I like their styles... **inspirational...** very **elegant and innovative.**" CJ189*

As the above quotations demonstrate, these respondents highlighted a role played by celebrities and fashionistas as indirect inspirational reference groups in endorsing a specific brand or clothing style. This suggests that famous fashionistas and celebrities inspire Saudi women to adopt certain styles for particular events, which indicates the dynamic of social imitation of trendsetters. Therefore, this indirect group of influencers appears to have a substantial impact on forming consumer tastes, which was mentioned by 16.7% (109) of the respondents. The main influencers mentioned by the respondents were Haifa Wahbi, Meriam Fares, Balqees Fathi and Lugain Omran, who are leading Arabian celebrities. Sharing the daily life of celebrities with a large number of followers through social media exposes consumers to different fashions. The consumers are then stimulated to imitate this fashion in order to align with the established standard of taste.

In addition, through social media, Saudi women can easily access other opinions about an introduced fashion. The reviews posted by social media users usually reflect individuals' evaluation of the style and aesthetic qualities of a fashion item, which implies its level of social acceptance or rejection. Although these reviews represent subjective perspectives, they are highly influenced by the sociocultural normative beliefs that conceptualise the standard of acceptance or rejection. Positive reviews usually encourage the behaviour of adoption and vice versa.

However, a considerable proportion of the research sample (40.53%) stated that they gather essential information about fashion and clothing in store (active process) by examining the intrinsic qualities physically or by asking the shop assistant. These respondents perceived physical evaluation to be the most reliable method of gathering information. This indicates that they evaluated the product information immediately before the purchasing decision. One consumer added that:

*"I always ask my **cousin** for advice before I go shopping. She lives in shopping malls and she is **honest** too." CJ135*

Asking people for information, especially trusted members within the social network, was also identified by 18.65% of participants as a way of gathering information.

5.4.4.3 Key Influential Factors Related to Product Characteristics

When respondents were asked which of the intrinsic and extrinsic qualities were more influential when comparing different clothing items before purchasing, approximately 49% emphasised the factor of exclusivity and uniqueness.

*“I don’t like to **buy** something that is **easy to find** in the market... **not repeated... rare designs** make me **feel different and not identical.**” CT107*

*“We spend **time** comparing between different styles until we find the one that is **expensive** and **not** widely **spread** in the market to differentiate ourselves from others.” CT491*

The responses presented above indicate a correlation between the rarity of a fashion product and the feeling of uniqueness caused from acquiring or wearing it. This behaviour can be related to the arguments by Veblen (1899), Synder and Fromkin (1977) and Vigneron and Johnson (1999) regarding the social values and psychological demands that can be communicated through the consumption of status items, in which they argued that ostentation, materialism and uniqueness are the main keys for establishing social status. However, the respondents in the current study indicated that, in the Saudi context, this behaviour is not only applicable to status fashion, it also seems to be an influential factor in the consumption of clothing worn during the daily routine of going to work or attending university:

*“It is **embarrassing** to recognise that somebody’s **wearing** the **same** thing as you, no matter whether it happens at **university or work**. It is a **real social plight**, especially at occasions, and women will make it a focus of their gossip.” CM548*

Another consumer stated that:

*“Some items need more **effort and time** for comparison, such as **occasion and Eid** clothes, the abaya and work clothes. However, most women buy the thing that is **distinctive** as soon as they find it. Never lose a chance.” CT535*

The participants in this study identified that, in Saudi Arabia, this issue is applicable to women not only in the consumption of status fashion but also where there is a requirement to wear a uniform that may limit the presentation of self-identity through clothes such as in universities. Therefore, women attempt to address this issue by adopting distinctive branded fashion that meets the general frame of official requirements. 15.14% of respondents identified the brand name as a consideration by Saudi women when intending to purchase new clothes, and 11.77% of respondents identified the country of origin as a further consideration. This shows that the image of international fashion companies, especially status brand names, has a significant influence as an indicator of product quality. Respondents related the influence of the country of origin in this research to the assumed superiority associated with products produced in countries with a long-term, well-established reputation of fashion, which mainly includes countries in Europe and Turkey. Products manufactured in Asian countries under unknown brand names were associated with poor quality:

*“...there is **no comparison** between the **quality** provided by **Western** brands and the **Asian** ones.” CM548*

This suggests that these two factors (distinctiveness and the country of origin) are used by female consumers in Saudi Arabia to assess product quality, and expensive clothes produced in Western countries and Turkey are perceived to be of better quality than those produced elsewhere.

Examining the suitability of the price compared to the product's performance was indicated by a minor number of respondents. However, the respondents clarified

that they use price as a signifier of quality rather than to influence the purchasing decision. This makes evident the fact that lower-priced products do not stimulate the appetite for purchasing in Saudi Arabia because lower prices are correlated with lower quality:

*"I don't buy **cheap** things because they are always **bad in quality**." CF1*

However, one respondent highlighted that the quality of Asian clothing can sometimes be acceptable:

*"**Asian** products can be suitable for indoor clothing, prayer garments, and sleepwear. They have the **expected quality** for this." CM4*

On the other hand, aspects related to product performance or aesthetics, such as durability, materials, colour or embroidery, were given less emphasis by the respondents. Regarding ethical or sustainable clothing products, a lower level of awareness about green materials and environmentally friendly apparel was identified. It appears that these concepts are not widely known among Saudi consumers. Indeed, the majority of respondents had never heard of these issues, which suggests that they are less likely to influence the consumption of fashion in Saudi Arabia.

5.4.4.4 The Influence of the Post-Purchase Experience on Consumer Behaviour

The post-purchase experience has a multifaceted effect on consumers: it influences the consumer and other consumers within their social network. The evaluation of the purchasing process or the whole consumption process as an experience establishes a perception that can be accessed during future purchasing. This can include factors such as product quality, competitive pricing and good customer service. A positive experience prompts a positive impression and repurchasing, and vice versa.

All of the respondents in this study were affected by the post-purchase experience. However, the majority of the research sample (approximately 82%) did not share their experience with others. Therefore, the influence of the post-purchase experience occurred at an individual level and was limited in its indication of the desire to re-purchase or the intention to avoid a product in the future:

*“...the **first shop** I think to **visit** is the one that has provided me with **distinctive qualities previously.**” CT491*

Another woman stated that:

*“Well, any **cheating** in price or quality is enough to make me **never go again** to the same place.” CJ315*

On the other hand, some women tended to visit the same fashion shop even when they felt a level of dissatisfaction regarding the price or the customer service:

*“I know that these people are more **pricy** than the other ones but they provide the **desired quality.**” CT90*

*“...**no special offers** or bargains for **permanent customers**, but they are the best in terms of the provided **quality.**” CR22*

This indicates that some aspects of the experience evaluated by the consumer may overlap, and the consumer must make a decision based on the strength of the sought benefit. For example, for the consumers quoted above, the influence of bad customer service or exaggerated price was lessened when the product was expected to be of high quality. However, these examples of individual-level post-purchase influence do not reflect the collectivistic characteristic of the Saudi culture.

To clarify the reason for this attitude, one respondent explained that:

*“...the first idea that will pop up is **envy**. If you tell them the truth they will think that you are trying to **dissuade** them from buying things that might be good only for your own benefit.” CT90*

Another woman added:

“You cannot predict the consequences, you will be blamed for any fault.” CM76

Therefore, it can be assumed that some Saudi women may prefer not to influence others by sharing their experience, in order to avoid any conflict that might be caused by a personal interpretation of the advice offered. Another consumer related this behaviour to the principle of morality, stating that:

*“This business is [**arzaq**] bread and butter. It is **immoral** to influence people in a way that might **affect** others’ businesses. Let people know by themselves.” CF1*

However, 18% of the research sample confirmed that they would share their experience of a particular clothing item, fashion store or an account that sells fashion through social media by leaving a review on social media under an anonymous username.

5.4.4.5 Strategies for the Final Stage of Consumption

Fifty percent of the respondents noted that they donate their old clothes as a final stage of consumption. They explained that clothes in very good condition can be donated to families in need in Saudi Arabia or to neighbouring countries with economic or political issues, and this is usually carried out through official socio-religious charitable organisations. Used clothes can also be offered to domestic housemaids or drivers (as gifts for their female family members) when they plan to return to their home countries in Asia or Africa. These clothes can sometimes be branded or worn only once. However, 49 women (7.5%) said they do not provide their maids and drivers with second -hand clothing to wear or as gifts for their

family members in their home countries: they would rather go to the shop for them or take them shopping if they ask for new clothes:

“We buy them new things as we buy for ourselves.” CF1

In addition, approximately 8% of respondents said they re-use their old clothes, and about 40% explained that they store them in case of emergencies such as unexpected gathering occasions. Respondents additionally identified that storing clothes that are not in use any more can also be due to immaterial values attached to a garment, such as remembrance of a happy event, as explained in the following quotation:

“I don’t usually get rid of old clothes. Each piece holds a memory; my engagement dress, maternity clothing, and some of my childhood clothes, all of them are safely stored. Most of them are branded and in a good condition and can be used again.” CT90

Storing unwanted clothes could also be due to the limited recycling or disposal options offered to consumers in Saudi Arabia. It may also suggest a dominance of a shared negative sociocultural perspective related to purchasing second-hand clothes, which would explain the absence of second-hand clothing shops or charity fashion shops in the Saudi market as well as the absence of reselling clothes online.

5.4.5 Different Categories of Clothes Worn Underneath the Abaya in Different Social Settings

Table 5.5 presents different categories of fashion worn underneath the *abaya* in different social settings.

Special occasions and parties	% (F)	Workplace and university	% (F)	Eid clothes	% (F)	At home	% (F)	Attachment to a particular brand	% (F)
Customised	96.18 (629)	Customised	2.14 (14)	Customised	0	Customised	0.46 (3)	Yes	20.49 (134)
Luxury global	3.36 (22)	Luxury global	43.73 (286)	Luxury global	40.83 (267)	Western clothes	38.99 (255)	No	79.51 (520)
Fast fashion	0	Fast fashion	54.13 (354)	Fast fashion	48.62 (318)	Traditional dress	60.55 (396)	-	-
Local brand	0	Local brand	0	Local brand	1.22 (8)	-	-	-	-
Traditional dress	0.46 (3)	-	-	Traditional dress	9.33 (61)	-	-	-	-

Table 5. 5: Different categories of fashion and clothes underneath the *abaya*.

5.4.5.1 Clothes for Weddings and Special Occasions

The respondents demonstrated a strongly positive attitude towards custom-made dresses produced locally or within the Gulf region to be worn on social occasions, especially at wedding parties, with 96.18% of the sample following this practice. The adoption of customisation was revealed to be popular among the respondents:

*“...to **avoid similarities.**” CF1*

*“...to be **distinctive.**” CM4*

*“...to show that I can **afford it** just like others.” CM8*

Various responses were given stressing the concept of uniqueness, which mainly signifies wealth and economic capability. The reasons given by respondents for this behaviour of customising dress to create an individualised identity varied from the desire to establish a distinctive social status to the desire for social equality reflected by the adoption of the widely common behaviour of individualisation – that is, alignment with the behavioural pattern rather than the adopted style. This behaviour can be considered in relation to Mackinney-Valentin (2017), who suggests that a level of ambivalence is paradoxically implicated as a core principle in social theories of fashion and status. This concept identifies the dichotomies in different contexts of fashion, which in the case of this study are related to notions of conformity and individualism. The responses to the questionnaire suggest that, in Saudi Arabia, the fashion system for special occasions balances between the collective norm of displaying wealth, which is highly associated with Arab culture, and the individual choice of a unique dress identity.

A minor percentage (about 3.36%) of respondents demonstrated a level of preference for ready-to-wear luxury fashion, especially for occasions with a limited number of attendees. The respondents also identified that this category of fashion can be worn when the occasion is hosted by people who are not close relatives,

because, significantly, more attention is given in Saudi society to the appearance of hosts, especially at weddings.

The influence of age on the consumption of fashion for social occasions was also mentioned by the older participants. For example, this respondent stated that:

*“I prefer to wear what **suits my age**. For my occasion clothes, I buy fabric for 1,000 or 2,000 SAR and take it to one of the well-known ladies’ retailers to be tailored. Women of my age should look carefully for what suits them, otherwise they will lose respect and might be a source of **ridicule**.” CJ70*

In addition, another respondent (CT192) stated that they prefer traditional dress for special occasions, and linked this to her age and regional belonging to a rural area before moving to the city (see Appendix 8 for the full quotation). Both respondents highlighted an association between the factor of age and the socially expected level of dress modesty that should be shown on social occasions, which can be called a reasoned action in the context of Fishbien and Ajzen’s (1975) theory.

In Saudi Arabia, customised special occasion dress is usually produced locally for all age groups across the Kingdom. The major retailers of the luxury fabrics that are used for the purpose of customisation are usually located in major cities.

5.4.5.2 Clothes for Official Institutions: Work and University

Approximately 54% of the research respondents confirmed that they adopt suitable fast fashion items in order meet uniform requirements (colour, design and length). University students made up the majority of this percentage (approximately 39%); however, some teachers also chose fast fashion for work. Unfortunately, no reasons were provided by respondents to explain this fashion behaviour. A likely reason for the adoption of fast fashion is that it offers the consumer an opportunity to establish a new dress code that changes continuously. Fast fashion may also be utilised by these respondents to reduce the cost of wearing new fashion every day. In contrast, 43% of respondents from different age, occupation, region and income groups said

that they adopt international luxury fashion for the university and workplace. However, this adoption was associated with the role of social pressure applied by different reference groups:

*“I am a **university student**, I see **girls** every day wearing different **brands** and I do not want to look **worse than** them as this might **embarrass** me, so I try to shop as much as I can to maintain my **self-confidence**.” CJ185*

In the response presented above, the respondent acknowledged the significant influence of the comparative reference group on her behaviour of adopting luxury brands to wear at university. The aim of the social comparison between members in a community, where the value of conformity is communicated via the wearing of uniformed attire, is to eliminate individual social differences. The responses given in this study indicate that female consumers in Saudi Arabia usually try to maintain a level of social equality through the adoption of luxury status fashion in order to boost their self-confidence. The influence of a reference group was also highlighted by another respondent, who stated that:

*“I normally buy **international** designs, especially well-known brand names...**not for personal reasons**, it is totally a **social pressure...teacher... high salary...married employee... cannot be easily emulated** either because of its **price or rare...colleagues... in-laws**.” CF9*

In this quotation, the consumer explained how establishing status through clothes is a form of social competition that exists in workplaces. The quotation implies that the perceived stereotype linking the economic status of a particular occupation to a theoretical consumption pattern is a social pressure applied by different social forces, including colleagues and in-laws, which compels some consumers to present themselves in a particular fashion in order to meet social expectations. One way of achieving this is through the consumption of rare, expensive fashion clothing to be worn in official institutions. However, the above respondent criticised society for being shallow and judgemental. In-law female members were critically mentioned

by 59 respondents as people who always apply social pressure on married women in relation to their choice of fashion (Table 0.7).

Some of the respondents' behavioural patterns demonstrated a bias towards satisfying social expectations, which sometimes marginalised the individual's self-motivation towards the adoption of particular fashion. This suggests that the psychological demand for gaining social approval can negate an individual's definition of the self and her subjective interpretation of values. However, the ultimate goal of gaining social approval is to fulfil the psychological demand for self-actualisation, self-confidence and self-esteem. Therefore, the persuasion or positive or negative personal feelings regarding fashion behaviour could be significantly affected by social pressure in Saudi Arabia. This interpretation applies elements of the Theory of Reasoned Action (Fishbein, 1963). However, Fishbein and Ajzen (1975) defined subjective norms at a micro-level, which included key figures such as friends and family members. In Saudi Arabia, the system of subjective norms is operated by wider, macro-level social networks, which could be attributed to the collectivistic cultural identity.

*“When **Western fashion** was first introduced to the Saudi market **in the 1970s**, I was one of the first adopters. I still wear it but I choose **modest designs** to suit my age **for parties** as well as the **workplace**. I work in the **private sector**.” CJ195*

This woman is in her sixties but still worked as a consultant in the private sector, where less emphasis is given to uniform. She indicated that she adopts the luxury fashion brands that have become available since the 1970s in Saudi Arabia, as appropriate to the status of her job. Due to her age, there was a social requirement of modesty in her dress code. Therefore, she adopted modest designs provided by Western brands that satisfied the requirements of her job position as well as her age.

A minor proportion of the consumers described customising their uniforms due to the limited number of sizes available.

5.4.5.3 Eid Clothing

Approximately 41% of the research respondents adopted luxury fashion for Eids, and about 48% of them adopted designs provided by Western fast fashion, to be worn at a family gathering rather than at big Eid parties. The choice of fast fashion is mainly indicated in the category of younger unmarried women: the pressure of the in-laws encourages the consumption of luxury fashion. A small percentage of consumers (approximately 9%) selected traditional dress as their first choice for Eid-ul-Adha celebrations and Ramadan gathering nights. For example, it was explained that despite the general preference for Western styles, wearing traditional clothes at some sociocultural events where people celebrate a shared spirit/values is more appropriate:

*“I normally buy Western designs, but for some occasions, like **Eid-ul-Adha** or if I am invited to a **pre-wedding party**, I buy **traditional designs** for these events. But in my daily life I wear my jeans.” CR79*

*“I only buy them for traditional occasions, including **Eid-ul-Adha** or **pre-wedding parties** – ‘henna’. I wish that I could wear them in my daily life but as you know, they do not fit with today’s lifestyle, and if I did I may be called **grandma** by my cousins as these traditional designs are usually linked with older women.” CD73*

Both respondents highlighted the wearing of traditional dress for Eid-ul-Aha as well as pre-wedding parties, which can also be held on Eid nights. Another issue highlighted in the responses was the association between the older age group and the adoption of traditional dress.

5.4.5.4 Indoor Clothes

The majority of the research sample (60.55%) said they mostly wear traditional clothes at home, although 39% of respondents – particularly in the 20 to 35-year-old age group – reported wearing Western clothes, including jeans. For both clothing choices, the respondents explained that they were influenced by performance characteristics such as comfort rather than social considerations:

*“...both styles are more **comfortable** for indoor clothes.” CJ332*

Some respondents stated that they only wear traditional clothes at home in front of *mahrms*. According to their views, wearing traditional, modest garments reflects the value of respect that entails presenting the self in a modestly defined manner in the presence of the opposite gender. This avoids any negative comments by male relatives regarding dress, especially in conservative families.

*“I can’t sit with my **uncles** or my **nephews** while I am wearing tight jeans or a sleeveless top. **Traditional** designs would be the most **appropriate** garment for this. It is **decent**. **Modest skirts and blouses are also appropriate.**”
CR198*

*“The **modesty** and the **fascinating adornment** of the traditional designs make them **special** and **favourable** for family gatherings when **males** are expected to be joining in, for more **respectability.**” CT200*

In these quotations, the respondents identify several values, such as decency, appropriateness and respectability, as implications of wearing traditional dress. As the quotation shows, respondent **CR198** also acknowledged the aesthetic aspect of the garments as a value of traditional dress. Therefore, the wearing of traditional dress seems to be the dominant behaviour in the presence of male guardians. Some women also wear such clothing when celebrating in the morning of Eid-ul-Adha and at pre-wedding parties.

5.4.5.5 Brand Loyalty

The analysis of the research results revealed a moderate level of personal/emotional attachment to fashion brands. Only 20.49% of the research sample had an attachment to a particular brand, often developed based on trust regarding product quality. Some of the brands mentioned were: Next, Zara, Dolce and Gabbana, Mango, Selfridges, Dior and Femi9. However, respondents did not specify any further details to explain their attachment, such as brand image or personality. Despite their responsiveness to and familiarity with the international brand names, the majority of participants (79.51%) stated that they do not have any attachment to a specific brand and they seek what they desire from different brands.

This behaviour of variety value seeking in fashion could decrease brand attachment. Familiarity with the values offered by a brand could also decrease the level of attachment. This would pose a challenge for brands to strike a balance between the concepts of familiarity and innovation/novelty. At first glance, this familiarity appears to cause a progressively lower level of stimulation which does not create brand attachment. Almost all respondents apart from 16 (2.45%) skipped the question about local market issues. The 16 participants who responded identified cheating and misleading prices as the main market problems. Therefore, the current research relies on the aspects discussed in the results of the pilot consumer questionnaire.

5.4.6 The Influence of Sociocultural Factors on Fashion Consumption (underneath the Abaya)

Table 5.6 indicates the influence of different sociocultural factors such as religion, social considerations as well as individual factors on the consumption of fashion to be worn under the *abaya*.

Religious Influence	% (F)	Modesty Principles	% (F)	Social Influence	% (F)	Social Considerations	% (F)	Individual Influence	% (F)	Individual consideration	% (F)
Yes	30.28 (198)	Looseness	2.14 (14)	Yes	97.09 (635)	Social class	1.68 (11)	Yes	25.07 (164)	Personal traits	0
No	69.72 (456)	Opaque	19.41 (127)	No	2.91 (19)	Others' opinions	90.98 (595)	No	74.92 (490)	Self-concept	0.61 (4)
-	-	Concealment	3.21 (21)	-	-	Rules/traditions	4.43 (29)	-	-	Experience and knowledge	4.59 (30)
-	-	Unlike men	5.50 (36)	-	-	-	-	-	-	Beliefs/perceptions	19.87 (130)
-	-	Unlike other faiths	0	-	-	-	-	-	-	-	-
-	-	Moderation	0	-	-	-	-	-	-	-	-

Table 5. 6: Factors influencing fashion consumption behaviour underneath the *abaya*.

5.4.6.1 Social vs. Individual Influence

The empirical data suggest that social considerations, such as the opinions of others (mentioned by approximately 90.98% of the sample) and society's rules and traditions (4.43%), have a significant influence on fashion consumption behaviour in Saudi Arabia. That is, peers or the social reference group inform the status given to sociocultural beliefs, rules and traditions that define the values transmitted through different fashions. The influence of others is a complex factor that can be inspirational, comparative or evaluative. As the respondents demonstrated, the diffusion of new fashions by an indirect reference group inspires Saudi consumers to try a new style, and the evaluation of the style's suitability is carried out by the normative and comparative reference group. However, subjectivity sometimes informs the construction of social attitudes. In this way, a struggle can emerge when constructing self-identity through fashion as a result of the conflict between the different social perspectives of different reference groups. This was discussed by some consumers, who gave examples of wearing revealing clothes that might be considered inappropriate by some members of the normative reference group such as conservative parents and older grandparents in extended families. Thus, the behaviour of wearing revealing clothes can be associated with morality deviation, which also affects a family's reputation within society. In contrast, the respondents also illustrated how wearing this form of fashion can be considered a signifier of a high level of self-confidence and modernity by a particular comparative reference group such as friends. Similarly, the consumption of expensive fashion for establishing or maintaining social status can be perceived by individuals as an irritating consequence of social pressure, while others may view it as an indicator of wealth and elegant taste. Nevertheless, display is the dominating factor. Women wear revealing clothes to display the beauty of their bodies, and the adoption of luxury fashion is usually to display wealth:

*"...many **conservative** women relatives signify **visual modesty**; however, they don't mind **overspending**." CF7*

This suggests that Saudi women may adopt a form of interchangeable self-identity through their clothes in order to achieve others' approval of their attire, usually by transmitting qualities that enable them to avoid being in the position of *'the one I fear I would be'*, which can be the case in several circumstances. It is a challenging social task.

*"I don't always present myself in a way that I want, just to avoid **harsh** direct or indirect social **criticism** about my **appearance**."* CR22

Therefore, the personal evaluation of possible social consequences resulting from the adoption of a particular behaviour has a great influence on the pattern of fashion adoption in Saudi society. This significant level of social influence explains the low-level impact of micro aspects related to individual definitions and perceptions of different fashions. Although approximately 25% of the research respondents indicated an influence of personal cognitive and affective elements, such as self-concept, knowledge, experience, beliefs and perceptions in stimulating the adoption of a specific fashion, these aspects were defined in a social context. Some consumers explained that the definition of real self-identity through clothing is limited to environments that only include close friends and some female family members:

*"I like the combinations of **crazy colours** and I only wear them in front of my friend because she is the only one understands my **identity while others** may view this as a **poor taste**."* CD73

*"We learn from our childhood that **we represent a society** rather than an individual identity."* CM35

This shows that, within the Saudi cultural context, defining self-identity through the adopted fashion is cohesive with sociocultural considerations.

5.4.6.2 *The Influence of Islamic Modesty*

When the participants were asked about the influence of Islamic modesty as a value to be considered when presenting the self through fashion, they demonstrated some confusion, which seems to be due to the complexity of defining the meaning of Islamic modesty, especially in Saudi society. This confusion may also be a result of the definition of modest Islamic clothes, which is limited to the wearing of the *abaya* in public. The majority of the research sample (approximately 70%) stated that their clothing choices were not dominated by the exact requirement of the principle of Islamic modesty.

*“I wear **revealing customised dress in weddings and big parties**. I don’t see any problem with this. Although my **grandmother** always **criticises** this, I receive nice **compliments** from **others**. I feel it is logical, we are all women, no men around and until now **I don’t think there is a consensus about modest dress in women-only social settings...**” CR613*

The concept of Islamic modesty was clearly defined in a gender context. A large number of the respondents argued that although a level of Islamic modesty should be generally considered, the Islamic requirements of dress should only be applied to mixed-gender social environments. This suggests that a degree of complexity and ambiguity exists in the notion of Islamic modesty defined by Saudi women. They understand that a dress that is not extremely revealing, such as a sleeveless short fitted dress, could still be considered modest.

*“In **weddings**, there is **competition** between women to show who is more attractive and has the perfect body shape. The only way to prove this is via wearing **revealing dresses...** as we are **all women** together.” CR521*

*“The **body image** is a significant definition of the feminine identity between women... Many of the women who I know had cosmetic surgery to improve their appearance and to be able to wear revealing clothes that substantiate their femininity... ideal bodies on social media...” CT562*

*“...it depends on the shape of the body. Women who have nice figures are encouraged to wear revealing clothes, especially at **weddings**... we have to hide our imperfections to avoid **criticism**... there is a standard for the perfect body introduced by **social media** ...” CJ606*

The above quotations highlight the importance of the body image in affecting the adoption of revealing clothes as well as the perceptions of others about this behaviour. They also indicate the social establishment of a standard that defines the ideal body figure.

*“...it is difficult to decide which is modest and which is not in women-only environments. People have **different opinions** about this but they **adhere** to a **broad standard**.” CR26*

The quotation above indicates that the respondent’s definition of modesty in women-only social settings appears predominantly subjective. Nevertheless, they noted that this subjectivity cannot exceed or transgress the broader established standard, which reflects the theory of self-definition proposed by Stone (1962), who argued that defining self-identity should be compatible with the wider cultural system in order to obtain social approval. However, approximately 30% of respondents identified Islamic modesty as a core principle of their clothing consumption. An analysis of the qualitative data of the participant quotations indicates that some consumers associated this consideration with social influence (13 consumers aged from 20 to 35: 1.99%), including the fear of social disapproval resulting from the adoption of immodest fashion and the associated implications of being immoral and disrespectful to local values. Other respondents (29 consumers aged from 20 to 40: 4.43%) demonstrated a notable level of positive personal conviction towards the concept of modest clothes, even within female-only environments.

*“**Modesty** is not a choice, it is a **religious value** even in female social settings. People misunderstand modesty...” CT293*

This segment of the consumers signified Islamic modesty as a key factor that helps to avoid different kinds of social disadvantages, such as social envy, which can be a consequence of the feeling of inequality caused by high levels of showing off wealth or the beauty of the body by other women:

*"...women go to **extremes in revealing and showing off wealth** through clothes... **corruption and envy.**" CM99*

When asked about the modest dress for clothing worn under the *abaya*, 19.41% of respondents stated that even sleeveless or short dresses should be opaque. Thus, the research results indicate that, despite the conservative characteristic of Saudi society, the influence of social factors surpasses the influence of Islamic modesty on the choice of clothes worn in female-only social environments. However, the influence of religion, social and individual factors may overlap under some circumstances, including the identity of the social setting and audience. The majority of the research sample did not demonstrate any differences in relation to regional identity.

5.4.7 Consumption Behaviour Regarding the Abaya

Table 5.7 includes data relating to the consumption of the *abaya*.

Number of <i>abayas</i>	0% (F)	Place to buy from	0% (F)	Category	0% (F)	Budget (SAR)	0% (F)	Preferred colour	0% (F)	Preferred style	0% (F)
1 to 3	60.24 (394)	Souq	8.10 (53)	Customised	21.10 (138)	300 to 600	42.05 (275)	Black	75.84 (496)	Traditional	12.08 (79)
4 to 6	32.42 (212)	Mall	91.90 (601)	Ready to wear	78.90 (516)	700 to 1000	36.24 (237)	Dark	16.97 (111)	Moderate plain	59.02 (386)
More	7.34 (48)					More	21.71 (142)	Pastel	7.19 (47)	Slightly decorated	28.90 (189)
								Vibrant	0	Magnificently decorated	0

Table 5.7: The consumption of the *abaya* and its values.

5.4.7.1 General Characteristics of Abaya Consumption

Approximately 60% of the research sample owned one to three *abayas* on average, which they usually bought from shopping malls where famous local *abaya* brands were located. In addition, they indicated that each *abaya* had different characteristics in order to meet the requirements of the different public environments.

*“...one for **work**, one for **shopping**, and one for **occasions**.” CT5*

*“Each *abaya* serves a different purpose. For example, the **shopping** one should be **light and closed** while the one worn for **occasions** can be slightly or significantly **decorated**.” CT11*

Approximately 79% of the participants preferred their *abaya* to be ready to wear. They also noted that their allocated budget for buying an *abaya* varies depending on the purpose of the *abaya* they are intending to purchase.

*“...it depends on the **purpose** of the *abaya* I am intending to buy.” CT11*

Despite the defined purpose of the *abaya*, which is concealment, it seems that Saudi women wear different types of *abaya* in different public places.

5.4.7.2 Preference for Different Abaya Categories

More than half of the research respondents (59%) stated that they prefer to wear the moderate plain *abaya* style. The preference for this *abaya* category can be attributed to its practicality and moderate appearance.

*“...it is still **modest** but more **practical**. Placing the *abaya* on the top of my head is challenging as I think it will keep falling.” CJ33*

Approximately 29% of the respondents stated that they prefer to wear a slightly decorated *abaya* in a way that does not attract male attention in order to present their self-identity. The majority of these respondents were from Jeddah (26%). On the other hand, about 12% of the respondents said they prefer to wear the conservative form of the *abaya* (*abayat-ar-ras*). This can be due to social pressure that associates this style of the *abaya* with moral qualities and as a signifier of respect:

*“A girl’s **dignity** can be easily identified through the shape of her *abaya*. Modest girls always cover their body properly with a conservative *abaya*.” CM366*

*“Although it is a **traditional** form of *abaya*, people would highly **respect** a girl who is wearing this form of *abaya*... I feel I cannot wear any other form. It has become a conviction.” CT5*

*“...all women of my age wear **abayat-ar-ras** for religion, age as well as respect.” CT192*

*“...is a fundamental element of my Saudi **nationality** and I do want to look Saudi inside the Saudi society or even when I visit Western countries.” CR158*

The quotations presented in this section consistently highlight the significance of the traditional form of the *abaya* in expressing the identity of Saudi women. This criterion is socially linked with the epitome of a woman’s rectitude in the Saudi cultural context. The respondents revealed that the conservative style of the *abaya* is dominant in regions with a conservative identity, such as Tabouk and Al-Jouf, which can also be correlated with the strong tribal patriarchal authority in these regions discussed previously in this chapter. About 75.84% of the respondents said they prefer black *abaya*, and approximately 32% said they would prefer to wear dark colours if they had the freedom to choose. These views were predominantly shared by consumers aged 20 to 35 who lived in Jeddah and Al-Madinah. This could indicate an influence of the cosmopolitan identity of these regions. The respondents

explained that the black colour has been socially legitimised in Saudi Arabia to be the lawful colour for the *abaya* and inhibits the attention that can be caused by wearing other colours:

*“...to avoid **attractiveness** that can be caused by colours.” CJ66*

Another respondent perceived wearing black as a contrast to men’s clothing in order to fulfil the principle of Islamic modesty that signifies contrast in the definition of the dress code of each gender:

*“We have to be **different to men** and dress in **black**.” CR78*

Furthermore, as the quotation below shows, the respondents perceived the black colour as denoting the national identity of Saudi women, and colourful *abayas* as signifying other nationalities:

*“The **colourful abaya** is considered to be an **extraneous** form of the *abaya* that developed somewhere else. The adopters of this kind of *abaya* are usually **foreigners or those who have been naturalised**.” CT491*

However, some respondents associated the preference for black *abaya* with other purposes, such as enhancing body image, elegance and femininity, which should be avoided in public according to the principles of Islamic modesty:

*“**Black** is the colour of **elegance** and elegance is the most obvious characteristic of Saudi female identity. Therefore, it does not only represent the meaning of modesty, it also enhances the desired **elegant** appearance in public... helps women to look **slimmer**.” CM134*

This indicates that, for Saudi women, the black *abaya* represents different values that vary from religious to national. It also helps to achieve some goals usually sought through fashion, such as enhancing body image.

5.4.7.3 Beliefs about the Abaya

If there is freedom of choice	0% (F)	Reason for choosing the abaya	0% (F)
<i>Abaya</i>	96.48 (631)	Religious	68.65 (449)
Modest clothes	3.52 (23)	Social/national	12.08 (79)
		Personal	0.46 (3)

Table 5. 8: The *abaya* values

As shown in Table 5.8 above, when the respondents were asked about the type of clothes they would wear in public if they had the freedom of choice, approximately 96.48% of them chose the *abaya*. According to the consumers, the *abaya* denotes several meanings. The majority of the respondents identified religious meanings, and some also noted social and national values. A wide range of meanings indicating religious and social significance were given in Arabic that have been grouped into the broader categories. Some religious meanings are repeatedly attributed: an Islamic unified identity (81 times), the obedience to God '*Allah*' (123 times), personal conviction that follows the Islamic beliefs about the sanctity of the female body that should be modestly covered (39 times), the fear from God (12 times) and social meanings of the *abaya* to indicate the Saudi identity '*Asl*' that substantiates belonging and differentiates Saudi women from other national groups.

A small percentage (approximately 3.52%) of participants said that they would choose to wear other forms of modest clothes. They argued that the aim of Islamic modesty is to establish a unified definition of Muslim women's dress code that does not have to be identical:

*“...one of the Islamic principles supports the **belief in differences**, this can be applied to women’s appearances in public... it seems to be a **social crime** to wear a colourful abaya and it is always to malign the **identity of Jeddah’s** population. People are judgemental... abaya is a very important Islamic symbol.” CJ183*

This respondent commented that women should have the freedom of selecting between the available designs of the *abaya* to present their own Islamic but individualised identity when in public. She criticised the view that conceptualises the *abaya* as a parameter to measure an individual’s adherence to a particular level of religious commitment or ethnicity. She assigned the blame of this judgemental notion on the conservative religious ideology as well as the regional customs that guide public opinion. However, this woman did not deny the significance of the *abaya* itself as a symbol of Islamic modesty and she even strongly defended the practice of wearing the *abaya*. Again, this opinion can be referred to the cultural characteristic of Jeddah as a cosmopolitan city that embraces Saudi people who belong to different racial backgrounds, not only the tribes.

Also, a small number of respondents indicated some individual values attributed to the wearing of the *abaya* such as elegance and femininity.

*“Thanks God for offering us the **abaya**. The **abaya** enhances my **body image**. It makes me look **slimmer** and more **feminine**.” CM504*

A more detailed discussion of the values transmitted through the *abaya* is provided in Section 7.3.4.2.

5.5 Summary of the Chapter

This chapter provided an analysis of different patterns of fashion shopping and consumption in Saudi society. It also explained the different stages of fashion consumption and identified the key factors that affect each stage. The analysis of the data revealed that social influence drives a system which substantiates the notion of

the constructed self-identity as reflecting the society's values. A number of themes and specifications related to behavioural patterns were also identified and explained in more detail, including the perceived risks associated with online shopping, the role of others and the tensions regarding the definition of modest clothes.⁴⁹

In the next chapter, the researcher will analyse the results related to the Saudi fashion and clothing market obtained through observation and interviews conducted with market specialists. This is to investigate how local retailers understand women's consumer behaviour in order to satisfy their demands.

⁴⁹ For further quotations, see Appendix 7.

Chapter 6: The Fashion Market System in Saudi Arabia

6.1 Introduction

This chapter presents the research findings about the Saudi women's fashion market. The findings are derived from an observation of the market, as well as interviews with shop owners, experts and a fashion designer. These findings will be discussed and articulated in order to establish a framework to define the segmentation of the Saudi women's fashion and clothing market.

6.2 General Overview of the Saudi Fashion Market

In Saudi Arabia, the common place for selling and purchasing items is the modern shopping mall. The size and design of a shopping mall and the number of stores available in it vary from one region to another depending on the characteristics and demography of the region. For example, some of the shopping malls located in Jeddah and Riyadh are iconic commercial landmarks and are significantly larger than those located in smaller regions such as Tabouk and Al-Jouf. In addition, shopping malls in big regions have a wide range of international brands compared to smaller regions that have a limited number, or none, of them.

Generally, most shopping malls consist of a minimal number of floors (usually between two and three floors). Some of the large shopping malls in big cities have a bandstand in the middle and are used as a platform for entertainment activities that are held at Ramadan or in the summer holidays. They can also be used to display different merchandise from a particular fashion store. Nevertheless, some shopping malls only have one floor such as Haifa'a Mall in Jeddah. All of the observed shopping malls include fashion brand stores in addition to local retailer names. Some of these shopping malls have their own websites and some do not. The opening times of shopping malls differ, slightly, from one to another even within the same location. However, the majority of the observed malls open from 10.00 am to 12.00 midnight. At Ramadan, shopping malls are open during the daytime but the fashion stores

inside the mall are closed. All clothing stores open after *Iftar*, which is the time of dusk when Muslims break their fast. These stores then close the next day in the morning when the time for fasting starts.



Figure 6.1: Al-Andalus Mall, Jeddah (16 August 2016. 11:30 am).

The second type of shopping setting in Saudi Arabia is the souq. The souq can be defined as a pedestrian open or roofed area, single-floor precinct where small shops are situated in rows. Some souqs are modern such as Al-Najjar, Al-Hijaz and Al-Mesadiyah, where one of the famous fashion designers is based (Al-Badawi), and others are traditional such as Al-Balad and Al-Bawadi (these are all located in Jeddah). Traditional souqs are mainly operated by foreign retailers and the clothing shops usually provide Asian-made items. These include prayer garments, *abayas*, Western-style clothes and traditional garments. In traditional souqs, haggling is a very common shopping behaviour until an agreement between the buyer and seller is reached. In Saudi Arabia, souqs are permanent and have fixed shops, rather than movable stalls; however, some cheap-quality underwear items and prayer garments or *abayas* are sold in small booths in the souqs.



Figure 6.2: Souq Al-Bawadi, Jeddah (17 August 2015. 4:00 pm).

Some souqs are called *mujamma* when there are a number of identical buildings, connected with short streets, and with an internal souq in each, such as Mujamma Al-Sharq in Jeddah. All the shops in a *mujamma* are fashion related, with perhaps a takeaway or café as well. However, Saudis sometimes call malls *mujammat* (the plural of *mujamma* in the Arabic language is the term used to indicate a location

where retailers from the same industry gather in a building or a number of buildings to conduct similar activities).

The observation of the fashion shopping settings in Saudi Arabia highlighted an interesting feature related to shopping time which could be exclusive to this society or shared with other societies with a similar cultural context. In Saudi Arabia, daytime is a dead period for fashion shopping as almost all of the shops are empty of consumers. The actual start time for shopping is 6.00 pm. This might be due to the hot weather during the morning, especially in summer, which is supposed to be a very active shopping season. Another reason could be that people are at school, university and work during term time. The role of guardians in Saudi society might also be relevant here; as Saudi Arabia is a conservative culture, women need to wait for a male family member to drive them to the shopping mall (this fact was discussed in the analysis of the consumer questionnaire).



Figure 6.3: Al-Arab Mall, Jeddah (12 August 2014).⁵⁰

⁵⁰ Both photographs were taken on the same day. The first one was taken at 11:30 am while the other was taken at 8.00 pm

6.2.1 Fashion Retailers

The main categories of the market retailers that operate as observed vary and can be classified as international brand names, department stores, speciality shops, and discount stores.

- International Brands



Figure 6.4: Mango in Al-Hokair Shopping Centre, Tabouk (2 September 2016. 11.00 am).

Luxury Western brands such as YSL are only available in Riyadh and Jeddah in an independent store while other brands such as Dolce and Gabbana, Armani, Gucci and Burberry are available in Rubaiyat, a multi-branded department store that has branches in Jeddah and Riyadh. In Saudi Arabia, international brands usually enter the market via a partnership with a Saudi retail company. Some of the key Saudi fashion retail companies who are involved in these partnerships are: Al-Bandar Trading Co, Al-Hokair & Co, Landmark Group, M H Al-Shaya Co, Nisk, Anwal and Bin Zagr. These companies are therefore in a position of power in the market.

- **Local Department Stores**

This category includes stores that offer Western styles produced in Asian countries by unknown brand names. Some of these department stores are chains, such as City Max, Centre Point, Redtag, Fine Fair, Fine Look and Al-Haram Plaza. These stores are owned by Saudi retailers or by Middle Eastern franchisers. The department stores can be located in shopping malls or as a separate mega department store. In big cities, there are a number of different department stores while in some smaller regions only one department store operates. The local department stores vary slightly in terms of space, size and the offered fashion items due to the fact that some of these stores only offer Western-style clothes while others combine Western and traditional designs. For example, the traditional women's garment is widely available in Al-Haram Centre but not in Centre Point or City Max.

- **Speciality Shops**

Speciality shops supply the market with a single type of clothing product. Different types of specialised fashion and clothing shops were identified during the observation. They include the traditional dress shops, fabric retailers, lingerie shops, designers and ready-to-wear evening dress shops, small factories for customised evening dresses and alteration, in addition to shops that provide functional clothing such as school uniforms and prayer garments. There are also a limited number of outlets that provide traditional but not Saudi traditional dress such as Moroccan kaftans. Specialised fashion businesses can consist of an entire building comprising four to six floors. An example is the Blue Building in Jeddah that specialises in occasion and party clothes. Otherwise, they would be sited within shopping malls.

- ***Speciality Traditional Dress Shops***

The main retailer who supplies the traditional dress is a well-known local brand called Al-Yashmak. This company was established in 1981 and the name was

inspired by Yasmak, which is a Turkish term meaning ‘the face cover’.⁵¹ The observed garments are heavy in weight and almost all of the designs come in vibrant colours while some of them are black. This branded store was only identified in Jeddah, Riyadh and Dammam, and the stores were almost empty apart from the shop assistant. Observing the company’s website shows that there are only ten branches spread over six cities across the Kingdom.



Figure 6.5: Al-Yashmak design.⁵²

Traditional dress can also be imported from Asian countries for local department stores such as Al-Haram Plaza and Al-Bader Centre. In both centres, the traditional dress is displayed in corners that also looked empty of consumers during the observation that took place in the evening, which is the active shopping period. Also, there are a number of stores that specialise in the traditional dress and are located either in shopping malls or souqs.

⁵¹ Visit <https://alyashmak.com>

⁵² Retrieved from <https://alyashmak.com> [Accessed 11-12-2016]



Figure 0.6: Traditional dress offered by Al-Haram Plaza, Jeddah. (12 September 2016. 8.00 pm).

- ***Local Luxury Fashion***

Defining the identity of luxury Saudi fashion can be problematic and challenging. It varies from one designer to another. However, it can be argued that it is inspired by the Arabic taste but infuses contemporary fashion elements at the same time. This is applied to some of the local Saudi designers such as Zaki Bin Abboud, who is called the princess of Arabian fashion. Zaki's spectacular designs usually combine the Arabic aesthetic mainstream of applying vibrant colours with the contemporary creativity of global fashion that (sometimes) applies the concept of revealing and exposing women's bodies as a core design element. However, the first impression about her collections is the level of revealing of women's bodies, which can sometimes be considered dramatic.



Figure 6.7: An example of Zaki's collection 2018.⁵³

Ahmad El Badawi is also a local but non-Saudi (Egyptian) Jeddah-based fashion designer. El Badawi has a strict view against using a female's body for fashion shows and commercial purposes; however, this opinion does not seem to have influenced the identity of his designs, which are revealing designs.

⁵³ Retrieved from <https://www.luukmagazine.com/emirati-arabi-alla-scoperta-dei-suoi-stilisti/> [Accessed 11-12-2018].



Figure 6.8: Ahmed El Badawi collection 2017.⁵⁴

Moreover, haute couture by designers from the Arabian Gulf such as Yousef Al-Jasmi (a UAE designer) is in high demand by Saudi women. One of the possible reasons for the attachment to his collections is that his luxurious brand has dressed Lady Gaga, Sharon Stone and Paris Hilton in addition to famous celebrities from the Arab world (sayyidati.com, 2016). At the time of the observation, Al-Jasmi did not have a store in Saudi Arabia; however, he always attends the annual fashion events in Jeddah.

⁵⁴ Retrieved from <https://twitter.com/ahmedelbadawyab> [Accessed 12-3-2018].



Figure 6.9: Al-Jasmi's collection 2015.⁵⁵

The fashionable evening dresses are also designed in local small fashion factories where the dress is exclusively customised according to the consumer's taste. In this case, the dress is made out of an exclusive fabric bought by the consumer who usually has a preconception of a particular design, which is then discussed with one of the designers. Some of these factories tag their products with the name of the shop as a brand name.

- **Discount Stores**

Discount stores are usually located in traditional souqs. This sector can specialise in selling a particular fashion item or it can offer a range of products. The bargain is usually based on selling a pack of 12 items or a half-pack of six items at a discount price. For example, a pack of 12 mix-and-match prayer garments, cotton blend (75% cotton and 25% polyester), in soft surface fabric and plain pastel colours, decorated on the neckline and cuffs is sold for 720 SAR, which is 60 SAR per item (=£12).

⁵⁵ Retrieved from <http://www.fashionforward.ae/designerbios/2015/5/25/yousef-al-jasmi>[Accessed 11-6-2016].

However, when these garments are sold separately somewhere else, the cost would be 120 SAR per item.

Although the observation was conducted at several periods over three years, no significant changes related to the structure of the market or to retailer types were identified. For example, no local brands were established that transformed the local industry and no international brand entered the market offering a distinctive form of fashion. Also, it was observed that the fashion market in small regions is dependent on the local fashion suppliers due to the fact that all of the well-known international names are exclusive to central cities. The reason for this is the dynamism of purchasing caused by the high population density in big cities.

6.2.2. Abaya Market

Women's black *abayas* are widely offered in the Saudi market by local retailers but not by international brands (either luxury brands or mass fashion brands). With regard to the *abaya* offered by international names, the Italian luxury fashion brand Dolce and Gabbana launched the first *abaya* collection in 2016 targeting Muslim consumers as a valuable component of the global fashion market.⁵⁶ Nevertheless, the researcher did not find this collection in the Saudi market during the observation or via the analysis of the company's Saudi website. A possible reason for this might be that Dolce and Gabbana is targeting Muslim women in Western countries, including Muslim residents and other Muslim Arab and non-Arab visitors who come to Europe for tourism or shopping. Therefore, this collection line might be produced as a limited edition for exclusive sale in Western countries, not in commercial quantities to be distributed to branches in Saudi Arabia.

However, in the fashion world, the phenomenon of creating a collection of cultural products to target a particular consumer such as Muslims might be perceived negatively by other designers. For instance, in 2016 the co-founder of the French

⁵⁶ For the full article, visit <http://www.vogue.co.uk/article/dolce-and-gabbana-hijab-and-abaya-collection>.

label YSL, Pierre Bergé, accused designers who produce Islamic *abayas*, including Dolce and Gabbana, of contributing to enslaving women. He argued against introducing this item into the fashion market, stating that he felt scandalised by it. He also argued that designers should not “*collaborate with this dictatorship*” to impose this “*abominable thing*”⁵⁷ on women; instead, he felt that the core principle of fashion is to provide women with a sense of freedom and help them to manifest their beauty, not to hide it. This perceived stereotype about the *abaya* as a cultural product of enslavement might be the reason underlying the absence of the *abaya* as a product offered by international luxury or fast fashion brand names in Saudi Arabia or elsewhere in the world.

The observation of the displayed *abayas* in shop windows across different cities revealed a variety of shapes, but not colours, as the majority of them are displayed in black. In terms of appearance, the *abaya* can be classified into different categories. Some are more traditional or conservative, totally black, free from any kind of adornment, and are placed on the crown of the head and can be fastened or opened from the front with small cuffs that only reveal the hands.

A form of the *abaya* that is socially (applying regional differences) considered as a less conservative, but modest, form is the moderate *abaya*. The moderate *abaya* is a garment that is worn to be placed on the shoulders, with an open or fastened front, and can be plain black or slightly modified with black or dark-coloured embroidery on the cuffs.

The luxury *abaya* combines a high price with an attractive fashionable appearance. It is made out of quality fabric and can include heavy embroidery. In some *abayas*, Swarovski stones are elegantly applied as an adornment. Also, golden and silver metallic yarns are also applied for the same purpose. Local designers who specialise in fashionable *abaya* have a seasonal collection line. Some of the observed designer *abayas* are sold for about 5,000 SAR, which is approximately a third of the price of

⁵⁷ Visit <https://www.thecut.com/2016/03/pierre-berge-comments-on-islamic-fashion.html>

Dolce and Gabbana's one. The *abaya* can also be customised according to the consumer's taste at a higher cost while others are ready tailored.

Another form of the *abaya* can be described as modern or fashionable because its design does not echo the traditional or the moderate plain pattern. This version of the *abaya* can have a white stripe or heavy embroidery on one side of the front or in the upper part of the back side of it as shown in Figure 5.9 below.



Figure 6.10: Modern *abayas* (Al-Sharq Centre, Jeddah 11 April 2015).

Most *abaya* shops provide customisation as well as adjustment services. Some of these shops are located in traditional souqs while others are in shopping malls. Asians from Yemen, Pakistan, India and Bangladesh are the dominant nationalities that operate this market. There are no significant differences in terms of the quality of the available products in both shopping environments (malls and souqs). As observed in *abaya* shops, due to the lack of labelling, shoppers guess the type of material used to produce the *abaya* or rely on their own knowledge about the materials which can be recognised visually and tactilely, or they ask the shop assistant for help.

Saudi women's dress code in public does not simply consist of an *abaya*. They combine the *abaya* with a number of other veiling items. These include the headscarf and the face veil. The black headscarf can be sold independently or as part of an *abaya* set. A scarf that is sold as part of an *abaya* set has to match the design of the *abaya*, which can be plain or decorated. The decoration of the scarf also varies from simple black or dark embroidery to a patterned vibrant colour applique superimposed over the edges of the scarf as a contrast to the black colour. In addition to the headscarf, a black face cover is available in the market at an affordable price. There are a number of face veiling designs with some nuances: some are designed to cover the woman's face completely with a long *shilah* that can also cover the chest. Other veils allow the woman to see through a horizontal slit that reveals her eyes. The size can be adjusted by the consumer through attached bands on each side of the face cover, which can be tightened around the back of the head. Also, black gloves and socks that are bought by conservative consumers are available.

During the observation, an unexpected sector of the *abaya* market was identified. In this sector, a cheap-quality *abaya* is sold on the street. They are randomly hung in the middle of alleyways between buildings and sold in a 'suspicious' environment targeting non-Saudis.



Figure 6.11: Cheap-quality *abayas* sold in the street. (Al-Balad, Jeddah. 12 April 2016).

The availability of these categories of the *abaya* varies from one region to another. For example, in the market located in regions with a strong adherence to cultural norms such as small cities in Tabouk and Al-Jouf, the conservative and moderate plain forms of the *abaya* are dominant. On the other hand, in larger cosmopolitan cities such as Jeddah and Riyadh, a wide range of *abayas* is offered.

6.2.3 Market Issues

A range of issues were identified during the observation of the local market which can be summarised in the following sections.

6.2.3.1 Misleading Price

Prices might vary within the same store according to the period of the day: for example, a product can be cheaper in the morning and early afternoon. In addition, the commercial interaction between the seller and the buyer can be based on bargaining; therefore, some products might lack a price tag in shops that adopt this

system of selling. In this case, the consumer has to ask the shop assistants about the price, which could differ depending on the shopping time. This is considered to be a breach of the Islamic marketing ethics that emphasise truth and transparency and prohibit price tampering in the marketplace (Morris and Al-Dabbagh, 2004). Evidence of this is the series of legal actions taken by the Saudi Ministry of Commerce against some of the famous stores in different parts of Saudi Arabia for displaying unrealistic sales. In one of them for instance, on 29 July 2013, the Ministry of Commerce closed Debenhams in Ghurnatah Mall in Riyadh. The reason for the closure was the difference between the price on the fashion item's tag and the price on the receipt, in addition to delusional offers (almowaten, 2013).⁵⁸ This can be linked to consumer distrust towards sales in Saudi Arabia, which was discussed in Chapter4.



Figure 6.12: Members of the Ministry of Commerce taking action against misleading sales in Debenhams (Riyadh 2013).

The law of Islamic marketing that is implemented in the Saudi market prohibits any commercial interaction that is considered unethical (Al-Dabbagh, 2008). Profiteering, cheating, deception and selling harmful goods are strictly prohibited

⁵⁸ Retrieved from <http://www.tagteyat.com/2013/11/07/3904.html> [Accessed 11-4-2015].

market behaviour in Islam. Within the Saudi context, Al-Dabbagh (2008) argues that the need for the establishment of a consumer protection system does not mean the replication of its theoretical framework. The means of consumer protection have to be practically effective in the market. Morris and Al-Dabbagh (2004) suggest that the majority of marketing practices in Saudi Arabia do not reflect the ethical Islamic principles of marketing. Therefore, monitoring the market to ensure the fulfilment of ethical Islamic marketing law is a duty that should be strictly enacted by the Ministry of Commerce (Morris and Al-Dabbagh, 2004). They suggest that inspectors should conduct daily tours to check prices and expiry dates in the local market to ensure fair Islamic interaction in the marketplace. In fact, being updated by the local media enabled the researcher to identify the considerable role held by the Ministry of Commerce and Investment in ascertaining the fulfilment of a product's quality. Any retailer who is found to be guilty of conducting unethical commerce faces strict penalties, including fines, imprisonment, libel in the local media, expulsion and business closure (Commercial Fraud Control System, 2008 cited in Al-Dabbagh, 2008). This authority deals with a large number of daily reported unethical cases in the local market. However, only a limited number are cases involving fashion and clothing goods. This might be due to this sector being perceived to be less harmful than other sectors such as food and medicines. Therefore, this market is experiencing unethical problems that might affect consumers. Such problems should also be considered in the fashion market, as Islamic marketing established its principles as a framework to be applied to all permissible market transactions.

6.2.3.2 Recycling

Despite increasing global awareness about recycling unwanted apparel through different disposal methods including charity shops and clothing bank points, the researcher did not identify any second-hand or charity clothing shops in any of the visited cities. This suggests that there may be a low level of awareness of fashion sustainability and environmental issues associated with clothes recycling. However, in some areas, a number of charity bins are located near mosques to collect donations of unwanted clothes.

6.2.3.3 Fitting Rooms

It was also observed that women's fitting rooms are provided inside a limited number of fashion stores; however, women usually try on their bought clothes inside the shopping mall's toilets so they can change or return them immediately as shop owners have to make sure that the item has not been used or worn for a particular occasion. The lack of fitting rooms seems to be related to social and cultural considerations about taking clothes off outside the home. There is an anxiety about surveillance cameras that might be attached to the mirrors inside the fitting rooms and used for unethical purposes. This fear is widespread due to a series of cautionary stories available on social media or told by relatives and friends. Therefore, women always try to avoid taking off their *abaya* to try on new clothes in a shopping mall.

6.2.3.4. Employability

Another identified issue is that there are only a small number of Saudi male workers, including shop assistants and tailors, in smaller and large fashion businesses. Although a small number of Saudi women work as shop assistants, the observation showed that Asians and other Arab nationalities (mainly Yemeni and Syrian) are dominant (as observed during different periods from April 2014 until April 2016), especially in regions such as Tabouk and Al-Jouf.⁵⁹ This can be explained in the

⁵⁹ Note: a Royal Decree No A/ 121 of feminisation, relating to shops that sell women's essentials, was issued on 4 May 2011. The feminisation project was developed according to three stages. The first stage targeted lingerie and cosmetic shops, the second phase targeted evening dresses and accessory shops and finally the third stage of this project targeted shops selling perfume and traditional clothes including the *abaya*, and was to be achieved by 2017. This issue gained great attention by the whole society and caused a form of polemic between different parties of the local community. The main parties involved in this conflict were the Ministry of Labour as the authority responsible for implementing this decision, Chambers of Commerce traders and business bodies as executive agencies, families and the religious authority. This conflict emerged from the position of Saudi women in a sociocultural context. For example, the Chairman of the Commission for the Promotion of Virtue and the Prevention of Vice as a representative of the religious authority accused the Ministry of Labour of increasing the chances of harassment and extortion in shopping places (Al-Sharq Newspaper, 25-5-2014). Moreover, the conservative part of the Saudi community, including some families, consolidated with each other against this sanction, due to fear that increasing female

context of the Saudization policy (Saudi nationalisation scheme) implemented by the Ministry of Labour, which requires business owners to employ Saudi citizens to meet a particular Saudi-to-foreigner ratio. Until January 2018, this sector of the market was not included among the 12 sectors to be designated for Saudis.⁶⁰

Until the middle of 2011, fashion shops in Saudi Arabia were entirely operated by men. In July 2011, the Saudi Ministry of Labour and Social Affairs issued an official resolution that necessitates feminising shops where females' underclothing is sold. Later on, a memorandum understanding was signed between the ministry mentioned above and the Commission of the Promotion of Virtue and the Prevention of Vice to determine the mechanism of women's work in public places in accordance with the Islamic regulations as required by public interest. The implementation of the resolution was observed and enforced to include all forms of shops that sell women's clothes by December 2017.

6.2.3.5 Counterfeiting

Counterfeited clothing trademarks are displayed in small shops in traditional souqs, and retailers sometimes even try to persuade the consumer that they are original. International brand logos such as Chanel appear on prayer garments. Moreover, some designs of local fashion designers that are customised for famous celebrities in the Arab world such as Myriam Fares and Balqees are copied and sold at a very affordable price. Despite the role of a Saudi committee called the Anti-Counterfeit Awareness Committee (ACAC) in protecting consumers from the market act of counterfeiting, the market still displays such products openly. The duty of this committee, which was established in 1998, is to block counterfeited products from entering the Saudi market (Al-Dabbagh, 2008). It also encourages citizens to report any suspicious cases through the provided telephone hotline.

employment could lead to mixing between genders and potential moral deviation (Al-Iqtisadyah No. 7502 on 26-4-2014).

⁶⁰ For more information, visit <https://stepfeed.com/these-12-jobs-will-no-longer-be-available-to-expats-in-saudi-arabia-9881>

6.2.3.6 Quality Issues

A percentage of poor-quality clothes including T-shirts, trousers, jeans, skirts, pyjamas, cheap *abaya* and traditional robes are available in the local market and sold in budget shopping environments. This market usually targets people from non-Saudi nationalities who are resident in the country or people with low financial resources arriving in the Kingdom for work or religious rituals. In this sector only limited information about the product is given. Such products permeate the country illegally as they do not meet the standard of imported products legislated by the Saudi Standards, Metrology and Quality Org⁶¹ (SASO).⁶² In addition, these products do not meet the ethical principles and moral imperatives for trade provided by Islam relating the principle of quality. Although this sector does not mainly target Saudis, it might have a negative impact on the market offering in general. Another related issue is the size of these fashion products that do not seem to be realistic. It was identified that large size items are still considered small.

6.2.3.7 Returning and Replacement

“The purchased products cannot be replaced or returned under any circumstances.”

The above phrase seems to be the policy of the majority of clothing and fashion stores in Saudi Arabia. Although this action is considered to be a serious breach of the strict rules legislated by the Consumer Protection Association as a department of the Ministry of Commerce and Industry,⁶³ this marketing behaviour is very common and overt. The Islamic marketing law commands the seller to accept the return of a product that does not meet the consumer’s demands (Siddiqi, n.d.: 799–804; Khan, 1985: 202) in order to protect the individual’s rights in any commercial transaction. On the other hand, Ameen (1990) found that 95% of Saudi consumers do not tend to return or claim redress after a bought item is found to be defective

⁶¹ For more information, visit <http://www.saso.gov.sa/ar/quality/Pages/Regulations.aspx>

⁶² It is also mentioned as the Saudi Arabian Standards Office.

⁶³ For more information, visit <https://cpa.org.sa/>

inasmuch as their high disposable income allows consumers to replace any product that failed to meet the desirable benefits. He added that this is a common behaviour among all of the society's classes, even those from the low-income category. The reason for this is to avoid a possible negative attitude from the seller when returning an item, as in the Saudi context the seller does not consider themselves responsible for any goods after they are sold.

Having conducted the observation for the purpose of market analysis, further investigation was required to clarify the structure of the market, the understanding of Saudi female consumer behaviour and the responsive adopted strategies applied to meet the demands of the market. In the next section, the researcher will discuss the main findings that emerged from the thematic analysis of the interviews with the shop owners.

6.3 The Analysis and Key Findings of the Interviews with Shop Owners

6.3.1 First Interview (W1)

(Jeddah, 22 April 2014, 11.00 am)

This interview was with Abu-Muhammad, the owner of a mega fashion store located in an active commercial area established 200 years ago in the heart of Jeddah city. This business was founded in 1975 as a small shop selling Saudi traditional dress. A couple of years after the establishment of this business, the founder decided to adapt his business to offer clothing items such as skirts, trousers and blouses in addition to the traditional dress. This was a general market response to the increasing demand for Western fashion in the late 1970s as a result of the economic boom and the rise in disposable income. Since then this business has gradually expanded to provide a wider range of fashion in a modern mega store.

*“For the first time, ladies from different age groups enjoyed the advantage of this **economic boom**. Women were **eager** to try **Western fashion**... The products we used to sell were imported from **France and Italy** and since then,*

*the market, in general, started to expand and a number of **global brands** have been **introduced** to the market.” W1*

The shop owner referred to the embryonic consumption of Western fashion resulting from people’s wealth and the ability to afford imported Western fashion. He also ascribed the desire to try Western fashion to the introduction of TV channels and the influence played by Egyptian actresses as an inspirational reference group, adding that:

*“The preference for the **Western fashion, especially European**, was synchronic with the introduction of **Egyptian TV** channels in the 1950s and 1960s. By this time, women tended to copy the style of Egyptian actresses as a sign of **modernity and elegance**.” W1*

Currently, this business sells products that are manufactured in Asian countries such as China, Bangladesh, Vietnam, India and Indonesia.

*“...nothing is produced in Europe or the US. **Chinese products are dominant**. Even those well-established brand names, they are produced in China. We import the **second-class items** for our business as there are no first-class clothing items from China. Our products are high quality, fashionable and affordable for consumers from all social classes.” W1*

6.3.1.1 The Main Components of the Local Fashion Market

When he was asked about the system of the market, he began by indicating its complexity that is caused by the dominance of imported products and foreign merchants:

*“The local Saudi fashion market is **complicated** and can sometimes be **confusing** in terms of its structure, and its **policy is incoherent**. There are a number of reasons for this, such as the **dominance** of the **foreigners** (Asian and Yemeni immigrants) over the local market.” W1*

In relation to the structure of the market, his 40 years of expertise as a fashion retailer enabled **W1** to classify the different constituents of the Saudi clothing market. According to **W1**, fashion retailers for the clothes worn beneath the *abaya* can be classified as the following:

- **Luxury International Fashion Brands**

This includes the well-known imported high-end luxury Western brand names; these brands include Chanel, Burberry, Dolce and Gabbana and Dior. He highlighted that:

*“...in Saudi, it does not matter how **rich or poor** you are, almost all women buy **logos**... nowadays, even university students wear them.” **W1***

He argued that purchasing these expensive brands is no longer limited to elite women or those with a high disposable income. In recent years, even university students are attracted to Western brands for different reasons, as discussed in Chapter 4.

- **International Popular (affordable) Fashion Brands**

*“... **affordable** international brands but **less luxurious**.” **W1***

W1 mentioned a number of key players who dominate this market and constitute a large proportion of the market share. However, these competitors are commission agents for Western brands that are less luxurious such as Mango, Next, Zara, F & F, Gap and Top shop. These agents make no attempt to move into their own industrial fashion production. The retail outlets are branded with the Western brand name and the commission agent's name. In addition, a number of local department stores operate in the market under names such as: Centre Point, City Max, Al-Haram, Fine Look and Redtag. These names are not Western; they are Saudi or Middle Eastern outlets that sell Western styles.

- Wholesalers

This category supplies the market via different systems of importation; for example, this can be through direct contact with a foreign supplier, which is usually a factory. The process of this system starts when a legal short- or long-term contract between the importer and the supplier is signed then, the products are exported through maritime transport. When the products arrive at the sea port, they are checked by the department responsible for ascertaining specific qualities. After this, a decision is made by Customs Clearance to confirm the products' suitability and they authorise a certificate for the cargo to be released. In most cases, this commercial transaction is legal and safe as there are no financial transaction problems to solve and there are reduced risks. It is usually based on long-term trust established between the local wholesaler and the Asian supplier. Often, these local wholesalers supply the market in smaller regions and smaller cities.

*"...the clauses of the **contract** are often very simple as they obligate the **importer** to pay on time and they obligate the **exporter** to ensure the safety of the goods during the period of shipment. Usually, there is not any penalty clause. Also, it is important for them to make sure that the **exported products** meet the conditions legislated by **Saudi Standards, Metrology and Quality Org...** This is how it works. For my business, I deal with a number of fashion factories in China." W1*

The second method is via an agent based in the products' country of origin. This method is usually adopted by new investors with less experience of the market. It is also a solution for retailers who face a shortage of supply caused by the sudden introduction of a new trend or the start of a holiday. However, in this system, the supplier is not responsible for any fault in the product after it is exported. It is also considered to be risky:

*"Usually, **young enthusiastic** investors with **no experience** are **trapped** by these agents. There are a large number of people working in this field and we*

*have to **be careful** when dealing with them as some of them are professional in **fraud and deceit.**" W1*

The third system is based on a partnership between a Chinese party for production (clothing factory) and a Saudi enterprise for distribution. In most cases, the capital in this kind of partnerships is Saudi but is established in China due to the abundance of trained labour as well as the considerably low wages.

*"...some of them have been established to **supply the Saudi market exclusively.** This is a form of a partnership between a **Chinese factory** and a **Saudi distributor.** You can say it is a Saudi business based outside Saudi Arabia." W1*

All of the above-mentioned systems of imports and wholesalers supply some local fashion retailers including volume discount sellers (considered in the Saudi market as wholesalers but selling to the public). W1 mentioned that annual meetings are arranged, which usually take place in June/July between fashion wholesalers and the owners of small fashion businesses from different parts of the Kingdom to ratify agreements and create bargains. The owner highlighted an interesting point, which is that these systems of market suppliers, in the end, offer very similar products.

*"...none of them offer unique items, **they are all the same...** the **international factory** suggests the type of product and the form of fashion... their production is either produced according to the factory's perception of the demand of Saudi women or according to the criteria informed by the **importer...** they have their own supply chain and they also **copy** the design of **international brands** sometimes." W1*

The Asian factories most often suggest the type of product to be imported to Saudi Arabia according to the availability or to what is considered to be in demand. Although these factories directly target the Saudi market, they have less understanding of consumer demands. Therefore, it can be said that merchants,

wholesalers and international factories play a role in forming fashion market taste in Saudi Arabia.

- **Dependent Retailers**

The majority of small fashion businesses are dependent on the products that are imported and distributed by the wholesalers, especially those located in smaller cities. For this reason, women who are looking for an individualised dress identity might not achieve this goal through this sector of the market due to the similarity of the available designs and materials that are imported to meet the wholesalers' taste/preferences or due to their availability in the exporter's warehouse.

*"...these businesses are usually **inactive, limited and fruitless.**" W1*

- **Independent Retailers**

This sector does not depend on the wholesaler supplier and has its own supply system that can be divided into two sub-segments: quality independent retailers and low-end independent retailers. The quality sector of this market has a minimal market share; however, retailers make considerable profits and significantly influence the market as small competitors. The system of this sector is based on a focused strategy that aims to specify the class and type of the imported clothing products. Retailers from this sector import their fashion and clothing products from non-Asian countries such as Spain, Morocco, Italy and Turkey. Most retailers travel to the country of origin to sign the contract of sale and select between varieties of products according to the speciality of the business. Fashion items that are provided under this sector are usually limited and unique in terms of the design, adornments and the high quality of the material. The identity of the designs in this sector varies from purely Western styles to Arabian taste that may, or may not, reflect the visual Islamic modesty. Furthermore, these products are not widely distributed and therefore are unlikely to be counterfeited. Thus, this sector offers an excellent opportunity for women who are looking for individualisation and uniqueness. The

speciality of these shops varies between evening dresses, Moroccan kaftans, formal styles and casual clothing.

*“...imported from **non-Asian** countries... **focused** strategies... **unique** and **high-quality** products... it is successful in making the consumer happy.” W1*

On the other hand, the low-end sector is considered by W1 to be illegal. This system is operated by some foreign nationalities such as Bangladeshis and Indians who benefit from the operational presence of some luxury international factories in their countries, and import stock products that have been rejected due to manufacturing defects.

*“...other **smaller shops** do operate in the market but to investigate them you have to rummage among a **chaotic mess** caused by **illegal immigrants**... it is lawless... relies on **faulty** items... **from Dubai**... so don't be surprised if you find **a polo shirt for 10 SAR.**” W1*

Through illegal disorderly bargains between the retailer in Saudi Arabia and his supplier based in the country of origin, these products are sent to Dubai first to be distributed to countries where a less controlling authority allows this standard of product, such as Yemen, or to countries that are less concerned about quality standards, such as some countries in Africa. These retailers adopt land transport to avoid the testing process via which imported goods are rejected. The products then arrive at a particular location. Although this sector does not significantly target Saudi consumers, it does negatively impact the market. The illicit action of glutting the market with counterfeit products might be the main cause of consumers' hesitation and anxiety towards the available authentic products. In addition, these low-end products can be produced locally:

*“...are made locally **by foreigners** and labelled with **counterfeited** international **logos**. This might cause a consumer to have doubts regarding original brands.” W1*

To sum up, **W1** provided a plausible context for how the market operates. He systematised five categories as the main segments of businesses that construct the Saudi ready-to-wear fashion market (this classification does not include the *abaya* or the locally designed evening dresses).

6.3.1.1 No Competitiveness to Meet the Consumer Demands

Although this business has been established for about 40 years, the mode of market competitiveness seems to be moderate.

*“Livelihood [Arzaq] is by God. I established the name of my business in the 1970s and I still make profits that maximise day by day, thanking Allah, so **why should we compete then?** We all provide similar productions. I have a large number of consumers which also increases.” **W1***

The shop owner admitted that there is no particular distinctiveness to his business as he sells products that can be found in similar types of stores. **W1** here related the success of his business to God’s will and his combined experience of 40 years of operation in the local market as a trusted enterprise, which has enabled him to satisfy consumer demand.

When **W1** was asked whether or not there is any established way to communicate with consumers in order to understand their needs, he stated that:

*“Whatever Saudi women find in the market they will buy. It is **risky to follow their preferences** as they **keep changing**. The things they like today, they forbear from buying it tomorrow. Supplying the market is our responsibility not the consumer’s duty.” **W1***

This view reflects an anxiety about the behaviour of Saudi women in terms of the instability of fashion consumption behaviour and the risk of following their

preferences. Also, the owner, implicitly, justified the lack of communication channels with consumers as being due to the cultural issues that prevent direct contact with males:

*“...it is **difficult and problematic** to establish direct communication due to cultural considerations.” W1*

In response to a follow-up question about the possibility of employing women for this purpose, he said:

*“They are **not** professionally **trained**.” W1*

The shop owner's responses indicate that no consideration is given to the consumers' predilections or demands. Tracking the real level of understanding of consumer demand can be achieved through a critical retrospective reflection (Quinn et al., 2007). Based on this marketing perspective, the historical overview of this business given earlier in the introduction to this interview shows a previous positive response to the market demand during the 1970s, which does not seem to be a continuing strategy. The current situation of this business reflects an anxiety about developing a strategy that takes consumer demand into consideration.

According to the interviewee's responses, there have been no attempts to move a step forward and establish an online shopping website for this business. He attributed this to the consumers rather than himself as a retailer. The consumers' preference for physical shopping that allows reliable evaluation of the product and the assumed difficulties attributed to the use of websites were proposed to be challenges against launching a website for online shopping.

*“When shopping for fashion, **women only trust their own eyes**. Moreover, using the internet requires professional skills which might not be applicable to all women. W1*

However, it was observed that this store has an Instagram account to make the consumers aware of new arrivals and to answer their questions about prices and availability of colours and sizes.

6.3.1.2 Following Up the Observed Market Issues

When this owner was asked about employing Saudis as shop assistants, he attributed the limited employment opportunities to the minimum wage that has been legislated by the government for Saudi citizens, which is still considered to be high compared with the wages of non-Saudis.

*“...they look for a **high salary.**” W1*

Consumer dissatisfaction about the limitation of available sizes was also mentioned to **W1**, and he ascribed this to the lack of a Saudi national standard to be designed especially for Saudi women:

“There are no standard sizes used in Saudi clothing: when a woman, for example, asks for a large size it might be still small for her. There is nothing we can do to help with this. The products are mostly produced in China and they have their own sizing system.” W1

6.3.2 Second Interview (W2): The Market for Special Occasion Clothes

(Jeddah, 23 April 2014, 10.00 am)

This interview with an owner of fashion a boutique that sells special occasion clothes. It is located in Al-Yamamah, a famous shopping venue for wedding and evening dresses in Jeddah; also, it is the largest gold and wedding essentials centre in the Middle East. This business was established in 1991.

6.3.2.1 Sub-segments of Special Occasion Fashion

The system in which this market operates was briefly explained by **W2** as consisting of the following sectors:

- **Local Fashion Designers**

In this sector, the dress is designed according to the customer's taste and requirements by one of the Saudi designers.

*"...although the customer explains the **specifications** of her dress, you can tell by some details who the designer is. For example, Zaki always includes **horses, applies vibrant colours and metallic accessories** while the designs of the one in Al-Mesadiyah: [Ahmed El Badawi] reflects **crazy concepts**. I remember that one of his designs was pink and included bank notes...Both of them are very expensive... In order to establish a **distinctive** design, some of the local designers go much further... the clash between colours they use or applying strange materials... this is **not creativity**, it is a fashion crime and it is more likely to be criticised when worn for an occasion. In the end, it is a dress, not a fantasia." **W2***

In the above quotation, **W2** inferred how the eagerness to establish a distinctive style in most cases, leads to design faults. The design might receive criticism if worn for a social occasion as it seems that creativity should be defined within a context that ensures social acceptance.

- **Independent Retailers**

Retailers in this sector consist of boutiques that offer a limited number of expensive designs displayed in a 'classy' shopping environment. In this category, the items can be manufactured locally or internationally within the Gulf such as in Kuwait and Dubai or in Europe. This fashion is not widely distributed and is usually available in

one boutique. There is always an associated department for minimal modifications, which is offered as a free service.

*"...are **classy**... from **Europe**... Gulf... modification is also available." W2*

- **Dependent Retailers**

From the interviewee's perception, dependent retailers are those supplied by the wholesalers or Chinese factories. He also mentioned the significant similarities in terms of the designs offered under this sector at affordable prices, but they can have limited sizes.

*"Some of the dresses are **high quality** and **some are not**... **limited** choice of **size**... **widely spread** designs... **common** and not unique." W2*

- **Fabric Merchants**

In this sector, the fabrics to be used for customised fashion are sold. **W2** mentioned that this sector of the market is dominant due to the fact that most of the available products come as a one-off piece, which makes them in high demand. Al-Essayi is the market leader who offers a wide range of designed fabrics. The price of some pieces might reach 20,000 SAR (about \$5,550). This high price can be attributed to a number of features, mentioned by the interviewee in the following:

*"This high price can be due to the type and quality of **fabric**, the use of **Swarovski** stones and the **limitation** of its availability in the market. When one of these fabrics has been selected by one of those **famous celebrities**, the price goes even higher." W2*

Therefore, it can be argued that these items gain their popularity from their exclusivity of one-off fabrics, their high quality as well as being selected to be worn by famous celebrities.

W2 positioned his business as an independent retailer. He explained the system of his business, which aims to shorten the supply chain and increase the efficiency of the products. The supply chain starts when the owner receives the imported high-quality fabric that is produced in Japan, Spain or Italy. The next stage aims to enhance the visual appearance of the fabric by adding Swarovski crystal stones or using metallic yarns for embroidery. This is undertaken in his own workshop by Philippine workers. Then, the fabric is stitched in small, medium and large sizes to be prepared for display. When the interviewee was asked about the difference between his business and designers, he answered:

*“...due to the reason that it is **not** based on **customisation**, we produce no more than three pieces from each design. Also, we have more than one **designer** who also work **as tailors** during the supply chain process...we do **modify sizes** but some complicated designs can be affected badly when modified. Therefore, we inform our customer about the possible consequences of modification that might affect the design and try to persuade her to buy another one... our products are ideal items for a reasonable **degree of a unique dress identity** that we produce. It is impossible to gain full satisfaction but we try our best.”*

W2

However, **W2** does not adopt a particular strategy to understand how consumers define uniqueness (rarity or distinction), which seems to be a fundamental value of fashion in the Saudi society. This owner applies his own understanding and conception of uniqueness signifiers. He explained the role played by famous celebrities in leading the fashion system in Saudi society and how consumers follow the celebrities' taste:

*“Saudi women are attracted to the style adopted by **famous actresses** and they are obsessed about their fashion, and as you know, those people usually change their style every day. Therefore, I find it logical to guide the consumer rather than following their preferences as they are unsteady and difficult to predict.”*

W2

6.3.2.2 Business Strategies

Online marketing seems to be a useless method for this owner as he mentioned that:

*“Establishing a website for advertising my products seems to be **useless**. The reason for this is that women do shopping every day, therefore they are available in the market to **browse and see** what is new. And even if I have a website that displays my items, women have to come personally to buy them.”*

W2

This owner gives less consideration to online marketing and justified that by the social preference for physical shopping to obtain knowledge about the available products and the associated quality based on actual in-person evaluation. However, this business has an Instagram account displaying the available designs.

When he was asked about employing Saudi citizens as shop assistants, he answered:

*“Who would accept being a shop assistant in a fashion store? First, **wages** are **not that high** and Saudis want a salary as a manager. Secondly, both Saudi men and women **feel ashamed** of talking to each other.”* **W2**

W2 ended his interview by saying that:

“Since the establishment of this business, we have successfully and proudly achieved a high level of consumer satisfaction and very rarely receive complaints. We have valuable customers from different regions from the Kingdom as well as from the Gulf region. We do what we can and in the end prosperity is from Allah [God].” **W2**

6.3.3 Third Interview (W3)

(Jeddah, 27 April 2014, 4.00 pm)

This interview was conducted with an owner of one of the well-established names for *abaya*. The interview was short; however, some useful facts were obtained from the short discussion with the shop owner. This business was set up in 1999. The shop established its own brand name in 2005 and the *abayas* are produced locally; however, the fabric is imported from China, Bangladesh and Japan. The designs vary between traditional and moderate but are not extravagant, fashionable or modern.

*“The market is not complicated... we all offer the same item that is used for the same purpose... Most of our designs meet the criteria of the **Islamic** abaya... the abaya is proposed for covering purposes to avoid attraction not to be fashionable like dresses... [He carried on talking about the significance of modesty as a dress code for Muslim women]... We provide the abaya in **black only**. Other dark plain colours are also available but in very limited number... they are for women studying in America and Europe... We also do modifications... Akbar [Pakistani tailor] is here for this... We mainly target Saudi consumers and women who prefer to dress in a **conservative** way... Some women from other nationalities may prefer fashionable abaya but most of my Saudi customers buy the conservative styles... even those we called fashionable cannot be exaggerated in terms of adornments otherwise they are going to be sermonised by the committee or by a conservative society member... [He spent 10 minutes giving examples of other abaya shops that have been in this situation]... Online websites are **not an effective** method for displaying the abaya... it is useless for me. All of the abaya’s characteristics should be evaluated inside the store... [he dismissively said] women **do not prefer** dealing with **Saudis**.” W3*

This interviewee did not give a classification of the *abaya* market as he believe that this sector simply provides the same item. One of the facts about this business owner is the hesitation in using an official website as an advertising channel. However, this shop has an Instagram account to keep customers updated about new arrivals and discounts. He also did not prefer employing Saudi assistants.

6.3.4 The Fourth Interview (RM)

(Madinah, 12 September 2015, 4.30 pm)

The owner of this business launched a fashion outlet in 1999 as a mini department store. The store occupies a space of 400 square metres in one of the most active shopping places in Madinah.

*“...ours is **smaller** than the mega ones but we offer the same quality provided by them. Most of the retailers in small cities are supplied by wholesalers; therefore, there is not a huge difference between us... for me as a retailer this has no impact. Our business successfully operates... We don’t need competitions. All businesses are operated by Allah’s will.” RM*

RM did not deny the existing similarity between the retailers regarding the style of fashion he provided and he attributed this to the dependence on wholesalers to supply the majority of fashion businesses. In this owner’s opinion, market competition is believed to be a human planning phenomenon that cannot prevent God’s will that directs the future of every business.

6.3.5 The Fifth Interview (RT)

(Tabouk, 13 September 2016, 11.00 am)

This department store was founded in 2002 and the interviewee mentioned that no changes had been made to this business since its establishment. His belief in God’s prosperity and fairness as key factors related to the success of his business.

*“We started years ago... everything still the same... making profits as a well-known name in the region...I travel to Jeddah to buy from the **wholesalers** or contact one of the distributors who provide a delivery service to bring the products from Jeddah. These vans come very frequently to supply markets in*

the small cities... We are traditional and we believe that prosperity is from God and anything else does not matter but fairness.” RT

6.3.6 Interview with a Fashion Designer (FD)

(Jeddah, 20 September 2016, 10.00 pm)

The designer preferred to remain anonymous and therefore she will be coded as **FD**. This designer is a 27-year-old woman who stated that she started her business in 2016 to keep herself occupied. Her business is located on the first floor of a well-known shopping mall in Jeddah in a luxury setting. It specialises in designing wedding and occasion dresses. A total of six employees from the Philippines work as tailors and designer assistants. Despite the short time in which this business has operated, this designer has gained a good reputation that attracts a considerable number of customers. The designs vary between Victorian, classic and trendy.

*“I had the idea of this business a couple of years ago and my father supported me financially. After I graduated in 2014, I wanted to join the labour force as a teacher but as you may know thousands of girls apply for this job and they have to wait for ages. I thought of starting a business to occupy myself I am good at designing dresses and I am known in my family as the one who is always aware of the latest fashion. Starting this business was for fun at the beginning but I am enjoying it as a job... It is profitable but dealing with customers is difficult. Sometimes customers argue with the workers for different reasons such as dissatisfaction about the size and as an owner, I have to deal with these problems. Working in an educational institution would be way easier...in my designs I blend between pastel colours I don't use the concept of contrast between colours or materials at all...they are simple and elegant...women come to me because they already know the type of designs I provide...I help women to improve their **body image...revealing the perfect parts of the body and hiding imperfections by deciding about what could be the best design...If***

*I follow a customer's taste, this might affect my business negatively. I have my **own identity** of design which cannot be changed to satisfy a customer." FD*

FD shared a story of one of her sisters who used to own an *abaya* shop in Tabouk:

"My sister used her Instagram account to display her designs that were always considered immodest by Instagram users because of the application of pastel-colour embroidery. She used to receive really harsh comments... When I started my business, I decided to share my designs through an Instagram account that was created especially for advertising; however, I blocked the users' comments." FD

This interviewee indicated how consumers imply that cultural norms play a role of 'evaluators' not only of others' appearance but also for styles established by designers. Exposing the design to the largest possible target market through social media is a marketing strategy. However, in Saudi Arabia, it seems that consumers may negatively affect this strategy.

6.4 Shared Similarities and Common Issues

The analysis of the interviews revealed some facts related to the structure and system of the market, together with identifying a number of shared opinions about the consumers and marketing strategies. The following sections summarise the key findings of the interviews.

6.4.1 The Lack of a Defined Marketing Strategy

The operation of any business should rely on a well-defined marketing philosophy. The primary aim of this philosophy should focus on identifying the unmet demands of the consumers. This will lead to the design of an effective marketing strategy that satisfies consumer needs and achieves long-term success. Despite the global marketing tendency to favour strategies that focus on understanding consumer behaviour, this does not appear to be the situation in the Saudi market because of

the faith in God's will over human planning (*rizq*). It was also noted that no attempt has been made to understand consumer behaviours and attitudes towards a particular fashion item/style, by conducting surveys for example. This hesitation was justified as circumspection due to the cultural restrictions that stress the avoidance of communication between males and females in Saudi Arabia. However, verbal communication is required between the consumer and the shopkeeper, who is usually a man (in most cases until 2015), as a part of the shopping activity. Nonetheless, it is evident that the statements by the interviewees are apparently contradictory regarding the utilisation of social media as an advertising channel to disseminate the fashion and clothes they sell, as observed by the researcher. The interviewees mentioned that Instagram is a speedy app that is installed on every woman's phone and that using this phone application facilitates reaching a large percentage of consumers. This is especially the case in a culture where fashion shows are very rare. The Instagram accounts of these businesses are usually administered by the shop assistants.

The lack of an elementary connection between the consumers and the retailers resulted in a lack of knowledge about the target consumers. This helps to explain the negative impressions about the local market mentioned by some consumers, which were discussed in the previous chapter. Furthermore, it seems unlikely that commercial online websites for advertising or selling will be developed. Therefore, the adoption of a traditional business based on supplying the fashion market with the products that are proposed to be a new trend is a dominant strategy. This traditional marketing strategy is considered to have some disadvantages as it is not an effective strategy for a business that is seeking to expand its market share. Based on the research findings, one of the disadvantages of this traditional strategy is the distribution of similar (sometimes identical) designs in different regions of Saudi Arabia, which decreases the opportunity for competitiveness as well as consumer satisfaction as they usually seek uniqueness. Regarding the moderate mode of market competition, Jain's argument (1989) has relevance regarding the standardisation of marketing activities, including products and promotion and its association with a low degree of competitiveness. Despite the expected risk

associated with the adoption of this traditional strategy, it is evident from the analysis of the interviews that all of the businesses are gradually growing and are making reasonable profits.

6.4.2 Non-Saudi Workers in the Saudi Shopping Culture

When the shop owners were asked about the issue of non-Saudi workers, they answered that they actually prefer to employ people from other nationalities. They attributed this to the difference between the salaries paid to Saudi citizen workers and foreign workers. The minimum Saudi monthly salary is more than triple that of foreign workers. This compels the employment of foreigners. Moreover, according to the shop owners, due to some cultural considerations regarding the sensitivity of verbal communication between men and women, Saudi consumers may feel more confident and less shamed when talking to a foreign shop assistant rather than a Saudi one. Although the Islamic teachings stress the avoidance of unnecessary direct contact between males and females, it is permitted for selling and buying purposes. In addition, Islam does not specify a particular race or background to be considered for more or less conservative forms of verbal communication. Therefore, this form of behaviour of differentiating between foreign and Saudi workers, with greater trust of foreign rather than Saudi shop assistants, is generated by local social conventions rather than religious belief.

6.5 Saudi Fashion Industry: Position and Issues

After many cancellations, this interview with a representative of the Chamber of Commerce in Jeddah took place in April 2016 and lasted for two hours. The interview focused on issues related to the local industry such as the limitation of the registered local fashion factories, the lack of Saudi workers in this sector, challenges, opportunities and the potential for growth.

First of all, the interviewee was asked to posit the Saudi fashion industry in the wider context of the regional industry. He confirmed that it is at an early stage of

development that does not meet the local demand in terms of quantity. He explained this point by stating that:

*“...it is in its **infant stage** as an industry...as a limited number of Saudi factories are registered in the Saudi Industrial Property Authority. The **quantities** provided by these companies are **significantly limited** compared with the increasing demand for the new fashion and other clothing items...Let’s say that the local industry used to **supply 0.7%** of the market **20 years ago** but now, this has dropped to be **only 0.3%** of the total market as **99.7%** of the market is supplied by the **imports.**” JC*

When further questioned about the reasons behind this insignificant position of the local industry, he stated a number of them as follows:

*“...it is a very challenging task to answer this question but I will try my best to classify some of them. For example, the **competitive qualities of imported** Western brands, the **traditional** production **methods** adopted by the existing local factories, the limited access to the advanced machinery (tax and operating), the **lack of trained workers** and most importantly the **consumers’ distrust** about the local production.” JC*

In this quotation, the interviewee ascribed the weak position of the local clothing and fashion industry to a number of correlated facts that can be considered as barriers.

- **The Ascendancy of International Brands**

*“...due to this dominance, all of the **local** clothing **firms** are **threatened with closure.**”
JC*

In Saudi Arabia, international fashion brands have succeeded in possessing a large market share compared to local productions. Due to the competitive qualities that international fashion brands offer, such as affordable prices, quality materials and

trendy designs, they gain consumer satisfaction. This of course affects the market of local products. However, he mentioned a considerable role played by the local factories in producing customised clothes, especially evening dress, which positively influences this sector.

*“...the small factories that produce **customised clothes** are **doing well** in the market...we call it small based on the number of the employees that does not exceed 50 workers.” JC*

- **The Limited Proficiency of the Local Industry**

Based on the interviewee’s opinion, the local fashion industry is fraught with issues and challenges. An example is the adoption of basic production techniques that are based on a manual manufacturing process which may result in a low-quality product that does not meet the consumer’s expectation. As a logical consequence, the consumer hesitates to buy local products. Currently, there is no doubt that producing commercial quantities of goods requires an application of the advanced technologies that are used globally, such as digital design. Moreover, applying the advanced techniques is not limited to production lines; it also includes advertising and marketing strategies. This interviewee criticised the local manufacturers for being traditional and stated that:

*“...is **very traditional** they do not even consider developing a marketing strategy...very **random**... what is special about the Saudi market is that we are the only market in which an ultimate **increasing demand** for fashion is faced by a **downgrading** of the local **industry**. It is just a difficult equation to be solved.” JC*

Therefore, it can be said that not only retailers but also the limited number of local manufacturers share the same behaviour of not designing a particular strategic system based on a set of coordinating activities to operate effectively in the market. It is important for any company to adopt a marketing strategy that enables it to situate itself effectively in the wider context of the competitive market. In addition,

an issue regarding the lack of trained workers or the limited skills of those joining the labour force was highlighted.

*“I can say that **99%** of the **workers** in the local industry are **foreign** [mainly Asian]. They are tailors who are trained to use the **old-fashioned machines**. I don’t think Saudis would be interested to work in this industry unless as a fashion designer...it is the **universities’ responsibility.**” JC*

He digressed but highlighted a significant issue about the social status given to workers in this sector:

*“...we all as Saudis are brought up in a culture that specifies particular **professions** to be **exclusive to foreigners**. For example... tailors are usually Pakistanis or Indians. In general, these kinds of jobs are given **less status**... Most of the **fashion designers** in Saudi are **dilettanti** not professionals. Anyone who is good at drawing starts a fashion business... it is not logical.” JC*

JC signified the role of the culture in which a stereotypical low status is conceptually formed and linked to particular sectors, including the fashion sector. Also, he pointed out the limited skills of the fashion designers as, according to his perspective, they are dilettanti and have not been trained or have not graduated from well-known international fashion institutions. He mentioned that this situation led him to plan regular meetings in cooperation with the Ministry of Industry and Commerce, the Passports Bureau and the Chamber in order to identify the reasons behind the alienation of local investment. He explained that these meetings aimed to highlight the barriers preventing local products from attracting consumers and competing with global products. However, to date no updates/results/influence of these meetings have been reported or noticed.

6.5.1 Challenges

*“The Saudi fashion market attracts **global companies** due to many reasons such as its notable **buying power**, the **growing population**, the **stable***

*economy and the high individual **income**. However, the market is **threatened** by **foreigners**... I am not generalising...The Kingdom welcomes all people from around the world to come and work in Saudi, I mean those who conduct **illegal** transactions such as **fake labelling** and other sorts of **deception**.” JC*

In his opinion, the clothing and fashion sector is facing a number of challenges, including foreign retailers, especially Asians. It was discussed that foreign retailers own about 96% of the local fashion market. In addition, a large percentage illegally administer their businesses through contravening the regulations of residency and commercial fraud.

6.5.2 International Partnership

The interviewee explained that until 2015, any international brand considering entering the market was required to sign a partnership with a Saudi company. Usually, the Saudi partner (commission agent) possesses 25% of the revenue without participating in the main company's VAT.

*“...they possess more than **25%** of the brand...they do not help the local industry...it was the system until 2015... prices are different as well as the sale seasons...rules have changed since then... Although there is about a **12% tariff rate** [on average] on products entering the local market, consumers will pay for it as it will be added to the actual price of the product.” JC*

The way in which this system operates is based on the commission agents holding full responsibility for the imported international brands as soon they arrive in the Kingdom as a form of liability avoidance taken by the main brand. This means the brand company has no managerial power over the branch in Saudi Arabia. They are operated and managed by the commission agent. Therefore, it does not follow the same system related to sales seasons or pricing. This might be the reason for the variation in price, which might be double the price of the brand's country of origin. Furthermore, this might explain some of the unethical trading of the commercial

operation, which can negatively affect the brand name. This issue was mentioned earlier in this chapter. However, in 2015, the government established new legislation for international commerce which eliminates the requirement for a Saudi partner as a main condition for international brands to enter the Saudi market. This allows international brands to present products in the Saudi market with 100% possession of the company's stock and market revenue. In other words, this governmental decision nullifies the power of monopolist commission agents over the market. This should benefit the local market, as it enhances the dynamic of market competition. However, no international brands seem to have taken advantage of this decision yet and the market still operates in the same way. The interviewee suggested that the government might legislate a law that specifies a high percentage of Saudi employees to work in international brand stores in order to fulfil the target ratio of Saudization.

6.5.3 Market Supervision

JC mentioned the effective role of the Ministry of Commerce in supervising the market in order to ascertain the essential quality of products, including tangible and ethical qualities. However, he highlighted that:

*“...the **problem** is always with the **Chinese** companies as **10%** of their clothes are **carcinogenic**. Despite the regular inspection campaign and the raids that target trademark **fraud**, there is lots of work to do towards this threat... because of Saudi retailers too.” **JC***

The interviewee emphasised that importing products that directly harm the consumer is a serious issue and needs an urgent solution. As he explained, large volumes of the Chinese products are produced in a process that uses unauthorised chemicals for bleaching and dyeing, which can cause serious skin conditions. He did not only admonish the Chinese company for this fault but also the local retailers as a part of the commercial interaction. Through the conversation, **JC** mentioned the efforts made by the local authority to contact the Chinese Commercial Bureau to

inform them of their dissatisfaction with the imported Chinese product. In response, they sent official letters to clarify that Saudi and foreign retailers travel to China for business and require the lowest quality and the cheapest clothes to be imported to the Saudi market.

He also explained that supervising the market is a coordinated responsibility between different authorities and departments, including the Ministry of Trade, the Ministry of Commerce, Chambers of Commerce, SASO (Saudi Arabian Standards Office) and the laboratories of different ministries, and he also mentioned the consumers as a part of this mission.

6.5.4 The Role of the Government in Supporting this Industry

When the role of the government was discussed, **JC** asserted that the clothing industry attracts the full attention of the government. However, in relation to funding small projects he stated that:

*“...it is **not funded by the government** anymore; I believe this was the case in the 1970s, but, now it can be through **loans** from commercial **banks** or via social programmes that support launching small businesses.” **JC***

Commercial banks usually apply a rate of interest to any loan taken for commercial purposes. This might be a reason for hesitation in investing in this market.

6.5.5 Have There Been Any Attempts to Understand Consumer Behaviour?

JC criticised the local manufacturers as well as the retailers for ignoring consumer demands. In contrast, when he was asked whether a possible attempt has been made to establish a programme that aims to collect data from the consumers to establish a data set that defines their demography and demands, he said it is the responsibility of the academic institutions and the companies but not the Chamber of Commerce.

To sum up, the analysis of this interview revealed a number of issues that are challenging the local industry. **JC** attributed the reasons behind its weakness and the inability to compete with international brands to the lack of trained workers, traditional production strategies and the limited application of advanced technology in the supply chain. He admonished academic institutions for being less effective in designing curricula to strengthen the skills of students who might work in this industry. These findings led to interviews with academics being conducted to follow up issues that emerged from this interview in relation to the role that educational institutions play in this sector, as a part of the abductive strategy of the research.

6.6 Interview with the First Academic (AC)

An interview with an academic who specialises in fashion design and clothing production techniques was conducted in September 2016. This academic preferred to remain anonymous and will be coded as **AC**. The aim of this interview was to investigate the contribution of educational institutions, particularly universities, in order to improve the local fashion industry. In this interview a number of issues emerged relating to the position of the field of fashion and clothing in Saudi universities. One of them is the limitation of courses, which was already identified in the literature review. In addition, the discussion included an evaluation of the current curricula that are taught in Saudi girls' universities. A number of facts about the educational system are related to the field of fashion and clothing, and will be discussed in the following sections.

6.6.1 Fashion Education and Traditionalism

The conversation with **AC** revealed some points of weakness in the Saudi educational system in universities, especially the compulsory curricula. One of them is what she called '*traditionalism*' which affects the way in which curricula are designed.

*“...due to **traditionalism**... they are very **old** and have never been updated. I teach the same curricula I used to study about 21 years ago in Egypt... theoretical and practical... the system of **centralisation** is the reason... all universities **teach identical courses.**” AC*

The interviewee highlighted the point that both theoretical and practical curricula are outdated. Departments of clothing and textiles in Saudi universities follow the Egyptian syllabus that was designed in the 1970s and has never been updated since. There is no doubt that since the 1970s, the field of fashion design and the clothing industry have undergone remarkable development in terms of design theories, marketing theories and industrial strategies. This is also linked to the centralised system of education. This point can explain the lack of knowledge about clothes recycling and sustainable fashion, which was identified through the analysis of the consumer questionnaire. In addition, in Saudi universities, courses are designed to be generalised to all universities. Therefore, the opinion of the course leader or the lecturer is not considered when composing the curricula. This system of course limits the opportunity for innovation and creativity. **AC** mentioned that there are no modules that encourage creative design.

*“Although considerable attention is paid by the Ministry of Education to the national plans for developing the educational system, this always targets primary education... the programme of **abroad scholarships.**” AC*

Based on the discussion about the specifics and skills that are taught, the scope of the curricula seems to be based on basic sketching, embroidery, stitching and finishing techniques. The skills of a detailed value chain system in the fashion and clothing sector are not fully covered. Such a system comprises stages of an intensive and complicated production process: fibres and testing; fabric production; dyeing and bleaching; design, measurement, cutting, stitching; labelling, packaging, marketing and distribution. When **AC** was requested to evaluate any curriculum that introduces the contemporary concepts of fashion such as recycling, green fashion, fair trade, ethical fashion or sustainable products, she answered:

*“...not really any of them... it is mainly about **improving** and **re-use**... taught in other departments, in science...maybe?” AC*

Curricula covering the field of fashion consumer behaviour and changes in consumption patterns seem to be non-existent in fashion departments across Saudi universities. From the interviewee’s point of view, this sector mainly focuses on the practical aspects. Moreover, the interviewee criticised the educational system for being traditional and centralised. This in turn resulted in a limitation in the offered courses and an ineffective role for the designed curricula. Consequently, the educational system is unlikely to exert a positive influence on the local clothing and fashion market.

6.6.2 Culture and Status

*“...the issue of **status** starts from primary education as the home economic lessons in girls’ schools are given less regard by the students... even in higher education, students from other scientific departments have a higher academic perception. The fashion sector is always considered as **not academic**. Also, as a university department, it is always the first choice for students with low grades from high school.” AC*

The stereotyped low status given to this sector as a career, which was also highlighted by **JC** and linked to culture, also emerges here to be associated with fashion as an academic field. As mentioned by **AC**, this attitude of disregarding this sector, which is practised since primary school, is gradually developed through the educational journey to form a stereotypical conception of this field as being less important and not academic. Therefore, students are not interested in the field as a result.

When the interviewee was asked whether there is any kind of partnership between the departments of marketing or fashion design and local enterprise for the purpose of cooperation or market research, she answered:

*“No there is not. You know the culture. Partnership means a direct contact with other parties or a regular visit which cannot be always **acceptable due to the culture**. When girls enter the university they are not allowed to leave unless it is home time.” AC*

This ignorance of the role of partnership, which is usually based on knowledge exchange, could be one of the issues attributed to the lack of academic market research to define the broader context of the market.

6.7 Interview with Dr Al-Dabbagh

(London, 17 May 2016, 3.00 pm)

An interview was undertaken with Dr Al-Dabbagh in London, June 2016, during her annual visit to the UK. She is an expert in the fields of fashion market, clothing production and consumers' rights. She is a member of the Department of Clothing and Textile at King Abdul Aziz University in Jeddah. The aim of this interview was to demonstrate issues related to the local market and Saudi fashion consumers. The interviewee's name will be mentioned directly as when signing the consent form, Al-Dabbagh indicated that she was happy for her name to be given.

6.7.1 Limitation of Fashion Market Research

Al-Dabbagh started this conversation by complementing the researcher for conducting a research study that covers the local fashion market.

*“...there is a **limitation** of studies by academics and retailers in the field of Saudi fashion and this is why we have an ineffective industry... the situation could have been better if there had been intensive research.”*

From this quotation, another reason can be provided for the meagre position of the local fashion industry: the lack of research. Al-Dabbagh signified the need for

designing curricula that focus on the study of consumer behaviour, especially in the field of fashion:

*“The curricula are not well developed in this area. **Consumer behaviour is** briefly mentioned in a lecture or two through the whole academic year. Maybe in marketing departments but **not in clothing and textile.**”*

The success of any market largely depends on the understanding of consumer behaviour. Therefore, the ignorance of the field of consumer behaviour in general and in the field of fashion in particular, which is evidently the case in Saudi Arabia, is a core reason for the weakness of the local market.

6.7.2 Unethical Issues in the Local Fashion Market

In relation to market ethics, Al-Dabbagh stated that:

*“The market has been **suffering for decades** from different sorts of **unethical** issues such as **deception, lack of labelling**...responsible authorities should focus more on this market...the market sometimes responds to **minimal needs** such as the scarf that can be sold or offered for free with sleeveless dresses I mean for consumers who are concerned about modesty...”*

In her opinion, the market, sometimes, responds to satisfy a sector of conservative consumers. However, more significant responses should be made to satisfy the demand of a larger portion of consumers.

These interviews highlighted a number of issues to be improved through the university educational system as well as the market in order to supply the labour market with a trained workforce with appropriate theoretical and practical skills. One issue that was mentioned by the three interviewees is that of perceived status, where a sense of social inferiority is given to this kind of industry either as an academic domain or as a job. Traditionalism is also a part of this issue as it prevents the essential development of the local industry.

6.8 Summary of the Chapter

The obtained data reveal some valuable facts, including the main constituents that structure the Saudi fashion market. These can be integrated to establish a comprehensive framework that defines the context of the Saudi fashion market in more depth. As most of the studies about the Saudi fashion market usually rely on statistical analysis that illustrates the value of imported goods for market forecasting, the significant ignorance of local elements of the market limits the scope of the market. Therefore, clarifying the market structure and explaining the main features of each sector by giving an equal level of consideration to different categories of suppliers will widen the landscape in which this market can be analysed. Moreover, a number of challenges and issues related to the local industry were highlighted and discussed in detail throughout this chapter.

In Chapter 6, the various patterns of fashion consumption that were highlighted in the previous chapter will be correlated with particular segments of the market for further effective definition of the market. This will signify the value of the behavioural proximity of the consumer and the retailer. The researcher will integrate the main findings in order to develop theoretical models to explain the particularities of consumer behaviour, market structure and issues in the local market. In response to these issues, the researcher will put forward recommendations that might help in surmounting barriers that prevent the development of the local industry.

Chapter 7: Research Outcomes and Recommendations

7.1 Introduction

In the previous two chapters, the researcher presented the results of the primary research on Saudi women's fashion behaviour (see Chapter 4) as well as the local fashion market (see Chapter 5). In this chapter, the research data are integrated in the form of theoretical models that explain the nature of the Saudi fashion market and the behaviour of its consumers. This chapter will first provide an insight into the clothing and fashion market segmentation in Saudi Arabia and then explain the main factors that influence each stage of fashion consumption. In addition, the main problems of the local market are highlighted in order to establish a set of recommendations that help to solve these problems or reduce their impact on the local market.

7.2 Saudi Clothing and Fashion Market Segmentation

In response to the lack of information on the structure of the Saudi fashion market and scholars' call to analyse the particularities of this market (Katz, 1986; Tuncalp and Yavas, 1986; Rabolt and Forney, 1989), the model in Figure 6.1 was developed to define the main segmentation of the Saudi fashion market. The proposed model was developed by integrating different aspects including the type of business, the operational system, market suppliers and the demography of the target consumer. This model is an '*approximation of reality*', which Wedel and Kamakura (2000) argue is a common feature of studies that aim to explain market segmentation.

Figure 7.1 presents the process by which this model was developed through the application of some aspects of Dibb and Simkin's (1997) framework for the process of market segmentation. The figure is followed by a detailed discussion of actions that were undertaken in the development of each phase of the process of the proposed segmentation.

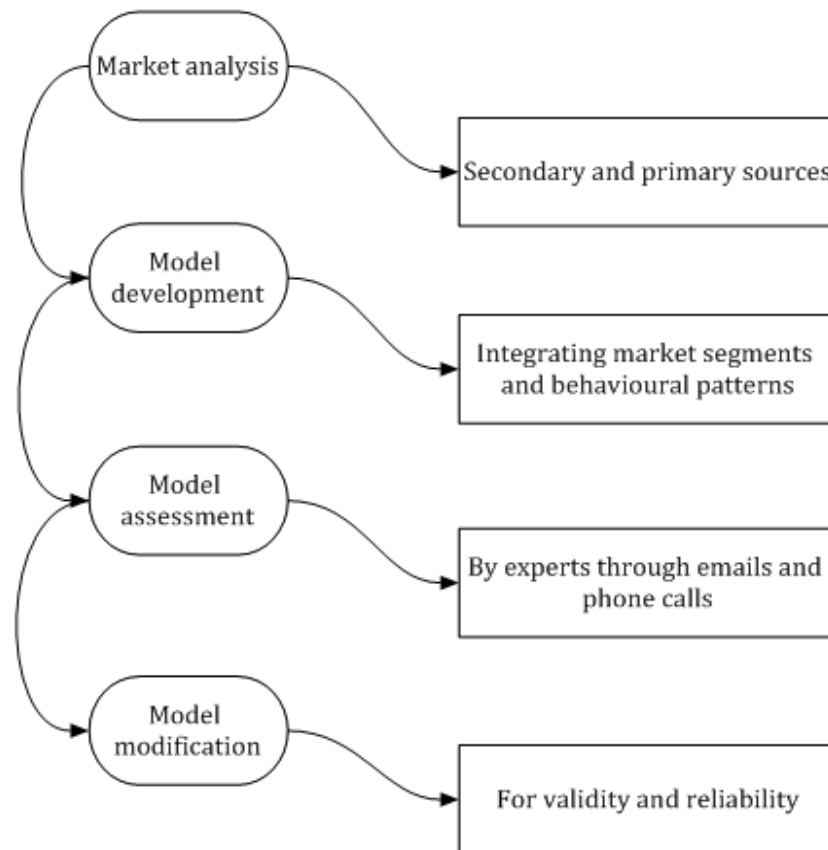


Figure 7.1: Stages of the process of model development.

It is essential that these steps are followed sequentially when developing a model of market segmentation. Each of these steps has its own significance to ensure a valid transition to the next step. Following the model enables the researcher to formulate the market system and to ensure the accuracy and effectiveness of the model and its possible implementation (Dibb and Simkin, 1997).

7.2.1 Stage 1: Analysis: Describing the Current Situation

The first step in the process to develop a model explaining Saudi fashion market segmentation involved analysing the data obtained through the primary research. Analysis of the retailers through market observation (see Section 5.2.1) and of the interviews with shop owners (see Sections 5.3.1 and 5.3.2) presented a range of categories of the market that can be broadly divided into three main segments: luxury, mass or fast fashion and low-end market. The low-end market relates to

products for non-Saudis from low economic classes. Each of these segments has its own operational system that indicates the type of business (dependent or independent) as well as the system of suppliers (local or international).

Souiden (2002: 618) argues that the majority of the proposed approaches to market segmentation ignore a fundamental aspect of the market, which is the characteristics of the product. In this study, the tangible/functional and intangible characteristics of the clothing and fashion products are given substantial consideration. This is due to the fact that these characteristics are usually drawn on to transmit different meanings. Fashion products are divided into segments according to a number of factors such as the identity of the design (Western fashion or locally made fashion products), type of product (customised or ready-to-wear), after-sales service (return, exchange or alteration), social setting of consumption (for work, formal meetings, informal gatherings or special occasions), price level (high, affordable or low) and the country of origin (local or international).

It was identified in the research (see Section 2.7.2.1.2) that the country of origin was considered significant by consumers in assessing the quality of product. In this research, the main countries of origin (COOs) that have been highlighted are:

- **Western COOs:** such as the United States and Europe including Italy, Spain, France and the United Kingdom. Turkey is classified as a Western country in this study due to the associated high quality ascribed to Turkish fashion by Saudis.⁶⁴
- **African COOs:** mainly Morocco.
- **Asian COOs** such as China, India, Bangladesh, Pakistan and Vietnam.
- **Locally produced fashion items:** that are made in Saudi Arabia or within the Gulf region.
- **Unknown COO:** for products that lack the 'made in' labels.

⁶⁴ This status is only applied to fashion and clothing products as other Turkish industries such as electronics may be given a lower status in terms of quality.

The process of Saudi fashion and clothing market segmentation involved defining the demographic profile of the consumer. Saudi women can be described as young, well-educated consumers. However, consumers can be grouped into four economic categories according to their occupational positions and monthly income. The proposed economic classes are:

- **Upper class:** includes women who work in the academic sector, business women, teachers with more than seven years of teaching experience, administrators in governmental and private institutions and business women with a monthly income of more than SAR 11,000. This class includes the majority of the interviewed Saudi teachers (a teacher's salary in Saudi Arabia can reach up to 24,000 SAR – more than £4000 a month – especially for those who have been teaching for more than 20 years in public primary and secondary schools).
- **Upper middle class:** consists of senior civil servants with a monthly income of between SAR 8,000 and 10,000.
- **Middle class:** includes women with an average monthly income of SAR 5,000 to 7,000. Saudi women who joined the labour force recently and those who run small businesses are classified under this category.
- **Working class:** encompasses women who work as a cashier, shop assistant or security guard in schools, universities and shopping malls. Women from this class usually earn between SAR 3,000 and 5,000 per month. Although this category is labelled working class, it also includes university students who receive the governmental student grant every month (about SAR 1,000 = £200) until they finish their university education. This amount may vary slightly depending on the area of speciality.

In this research, housewife respondents are included in each of these economic classes. For example, housewives who belong to a wealthy family or those who receive a monthly income from landed properties or investments are categorised within the upper-class category. Therefore, in this case, monthly income is

considered for categorising the economic class and occupational position is disregarded when talking about housewives.

Outlining the common characteristics that constitute each segment of the market can lead to a better understanding of the values that consumers seek when shopping for fashion. This in turn provides a clear definition of the market and the patterns of consumption behaviour in the Saudi matrix which is the focus of this study.

In Figure 6.3, each of the three main segments of luxury, mass market and low-end fashion are first divided into more detailed categories. These are then defined into the country of origin. Each type of products is then related to the economic classes of consumers who purchase them.

7.2.2 Stage 2: Strategy for Model Development: Building Relationships

After dividing the Saudi fashion and clothing market into three main categories, the values of fashion consumption were established for the luxury and the mass market segments. The low-end segment related to the non-Saudi consumers who were not included in the questionnaire and therefore, the more detailed analysis of values in the segment has not been undertaken.

These values of fashion consumption are usually constructed by the consumer in a personal or sociocultural context based on the tangible and intangible characteristics of the fashion item. In addition, values vary from one social setting to another in order to construct a desirable identity that is consistent with the collective social expectations. Therefore, for each market segment, the social setting or consumption milieu has also been identified in the model.

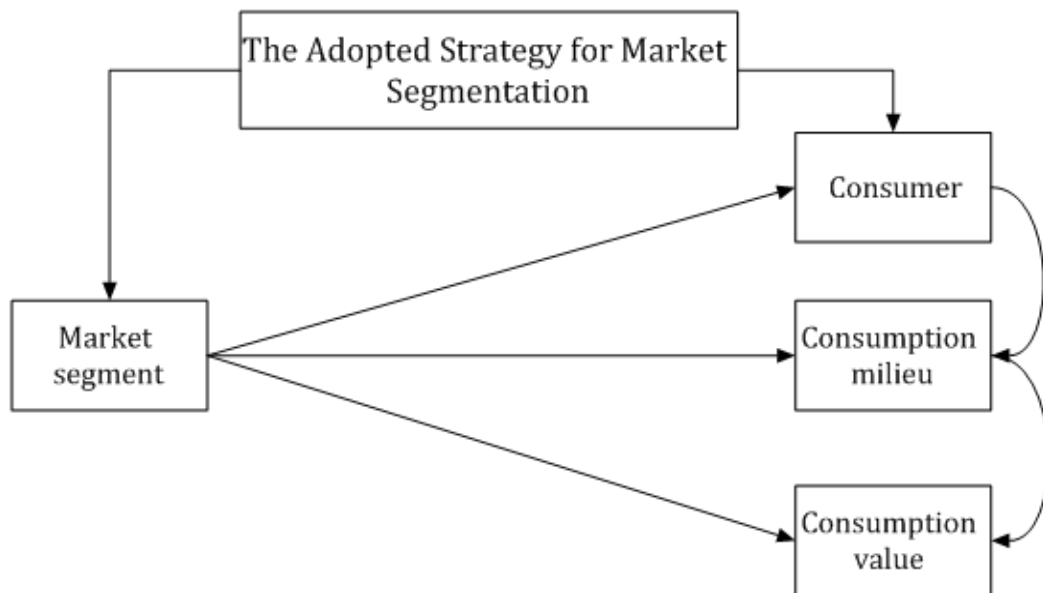


Figure 7.2: The proposed strategy for Saudi fashion and clothing market segmentation.

This framework links the market segment, the definition of the consumer, the social setting of consumption and the values sought through the consumption of fashion. In the context of the presented framework, Figure 6.3 presents the proposed theoretical model that defines the structure of the Saudi women’s clothing and fashion market. The model combines production attributes and consumption patterns.

This system integrates cultural norms and social expectations to construct a value system that defines the way in which Saudi women transmit and perceive different messages through the adopted fashion. Usually, Saudi women attempt to meet these desirable values due to the influence of social factors in formulating a fashion and clothing communicative system.

The researcher borrowed and adapted some aspects from Rudani’s (2009) strategy for market segmentation that was discussed in the literature review (see Section 3.8). The adopted strategy considers the consumer-oriented approach and product-oriented approach as one unified entity that cannot be separated, rather than separate branches that focus on consumer or product. In this model, the establishment of links between the market structure and consumer values aims to

signify the role of different products in symbolising meanings. The model has been constructed in a way that is intended to reflect the reality of the Saudi fashion and clothing system based on factual quantitative and qualitative results obtained from consumers and retailers as well as other interviewees from the academic and governmental managerial domains. This is supported by a reflexive interpretation.

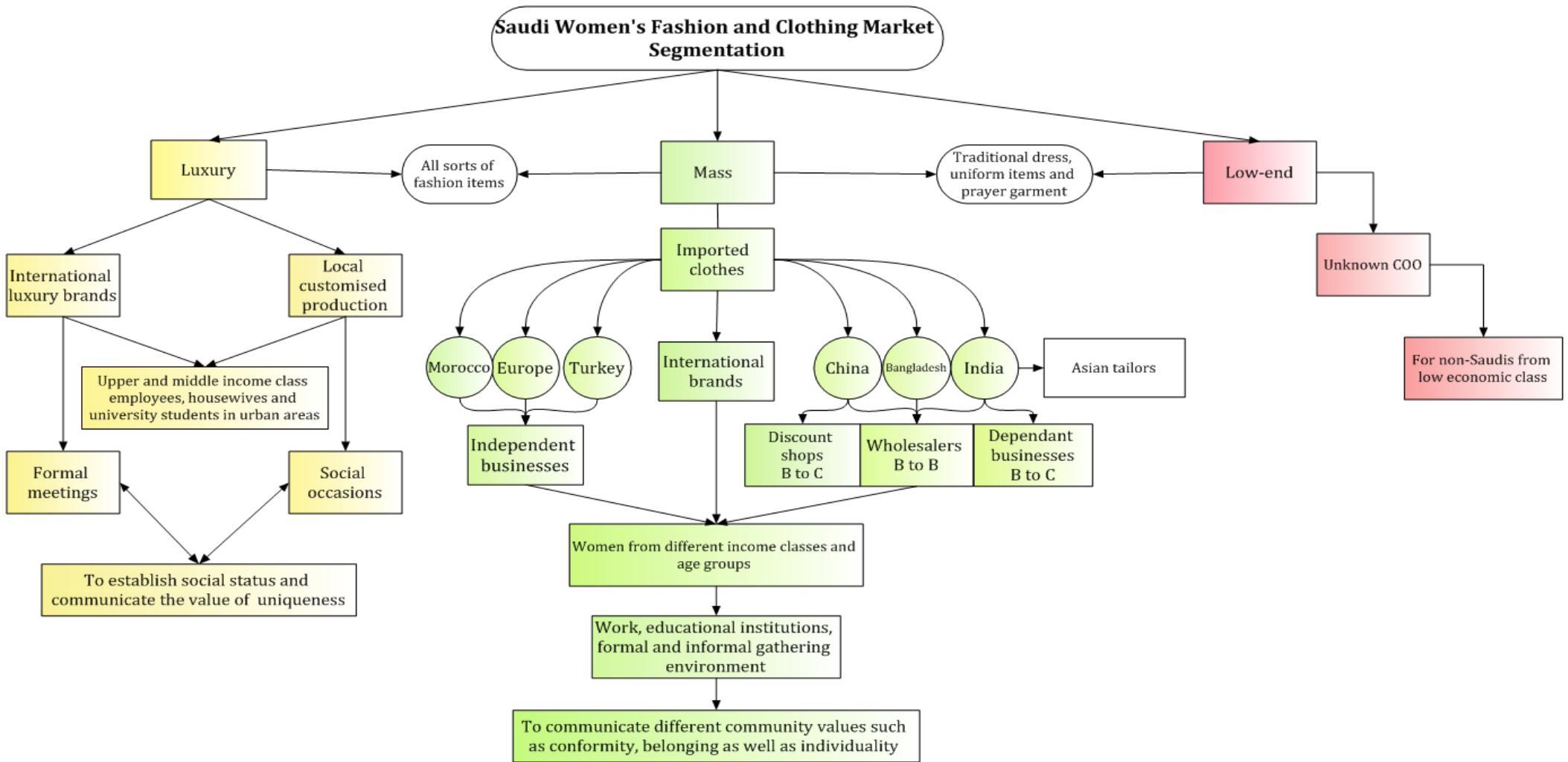


Figure 7.3: The proposed theoretical model for Saudi women's fashion and clothing market segmentation.

The credibility of this segmentation is rooted in the adopted abductive approach that relies on objectivity through systematic research based on empirical evidence rather than axioms. However, it was essential for this model to be assessed and validated by a specialist in order to achieve a higher level of reliability.

7.2.3 Stage 3: Model Evaluation

After links were logically established between the market aspects, the model for the Saudi fashion and clothing market segmentation was formed and was ready to be evaluated. Although this model was developed in accordance with an analysis of the empirical data, it was essential for it to be evaluated by an expert in the Saudi fashion and clothing market field. This was to ensure the validity and reliability of the results on each segment.

The model was evaluated by a representative from the Jeddah Chamber of Commerce who preferred to remain anonymous and not to be directly mentioned in this research. The assessor did not require any significant alterations. However, he suggested a minor modification, which was to mainly include wholesalers as an aspect of the mass-market segment. He explained that wholesalers supply different types of fashion businesses and it would make more sense if they were included in the model.

7.2.4 Stage 4: Model Modification

Based on the assessor's feedback, two types of wholesalers were included in this model: B to B wholesalers and discount shops or B to C (discount shops). After this addition was made, the model was evaluated for a second time and the assessor gave positive feedback about the adapted model. The model was described as an *'archetype'*, *'epitome of clarification'*, *'effective definition'* and as *'valuable and deserves to be published'*. The assessor stated that this model is one of the first frameworks to define the Saudi clothing and fashion market via a lens that widens its scope and correlates market aspects with consumer values. He also mentioned

that most of the available data about the Saudi market are factual and based on statistical analysis only, indicating the quantities of imports and exports of goods. He also said that “...*this model is considered a great contribution to the market research in Saudi Arabia*”.

It is argued that this model is only applicable to the Saudi context as it was developed according to the analysis of data collected from Saudi citizens. However, it can be slightly or significantly modified to analyse the fashion and clothing market in societies that have similar cultural patterns. A significant strength of this model is its ability to provide an insight into the operational system of the market as well as the meanings of fashion consumption. The aim is to clarify the idiosyncrasy of the Saudi women’s fashion system.

This model is useful for marketing implementation as it helps existing fashion businesses to understand consumer behaviour and the sought-after values in each segment. This in turn will help to develop more effective strategies that enable companies to meet consumer demand and to gain a high level of consumer satisfaction. Also, it helps to identify any potential consumers and activates their roles in the market. For investors/retailers who consider approaching this market, the model offers an insight into the operational system of each segment of the Saudi fashion market, which paves the way for making a decision about who to compete with and how to promote their product. In addition, due to the multidisciplinary approach adopted to develop this model, the model is not solely for marketing implementation: it can also be applied to understand the sociocultural matrix of the Saudi society that influences the adoption of fashion in different social settings. Thus the model can be useful for anthropological studies that focus on the semiotics of women’s fashion consumption in Saudi Arabia.

7.2.5 The Abaya Market

Although wearing the *abaya* in public is a sociocultural requirement, *abaya* styles and functionalities differ according to the social nature of the public space. For

example, some functions of the luxury, fashionable or modern *abaya*, such as having wide cuffs and an open front, allow the woman to take off her *abaya* more easily when entering a wedding hall, especially if she is wearing a dress that is heavily decorated or has a long train. On the other hand, going shopping requires wearing an *abaya* that is placed on the shoulders and has a closed front to prevent revealing the clothes underneath and to allow easier mobility. Therefore, the *abaya* market in Saudi Arabia does not simply consist of the conservative *abaya* and a fashionable one; the largest segment of the *abaya* market comprises the moderate style that suits different public places and definitely meets Islamic requirements. As discussed in Chapter 4, the adoption of any particular form of the *abaya* depends on various factors such as the identity of the region, the social expectations associated with the characteristics of the public place and the factor of age. The figure has been developed in accordance with the analysis of data gathered through the consumers' questionnaire, market observation and the interview with the owner of the *abaya* shop.

The following model was designed to classify the main segments of the Saudi *abaya* market and summarises the characteristics of each segment. As illustrated on the next page, the figure divides the *abaya* market into three categories: luxury *abaya*, moderate everyday-wear *abaya* and conservative *abaya*. These three categories of *abaya* were defined according to their characteristics including weight, colour, shape and price. The everyday-wear *abaya* is divided into two subcategories according to its use in shopping and work places. In Saudi Arabia, black is the dominant colour for the *abaya* provided for each of the stated segments.

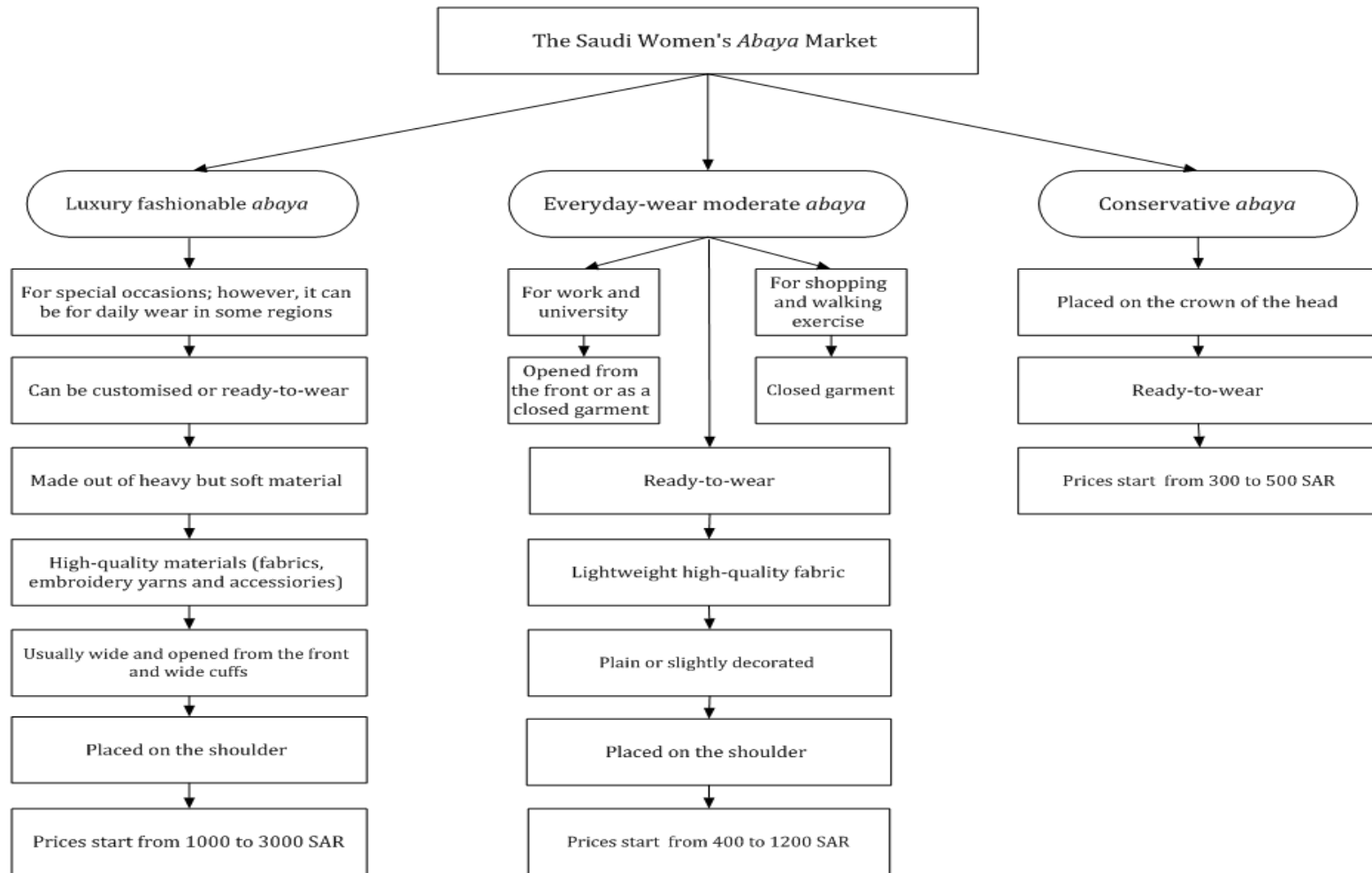


Figure 7.4: The Saudi women's *abaya* market.

Figure 6.4, which is considered a subsidiary model of the main framework that defines the structure of the Saudi fashion market, was also evaluated by the representative from the Jeddah Chamber of Commerce. He stated that:

“From the best of my knowledge, you are the first scholar who thought of this item as a component of the Saudi market rather than a cultural tradition. Although the abaya is an important clothing item for every Saudi woman, no one has thought of it before as a segment of the local market. Your effort is appreciated.”

Having highlighted the segments of the Saudi women’s fashion and clothing market, the next section of this chapter moves to consider the consumer behaviour in this market. It explains the process of consumption and the meanings presented through the consumption of different fashions in women-only social settings in addition to wearing the *abaya* as a dress code in public.

7.3 The Process of Saudi Women’s Fashion and Clothing Consumption Behaviour

The following model presented in Figure 7.5 has been developed to explain the systematic process of actions that occur in several consecutive phases of Saudi women’s buyer behaviour and consumption of fashion and clothing. The model was constructed according to the major frequencies and percentages in the consumers’ responses in order to summarise the key factors that define, dominate and influence each phase of consumption behaviour. In order to develop this model, the broader outline is borrowed and adapted from the preliminary framework proposed by Blackwell et al. (2006) (see Section 3.7.1). The model suggests that different social forces play a dominant role in influencing almost every stage of the process of fashion consumption. The model 6.5 is given below and is followed by a detailed discussion of each stage and the key factors that are important at each stage.

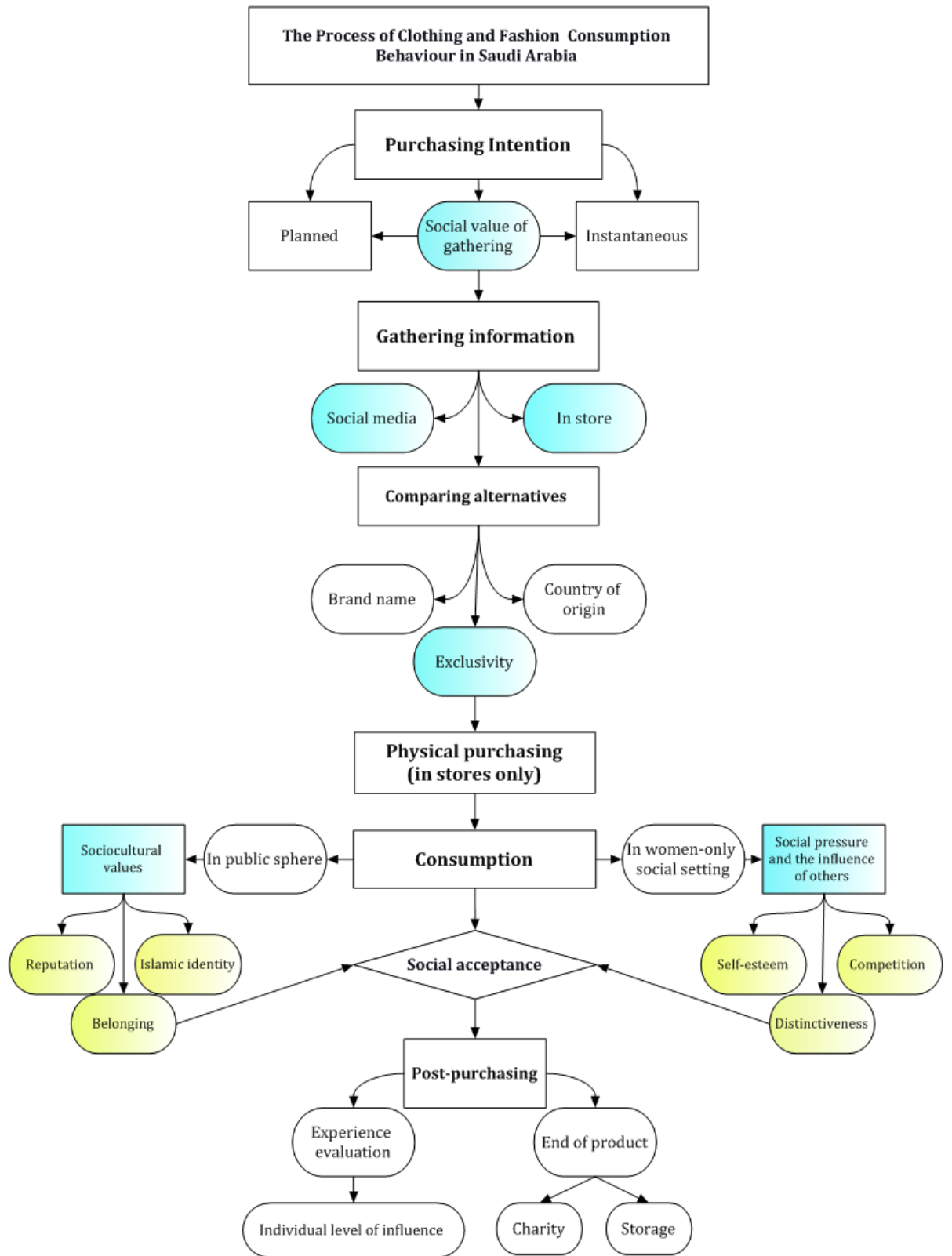


Figure 7.5: The process of fashion and clothing consumption in Saudi Arabia.

7.3.1 Purchasing Intention

In Saudi society, the purchasing intention – the stimulus that encourages the need for new clothes - is strongly influenced by social requirements. It is driven by the requirements relating to peer pressure in various types of women-only environments or social gatherings. This factor is defined in the chart as ‘the social value of gathering’. The need here involves meeting the social expectation of wearing new clothes at each gathering event (see Section 5.4.4.1). A planned purchasing intention occurs in response to an expected upcoming event such as a party, Eid or the start of a new academic year, while an instantaneous purchasing intention is usually related to achieving a personal or emotional goal such as enjoyment or reducing stress. Also, the purchasing intention can be developed instantly as a result of an individual desire to purchase an item following exposure to an attractive or unique fashion item. In this case, the consumer makes an immediate purchasing decision, especially if the consumer has a positive impression about other characteristics of the item such as the price and appearance based on the consumer’s evaluation. This behaviour may occur very frequently due to the availability of high levels of personal disposable income (see Section 5.4.1.6).

7.3.2 Search for Information

When the intention to buy new clothes is formed, women start looking for information related to the desired fashion. In Saudi Arabia, this is usually undertaken actively by visiting the store, which enables the consumer to obtain the information personally (see Section 5.4.4.2). This method ensures that realistic information is obtained. Many Saudi women access social media not just to gather information available on the retailers’ accounts: social media is also a rich source of social commentary that evaluates different aspects of a particular fashion product or design (see Section 5.4.4.2). Instagram is the most widely used application among Saudi women for this purpose. Under each fashion picture on Instagram, thousands of likes or dislikes and hundreds of positive and negative comments made by people from different ideological backgrounds can be a clear indication of the dominant

social opinion about the displayed fashion item. Such comments are strongly considered to be influential (see Section 5.4.4.2), especially if some of the comments and reviews are made by users who belong to a comparative reference group. The influence of the opinions of others on fashion consumption behaviour is initially developed during this stage, in which the consumer's attitude towards a particular fashion item is formed.

Also, during this pre-purchasing stage, a crucial role is played by celebrities and fashionistas as inspirational indirect reference group who endorse fashion (see Section 5.4.4.2). The colours and styles of some of the well-known Arab celebrities such as Haifa Wahbi, Meriam Fares, Balqees Fathi and Lugain Omran are in demand as soon as they are endorsed. Imitating celebrities is a social dynamic that leads the fashion consumption context in Saudi society.

7.3.3 Comparing Alternatives

In Saudi Arabia, women mostly compare and contrast between three key factors: uniqueness, brand name and the country of origin, each of which are attributed to specific qualities of fashion (see Section 5.4.4.3). Saudi women fashion consumers seem to be less sensitive to price due to the economic ability to purchase expensive fashion.

Exclusivity, uniqueness and rarity are the most desirable symbolic values of a fashion item in Saudi Arabia (see Section 5.4.4.3). The refined superior-quality materials and the high level of craftsmanship provided by luxury brand names evoke meanings attributed to prestige, which in turn enhances the value of the self. Wearing a unique rare design leads to the successful establishment of social status. Also, the display of a brand logo is a symbol of awareness and involvement in the phenomenon of global luxury fashion.

Furthermore, the country of origin is the third extrinsic factor considered by Saudi fashion consumers as an indicator of intrinsic qualities (see Section 5.4.4.3).

Western fashion, in general, is stereotyped positively compared to fashion items that are imported from Asian countries. Western fashion is in high demand for women-only social settings. The majority of Saudi women do not perceive Western fashion as a cultural threat. It is instead embedded in the Saudi fashion system. Also, fashion, especially dresses for special occasions which have been designed and produced within the Gulf region, are perceived as a unique innovative fashion that cohesively embraces the bewitchment of the Arabian culture and Western modernity. However, in the Saudi context, the fashion for special occasions – whether luxury Western brands or customised local production - does not necessarily have to follow a pattern of Islamic modest fashion as it is worn in a female-only social environment.

7.3.4. Purchasing

Active shopping in physical fashion and clothing stores, especially those that are located in shopping malls, is the dominant purchasing behaviour among Saudi women. This is due to the associated social significance of it as an opportunity for entertainment and the modern atmosphere provided in shopping malls. With relation to online fashion shopping, it does not seem to be widely adopted by Saudi women consumers. The reason for this is the perception that is linked to the cultural dimension of uncertainty avoidance as well as the influence of the involvement in a real experience of online shopping that left a negative impression in the consumer's memory (see Section 5.4.3 and 5.4.3.1).

7.3.5 Consumption

After a positive evaluation of the level of uniqueness, the brand name and the country of origin, the purchasing decision is made and the stage of usage (fashion behaviour) starts. This is considered to be the core stage in the process of Saudi fashion consumer behaviour as it translates the social significance of fashion and clothing in this culture. During this stage, a woman establishes an identity that communicates meanings (symbolic interaction). Although establishing an identity

through fashion results from the interacting influences of a set of internalised individual affects and externalised social forces, the woman's self-identity is an accumulative product of socialisation and sociocultural values. In Saudi Arabia, women pay a great deal of attention to others and the sense of the self is constructed according to predictions about appraisal by others and how they are likely to review or react to the adopted fashion.

Others in Saudi Arabia consist of family and tribe (normative group) who embed the values related to the appropriateness of fashion in establishing the right identity. Family in Saudi Arabia is a fundamental aspect of the social structure where morality defines the protocol regarding what is considered to be proper attire. This includes the construction of meanings related to beliefs about modesty and aesthetic qualities. Comparative others, such as in-law female members (see Section 5.4.5.2), critically appraise the appropriateness of an individual's choice of clothes in meeting the defined sociocultural context of the fashion consumption system.

7.3.5.1 Women-Only Social Settings

In Saudi Arabia, the beliefs, ideas, meanings, values and effect communicated through an established identity of fashion or clothing vary according to the nature of the social setting and the associated social expectations. For example, in female-only social gathering events, especially weddings, the dynamics of social comparison (Festinger, 1954) that evaluates the identity of others against the identity of the self leads to social competition for identity distinctiveness (see Section 5.4.4.3). This ignites the aura of prestige that propels social status and elevates self-esteem. Saudi women seek self-esteem through unique and customised fashion that establishes a distinguished status. Wearing similar or identical designs at a wedding is counted as a social faux pas that leads to self-reproach (see Section 5.4.4.3). In Saudi weddings, a customised unique dress expresses wealth, social position, elegance and the beauty of the feminine body.

In Saudi Arabia, the practice of body display in weddings is prevalent and is, arguably, acceptable (see Section 5.4.6.2). The propriety of the individual's behaviour of revealing their body does not always imply religious discourse. It also depends on fluctuating social perceptions about the exposed body. For example, others positively perceive a revealing dress on a shapely body and may personally compliment the appearance of the wearer: this is an assertion of the success of the established identity achieved through wearing the dress at eliciting social approval. By contrast, a lower level of body-revealing behaviour by an overweight young woman is perceived negatively and is subject to social disapproval. In Saudi Arabia, the imperfection of a woman's body is conceptualised as a flaw that should be concealed. In this social context, women revealing their bodies is sanctioned only for beautiful bodies (see Section 5.4.6.2). This dualism in social opinions towards body-revealing behaviour, which has been defined in the context of the perceptual visualisation of the body, indicates the deemphasised influence of religion and normative beliefs relating to Islamic modesty. The social emphasis that has been placed on the femininity of women's bodies can explain the increasing demand for plastic surgery in Saudi Arabia. In recent years, Saudi women have undertaken plastic surgery in order to enhance their body image⁶⁵ and to approach the stereotyped perfection of the female body which has been attributed by local media to specific body ideals (see Section 5.4.6.2). In Saudi society, a unique fashion identity should be expressed via a perfect body as a responsive behaviour that aligns with the social conceptualisation of the uniqueness of dress and the perfection of the female body. This helps to satisfy the consumer's emotional needs for acceptance and emotional security.

The individual's age is also indicated to be an influential factor that limits the behaviour of revealing among women from older age groups. Older women, even

⁶⁵ According to the International Society of Aesthetic Plastic Surgery (ISAPS, 2018), the number of cosmetic procedures undertaken in Saudi Arabia in 2016 reached 95,000 with an annual growth of 25%. Saudi cosmetic patients are ranked the first in MENA. <https://www.isaps.org/> [Accessed 11-12-2018].

those who have perfect bodies, establish their self-identity through expensive but concealing dress that can also be a tight fitting attire (see Section 5.4.5.1).

The expression of Saudi women's self-identity and the communicative system of fashion differ according to the particularities of the social setting and the nature of the relationship with the audience. Other social settings such as work, university, small parties and routine weekend visits to family, in-laws and friends are also major arenas in which the social dynamics of symbolic interaction through fashion are expressed. For instance, due to the inclusion of work and university environments that embrace different categories of others (friends and competitors) and the applied rules of uniform to signify the concept of egalitarianism and conformity, Saudi women tend to carefully express their self-identity to prevent any possible consequences of criticism or exclusion. Official institutions normally apply severe sanctions regarding breaches of uniform criteria. However, expressive fashion items such as handbags that display a famous slogan are allowed, which guarantees distinctiveness where uniformity is the key value.

In Saudi Arabia, visiting the in-laws entails a careful decision about the woman's choice of fashion as in-laws are perceived to be always critical. This can be, theoretically, attributed to the inherent masculine nature of the society that maximises the standing of in-laws' expectations related to the wife's appearance. A Saudi wife has to satisfy her in-laws by adopting appropriate status fashion as an ultimate manifestation of the husband's social position (see Section 5.4.5.2). This concept is usually emphasised in the first years of marriage when attention is given to new brides who are not acquainted with the husband and his family.

In other social settings such as family, relatives and friends visits, casualwear is the common choice (see Section 5.4.5.4) due to the fact that less emphasis is given to the value of status and the symbolic interaction is with next-of-kin members (men and women). A modest concealing appearance in the presence of *mahrms* is a requirement that should be presented through any form of the traditional dress or attire that consists of a full-length skirt and a long-sleeved loose blouse (see Section

5.4.5.4). This is to reciprocate respect between the wearer who represents Islamic modesty and the viewer (male) who perceives this behaviour as a symbol of honour for the family they both belong to.

7.3.5.2 The Abaya in the Public Sphere

Women's *abaya* and face cover are distinctive cultural products in the Saudi material culture that symbolise a set of values. These values have been conceptually integrated to express the desirable pattern of Saudi women's identity in public. The factors associated with the *abaya* are deeply ingrained as beliefs that seem to be deeply held and translated into a defined pattern of behaviour. Although some of these values are coherent enough to form a concept, others may be perceived as controversial or even contradictory. An extensive range of Arabic terms were used by women in this study who were asked to express their personal opinion towards the *abaya* as a practice and as an item (see Section 5.4.7.2 and 5.4.7.3). Due to the process of translation from Arabic to English, some nuances related to meanings and inferences, especially those related to culture, might not be as effective as they would be if this part about the *abaya* was written in Arabic.

These values relate specifically to religious and national meanings, with some minor individual connotations. Figure 6.6 illustrates the hierarchy of the value system that determines several themes under each value. The figure has been designed in the context of the consumers' own perspectives regarding subjective individual inferences of the meanings and symbols of the *abaya* (see Section 5.4.7.3). The model also reflects an interpretation that systematises these values according to the level of its significance to the Saudi women.

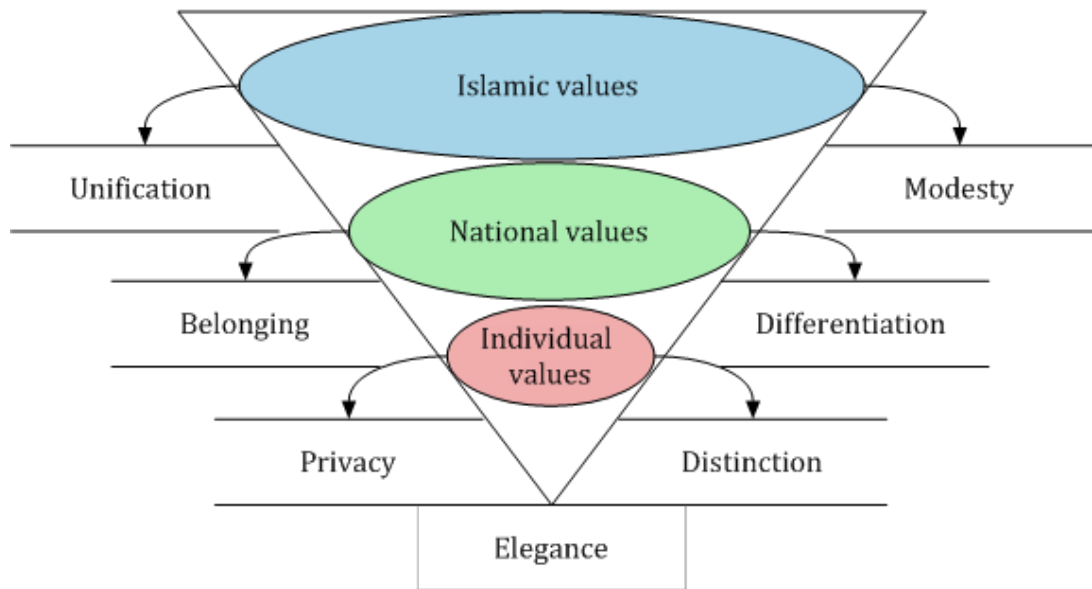


Figure 7.6: Values symbolised through the wearing of the *abaya*.

7.3.5.2.1 Religious Values

In Saudi Arabia, the black *abaya* is considered to be a fundamental component of the Islamic material culture. It constructs the Saudi women's Islamic identity that represents the principle of modesty. The society's value system, normative reference groups, education and local media cultivate the concept that the *abaya* and the face cover are integral parts of Islamic worship rather than part of a sociocultural behavioural matrix to express modesty. The sociocultural obligation of the wearing of the *abaya* as an established signifier of Islamic values, arguably, has engendered a gradual ideological revolution that centralises the *abaya* as the only visual definition of Muslim self-identity. This system fosters the individual's values according to religious considerations, which seems to be a dominant social perception. This results in the construction of a normative moral consciousness that sanctions the *abaya* as the only lawful dress in public based on the inferences of the religious contexts that represent the perspective of a particular Islamic creed (see Section 3.6.3). This belief structure, however, has been accommodated to represent belonging to the unified Islamic *Ummah* (the global Islamic community). Within this conceptual context, a feeling of *fear* may develop to prevent individuals from switching or modifying cultural codes. This is also due to the socially established

relationship between the extent of conservativeness of the chosen *abaya* style and the female's abstention, which in turn indicates the family's dignity (see Section 5.4.7.2 and 5.4.7.3). For this reason, the fear of destroying the family's reputation, which is usually associated with immoral females' behaviour, retains the stability of the *abaya* as the only Islamic dress that has to be worn in public.

The results of this research revealed that although the *abaya* is obligated by the religious social rules, the almost all of the research sample would prefer to wear the *abaya* in public if they had the freedom of choice (see Section 5.4.7.3). Some of the reasons for wearing the *abaya* are attributed to personal religious conviction, to obedience to or the fear of God. This may refute the assumption that Saudi women are tyrannically forced to wear it by the political authority to fulfil the requirements of a specific regime. This argument can also be supported by the recent published statements by the Crown Prince and a member of the religious authority (see Section 3.6.3). These statements declare that women in Saudi Arabia have the right to choose the way in which they present themselves in public as long it fulfils the principle of Islamic modesty. However, to date, the Saudi women's *abaya* has not been replaced by any other Islamic modest garment, which reflects a solid ingrained conception about the *abaya*.

Another piece of evidence that can support this argument is the incident when a group of Saudi women met the American envoy Karen Hughes in 2005 (Weisman, 2005). During the meeting, the envoy was surprised at their unexpected contentment as they informed her that they do not sustain oppression through the wearing of the *abaya*. It is possible for some to argue that this kind of event might be orchestrated as it was conducted in Saudi Arabia, and this might be true. However, this view is held by some of the famous Saudi women such as the novelist Alem (2002), who lives in a Western country. She mentioned that the Saudi women's veil is a moderate annoyance for some people and criticised the way in which Western media exaggerates and transforms it into a gigantic form of sexism. Therefore, wearing the *abaya* is highly accepted as an expression of Islamic self-identity in public.

7.3.5.2.2 National Values

The *abaya* is regarded as a crucial element in the continuum of contemporary Saudi heritage. It represents the value of belonging and differentiation in a national context that establishes the unique visual identity of Saudi women. The value of belonging is associated with the concept of national oneness/sameness that is dominant among the population in Saudi society and which surpasses tribal and regional affiliation. In this sense, the black *abaya* is established as a national dress code that symbolises a unified national identity of Muslim Saudi woman (see Section 3.6.3 and 5.4.7.3). In addition, the *abaya* is a cultural object that has been applied in order to differentiate Saudi women from others, even those from the wider Islamic community. This may contradict the Islamic value of unification that was stated in the previous section. The *abaya* visually and ideologically integrates Saudis into the mainstream Saudi context that considers the *abaya* as a distinctive external visible element of Saudi women's national identity. Within this context, the *abaya* is an important identifier and expression of the Saudi Arabian ethnic and national identity. It can be implicitly understood to be a symbol of pride in the Saudi nationality. In the analysis of the consumer questionnaire, it was identified that a woman who wears an *abaya* that is socially considered to be different in terms of colour for example is perceived by others as a foreigner or migrant who has been naturalised (see Section 5.4.7.3). The analysis of the research findings highlights a symbiotic equilibrium between the concept of belonging/patriotism (in a micro-Saudi-context) and the ideology of differentiation (in a macro-national-context to represent the world) in the conceptual construction of the *abaya* as an ultimate manifestation of Saudi national values.

7.3.5.2.3 Individual Values

There is an implication that feminine and beauty aspects are attributed to the wearer of the *abaya*. For Saudi women, the *abaya* communicates a feminine identity that distinguishes them from men: therefore, the *abaya* in this context communicates a gender identity. This theme reflects the influence of the principle of

Islamic modesty that differentiates feminine attire from masculine attire. Therefore, wearing the black *abaya* in public affirms this sense of pride as it visibly distinguishes women from men. Although the *abaya* is required to fulfil the aim of gender segregation that is enforced for moral purposes, the *abaya*, as stated by some respondents, communicates values of beauty and elegance (see Section 5.4.7.3). This attitude is not attributed to the luxury or fashionable *abaya*: it also includes the moderate plain *abaya*. Due to its physical characteristics, including the black colour and the simplicity of design that guarantees full concealment, the *abaya* enhances body appearance and camouflages its flaws in public. This function of the *abaya* allows Saudi women to wear their *abaya* on top of their pyjamas when going shopping and this is widely considered to offer more privacy and less pressure from others in relation to the clothes worn underneath the *abaya*.

Due to this phenomenon of the adoption of different fashion and clothing to suit different public and private settings, and the dichotomous approaches to the clothing in these different contexts, the previous theoretical framework was constructed in order to explain the striking complexity of the Saudi fashion system. The way in which Saudi women interprets modesty varies (see Section 5.4.5.1), as do sociocultural expectations associated with different social settings. Although subjectivity and individualism do exist, there is a form of unified attitude that exclusively conceptualises modesty in a gendered context. This attitude may cause an inclination to criticise any pattern that does not align with the dominant intellectual and behavioural framework. The influence of social pressure seems to transcend the subjective definition of the self through the adoption of different forms of attire (see Section 5.4.5.2).

7.3.6 Post-Consumption

This stage conceptualises a consumer's impression about the entire purchasing experience, which might result in a positive or negative attitude regarding future decisions about purchasing and consumption. Saudi women consumers do not seem to prefer to directly share a fashion purchasing experience through word of mouth

in cases of both positive and negative experiences. For example, when a woman feels that she has been victimised by a misleading price, or if the product failed to meet her expectations, she does not advise others against this product/store. Saudi women attributed this behaviour to not wanting to be accused of envy: such an accusation could occur, for example, if they were perceived as attempting to prevent others from enjoying the advantages provided by a particular fashion/business. It is also attributed to the Islamic concept of '*Rizq*' as a core principle of business: the concept indicates the economic benefits of God's gifts in relation to a particular business. Any consumer behaviour that negatively influences others' business or '*rizq*' is considered to be against Islamic morality unless it is significantly harmful. Therefore, the role of Saudi women in influencing others' opinions for or against purchasing is insignificant (this is evident to be only applicable to fashion as the context of this research). Interestingly, a negative impression about a fashion store resulting from unprofessional customer service or exaggerated price does not always constitute a negative attitude towards this store. Saudi women focus more on the quality of fashion such as the uniqueness of the design and material than the economic aspects.

In addition, the post-purchasing phase includes a process of making decisions about the suitable method of disposal. In Saudi Arabia, when a fashion item is no longer of use, it is donated to domestic maids or the offices of international charity organisations. Fashion items can also be stored due to the memories they hold. In Saudi Arabia, effective recycling strategies for unwanted clothes are limited. This situation raises an issue regarding the impact of unwanted clothes on the environment.

Finally, consumers' involvement in these stages also varies according to their affective (emotional) or cognitive response to different fashion items. Although Hawkins et al. (1998) argue that not all consumers pass through all of these buyer behaviour stages as some consumers may skip or reverse particular phases which can be due to a lack of time in urgent cases of purchasing, Saudi women seem to be more involved in all of the pre- and post-purchasing stages and they make an effort

to seek the exact quality they desire when shopping for fashion. Understanding the process of Saudi women's fashion consumption behaviour, including the way in which they purchase and consume fashion and clothing items, helps retailers to understand their attitudes and to predict their reaction towards different products, which in turn helps to develop focused approaches for a successful marketing strategy. However, this knowledge about Saudi women consumers should not be limited to developing strategies for marketing purposes: it should also be employed to explain the wider sociocultural implications.

7.4 Main Weaknesses in the Saudi Fashion System: Industry, Market and Education

This research suggests the existence of some issues in the Saudi fashion system. Some of these issues are related to the market, others to the local industry and still others are consequences of the fashion education system.

Key issues in the fashion industry were identified in the interview with the representative of the Jeddah Chamber of Commerce (see Section 6.5) and were also discussed in Section 3.9. The minimal scale of Saudi clothing production is indicated by his statement that *"the local industry used to supply 0.7% of the market 20 years ago but now this has dropped to be only 0.3% of the total market as 99.7% of the market is supplied by the imports"*. Only 20 fashion and clothing factories were registered by the Saudi Industrial Property Authority website in May 2018.⁶⁶ These factories were named in the listing but none had websites or any further accessible information. This resulted in a lack of 'made in Saudi' labels, which in turn indicates a lack of well-established fashion businesses as brand names. In addition, the representative identified a dependency on traditional production strategies by the factories and a lack of application of advanced technology to the production process. The managerial and production system impedes the development of fashion as a local innovative industry with a unique identity that can positively meet consumer demand. Furthermore, the society plays a role in the construction of the stereotype

⁶⁶ <https://www.modon.gov.sa/ar/IndustrialCities/Pages/factory.aspx?factoryId=6983> [Accessed 11-11-2018].

that considers fashion to be a low-status field and attributes the production of clothes to specific ethnicities (such as Pakistani, Indian and Philippine): see Section 6.5. This impacts the industry in many ways, from the low availability of skilled labour to the lack of information available. Moreover, the scarcity of industrial reports that can be analysed by experts in order to provide recommendations and strategies to address any obstacles is also considered as a limitation of the local industry. The lack of governmental funds to support the development of fashion firms (unlike the funding available for other fields of industry) is also a reason for the weak situation of the local fashion industry.

As a consequence, it can be said that locally produced mass-produced fashion (fast fashion) is inadequate in meeting the demand of the local market in terms of quantity and quality. However, the customised luxury fashion companies do provide some local production. In addition, the *abaya* is produced locally to meet the market demand.

Some issues were also identified in the local Saudi fashion market. One of the main issues is the complete dependency on imported fashion products to supply the local market. This dependency has resulted in a poor sizing system, as stated by the consumers (see Section 5.3.1.4), especially in fashion products that are distributed by the wholesalers or sold by dependent fashion shops and produced for them in China (see Section 6.3.1.3). Also, the sociocultural aspects related to distinctiveness that this study has identified as an essential driver for this market might not be highly considered in international fashion production. This point was indicated by the respondents regarding the imported fast fashion, with products being perceived by consumers as very similar/the same (see Table 0.8). It is also associated with the imported Asian fashion distributed by the wholesale system. Due to the similarity of the provided fashion, a weak market competition climate exists. This issue is also linked with the concept of *rizq* (see Section 7.3.6). The concept of *rizq* has a wider psychological impact as a religious belief that active competition will not alter God's gift of the success or otherwise of the business. Moreover, the barriers of market entry for overseas brands, such as the system of Saudi business partnership (see

Section 6.5), exclude the market from the possible benefits of the diversity of other potential fashion brands, in terms of enhancing market competition and satisfying the need for uniqueness.

Other issues are related to the lack of after-sales services such as return and exchange in most of the existing businesses (see Section 6.2.3.7) and the lack of facilities in terms of trying on new clothes that can be trusted by consumers (see Section 6.2.3.3). The existence of unethical market practices related to counterfeiting and deception that are practised by national as well as international retailers (see Section 6.2.3.5) is also an issue and may also impact the original brands. The change in product prices on different days and times is also an issue that diminishes consumer trust (see Section 6.2.3.1).

The retailers' negative attitudes towards consumer preferences resulting from the assumption that Saudi women buy any available fashion and therefore their opinion is not worth considering (see Section 6.3.1) is a serious market problem. Ignorance of the benefits of establishing communication channels with consumers to gain access to their impressions and evaluations about the products or the service is evident in the behaviour of the fashion retailers in the Saudi fashion market. Of course, developing effective strategies that aim to understand consumer behaviour and reach a larger portion of the target market is a crucial goal of any successful business. However, this is not applicable to Saudi Arabia as there is a hesitation to establish communication channels.

In addition, despite the fact that social media, especially Instagram accounts, are used as a platform for advertising, none of the interviewed retailers considered establishing an official online fashion shopping website. This may be due to the regulation process for establishing official corporate websites in Saudi Arabia (see Section 3.8.1). The lack of regulations for Instagram sites, where the majority of online trading appears to occur, is a significant problem that reduces the reliability of Instagram accounts and decreases consumer trust. This results in a lack of

consumer protection. However, the regulations for official websites deter retailers from establishing them.

One of the identified issues relating to consumption behaviour is the negative attitude towards online fashion shopping (see Section 5.4.3.1). Figure 7.7 summarises the main macro- and micro-level risks and barriers that prevent consumers from adopting online fashion and clothing shopping. The macro-level obstacles are related to the market, such as the lack of retailer involvement in e-commerce which has resulted in a limited number of online shopping websites. In addition, the country's infrastructure that lacks postcodes and barely uses house numbering sometimes affects the accuracy of delivery. Also, the payment system is not supported by most of the bank cards and the associated risks of fraud are also barriers (see Section 5.4.3.1). There is also a lack of established legislation to protect consumer rights in the online market (see Section 3.8.1). Micro-level factors are related to the consumer. These factors result from the perception of online shopping as an uncertain way of shopping for clothes, often based on personal experience, which assumes that there are some risks to be expected when shopping online, such as fraud, cheating, misleading information being provided on Instagram accounts, loss of items during delivery, delay, and the undesirable quality of products (see Section). This notion has been constructed during post-purchasing, which involves the evaluation of a previous experience of online shopping (see Section 5.4.3.1).

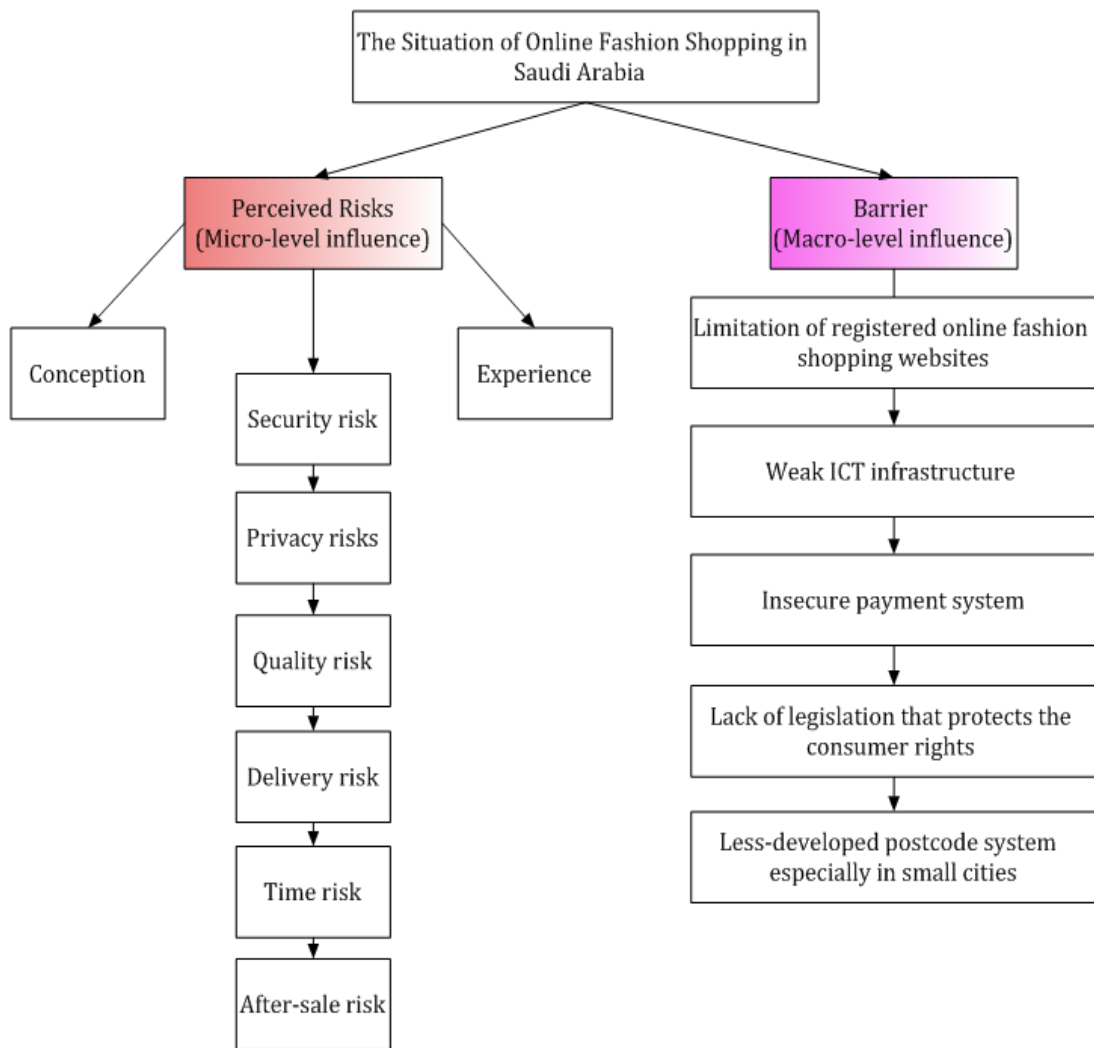


Figure 7.7: Barriers to adopting online fashion shopping in Saudi Arabia.

All of the stated issues have a negative impact, and therefore they need serious consideration.

Other weaknesses are related to the system of fashion education. In Saudi Arabia, fashion and clothing are stereotyped in mainstream education, which gives less academic status to fashion studies. This has resulted in a limitation in the number of fashion courses provided by the public and private universities. Moreover, the traditionalism of the university curricular content, which often focuses on practical aspects such as basic design elements, the use of sewing machines and embroidery, is a limitation of the fashion education system (see Section 6.6.1). These curricula

ignore the theoretical literature regarding fashion as a way of communicating values, which in turn limits the scope of fashion knowledge among Saudi fashion students. This is due to it being seen as a basic skills subject rather than an academic discipline. In addition, business management is not taught in fashion and clothing departments and employability skills are not emphasised. The role of fashion departments in preparing fashion students to establish their own business is also insubstantial. This includes the limitation of fashion entrepreneurship. Furthermore, fashion education in Saudi Arabia is limited to females. This outdated gender essentialist view prevents the activation of the masculine Saudi eye in relation to the fashion industry and a broader acceptance of fashion as a product and as a representation of the Saudi cultural identity.

Rizq as one of the main principles in an Islamic business system has to be presented in a way that highlights its significance as occurring primarily from the retailer's own efforts in terms of business strategy developments (see Section 6.4.1 and 7.3.6). As stated in the Quran⁶⁷, the more people strive, the more they accomplish and achieve. Understanding the concept of *rizq* also involves the actual causes of it, implying the individual's own actions. *Rizq* represents provision and Godly sustenance which are usually connected with the psychological demand for the behaviour of *Tawakkul* or putting an individual's trust on God. However, it also involves materialistic gain that can be signified as profit maximisation. In fashion and business studies, an Islamic management model should be developed as guidance that applies *rizq* as an Islamic concept and practice that encourages the employment of strategies that assure a lawful process of profit maximisation and market competition and supplies the religious normative statements related to business. Profit in this case is not limited to the materialistic or financial context: it also includes the level of trust between the consumer and retailer.

Another weakness is the lack of investment in research in the clothing and textile departments in Saudi universities. This results in the lack of an academic field for

⁶⁷ See Surah Al-Tawbah, Verse 111.

fashion marketing in Saudi Arabia that could investigate the particularities of the Saudi fashion industry and consumption behaviour.

7.5 Recommendations for the Decision Makers to Develop the Local Industry

Although Saudi Arabia has a long-established reputation for its oil industry as the main source of the economy, the development of other industries such as fashion and clothing would also be profitable. As the vision of 2030 lays the groundwork for the future Saudi economy, this vision should consider the fashion and clothing industry as a fundamental innovative industry that is expected to play a significant role as a non-oil aspect of the national economy. Therefore, the following recommendations have been defined in order to develop the industry:

- To produce fashion industry reports to make reliable data accessible and enable more effective support and development of the industry.
- Business enterprise funding should be provided to support the fashion industry, as is available for other industry fields in Saudi Arabia. Attention should be paid to small fashion projects by providing business support services including mentoring, legal consultation and various financial schemes.
- To review the complex regulations related to the Saudi surety system to encourage people to invest in this market and overcome the market-entry barriers for international brands.
- More attention should be given to controlling counterfeited fashion as this issue not only affects Western luxury brands but also the luxury local designs.
- Broader consumer protection regulations should be produced to prevent inconsistent or misleading pricing, false product information on labelling as well as in-store display.
- Development of the infrastructure such as a national postcode system is essential in order to solve problems related to item delivery.

- To review the regulations related to the establishment of official websites and online trading by Instagram sites and other social media. This is to establish a regulated and trustworthy environment for online trading.
- To enable the establishment of secure online trading systems such as PayPal or secure bank card payments.
- To establish an effective system of consumer protection that ensures the security of the customer's data provided through the process of online purchasing.

7.6 Recommendations for Retailers/Companies

For the existing fashion companies in Saudi Arabia as well as future businesses, the following recommendations apply:

- Establish a communication channel to communicate with consumers, in order to understand and respond effectively to their demands. This does not require direct contact with the consumer as it can occur through social media, which companies already use for advertising. Therefore, including an icon that leads to a rating of the provided products and service and the opportunity to comment anonymously can be useful in order to identify possible issues for improvement. Similarly, developing a system that identifies the demands to be addressed frequently helps in gaining an understanding of the changeable tastes and behaviour of the consumers.
- Attention should be paid to consumer rights in order to build up trust between the consumers and the local market.
- A successful marketing strategy requires an understanding of the consumers' value structure and the dynamics of different social and cultural influences on consumption patterns.
- It is recommended that fashion companies planning to present in the Saudi market and those already operating consider the factor of distinction as the key buyer behaviour driver in the consumption of fashion and clothing

among women in Saudi Arabia. This can be achieved though reducing the number of clothing pieces of each design.

- Saudi consumers' preferences may vary slightly from one region to another. However, understanding the common sociocultural elements that have been studied in this research should be applied when entering this market.
- Due to the fact that the country is experiencing social transition with regard to women's role in the society, the possible impact of these changes on fashion consumption behaviour should be kept under review by local and international retailers.
- Transparency is a fundamental element that can help to elevate the level of the brand/company's image. Therefore, reliable information about the product should be clearly provided through the product labels. This should include the standard international sizing information, materials and country of origin.
- In the longer term, a sizing system that focuses on the Saudi demographics should be developed.
- A consistent pricing system should be adopted to inspire consumer trust.
- Finally, integrity and honesty are key elements for success and market competition and the application of marketing strategies does not contradict the Islamic belief of *rizq*.

7.7 Recommendations for the Ministry of Education

Fashion education in Saudi Arabia could play an effective role in the local industry and market if the following recommendations were to be considered.

- Academic collaboration is required between marketing, psychology, sociology, media and Islamic university departments across Saudi Arabia in order to design curricula that effectively add an academic quality to the fashion industry field. This would dissolve the sociocultural stereotypes about fashion and clothing employment as low-status jobs attributed to particular ethnicities or gender.

- It is essential to propose and develop efficient fashion educational programmes to signify the individual, social and cultural values of fashion as a communicative system in order to expand the sources of inspiration for fashion students.
- Fashion departments should emphasise fashion as a business that requires some teaching of business entrepreneurship and marketing in relation to fashion. An in-depth understanding of theories related to fashion consumption in contemporary societies is useful, to be able to meet the market demand and to achieve long-term success.
- An integration of fashion marketing and management within business courses in male universities in Saudi Arabia would reduce the invisibility and improve the low status of the fashion industry.
- If considered beneficial, the signing of collaborative treaties between Saudi Arabia and international universities should be considered in order to employ experienced fashion academics and technicians in Saudi universities.
- Fashion academics in Saudi Arabia should be empowered to change or refine the content of the existing curricula. Centralism as a strategy of fashion education should be reduced in a way that does not contradict the broader system of the Ministry of Education.
- Maximising the students' employability and encouraging them to join the fashion market should be a greater point of focus during or after graduation.
- Developing stronger skills in fashion design, production, branding and management through changes in education and industry partnership.
- Technology should be employed to enable advanced skills for fashion production and marketing.

7.8 Summary of the Chapter

This chapter has discussed the main outcomes of the research study. It has clarified the structure of the Saudi clothing and fashion market through the establishment of a model developed in accordance with the analysis of the research findings. A model that explains different segments of the *abaya* market was also created to ensure a

full analysis of the market. The Saudi fashion and clothing market segmentation was followed by a model that illustrates the process of fashion consumption and the main sociocultural factors that influence the patterns of behaviour and the communicative system of fashion in Saudi Arabia. Also, in this chapter, a statement of the main issues found in the market, industry and fashion education has been provided. As a response, recommendations were provided for the government decision makers, retailers and fashion production companies and for the fashion education system in Saudi Arabia.

Chapter 8: Conclusion

8.1 Introduction

This research study set out to investigate Saudi women's fashion and clothing consumption in different social settings, in the form of a sociocultural analysis based on subjective individual views as well as perspectives from commerce and industry.

In this chapter, the research aim and objectives will be reviewed against the research findings in order to determine whether they have been partially or completely addressed. In addition, the chapter highlights the significance of the main outcomes of this research as a contribution to knowledge. It also includes a reflection on the methodology adopted for this research. Some recommendations for further research about fashion and clothing in Saudi Arabia are also provided.

8.2 Scrutinising the Research Aim and Objectives

The aim of this research was to analyse, understand and define the sociocultural factors and drivers affecting Saudi women's fashion and clothing consumption behaviour. This aim was to be fulfilled through achieving a number of objectives:

Objective 1 To investigate the sociocultural elements that influence Saudi women's fashion behaviour.

This research examined the patterns of fashion and clothing consumption among Saudi women in various public and female-only social milieus. This includes the wearing of different categories of *abaya* in different public places in addition to the consumption of different fashions at social celebrations such as in informal gatherings and at home; appropriate clothing to be worn in front of mahrams; the requirement of uniforms in official institutions such as universities and the working environment; socio-religious festivals including Eids; large formal female-only gatherings and parties; and at weddings. The findings of this research represent the

perspectives of a large sample size. The views given by 654 participants during the administration of the in-depth consumer questionnaire and the conducted observation can effectively explain the patterns of fashion and clothing consumption in Saudi society. To address this objective, a model was established in the light of the research findings to explain the process of fashion consumption behaviour in Saudi Arabia by highlighting the main factors that influence each stage of the process.

This study emphasises that women's fashion and clothing consumption behaviour in Saudi society is full of contradictions and dichotomies. It is identified that there is a range of values that vary according to the setting of consumption. The research findings suggest that Saudi women's fashion consumption is complex due to the existence of different social expectations associated with different social settings and circumstances. For example, different views given by the research respondents revealed that Saudi women's fashion consumption for occasions with a large number of people attending, such as weddings, is highly influenced by comparison and competition. This stimulates the establishment of a distinctive individualised dress identity that communicates wealth and social status. This is an attempt to differentiate the self from others to boost the self-esteem that results from social acceptance and receiving compliments. Therefore, distinctiveness and luxury are established values in the system of Saudi fashion consumption within this context. In contrast, the *abaya* is worn in public to signify conformity and belonging to the society, representing an adherence to the wider Islamic identity and belonging to the Saudi nationality. Moreover, there are various expectations for different social settings.

The behaviour of revealing body display and extravagance are, arguably, acceptable in wedding parties to reflect an established social status, as Islamic modesty seems to be defined in a gender context. By contrast, the wearing of the *abaya* in public reflects the impact of the sociocultural emphasis on the principle of modesty in a mixed-gender environment. It also represents the family's reputation and honour. A possible conclusion is that there is a tension between the definition of Islamic modesty that subjectively varies according to the nature of the social setting (mixed-

gender or women-only social settings). In this sense, Islamic modesty is defined according to the ideology of concealment in front of the opposite gender.

Both contexts reveal the high level of social pressure applied by others. The consumption of fashion in Saudi Arabia is driven by the necessity to meet social expectations. Due to the collectivistic characteristic of the Saudi culture that asserts the role of the society members in evaluating the appropriateness of people's appearance, the opinions of others are important. Social penalties such as criticism, exclusion or embarrassment prevent the adoption of fashion that is considered inappropriate to the circumstance and vice versa.

It is also worth expressing that although subjectivity and personal interpretation of sociocultural values do exist, their influence is considered to be minimal. The reason for this is that these personal definitions are firmly embedded in the wider sociocultural pattern of the Saudi society.

Objective 2: To understand the characteristics and structure of the Saudi women's fashion and clothing market.

Although the Saudi fashion market is complex in terms of its structure and operational system, this research provides a clear definition of the market segmentation by focusing on both the consumer and the fashion product. This understanding resulted from the market observation as well as the interviews with retailers and the fashion designer. To address Objective 2, a model was established to define the Saudi fashion and market segmentation. This model links each segment with the demography of its consumers, the milieu of consumption and the sought-after sociocultural or individual values. A link is also established between the characteristics of fashion items and their ability to meet or fulfil these values. This includes the extrinsic features of fashion items such as the country of origin and the uniqueness of design, which are considered to have a significant impact on fashion buyer behaviour as they are utilised to indicate the quality of the fashion product. This model was followed by a subsidiary model that explains the structure of the

abaya market and the characteristics of different categories of the *abaya* that are worn in different public places.

A number of issues in the Saudi fashion market were identified. Some of these issues are related to the system of management in fashion companies while others relate to unethical practices. Issues of infrastructure, labelling, sizing and inconsistent pricing were highlighted. The lack of communication with consumers and responsiveness to consumer demands is a main issue in the Saudi fashion market. Also, a contradiction was identified between the enthusiasm of almost every respondent towards physical active fashion shopping and the high level of uncertainty and fear of possible consequences of online shopping. The low status of the fashion industry in Saudi society and the dependence on imported international products are consequences of limitations in the fashion education system. These limitations were also defined.

Objective 3: To establish models of the Saudi women's fashion consumption behaviour.

A model was developed in order to explain the process of fashion consumption in Saudi Arabia. This model highlights the influential factors that impact each stage of the process. The fashion market segmentation model also includes different categories of clothing correlated to different drivers and contexts of consumption. In addition, the consumption of *abayas* was examined in a further model, which relates different categories of *abaya* to the context of use.

Objective 4: To produce recommendations for the industry, retailers and education that can help them to respond to the market demand, based on the understanding of the models of the fashion system.

One of the research outcomes is the set of recommendations established in order to improve the fashion market. Recommendations were created to be forwarded to decision makers in the Saudi government in order to respond to the issues identified in the market. In addition, recommendations have been provided for the local

retailers in order to help them to identify the opportunities that might improve the quality of the available fashion and their service, which in turn would benefit their business and satisfy their consumers. Recommendations were also developed to be forwarded to the Ministry of Education as well as the fashion departments in Saudi universities to improve the curricular content and to prepare students to join the local market.

To conclude, each of these objectives has been achieved.

8.3 Significance and Contribution to Knowledge

This research study provides a substantive contribution to the literature on Saudi women's fashion consumption behaviour. It provides an insight into the multiplicity of different social systems and contexts for fashion consumption by women in Saudi Arabia.

Previous studies have focused on the wearing of the *abaya* as a form of public attire among a group of undergraduates (DeCoursey (2017); on the disappearance of traditional costume (Rabolt and Forney, 1989; Yamani, 1997, 2004; Long, 2005; Al-Dabbagh 2006; Fatany, 2007); and the consumption of luxury fashion by overseas Saudi students (Aqeel, 2012 and Marciniak and Mohsen, 2014). This research takes a step forward, aiming to widen the scope of analysis of Saudi women's clothing that has often previously been narrowly defined, especially in the global media in which it is frequently perceived as a system that swathes women in the black *abaya* as a symbol of modest Islamic identity, presenting an image of sombre national uniformity. The manner in which the consumers' behavioural patterns are presented in this research avoids the adoption or the reflection of any approaches that represent the extreme views of developmentalists, feminists or the opposite approach of radical Islamists. These ideologies are usually the dominant voices when discussing the topics of dress code or fashion in Saudi Arabia. The study also highlights more aspects of the market and consumption behaviour compared to those who stereotype Saudi women as consumers who are obsessed by luxury

fashion, such as Aqeel (2012), Busnaina (2014) and Marciniak and Mohsen (2014). A strength of this study is that it has not narrowly focused on examining the dynamics of the fashion system in one region/city of Saudi Arabia; it gained access to the perspectives of consumers who belong to different regional identities (Tabouk, Al-Jouf, Riyadh, Jeddah, Al-Madinah and Dammam) that are significantly or slightly affected by strong conservative tribal and religious norms or cosmopolitan and multi-ethnicity characteristics. It differs from those studies that focus on the consumption in only two regions, Jeddah and Riyadh (Al-Subaie and Jones, 2017). Overall, this analysis establishes an understanding of women's fashion consumption in both public and women-only social settings and across different market segments and regions.

Due to the fact that this research is one of the initial studies about this topic, it provides a multidisciplinary insight into Saudi women's fashion and clothing consumption as a system of established relationships between the consumer, the market and the industry that in turn forms a system that operates through interactional activities. This includes the dynamics of sociocultural norms in defining and localising the meanings of different fashions in Saudi society and the responsive behavioural patterns of consumers. Also, it involves the influence of other members of the society as normative transmitters of meanings, trendsetters and fashion opinion leaders who provide inspiration for the adoption of new fashion items, or evaluators who assess the success or failure in aligning with the sociocultural values that should be communicated by the adoption of a specific fashion or visibly defined attire to meet particular expectations. Through this system, an essential relationship is also established between the consumer and intrinsic or extrinsic features of the fashion product as a key value transmitter. This research includes the local market and industry as parts of this system as they are believed to have an influence on the taste of the consumers due to the fact that they supply fashion, which is the core object of this system.

One of the main contributions of this research is that it provides a model that explains the process of Saudi women's fashion and clothing buyer behaviour and

consumption. This model has been validated by the representative of the Jeddah Chamber of Commerce and a sociologist who works in the Department of Sociology at one of the leading Saudi universities. It clarifies the main sociocultural factors and dynamics that affect each stage of the buyer behaviour and consumption process. These factors are not defined only in the light of the religious influence or the system of patriarchy (Al-Wedinani, 2016), as has been a usual approach within commentary on Saudi culture. The model defines the values communicated in public as well as in women-only social settings. It highlights the specific drivers of distinctiveness in relation to women-only social settings and of conformity/belonging in public. However, distinctiveness is a socially constructed ideology that defines a unified consumption pattern required to meet social expectations. The study provides an insight into Saudi social life that is characterised by different social dynamics in different contexts, with different expectations and social pressures exerted by others in the society.

This model is specific to the definition of fashion consumption in the Saudi cultural context. However, the adoption of this model is not limited to understanding fashion consumption in Saudi Arabia: it can also be applied as a conceptual structure to consumption in other societies, if based on research into those cultures. This model is expected to have a positive influence in understanding fashion consumption patterns within Saudi Arabia. Explaining the pattern of Saudi women's buyer behaviour leads to a more in-depth understanding of the system of values expressed through the adoption of different fashions. These values can then be deployed when developing marketing strategies.

Another contribution of this research is the Saudi fashion and clothing market segmentation model. It divides the market into a range of segments that vary in terms of the product type, the consumer's demography, the environment of the consumption and the drivers for the consumption. Three main categories of the market include luxury imported and local fashion, a range of mass-produced fashion and the low-end fashion market that targets non-Saudi consumers. In addition, another model was developed to explain different classifications of the *abaya*

associated with different purposes and contexts. This brings out a deeper and clearer definition of the Saudi fashion market that would be beneficial for fashion retailers or new market-entry fashion brands when developing a strategy to target a specific segment. This may also enable the government to develop appropriate support for the industry. Moreover, the understanding of the structure of the Saudi fashion market may have an influence on the stereotyped image about Saudi women and their fashion. Although imported Western fashion is popular, other forms of fashion exist to transmit values that Western fashion may fail to communicate. For example, luxury Western fashion is used for particular contexts such as formal meetings; however, for high-status occasions such as weddings, the locally designed customised fashion products are adopted as appropriate for elitist consumption. In addition, wearing the *abaya* transmits a range of values depending on the type of the *abaya*. The connotations of these different types may vary in different regions and due to the characteristics of the public place and the age of the wearer.

This framework signifies the role of the consumer as the ultimate arbiter of the success of each segment in meeting consumer demand. This is due to the role of consumer satisfaction about the value offered by each segment, which should be a core aspect of any marketing strategy (Rudani, 2009; McDonald and Dunbar, 2012).

The negative attitudes regarding online fashion shopping was explained through a model that indicates the barriers of its adoption in Saudi Arabia. Defining these barriers may help in the establishment of strategies to reduce the risks associated with online shopping. This model also signifies the negative attitudes towards fashion online shopping as one of the main weaknesses of the market. The model highlights the reasons behind these attitudes.

The developed models are considered as conceptual propositions that can be applied independently or sequentially to achieve a comprehensive understanding of the system of women's fashion consumption in Saudi society. These models clarify the relationships between the factors and forces involved in the consumption of fashion in Saudi Arabia. They form a new approach that might help in understanding

Saudi women's fashion consumption as a whole system of established relationships that in turn forms a complete system of interactional activities between the localised meanings of fashion and the responsive behavioural patterns. Also, these models help to understand the relationship between the consumer and intrinsic or extrinsic features of the fashion product as a key value transmitter.

A further outcome of the study was the identification of particular issues in the industry, market and the education system. This was based on the interviews, observation and questionnaire results. In response to these issues, recommendations have been developed in order to overcome these issues or to reduce their impact on the market. These recommendations, if considered, are expected to have a positive influence on the establishment of a more effective local fashion industry and a retail sector that is more responsive to the social and cultural demands of its consumers.

8.4 Reflection on the Methodology

This research has been dedicated to meeting the stated objectives and to answering the research questions. It is contended that the application of the pragmatic mixed-method strategy has positively influenced the depth and inclusivity of the research findings. The conducted primary research and the level of thematic analysis resulted in the development of a holistic structure to explain the structure of the market, the process of fashion consumption behaviour and the main problems/issues in the local fashion market. In response to these issues, recommendations have been developed in order to encourage decision makers, retailers and the education system to take collaborative action that can help in solving or reducing the negative impact of the market issues on Saudi fashion consumers and their perspectives about the local market.

Due to the lack of industrial documents available on governmental official websites, the consideration of the role of the local fashion industry relied especially on the qualitative data obtained through interviewing the representative of the Jeddah

Chamber of Commerce. The dependence on one key source of information to analyse the local industry occurred due to the lack of response to requests made by the researcher to Saudi decision makers, the key retailers and designers, who were contacted during the early stages of the primary research. This can be attributed to either the cultural issue of communicating with the opposite gender or due to the lack of interest in participation in an academic research study. However, interviewing a number of local retailers and academics, as well as considering the questionnaire findings and observation, allowed the interweaving of data from these sources in order to obtain a picture of the situation of the local fashion market's operational system.

As a research study that has been undertaken in Saudi Arabia by a native Saudi researcher but at the same time written and presented in English, translation can be problematic. Although the researcher tried very hard to ensure the maximum level of accuracy of translation, some Arabic terms cannot be literally translated. This is due to the fact that the colloquial Arabic of Saudis has the ability to emphasise layers and levels of semantic indications and may carry different connotations even within the same regional zone (see Section 5.6.2.1).

The models developed in the light of the research findings do not reflect a personal assumption based on the researcher's observation. The models were examined and evaluated by specialists in the final stage of the adopted methodology to ensure their effectiveness and applicability in explaining the structure of the market and the behaviour of its consumers. The research also pointed out the key weakness of the market and the local industry in responding to consumer demand. These issues are to be gradually solved as a first step in the process of local industrial development.

8.5 Recommendations for Further Research

This research covered several aspects of Saudi women's fashion consumption and the fashion market. However, there are some questions that require further

investigation. Therefore, it is recommended that further academic work covering the following areas would be beneficial:

- Due to the limited access to the southern region of Saudi Arabia caused by the ongoing Yemen war, the consumption of fashion in this region was not included in this study. The clothing consumption pattern in the southern region of Saudi Arabia is still a raw area of research and should be considered as a research topic. This area has a valuable heritage that is constituted upon the norms and traditions of different tribal identities that might affect certain levels of clothing consumption. This can be studied through a theoretical framework of semiotics and symbolism.
- The influence of a large population of non-Saudi groups and the segmentation and the consumption process of these groups could be considered. The range of different nationalities and cultures and their interaction with the Saudi fashion system would be a significant area to study. This can be conducted via a comparative lens that demonstrates how people from several population groups infer and translate their fashion preferences.
- A study of the consumption of fashion among women who are over the age of 50 is considered interesting. The current study includes the views of a number of respondents from this age group: however, the number was small and further investigation may reveal interesting facts about their consumption patterns. This kind of research can be undertaken by applying a comparative lens that compares and contrasts the consumption of different generations to define the dynamics of various influences in responding to fashion and constructing self-identity in a specific social setting.
- The researcher argues that the new social transformation in Saudi society that activates Saudi women's social role and offers them more space for freedom and social rights may have a direct or indirect impact on the fashion system and adoption attitudes. This can take place in the long or short-term future. This influence should be tested using a sociological lens to explain different responses that are driven by different adopted ideologies during the process of change (if such change does occur).

- Finally, an investigation of Saudi men's garments is recommended, to explore whether there is a similar public/private dichotomy and to examine the influence of social expectations in different contexts on the pattern of consumption.

8.6 Final Remarks

The researcher hopes that the analysis of the clothing market and fashion consumer behaviour in Saudi Arabia will be beneficial to development in the market and industry. It should help retailers and fashion brands to understand the market and the behaviour of its consumers. It should also help those unfamiliar with Saudi culture to understand the social dynamics that operate the system of fashion consumption in Saudi Arabia.

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Appendix 1: Consumer Questionnaire Consent Form

Dear respondent,

In order to complete my PhD degree in Consumer Behaviour at De Montfort University, UK, I am currently conducting extensive research on the clothing and fashion market in Saudi Arabia, which aims to understand the role of sociocultural drivers in influencing the consumption pattern of fashion among Saudi women. This requires gathering necessary data and opinions from consumers like you.

In this questionnaire, you are requested to answer some questions related to the Saudi fashion market. This will then help me to correlate these findings with other research studies in the literature. Please be aware that answering any questions is optional for respondents and you may wish to skip any question which you feel is not applicable to you, or which you do not feel comfortable answering.

Please note that all the information collected through this survey will be only be used exclusively for this research purpose, and **WILL NOT** be shared with any other party without your prior consent. This information will be used for similar academic purposes only if you allow me to use it. In addition, it will be saved securely and destroyed after using it.

If you need any further information regarding this questionnaire, please feel free to contact me on P09000859@myemail.dmu.ac.uk

Many thanks for your anticipated cooperation.

Elham Abu Nab

I have read the information above and

I permit information to be used in publications

I prefer to be anonymous

Name.....

Signature.....

Date / /

Questions for the Pilot Consumers' Questionnaire

Do you buy/wear well-known Western styles and brands?

- Yes
 - No
 - Why? Could you explain please?
-

Do you prefer to buy/wear traditional-style clothes?

- Yes
 - No
 - Why? Could you explain please?
-

Do you buy/wear Saudi brands?

- Yes
 - No
 - Why? Could you explain please?
-

Is there any problem with the local market and/or the local industry?

- Yes
 - No
 - Why? Could you explain please?
-

Thank you for participating. I really appreciate your time

The quantitative and qualitative data from this pilot questionnaire is provided in Chapter 4.

Appendix 2: Code Definitions for Participants of the Pilot Consumer Questionnaire

Code	Region	Age	Occupation
CA1	Tabouk	30	Head teacher
CA2	Tabouk	22	University student
CA3	Tabouk	22	University student
CA4	Tabouk	22	University student
CA5	Tabouk	29	Teacher
CA6	Tabouk	24	Housewife
CA7	Tabouk	30	Photographer
CA8	Tabouk	30	Housewife
CA9	Tabouk	36	Teacher
CA10	Tabouk	25	Teacher
CA11	Tabouk	33	Housewife
CA12	Tabouk	26	Teacher
CA13	Tabouk	26	Nurse
CA14	Tabouk	29	Housewife
CA15	Tabouk	28	Lecturer
CA16	Tabouk	26	Teacher
CA17	Tabouk	22	University student
CA18	Tabouk	23	University student
CA19	Tabouk	28	Nurse
CA20	Tabouk	33	Housewife
CA21	Tabouk	34	Doctor
CA22	Tabouk	30	Housewife
CA23	Tabouk	29	Jobseeker
CA24	Tabouk	22	University student
CA25	Tabouk	22	University student
CA26	Tabouk	24	University student
CA27	Tabouk	23	University student

CA28	Tabouk	29	Housewife
CA29	Tabouk	27	Academic
CA30	Tabouk	33	Teacher
CA31	Jeddah	30	Teacher
CA32	Jeddah	30	Teacher
CA33	Jeddah	29	Lecturer
CA34	Jeddah	23	University student
CA35	Jeddah	24	University student
CA36	Jeddah	28	Bank officer
CA37	Jeddah	25	Teacher
CA38	Jeddah	23	University student
CA39	Jeddah	25	Jobseeker
CA40	Jeddah	24	Jobseeker
CA41	Jeddah	32	Dentist
CA42	Jeddah	29	Doctor
CA43	Jeddah	27	Interior designer
CA44	Jeddah	25	Jobseeker
CA45	Jeddah	29	Teacher
CA46	Jeddah	25	Teacher
CA47	Jeddah	31	Housewife
CA48	Jeddah	33	Receptionist
CA49	Jeddah	22	University student
CA50	Jeddah	32	Doctor
CA51	Jeddah	26	Manager
CA52	Jeddah	26	Dentist
CA53	Jeddah	22	University student
CA54	Jeddah	30	Photographer
CA55	Jeddah	33	Doctor
CA56	Jeddah	26	Make-up artist
CA57	Jeddah	31	Housewife
CA58	Jeddah	22	University student

CA59	Jeddah	23	University student
CA60	Jeddah	31	Nurse

Table 0.1: Code Definitions for Participants of the Pilot Consumer Questionnaire.

Appendix 3: Questions for the In-Depth Consumer Questionnaire

Demography

Region

- Al-Jouf
- Dammam
- Al-Madinah
- Jeddah
- Riyadh
- Tabouk

Age

- Under 20
- 21 to 25
- 26 to 30
- 31 to 35
- 36 to 40
- 41 to 45
- 46 to 50
- 51 to 55
- 56 to 60

Marital status

- Single
- Engaged
- Married

Occupation

- Student
- Jobseeker
- Teacher
- Nurse
- Housewife
- Other

Educational level

- Primary
- Secondary
- University (first degree)
- Higher education

Monthly income

- 3,000 SAR or less
 - 4,000 to 7,000 SAR
 - 8,000 to 11,000 SAR
 - 12,000 to 15,000 SAR
 - More
-

General Fashion Shopping Habits

How often do you shop for new clothes?

- Weekly
 - Monthly
 - Seasonal
 - Could you explain about this please?
-

Do you prefer?

- Physical shopping
 - Online shopping
 - Could you state a reason for this please?
-

What is your preferred shopping period of the day?

- Morning
 - Afternoon
 - Evening
 - May I know why?
-

What is your preferred time of the week?

- Weekdays
 - Weekends
 - Can you tell me why?
-

Where do you shop for new clothes?

- Traditional souq
 - Shopping mall
 - What do you think is the reason for this?
-

Whom do you usually shop with?

- Family
 - Friend
 - Relatives
 - Alone
 - Can you explain why?
-

Do you shop during sale seasons?

- Yes
 - No
 - Do you have a reason for this choice?
-

Do you travel to shop for new clothes?

- Yes
 - No
 - State countries/cities please.
-

How often do you buy clothes online?

- Frequently
 - Monthly
 - Rarely
 - Never
 - Can you talk a bit more about this?
-

What is your average budget for new clothes?

- 900 or less
 - 1,000 to 1,500 SAR
 - 1,600 to 2,000 SAR
 - 2,100 to 2,500 SAR
 - More
-

General Process of Clothing and Fashion Consumption Behaviour

Is your intention to shop for new clothes?

- Through planning
 - Instantaneous
 - What do you think is the reason for this?
-

How do you usually search for clothing product information?

- Websites

- Social media
 - In store
 - Fashion magazine
 - Asking others
 - Can you tell me more about this?
-

Which of the following factors do you consider more when purchasing new clothes?

- Price
 - Brand name
 - The country of origin
 - Durability of material
 - Comfort
 - Exclusivity
 - Colour
 - Embroidery
 - Care instructions
 - Ethics
 - Any comments/reasons?
-

Does your shopping experience affect your future shopping?

- Yes
 - No
-

Is this?

- An individual-level choice
 - A social-level choice
-

Do you usually pass your experience on to others?

- Yes
 - No
 - Can you tell me why?
-

If yes, is this through?

- Word of mouth
 - Leaving a review in social media
 - Is there any particular reason for this?
-

What do you do with your old clothes?

- Re-use
 - Re-sell
 - Give to charity
 - Recycling bank
 - Throw away
 - Store
 - Other strategy. Tell me more about this please?
-
-

Categories of Clothes Worn Underneath the *Abaya*

What would you prefer for special occasion attire?

- Customised
 - Luxury global
 - Fast fashion
 - Traditional dress
 - Local brand
 - State a reason for your choice please.
-

What would you prefer for work and university attire?

- Customised
 - Luxury global
 - Fast fashion
 - Local brand
 - State a reason for your choice please.
-

What would you prefer for Eid attire?

- Customised
 - Luxury global
 - Fast fashion
 - Traditional dress
 - Local brand
 - State a reason for your choice please.
-

What do you usually wear at home?

- Customised clothes
- Western clothes
- Traditional dress

- State a reason for your choice please.
-

Do you have personal emotional attachment to a particular brand?

- Yes
 - No
 - Can you specify which brand and why?
-

Is there any problem related to the local fashion market?

- Yes
 - No
 - Can you tell me more about this?
-

The Influence of Sociocultural Factors on the Definition of the Self through Clothes

Are your regular choices for fashion and clothing dominated by religious requirements?

- Yes
 - No
 - Could you explain please?
-

Which of the following elements of Islamic modesty do you highly consider when you buy/wear clothes?

- Looseness
 - Opaque quality
 - Concealment
 - Dissimilarity to men
 - Dissimilarity to other faiths
 - Moderation/not conspicuous
 - Any comments?
-

Are your regular choices for fashion and clothing dominated by social considerations?

- Yes
 - No
 - Feel free to express your thoughts please.
-

Which of the following social factors do you highly consider when you buy/wear clothes?

- Social class
 - The opinion of others
 - Society rules and traditions
 - Can you explain in which way please?
-

Are your regular choices for fashion and clothing dominated by your individual perspective?

- Yes
 - No
 - Any comments you would like to add?
-

Which of the following individual factors affect you more when you buy/wear clothes? (This does not include personal taste)

- Personality/personal traits
 - Self-image
 - Learning: knowledge and experience
 - Beliefs and perceptions
 - Explain more please?
-

The Consumption Behaviour of the *Abaya*

How many abaya do you have?

- 1 to 3
 - 4 to 6
 - More
-

Where do you buy your *abaya* from?

- Traditional souq
 - Shopping mall
-

How would you like your *abaya* to be?

- Customised
 - Ready to wear
-

How much do you usually spend when you buy an *abaya*?

- 300 to 600 SAR
 - 700 to 1000 SAR
 - More
-

If you had the choice, what colour would you prefer for your *abaya*?

- Black
 - Dark colour
 - Pastel colour
 - Vibrant colour
 - Do you have a reason for this?
-

What form of the *abaya* do you usually wear?

- Traditional (*abayat ar-ras*)
 - Moderate plain (*abayat al-kitf*)
 - Slightly decorated
 - Magnificently decorated
 - Can you tell me why please?
-

If you had the choice, what would you wear in public?

- The *abaya*
 - Other form of modest attire
-

Is this due to?

- Religious considerations
 - Social considerations
 - Personal conviction
 - Others. Can you explain please?
-

Thank you for participating. I really appreciate your time.

Appendix 4: The Test Result of the Research Sample Size

This is a screen shot of Raosoft that shows the result of the examined research sample.

The screenshot shows the Raosoft Sample Size Calculator interface. The main form has the following inputs and results:

What margin of error can you accept? 5% is a common choice	5%	The margin of error is the amount of error that you can tolerate. If 90% of respondents answer yes, while 10% answer no, you may be able to tolerate a larger amount of error than if the respondents are split 50-50 or 45-55. Lower margin of error requires a larger sample size.
What confidence level do you need? Typical choices are 90%, 95%, or 99%	95%	The confidence level is the amount of uncertainty you can tolerate. Suppose that you have 20 yes-no questions in your survey. With a confidence level of 95%, you would expect that for one of the questions (1 in 20), the percentage of people who answer yes would be more than the margin of error away from the true answer. The true answer is the percentage you would get if you exhaustively interviewed everyone. Higher confidence level requires a larger sample size.
What is the population size? If you don't know, use 20000	10000000	How many people are there to choose your random sample from? The sample size doesn't change much for populations larger than 20,000.
What is the response distribution? Leave this as 50%	50%	For each question, what do you expect the results will be? If the sample is skewed highly one way or the other, the population probably is, too. If you don't know, use 50%, which gives the largest sample size. See below under More information if this is confusing.
Your recommended sample size is	385	This is the minimum recommended size of your survey. If you create a sample of this many people and get responses from everyone, you're more likely to get a correct answer than you would from a large sample where only a small percentage of the sample responds to your survey.

Online surveys with **Vovici** have completion rates of **66%**!

Alternate scenarios

With a sample size of	100	200	300	With a confidence level of	90	95	99
Your margin of error would be	9.80%	6.93%	5.66%	Your sample size would need to be	271	385	664

Save effort, save time. Conduct your survey online with **Vovici**.

More information

If 50% of all the people in a population of 20000 people drink coffee in the morning, and if you were repeat the survey of 377 people ("Did you drink coffee this morning?") many times, then 95% of the time, your survey would find that between 45% and 55% of the people in your sample answered "Yes". The remaining 5% of the time, or for 1 in 20 survey questions, you would expect the survey response to more than the margin of error away from the true answer. When you survey a sample of the population, you don't know that you've found the correct answer, but you do know that there's a 95% chance that you're within the margin of error of the correct answer. Try changing your sample size and watch what happens to the *alternate scenarios*. That tells you what happens if you don't use the recommended sample size, and how M.O.E and confidence level (that 95%) are related. To learn more if you're a beginner, read **Basic Statistics: A Modern Approach** and **The Cartoon Guide to Statistics**. Otherwise, look at the **more advanced books**.

Figure 0.1: The sample size test result. From www.raosoft.com/samplesize.html [Accessed 24-21-2018].

Appendix 5: Regional Code Definitions for Participants of the In-Depth Consumer Questionnaire

Al-Jouf	Dammam	Jeddah	Madinah	Riyadh	Tabouk
CF	CD	CJ	CM	CR	CT

Table 0.2: Regional code definitions.

Appendix 6: Code Definitions for Quotations from the In-Depth Consumer Questionnaire

The following table indicates the main demographic factors of respondents who provided their opinions by answering the open-ended questions.

Code	Age	Marital status	Occupation	Education
CF1	27	Married	Housewife	University
CF2	29	Married	Teacher	University
CM4	30	Single	Doctor	University
CT5	22	Single	Student	University
CF7	22	Single	Student	University
CM8	25	Married	Student	University
CF9	28	Married	Teacher	University
CT10	23	Single	Student	University
CT11	26	Engaged	Student	University

CR15	20	Married	Student	University
CR22	33	Single	Administer	University
CJ24	22	Married	Student	University
CR26	29	Married	Housewife	University
CM30	21	Single	Student	University
CJ33	26	Married	Nurse	University
CM35	32	Married	Teacher	University
CM38	29	Married	Academic	University
CM46	32	Married	ICT	University
CJ48	44	Married	Nurse	University
CJ53	31	Married	Teacher	University
CM55	31	Married	Head teacher	University
CM56	26	Married	Teacher	University
CT63	37	Married	Lecturer	University
CJ66	45	Married	Housewife	University
CR69	26	Married	Teacher	University
CJ70	50	Married	Teacher	University
CD73	25	Single	Accountant	University
CM76	39	Married	Nutritionist	University
CR78	31	Married	Doctor	University
CR79	29	Single	Nurse	University
CT80	28	Married	Housewife	University
CT81	42	Married	Teacher	University
CM99	33	Married	Teacher	University
CM101	30	Married	Housewife	University
CD102	32	Single	Doctor	University
CJ103	25	Single	Student	University
CJ105	30	Married	Housewife	University
CT107	22	Single	Student	University
CM108	33	Married	Lecturer	University
CD113	41	Married	Businesswoman	University

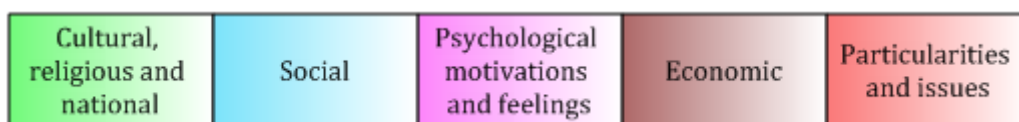
CM125	28	Married	Nurse	University
CJ127	26	Married	Self-employed	University
CM134	24	Married	Housewife	University
CJ135	30	Married	Security	University
CT149	30	Married	Make-up artist	University
CR158	22	Married	Student	University
CJ162	33	Married	Lecturer	University
CF174	27	Married	Teacher	University
CM183	27	Married	Teacher	University
CJ184	24	Married	Nurse	University
CR185	22	Single	Student	University
CT188	26	Single	Lecturer	University
CJ189	25	Single	Accountant	University
CT190	30	Married	Teacher	University
CD191	33	Married	Jobseeker	University
CT192	60s	Married	Retired teacher	University
CJ195	66	Married	Consultant	University
CR198	36	Married	Doctor	University
CT200	35	Single	Photographer	University
CT201	23	Single	Student	University
CR203	33	Married	Housewife	University
CJ210	33	Married	Teacher	University
CT212	25	Married	Nurse	University
CM219	31	Single	Bank officer	University
CR233	30	Married	Teacher	University
CM238	26	Married	Lecturer	University
CT251	29	Married	Nurse	University
CJ278	26	Single	Web designer	University
CT293	33	Married	Photographer	University
CR297	29	Married	Receptionist	University
CJ300	22	Engaged	Student	University

CT311	24	Single	Student	University
CJ303	31	Married	Housewife	University
CJ312	36	Married	Surgeon	University
CJ315	29	Married	Head teacher	University
CJ332	29	Single	Lecturer	University
CM366	25	Engaged	Nurse	University
CM401	32	Married	Doctor	University
CD486	44	Married	Teacher	University
CT491	29	Married	Self-employed	University
CT500	30	Married	Teacher	University
CM504	49	Married	Academic	University
CR521	27	Married	Teacher	University
CT535	31	Single	Housewife	University
CM548	25	Married	Teacher	University
CM551	39	Married	Housewife	University
CJ555	45	Married	Teacher	University
CT562	31	Single	Lecturer	University
CR601	35	Single	Journalist	University
CJ606	29	Married	Housewife	University
CT610	29	Married	Lecturer	University
CR613	30	Single	Researcher	University
CJ637	26	Married	Housewife	University

Table 0.3: Consumers' demographics (pilot study).

Appendix 7: Consumers' Statements and the First Stage of Thematic Analysis (Highlighting)

- *Total: 429 conversations*
- *Presented: 96 conversations*
- *Colour Codes*



The qualitative data of the in-depth consumer questionnaire are presented through some of the detailed statements made by the respondents when they answered the open-ended questions. The consumer questionnaire was answered by 654 respondents, but some only answered the close-ended questions, which are presented as quantitative data via the tables in Chapter 4. This left 429 questionnaires with qualitative responses, described here as conversations. Some shorter conversations repeated the same themes and codes, therefore only 96 conversations are given here. The researcher noticed that Saudi women who participated in this research enjoyed answering some questions more than others. For example, some women freely expressed their thoughts about social values while others expanded their conversations about the *abaya* as a key definition of their identity. Conversations are listed below in the order in which they were undertaken.

*“In recent years, **Ramadan and Eid have predated the school season**. It is really time consuming and also financially wearisome. I need to buy clothes separately for each of them... I decide to buy **new clothes for each new event**, such as Eid, wedding, or visit. I like buying distinctive things **for each occasion**... **to avoid similarities**. Oh, **social life**... **I don't buy cheap** things because they are always **bad in quality**... This business is **[Arzaq]** bread and butter. It is **immoral** to influence people in a way that might affect others' businesses. Let people know by themselves... We buy them [servants and drivers] new things as we buy for ourselves... Sorry but, for me, wearing the **black abaya is unquestionable Islamic behaviour**... we **Muslims** have a special code to define our **identity**... **it is a faith**.” CF1*

*“When I go shopping, whatever I like I directly buy. **I don't bother about the price** because if I consider a particular budget this will definitely limit my shopping **pleasure**... I have a number of **abayas** to satisfy different needs in different situations. The one **for work** is usually **traditional** to meet **the restriction established by the school's head teacher** while the one I wear*

*for shopping is moderate but still **very modest**. No decoration or attractive elements.” CF2*

*“**Asian** products can be suitable **for indoor clothing, prayer garments, and sleepwear**. They have the **expected quality** for this... **for weddings** it has to be **customised and distinctive**.” CM4*

*“**I do not trust online websites**. I had a **bad experience** with them once when I bought an expensive watch and I paid about 2,500 SAR for it but it was **never delivered**... [conversation continued]... in **weddings, local designs** have been **Westernised** and some **Western** designs have been **orientalised**. There is no independency in the identity of design... Although it is a **traditional form of abaya**, people would highly **respect** a girl who is wearing this form of **abaya**... **I feel I cannot wear any other form. It has become a conviction**. However, I have one for **work**, one for **shopping**, and one for **occasions**.” CT5*

*“The months of **Ramadan and Eid** are for **social gathering**, which requires **wearing a new thing each time**... [conversation continued]... many **conservative** women relatives signify **visual Islamic modesty through the abaya as well as in female social settings**; however, they don't mind **overspending**.” CF7*

*“I shop with my **family** but they do not affect my decision at all as I have a **different taste**, especially when shopping for **evening dresses**. However, for my **university clothes** my older **sister** may sometimes advise me because she has more experience in the **university atmosphere** and about what might be **acceptable** and what might not... **I wear brands to show that I can afford them just like others**.” CM8*

*“**I buy international designs, especially well-known brand names**... this not for a personal interest, it is totally a **social pressure**. I have worked as a **teacher** since 2009 and my **salary** is quite **high** and as a **married employee** **I do not have too many financial responsibilities**... Therefore I have to focus*

on **enhancing my appearance** by wearing **distinctive** designs that **cannot be easily emulated** either because of its **price** or **rare** availability. We live in a **shallow fake society** that judges you from your handbag to your watch, so a piece of clothing from any famous brand is needed for you to have full **respect** from people and to be pointed out as an **elegant** lady with **full knowledge of up-to-date fashion**. You will be able to gain such a **status** by then. For me this is the case with my **work colleagues** and my **in-laws**... [conversation continued]... **In our society** people always **judge** women according to their appearance. I really want to show that I am a **well-mannered** woman and reflect my **belonging** to a **conservative family**. Wearing the **traditional abaya** supports this. Moreover, it is the **lawful** garment for women in public, which we have to follow as **Muslims**.” CF9

“I always feel I need new clothes, **especially if** the ones I have are **worn more than once** in front of the same people. I don’t mean **social occasions** but **university**... I enjoy shopping with my **family** as a **social activity**. However the **decision** about my clothes is always **made by me**. I have the **freedom to choose** in which way I **present myself** through my selection of clothes... [conversation continued]... I cannot imagine myself in public **without my abaya I will feel naked** even if I am wearing my prayer garment instead. **Come on! What are you talking about?!**” CT10

“I usually spend as much as I can afford when buying a dress, especially if it is for a **special occasion**. I have to wear something that is suitable **no matter what it costs**... [conversation continued]... **Each abaya** serves a different purpose. For example, the **shopping** one should be **light and closed** while the one worn for **occasions** can be slightly or significantly **decorated**... it depends on the **purpose** of the abaya I am intending to buy.” CT11

“Despite my craziness about online fashion blogs and **Instagram fashionistas’** accounts, **I have never bought clothes online**... might be **swindlers**... **waiting for ages to have my items delivered**, this is if they have been delivered to me.” CR15

“...we **prefer to see** the item before buying it. **We cannot trust** anybody or anything but my own eyes.” CF19

“I don’t always present myself in a way that I want just **to avoid harsh direct or indirect social criticism** about my appearance... [conversation continued]... although there are **no special offers** or bargains for **permanent customers**, they are the best in terms of the provided **quality**.” CR22

“**Buying clothes online is full of hazards**. You may **lose your money** or **receive the wrong items**.” CJ24

“...it is difficult to **decide which is modest** and which is not in women-only environments. People have **different opinions** about this.” CR26

“**What does online shopping mean?**” CM30

“The **economic affluence** and the **increase** in average **salaries** that are decreed by King Abdullah have significantly **increased** my **purchasing times**. Now I shop mainly **every day**... [conversation continued]... **the shoulder abaya is modest** but more **practical**. Placing the **abaya** on the top of my head is challenging as I think it will keep falling.” CJ33

“We learn from our childhood that **we represent a society** rather than an individual identity.” CM35

“...through Instagram... **the sold items were not refundable**. Once I bought an evening dress from an **Instagram** account but I didn’t like it. I contacted the account holder to let her know that I would like to return the dress and have my money back but she **refused**.” CM46

*“Black is **elegant**, women in black abaya are attractive even if the abaya was extremely modest. The stereotypical connection between **femininity attractiveness and the black abaya** in the Saudi society **challenges** the tendency toward change, which I don’t think is necessary.” CJ48*

*“...the **first shop** I think to **visit** is the one that has provided me with **distinctive qualities** previously.” CT49*

*“I prefer to shop for fashion with my **sisters**. We always decide to go **together**. However, each of us has a **different taste**.” CJ53*

*“You buy something and you will be **shocked** when receiving something else. Once **I ordered** a fabulous red dress with Swarovski stones (this is how it looked on my laptop screen) for my sister’s engagement party and I paid about 3,300 SAR. **I received a disaster** the day before the party. I received a **poor-quality** red garment with fake plastic shiny stones wrapped in a transparent plastic bag. That time **I had to wear one of my old dresses again**, which I had worn already at another party 9 months ago. That **was so embarrassing**. When I should have been at the front welcoming people, I preferred to hide for the most of the party to avoid the **feeling of loss of self-confidence**... [conversation continued]... I wear the **black abaya** because **I am Muslim and all Muslim women have to wear it... black and modest** otherwise it will not fulfil its multiple functions as a **religious and national symbol**.” CM55*

*“**Western designs are the best**. Their **comfort and material** make them the best choice for today’s life.” CM56*

*“There is **not plenty of websites** and choices. All I know is Namshi.com.⁶⁸ Although it is not easy to use, anyone buying clothes online would probably do it through this website.” CT63*

⁶⁸ Namshi.com is a well-known online fashion shopping website in the Middle East.

"It is a **waste of money**. What if I bought something that doesn't suit me? It will be **difficult to return**. I would **prefer** to buy my clothes **in a shopping mall**. This allows me to **touch** the fabric and **see** the actual colour. I remember that long ago me and my sisters used to order our clothes from an American fashion magazine called Burda. We used to pay in advance for the woman who is dealing with this. Honestly, most of the time the products were good; however, sometimes the colour did not satisfy our expectation... [conversation continued]... **the abaya has to be black to avoid attractiveness** that can be caused by colours." CJ66

"Well, I think the **traditional designs** have become **extinct**, even if you want to buy them you cannot find the desired one easily. They are either **too expensive or very cheap**." CR69

"I prefer to wear what **suits my age**. For my occasion clothes, **I buy fabric for 1,000 or 2,000 SAR** and take it to one of the well-known ladies' retailers to be tailored. Women of my age should look carefully for what suits them, otherwise they **will lose respect** and might be a source of **ridicule**." CJ70

"I only buy them for occasions like **Eid-ul-Adha or pre-wedding parties** – 'henna'. I wish that I could wear them in my daily life but as you know, they do not fit with today's lifestyle, and if I did I may be called **grandma** by my cousins as these traditional designs are usually linked with older women... [conversation continued]... I like the combinations of **crazy colours** and I only wear them in front of my **friend because she is the only one who understands my identity while others may view this as a poor taste**." CD73

"You cannot predict the consequences, you will be blamed for any fault." CM76

"I earn a good amount of **money** so I can **buy whatever** I need whenever I want... I usually access some **celebrities'** social accounts to get **inspiration** for a new style. Especially those who are known for their **elegance**. **Reviews and comments** can make me aware of what is in fashion and **how people think** about it... [conversation continued]... **It takes ages** to make an order and centuries for the product to be delivered... We have to be **different to men and dress in black**." CR78

"I normally buy Western designs, but for some occasions, like **Eid-ul-Adha** or if I am invited to a **pre-wedding party**, I buy **traditional designs** for these events. But in my daily life I wear my jeans." CR79

"I do not buy things online because **I like malls' atmosphere**. **Eating and shopping with friends** is a delight. However, buying things online could **reduce the traffic** jam, especially in seasons such as the **night before Ramadan and the night before Eid day**." CT80

"**Online websites are such burglars**. My daughter paid that lady from **Instagram** but we received nothing." CT81

"...the first idea that will pop up is **envy**. If you tell them the truth they will think that you are trying to **dissuade them** from buying things that might be good only for your own benefit... [conversation continued]... I **don't** usually **get rid** of old clothes. Each piece holds **a memory**; my engagement dress, maternity clothing, and some of my childhood clothes, all of them are **safely stored**. Most of them are **branded** and in a good condition and can be **used again**." CT90

"I normally buy Western designs, but for some occasions, like **Eid-ul-Adha** or if I am invited to a **pre-wedding party**, I buy **traditional designs** for these events. But in my daily life I wear my jeans." CR79

“...women go to **extremes in revealing** and **showing off wealth** through clothes... **corruption and envy**... I believe that **online shopping can be an Islamic solution for women shopping** to avoid men’s **harassment**, which is very common among young people. Let me clarify that for you. *In the Quran, Allah said in surah Al-Ahzab: [‘And abide in your houses and do not display yourselves as [was] the display of the former times of ignorance’].* It is a command for **women to stay at home and not to show their beauty to strangers**. We are all **Muslims**: however, **look at women in shopping malls these days: full make-up, tight, decorated and coloured abaya and attractive looks**, then they say ‘We have been harassed by men’. If they dress **modestly**, the men will not look at them. In addition, shopping online can avoid molestation by drivers. It will be a restful pattern of shopping and an **Islamic** one in terms of its **system** as a shopping method.” **CM99**

“I have **three children** now and my **body shape** keep changing; I lose weight then I put on some kilos, which requires me to **shop** almost **every couple of weeks**.” **CM101**

“I buy **traditional clothes** for the **National Saudi day** only. Most of my clothes are **Western** if not all.” **CD102**

“I can buy anything online but **not clothes**. I have to **feel** the product and make sure that they have the desired **quality**. In online shopping, you **cannot guarantee** that the thing you order is the thing you receive as these people who sell online always present their product in an attractive way but in fact the product might be **bad in reality**.” **CJ103**

“I usually shop for clothes after receiving my **jammyyah**, which is usually about **10,000 SAR** (the average)... It is a chance to **see people** and to **lose** some **weight** as well... [conversation continued]... **Traditional** dress is **more Islamic** and really presents our identity. Therefore, they are the best choice for me.” **CJ105**

*"I don't like to buy something that is easy to find in the market... **rare designs** make me **feel different and not identical**."* CT107

*"I hope I can do, I think that will help in **saving money** because when we shop we go to buy only one thing but **when we see different designs we feel we really need them so we buy more than what we need**. For instance, when I shop for **Eid**, I only go for a dress and shoes but I return home with a number of dresses, shoes, handbags, abaya and pyjamas."* CM108

*"I think **physical shopping** is the **easiest sport** for me... I buy **both styles**. Traditional is essential for gathering with **mahrms** and also when doing the house work. I wear them as night wear, very **comfortable**."* CD113

*"The need for new clothes is a **continuous process**. There is a **change** of everything: **body size, occasions, fashion**, and all of these force us to shop for new clothes regularly... I don't like to go with my husband as he has no patience for **shopping**... I buy traditional dress just in case as they are **useful for Eid-ul-Adha** when packing the meat in the morning. **Also it is a respectable form of clothing when congratulating male relatives**."* CM125

*"I believe that within a female-only social setting there is always a guaranteed freedom in terms of the choice of clothes. However, **some may have a conservative view**, which is something you **should expect and respect**. Therefore, **establishing a balanced identity, nor religious neither secular, may avoid social criticism**."* CJ127

*"**Black** is the colour of **elegance** and **elegance** is the most obvious characteristic of Saudi female identity. Therefore, it does not only represent the meaning of modesty, it also enhances the desired **elegant appearance** in public... helps women to look **slimmer**."* CM134

*"I always ask my **cousin** for advice before I go shopping. She lives in shopping malls and she is **honest** too."* CJ135

*“...abaya... **It is religion... we cannot argue about it.**” CT149*

*“...**the abaya** is a fundamental element of my **Saudi nationality** and **I do want to look Saudi inside the Saudi society or even when I visit Western countries.**” CR158*

*“...I shop a lot...**in-laws and others in the society**...[conversation continued]...**the abaya** become a part of the identity...**it signifies how strong our Islamic identity and traditions are.**” CJ162*

*“...I wear revealing clothes and I admit. But this is only in **weddings** where a **large number of audiences behave in the same way I mean in terms of dress.** It might be considered **not Islamic or immodest**; however, it is not for gaining attention; it is to enjoy fashion... **I wear modest abaya** as you see no decorations... **I pay full attention** to **represent a modest Islamic identity** when in public or **in front of my mahrams.**” CF174*

*“I teach in the morning, and so does my husband, therefore **evening is the only time** for my husband to go with me for shopping.” conversation carried on and she expresses her view about the role of social events as she said]: “**The social events** such as **weddings** and parties are heavy **financial burdens.** However, **we enjoy shopping** for them.” CM183*

*“...one of the **Islamic** principles supports the **belief in differences; this can be applied to women’s appearances in public...** it seems to be a **social crime to wear a colourful abaya** and it is always to malign the **identity of Jeddah’s population.** **People are judgemental...abaya is a very important Islamic symbol...**Traditional designs do not match my daily routine. In addition, I don’t want to look **old** by wearing traditional designs.” CJ184*

*“It is a very **long process** and I do not have patience ... I am a **university student**, I see **girls** every day wearing different **brands** and **I do not want to***

look worse than them as this might *embarrass* me, so I try to shop as much as I can to maintain my *self-confidence*.” CJ185

“I access a number of *fashionistas*’ accounts regularly *to know* what’s in fashion every day. I can also read the comments to know how others, especially relatives, perceive this fashion.” CT188

“I like their styles... [*fashionistas*]... *inspirational*... very *elegant* and *innovative*.” CJ189

“*I go shopping whenever I feel bored even if there is no need*. Buying new clothes *cheers me up*... After *getting married*, I have to *visit* my *in-law’s* house every *weekend* and I have to *wear a new thing in each visit*... you know *in-laws, always critical*... that is why *I keep shopping* for clothes almost *every week*... [conversation continued]... I know that these people are more *pricey* than the other ones but they provide the *desired quality*.” CT190

“Our *mums and grand mums* wore the *local designs* in the past when the society was culturally closed or isolated. They have no communication channels with other societies except with neighbours who share almost the same Islamic cultural values. Now, women are totally *independent as they joined the labour force*. As a result, they want to look absolutely *modern* by wearing *Western* clothes. In addition, the introduction of the internet and social media helped woman to keep up to date with fashion and brands collections.” CD191

“*Of course traditional dress*. Before moving to the city I used to live in a *rural* area. When I was your age, I used to wear what I am wearing right now. By that time there was not any difference in designs between different generations, maybe a bit of embroidery on the sleeves or waist. *My mum* and I used to go to the tailor woman in her house to make our clothes. The design was the same and the only difference was in colours; old women preferred to choose dark colours to befit their age while younger women used to choose any colour they like. By that time, the wearing of *red* by old women was *perceived*

negatively inside the female society. She might lose her respect among other women within the same tribe or even other tribes due to this behaviour. Now you cannot differentiate between the mother and the daughter; they all wear sleeveless and open-cut designs. They forget their religion and their traditions, they just want to copy others. You cannot even differentiate between men and women... all women of my age wear abayat-al-ras for religion, age as well as respect.” CT192

“When Western fashion was first introduced to the Saudi market in the 1970s, I was one of the first adopters. I still wear it but I choose modest designs to suit my age for parties as well as the workplace. I work in the private sector.” CJ195

“I lived in London for about seven years. I used to buy everything online, groceries, clothes, bags, electronics and big furniture items. Everything used to be delivered on time. But when I came back to Saudi Arabia I had to change my shopping habit from a strongly online shopper to a traditional person who has to go to the shopping mall for a new bra or jeans. For me, deciding to go shopping means going a long way from home to the shopping mall, facing different forms of noise including cars’ horns, young males driving so fast in front of malls playing very loud music and don’t forget harassment, which is really annoying especially if you are without your mahram. However, clothing online shopping in Saudi Arabia can be problematic for a number of reasons. Firstly, the poor infrastructure, as we do not have a postcode for every neighbourhood and some of the houses don’t even have a door number. Secondly, regulating these kinds of transactions will be difficult as the Ministry of Commerce has already faced problems and infringements from foreigners and other Saudi cheater shop owners. Thirdly, you do not know how successful changing people’s traditional shopping habit to a modern form of online shopping will be. Even for me, now I’ve got used to it and I feel that physical shopping is a social activity as well as bearing in mind the lack of possible activities for ladies, which makes shopping the best form of entertainment for women... [conversation continued]... I can’t sit with my uncles or my nephews while

*I am wearing tight jeans or a sleeveless top. Traditional designs would be the most **appropriate** garment for this. It is **decent**.” CR198*

*“I think there is a huge change in our society. Due to the **sociable nature of Saudis**, people started to **celebrate** everything such as birthdays, graduation, returning from holidays and so on. **This requires new clothes to wear for each party**. Last month **I spent about 10.000** Riyals on dresses only. We had eight parties in a month... The **modesty** and the **fascinating adornment of the traditional designs** make them **special** and **favourable** for family gatherings **when males are expected to be joining** in, for more **respectability**.” CT200*

*“I want to have **every new fashion** so I shop more these days.” CT201*

*“Well, shopping for new clothes is a **happiness**; personally I feel it is a **pleasure**. Having new clothes in my wardrobe makes me feel **safe, secure** and ready for any **unexpected social occasion... to prevent criticism when people compare... my position among my tribe members... to enhance my self-confidence...s ince our childhood we wear what you call traditional it is modest** and indicates **piety**.” CR203*

*“The **Eid** season always coincides with the majority of **wedding parties**: therefore, shopping for new clothes in this period is **doubled or tripled**.” CJ210*

*“I shop in the evening because of the **hot weather**. Although shopping malls are air conditioned, it is still hot during our long summer season.” CT212*

*“For me, fashion shopping is a **continuous activity from the start to the end of the year**. Sometimes **I shop for clothes even if there is no need for them**, to ensure that I have a variety of clothes for any **unexpected occasion** such as a birthday or graduation party. I benefit from the availability of nice designs*

in some months of the year, which can be unavailable when you look for them.”

CM 219

“I travel every holiday to shop for new clothes. I don’t like it when my in-law comments that [oh, we saw your dress in that shop and it costs this] Therefore, I buy my clothes from Dubai and Turkey...” CR233

“Since my childhood, my mum always emphasises that we should look elegant and classy as we represent the family before ourselves. My mum used to buy us famous brands and it became a tradition in our family. However, in public, we have to be dressed very conservatively as my father is a well-known member of the society and as daughters we should respect this.”

CM238

“...as long as it is an only-women social setting I don’t mind wearing a revealing dress... I do respect my mahrams and I only meet them if I am sure that my clothes are appropriate.” CT251

“Well, online purchasing is the best way to save your time instead of spending hours looking for a dress or a bag. However, physical shopping has become a habit of our daily life. People do not go shopping to buy things only; they also enjoy the social life in the shopping malls. In addition, the majority of the occasion wear shops do not have online websites to display their products and they may fear that their designs will be copied as there is a weak governmental superintendence in protecting the intellectual property in relation to fashion designs. You can see fake products everywhere, LV bags for only 300 SAR and copied designs from the most famous international brands which are accumulated in the market and overtly sold. Furthermore, consumers prefer to visit clothing shops and see the available products and may have good opportunities for bargaining for a lower price.” CJ278

*“Modesty is not a choice, it is a **religious value** even in female social setting. People misunderstand this... **obedience to Allah.**” CT293*

*“...**evening is the only period** of the day that I can use the **family’s car**. In the morning, the **driver** is usually busy picking up and dropping off my siblings to **school** and also my mum and my sister to their **workplace**. In addition, I don’t like to go shopping **alone**, which will be the case if I go **in the morning.**” CJ300*

*“I wear plain absolutely **modest abaya**. **The traditional one is not practical**. I am not offending...but it is very **conservative** and **women who wear it are not necessarily more religious than us.**” CJ303*

*“I am attending university in the morning. I also have to wait for any of my brothers to **drive me** to the shopping mall, and **evening is the only time** for this and it is more **sociable** too.” CT311*

*“Fashion shopping is more like a **pleasure** than a necessity. **I don’t mind paying any cost** for this pleasure. Honestly, I go back home with **a mountain of shopping bags** and I can’t even remember how much I paid.” CJ312*

*“Well, any **cheating in price or quality** is enough to make me **never go again** to the same place.” CJ315*

*“...both styles are more **comfortable** for indoor clothes.” CJ332*

*“A girl’s **dignity** can be easily identified through the shape of her abaya. Modest girls always cover their body properly with a modest abaya.” CM366*

*“Who would go shopping in the **morning?! It is so boring**. Everybody has a job in the morning. I think shopping malls are **empty in the morning**...I shop from shopping malls...**facilities, restaurants, air conditioning**...this cannot be found in souqs.” CM401*

“Well, thanks to God that **I don't have a financial struggle** when buying my clothes, even if I think it can be sorted in a couple of days by **applying for a loan**. I am a **teacher** and this not impossible... I buy my clothes from shopping malls... it gives me a **feeling** that I am in an **organised modern place**.”
CD486

“We spend **time** comparing between different styles until we find the one that is **expensive** and **not widely spread** in the market to **differentiate ourselves from others**... the **first shop** I think to **visit** is the one that has provided me with **distinctive qualities** previously... [conversation continued]... The **colourful abaya** is considered to be an **extraneous form of the abaya that developed somewhere else**. The adopters of this kind of abaya are usually **foreigners or those who have been naturalised**.” CT491

“I prefer to **see** the product and touch it to **check the quality of the material**, the finishing before making my final decision. For me, **physical shopping** is **fun** and it is the only way for me to **chill out** after a tiring day of teaching young kids.” CT500

“Thanks God for offering us the **abaya**. The **abaya enhances my body image**. It makes me look **slimmer** and more **feminine**.” CM504

“I buy a lot of clothes...parties, weddings and the tribe's regular meetings...In **weddings**, there is a **competition** between women to show who is more attractive and has the perfect body shape. The only way to prove this is via wearing **revealing dresses**... as we are **all women together**.” CR521

“Some items need more **effort and time** for comparison, such as **occasion and Eid** clothes, the abaya, and work clothes. However, most women buy the thing that is **distinctive** as soon as they find it. Never lose a chance.” CT535

“It is **embarrassing** to recognise that somebody's **wearing the same thing** as you, no matter whether it happens at **university, or work**. It is a **real social plight, especially at occasions, and women will make it a focus of their**

*gossip... there is **no comparison** between the **quality** provided by **Western brands** and the **Asian** ones.” CM548*

*“I do not have a **Visa card** to pay online and I don’t even know how to follow the instructions of these websites. It is **complicated** for me. **In a society like Saudi Arabia, women prefer to go shopping as a social activity** rather than buying. Sometimes, I **walk around** the shopping mall for more than four hours and go back home without buying anything. I like looking at the **display windows** and compare between different designs and then when I go home I decide what to buy the next day, but sometimes I just buy straight away if the thing is very beautiful or if it is the only piece. **I do not think buying online** will fulfil this kind of **social environment** for us as women. It might fit other societies but not us.” CM551*

*“Well, I check new collections online with my daughters as they are better at using the iPad than me and I decide what designs are possible to buy but I go and buy them by myself to **check the quality** and also to **socialise**.” CJ55*

*“The **body image** is a significant definition of the feminine identity between women...Many of women who I know had cosmetic surgeries to improve their appearance and to be able to wear revealing clothes that substantiate their femininity...ideal bodies in social media...” CT562*

*“When you are looking for the best **quality** you have to **forget about the price**. **I don’t specify how much I am going to spend**, I’d rather wait until I get my salary and go shopping. Then, I will be sure I have **enough money** for any **expensive** dress or item that catches my eye.” CR601*

*“...it depends on the shape of the body. Women who have nice figures are encouraged to wear revealing clothes especially in **weddings**... we have to hide our imperfections to avoid **criticism**...there is a standard for perfect body introduced by **social media** ...” CJ606*

“Recently, the **summer holiday** has been very long. It is about four months. And as you know, when we say summer holiday we actually mean **wedding parties** and **Eid** days. Each of them is an individual festival so imagine when they come together. It is a huge shopping fest... [conversation carried on and her opinion about sales was given as]: Usually sales are **delusive** to get rid of clothes that have been displayed in the stores for ages. And what is funny is that the **price can go higher during sale seasons.**” CT610

“When my **parents** allow me, I shop with my **friends**. It is full of **fun**. We share the same kind of taste so we help each other in choosing.” CT611

“I wear **revealing customised dress in weddings and big parties**. I don’t see any problem with this. Although my **grandmother** always **criticises** this, I receive nice **compliments** from **others**. I feel it is ok we are all women, no men around and until now **I don’t think there is a consensus about modest dress in women-only social setting...** [conversation continued]... **it is the morality norms that dishonour revealing the female’s body in front of other women...** [conversation continued]... **no the abaya is something else. It provides privacy that prevents unwelcomed gazes. It is a protection. Moreover, I sometimes wear it on the top of my pyjamas and go shopping. No one would know what’s underneath. And, imagine there is no face cover. We will need make-up every time we go out.**” CR613

“I wear what I believe meets **the social expectations...** **modesty is subjective** and for me it is mainly applied to my appearance in the presence of males, **mahrms and non-mahrms**. If only women, **I wear what I feel is suitable... I don’t wear a customised dress more than once...** [conversation continued]... **My abaya is very modest; however, I don’t wear the traditional design as I feel it is ultra-conservative and for elderly women.**” CJ637

Appendix 8: An Example of the Process of Thematic Analysis

The first stage was generating the codes based on analysing the quotations given in the previous section. The second stage was to group these codes into categories and themes, as shown below in Tables 0.4, 0.5 and 0.6. For example, in Table 0.4, the categories are: 'Social dynamics/ pressure; Social settings; The influence of 'others'; and Culture and values', all forming the theme of Sociocultural influence.

Sociocultural influence (Theme)			
Social dynamics/ pressure	Social settings	The influence of 'others'	Culture and values
Norms and customs	Public (mixed-gender)	Tribe	Islam
Systems and laws	Eid-ul-Adha (women-only)	Family members	Obedience to Allah
Gathering	Eid-ul-Fitr (women-only)	In-laws	Religiosity and commitment
Comparison	Weddings (women-only)	Relatives	Traditions
Competition	Parties (women-only)	Colleagues	Restrictions
Emulation	Work (women-only)	Mates	Taboos
Evaluation and judgement	University (women-only)	Friends	Piety and modesty
Criticism	Family visits (women-only)	Social media and celebrities	Identity
Envy	Friends' visits (women-only)	The ' <i>committee</i> '	Belonging
Acceptance and rejection	-	-	Reputation, dignity and respect

Table 0.4: Groping codes related to social and cultural dynamics/influences.

Attitudes towards Different Categories of fashion (Theme)			
Asian fashion	Traditional Saudi dress	Western luxury and mass fashion	Locally designed evening dress
Affordable	Beautiful	Original	Revealing
For home	Too much	Identical	Vibrant
Counterfeited	Modest	Stylish	Heavy
Tasteless	For old women	Repeated	Vulgar
Copied	Nostalgic	Modern	Pricy
Ugly	Extinct	Similar	Individualised
Cheap	Heritage	Branded	Unique
Identical	Past	The same	Chic
-	For <i>henna</i>	Trendy	Exaggerated
-	Old-fashioned	Crazy	Distinctive
-	Adorable	Popular	Classy
-	Heavy	Pricy	Attractive
-	Favourite	Suitable	Elegant
-	Not suitable	Too much	Beautiful
-	Sophisticated	Formal	Expressive

-	Archaic	Plain	Impressive
-	<i>Mahrams</i>	Ideal	Fashionable
-	Expensive	Risky choice	Exclusive
-	Cheap	Classic	Customised
-	-	Cool	Different
-	-	High-quality	Distinguished
-	-	Simple	Quintessential
-	-	Modest	Charming
-	-	-	Luxury
-	-	-	Fabulous
-	-	-	Arabian
-	-	-	Rich
-	-	-	Creative
-	-	-	High
-	-	-	Satisfying
-	-	-	Royal
-	-	-	Feminine

Table 0.5: Grouping codes related to the attitudes towards different categories of fashion.

Attitudes towards Different Categories of the <i>Abaya</i>		
Modern/luxury/ fashionable <i>abaya</i>	Moderate <i>abaya</i>	Conservative <i>abaya</i>
Elegant	Practical	Islamic
Not Islamic	Light	Lawful
Alien	Modest	Decent
For foreigners	Affordable	Religious
Attracts men	Lawful	Numinous
Against Islam	Islamic	Piety
Hybrid	Functional	Respectful
Immodest	Decent	Modest
Imported culture	Elegant	Chastity
Threat	Feminine	For old women
Shame	Graceful	Old-fashioned
-	Suitable	Essential
-	Simple	-
-	Convenient	-

Table 0.6: Grouping codes related to different categories of the *abaya*

The final stage of analysis was to classify the codes into positive and negative sections to bring out a clearer response to the topic. The following tables indicate and classify the positive and negative terms that emerged from the thematic analysis of the qualitative data, which represent individual and sociocultural influences that affect the consumption of clothing and fashion in Saudi society (Table 0.7). The consumers' impressions towards different forms of fashion are included in Table 0.8. In Table 0.9, the consumers' attitudes toward different categories and characteristics of the *abaya* as a practice are highlighted. Some of these attitudes are also attributed to the wearers rather than the *abaya*. The number of times each term has been used is noted in the table. The significance of these responses is discussed in Chapter 6.

Individual behaviour (subjective stance)	Social perception (normative stance)	Sociocultural influences	Social reactions (explicit or implicit)		Individual affects	
			Rewards	Penalisation	Positive	Negative
My beliefs (1)	It is associated (1)	Islam (64)				
I think (33)	It will be criticised (9)	Faith (16)	Acceptance (21)	Rejection (3)	Satisfaction (14)	Dissatisfaction (7)
I view (3)	It is understood (3)	Religiosity (14)	Approval (13)	Disapproval (1)	Pleasure (7)	Disappointment (4)
I see (17)	It is appreciated (5)	Values (29)	Respect (18)	Disrespect (3)	Belonging (21)	Exclusion (1)
I feel (45)	It is attributed (10)	Systems (7)	Compliment (3)	Antipathy (1)	Fun (5)	Disquiet (2)
For me (1)	It is described (6)	Norms (18)	Reputation (37)	Put to shame (3)	Happy (3)	Frustration (1)
I believe (6)	It is considered (9)	Traditions (4)	Honour (17)	Dishonour (4)	Proud (9)	Ashamed (14)
In my opinion (4)	It is perceived (1)	Customs (12)	Liking (9)	Disliking (1)	Self-respect (8)	Self-reproach (1)
I understand (3)	It is regarded (1)	Obligations (30)	Encouraging (2)	Discouraging (6)	Security (4)	Fear (9)
I assume (2)	I will be criticised (1)	Sanctions (1)	Status (2)	Notoriety (1)	Esteem (12)	Confusion (1)
I prefer (13)	I will be seen as (8)	Adherence (6)	Fame (2)	Disgrace (7)	Aplomb (1)	Anxiety (1)
I give (1)	I will be judged (4)	Evaluation (31)	Conformity (15)	Hostility (5)	Harmony (16)	Opposition (6)
I decide (2)	They disapprove (1)	Assessment (1)	-	-	Self-confidence (18)	Chagrin (1)
I wear (38)	People will say (67)	Judgement (38)	-	-	-	-
I buy (7)	People think (35)	Restrictions (1)	-	-	-	-

I find (2)	People deprecate (12)	Laws (1)	-	-	-	-
I don't trust (11)	People will laugh (8)	Impositions (1)	-	-	-	-
I trust (3)	They circulate (1)	Comparison (13)	-	-	-	-
I pay (2)	They talk (24)	Competition (19)	-	-	-	-
I like to be (42)	They will (128)	Emulation (22)	-	-	-	-
I travel (102)	Superficial society (1)	Ridicule (1)	-	-	-	-
I represent (3)	They review (18)	Envy (7)	-	-	-	-
I compare (9)	They condemn (1)	Embarrassment (21)	-	-	-	-
I establish (3)	They scan (29)	Interposition (1)	-	-	-	-
I evaluate (4)	They know (11)	Taunting (1)	-	-	-	-
I choose (12)	They reject (5)	Normalisation (1)	-	-	-	-
I go (4)	They estimate (1)	Criticism (71)	-	-	-	-
I ask (3)	They deprecate (1)	Condemnation (1)	-	-	-	-
I moderate (1)	They conclude (1)	-	-	-	-	-
I consider (1)	People reject (37)	-	-	-	-	-
-	In-laws (59)	-	-	-	-	-
-	My parents (16)	-	-	-	-	-
-	My <i>Jamma'a</i> (21)* ⁶⁹	-	-	-	-	-
-	Our relatives (35)	-	-	-	-	-

Table 0.7: More detailed classification of individual and sociocultural positive or negative perceptions and reactions towards different adoptions of fashion.

⁶⁹ Jamma'a in Saudi means the family or tribe.

Asian fashion		Traditional Saudi dress		Western mass and luxury fashion		Locally produced evening dresses	
Positive	Negative	Positive	Negative	Positive	Negative	Positive	Negative
Affordable (8)	Counterfeited (1)	Beautiful (1)	Too much (1)	Original (1)	Identical (3)	Individualised (71)	Exaggerated (1)
For home (11)	Tasteless (1)	Modest (3)	For old women (1)	Stylish (1)	Repeated (1)	Unique (34)	Pricy (1)
-	Copied (3)	Nostalgic (1)	Extinct (1)	Modern (3)	Similar (1)	Chic (29)	Vulgar (1)
-	Ugly (1)	Heritage (1)	Past (1)	Branded (3)	The same (8)	Distinctive (38)	Heavy (2)
-	Cheap (8)	For <i>henna</i> (5)	Old-fashioned (1)	Trendy (1)	Crazy (1)	Classy (11)	Vibrant (2)
-	Identical (3)	Adorable (1)	Heavy (1)	Popular (19)	Pricy (3)	Attractive (1)	Revealing (18)
-	-	Favourite (1)	Not suitable (1)	Suitable (20)	Too much (2)	Elegant (5)	-
-	-	Sophisticated (1)	Archaic (1)	Formal (7)	Plain (19)	Beautiful (3)	-
-	-	For <i>Mahrams</i> (6)	Expensive (2)	Ideal (1)	Risky choice (1)	Expressive (6)	-
-	-	-	Cheap (1)	Classic (1)	Not suitable (4)	Satisfying (10)	-
-	-	-	-	Cool (2)	-	Impressive (2)	-
-	-	-	-	Quality (63)	-	Fashionable (1)	-
-	-	-	-	Simple (5)	-	Exclusive (46)	-
-	-	-	-	Modest (4)	-	Customised (16)	-
-	-	-	-	-	-	Different (4)	-
-	-	-	-	-	-	Distinguished (4)	-
-	-	-	-	-	-	Quintessential (1)	-
-	-	-	-	-	-	Charming (1)	-
-	-	-	-	-	-	Luxury (21)	-
-	-	-	-	-	-	Fabulous (1)	-
-	-	-	-	-	-	Arabian (1)	-
-	-	-	-	-	-	Rich (1)	-
-	-	-	-	-	-	Creative (1)	-
-	-	-	-	-	-	High (1)	-
-	-	-	-	-	-	Royal (1)	-
-	-	-	-	-	-	Feminine (2)	-

Table 0.8: Positive and negative impressions towards different fashions.

Modern/luxury/ fashionable <i>abaya</i>		Moderate <i>abaya</i>		Conservative <i>abaya</i>	
Positive	Negative	Positive	Negative	Positive	Negative
Elegant (4)	Alien (13)	Practical (5)	-	Islamic (11)	For old women (1)
-	Not Islamic (53)	Light (6)	-	Lawful (9)	Old-fashioned (1)
-	For foreigners (31)	Modest (13)	-	Decent (1)	-
-	Attracts men (26)	Affordable (2)	-	Religious (1)	-
-	Against Islam (1)	Lawful (16)	-	Numinous (1)	-
-	Hybrid (2)	Islamic (19)	-	Piety (25)	-
-	Immodest (25)	Functional (2)	-	Respectful (13)	-
-	Imported culture (3)	Decent (3)	-	Modest (9)	-
-	Threat (7)	Elegant (1)	-	Chastity (3)	-
-	Shame (11)	Graceful (1)	-	Essential (3)	-
-	-	Feminine (1)	-	-	-
-	-	Suitable (4)	-	-	-
-	-	Simple(5)	-	-	-
-	-	Convenient (7)	-	-	-

Table 0.9: Attitudes towards different categories of the *abaya*.

Appendix 9: The Observation of Women's Fashion Behaviour in Female-Only Environments

The following table indicates the place where the observation of fashion and clothing consumption behaviour in female social settings was undertaken. The observation was also undertaken at King Khalid's Hospital in Tabouk.

Social Environment	Region	Date of Observation
King Abdul Aziz University	Jeddah	April 2014
Wedding party	Jeddah	September 2014
Engagement party	Tabouk	September 2015
Eid Night	Al-Madinah	September 2016
Eid Day	Tabouk	September 2016
Tea party	Jeddah	September 2016

Table 0.10: The observed women-only social settings.

Appendix 10: Public Places that were Observed as Part of the Local Market and as Places for the Practice of Wearing the Abaya

Malls:

Name	Region	Period of Observation
Arab Mall	Jeddah	April 2014
Jeddah Mall	Jeddah	April 2014
Sultan Mall	Jeddah	April 2014
Al-Rashed Mall	Al-Madinah	July 2015
Al-Noor Mall	Al-Madinah	August 2015
Riyadh Gallery	Riyadh	August 2015
Al-Nakheel Mall	Riyadh	August 2015
Al-Faisaliah	Riyadh	August 2015

Al-Jouf Plaza	Al-Jouf	August 2015
Al-Hukair Mall	Tabouk	August 2015
Al-Andalus Mall	Jeddah	August 2016

Table 0.11: The observed shopping malls.

Souqs:

Name	Region	Period of Observation
Al- Khaimah	Jeddah	April 2015
Al- Sharque	Jeddah	May 2015
Al-Bawadi	Jeddah	August 2015
Al-Jaddah	Tabouk	May 2015
Al-Balad	Duba	April 2016
Al-Khasekiyyah	Jeddah	August 2016

Table 0.12: The observed souqs.

The Observed Shops:

	Name	Category	Product/brand/shop/speciality	Location	Partnership
1	Banana Republic	International fashion boutique	Simple casual styles of shirts, skirts and trousers	Jeddah and Riyadh	Al-Hokair & Co
2	Cortefiel	International fashion boutique	Patterned skirts and light blouses for formal and casual settings	Jeddah	Al-Hokair & Co
3	Desigual	International fashion boutique	Printed colourful shirts and midi-length dress	Jeddah and Riyadh	Al-Hokair & Co
4	Carage	International fashion boutique	Trousers, crop tops, T-shirts and mini dresses for young women	Jeddah	Al-Hokair & Co
5	New Yorker	International fashion boutique	Western street-wear styles that are suitable for teenagers and young adults	Jeddah	Al-Hokair & Co
6	Quiz	International fashion boutique	Selection of occasion clothes including dresses	Jeddah and Dammam	Al-Hokair & Co
7	Mango	International fashion boutique	Trousers, different styles of T-shirts and maxi dresses	Tabouk and Jeddah	Al-Hokair & Co
8	Next	International fashion boutique	A wide range of fast fashion items including dresses, blouses and jeans	Jeddah and Riyadh	Al-Hokair & Co
9	Wallis	International fashion boutique	Simple evening and casual dresses	Jeddah and Riyadh	Al-Hokair & Co
10	Zara	International fashion boutique	Fast fashion clothing items	Jeddah and Riyadh	Al-Hokair & Co
11	Rubayat	Multi-branded store	Ranges of fashion offered by Dolce & Gabbana, Bottega Veneta and Kenzo	Jeddah	Bin Zagr
12	New Look	International fashion boutique	A wide range of women's fashion and accessories	Jeddah and Riyadh	Landmark Group
13	City Max	Local department store	A wide range of women's clothing	Tabouk and Jeddah	Landmark Group

14	Centre Point	Local department store	A wide range of women's, men's and children's clothing offered by Splash	Tabouk, Jeddah and Madinah	Landmark Group
15	Redtag	Local department store	A wide range of women's, men's and children's fashion	Tabouk	-
16	Fine Look	Local department store	A wide range of women's, men's and children's fashion	Jeddah	-
17	Al-Yashmak	Specialised store	Traditional dress	Jeddah and Riyadh	Local ownership
18	Mujamma Al-Sharq	Souq	12 <i>abaya</i> shops, 6 shops for traditional dress, 19 stores for luxury fabrics and 5 evening dress stores were observed in this location	Jeddah	Local ownership
19	Lamsah	Fashion factory	Customised evening dress	Jeddah	Local ownership
20	Al-Mesadyyah	Modernised version of souq	Specialises in evening dresses	Jeddah	Local ownership
21	Al-Yamamah Centre	Shopping centre	12 shops for wedding and evening dresses, 1 for traditional dress and 9 for casual clothing were observed	Jeddah	Local ownership
24	The Blue Building	Fashion edifice	Evening dresses, wedding dresses and occasion wear accessories.	Jeddah	Local ownership
25	Al-Basha Building	Volume discount	Mainly T-shirts, skirts, trousers and Western and traditional dresses	Jeddah	Local ownership
26	Nayomi	Lingerie brand	Silk lingerie sets, cotton pyjamas, loungewear and nightdresses	Jeddah	Local ownership

Table 0.13: The observed shops.

Appendix 11: Retailer Interview Consent Form

Dear respondent,

In order to complete my PhD degree in Consumer Behaviour at De Montfort University UK, I am currently conducting extensive research on the clothing and fashion market in Saudi Arabia, which aims to understand the role of sociocultural drivers in influencing the consumption pattern of fashion behaviour among Saudi women. This requires gathering necessary data and opinion from professionals like you.

In this interview, you are requested to answer some questions related to the Saudi fashion market. This will then help me correlate these findings with other research studies in the literature. Please be aware that answering any questions is optional for respondents and you may wish to skip any question which you feel is not applicable to you, or which you do not feel comfortable answering.

Please note that all the information collected through this interview will be only be used exclusively for this research purpose, and **WILL NOT** be shared with any other party without your prior consent. This information will be used for similar academic purposes only if you do allow me to use it. In addition, it will be saved securely and destroyed after using it.

If you need any further information regarding this questionnaire, please feel free to contact me on P09000859@myemail.dmu.ac.uk

Many thanks for your anticipated cooperation.

Elham Abu Nab

I have read the information above and

- I permit information to be used in publications
- I prefer to be anonymous

I (do / do not) give permission for the interview to be recorded

Name..... Position.....

Signature..... Date / /

Questions for the Shop Owners' Semi-Structured Interview

- How old is this business?
- Where do you get your products from?
- What are the most active sale seasons?
- How does the market operate?
- Since the establishment of your business, what methods did/do you follow to ensure a reasonable degree of market competitiveness?
- Who are your competitors?
- Do you expect your business to expand/diminish in the future? How? Why?
- Do you have a particular marketing strategy to advertise your products?
What is it?
- Whom do you target? Who are your consumers?
- Do you have any particular communication channel that links you and your consumers to understand their demands?
- In terms of production, is there any problem with the local market? Explain.
- What about sizes?
- In terms of employees, how many Saudi workers do you employ?

Thank you for participating. I really appreciate your time.

Appendix 12: Fashion Designer Interview Consent Form

Dear respondent,

In order to complete my PhD degree in Consumer Behaviour at De Montfort University UK, I am currently conducting extensive research on the clothing and fashion market in Saudi Arabia, which aims to understand the role of sociocultural drivers in influencing the consumption pattern of fashion behaviour among Saudi women. This requires gathering necessary data and opinion from professionals like you.

In this interview, you are requested to answer some questions related to the Saudi fashion market. This will then help me correlate these findings with other research studies in the literature. Please be aware that answering any questions is optional for respondents and you may wish to skip any question which you feel is not applicable to you, or which you do not feel comfortable answering.

Please note that all the information collected through this interview will be only be used exclusively for this research purpose, and **WILL NOT** be shared with any other party without your prior consent. This information will be used for similar academic purposes only if you do allow me to use it. In addition, it will be saved securely and destroyed after using it.

If you need any further information regarding this questionnaire, please feel free to contact me on P09000859@myemail.dmu.ac.uk

Many thanks for your anticipated cooperation.

Elham Abu Nab

I have read the information above and

I permit information to be used in publications

I prefer to be anonymous

I (do / do not) give permission for the interview to be recorded

Name..... Position.....

Signature..... Date / /

Questions for the Semi-Structured Interview Fashion Designer

- 1- How long have you been working as a fashion designer?
- 2- Are you graduated as a fashion designer? If yes, where did you graduate from?
- 3- Where do you get the inspiration for your design?
- 4- How do you advertise your new collections?
- 5- Who is your customer?
- 6- How do you make sure that she is happy about the product/design?
- 7- Do you have a system or strategy to evaluate the level of consumer satisfaction?
- 8- How do you understand your customers' demands?
- 9- Do you think that understanding your consumer is important to the success of your business?
- 10- Do you think that your customers are loyal to you?
- 11- What are the main advantages and disadvantages of this business?

Thank you for participating. I really appreciate your time.

Appendix 13: The Representative Interview Consent Form

Dear respondent,

In order to complete my PhD degree in Consumer Behaviour at De Montfort University UK, I am currently conducting extensive research on the clothing and fashion market in Saudi Arabia, which aims to understand the role of sociocultural drivers in influencing the consumption pattern of fashion behaviour among Saudi women. This requires gathering necessary data and opinion from professionals like you.

In this interview, you are requested to answer some questions related to the Saudi fashion market. This will then help me correlate these findings with other research studies in the literature. Please be aware that answering any questions is optional for respondents and you may wish to skip any question which you feel is not applicable to you, or which you do not feel comfortable answering.

Please note that all the information collected through this interview will be only be used exclusively for this research purpose, and **WILL NOT** be shared with any other party without your prior consent. This information will be used for similar academic purposes only if you do allow me to use it. In addition, it will be saved securely and destroyed after using it.

If you need any further information regarding this questionnaire, please feel free to contact me on P09000859@myemail.dmu.ac.uk

Many thanks for your anticipated cooperation.

Elham Abu Nab

I have read the information above and

- I permit information to be used in publications
- I prefer to be anonymous

I (do / do not) give permission for the interview to be recorded

Name..... Position.....

Signature..... Date / /

Questions for the Semi-Structured Interview with the Representative of the Chamber of Commerce

1. What is the position of Saudi Arabia among other GCCs and MENA fashion and clothing manufacturers/industry?
2. Does the local clothing and fashion industry of Saudi Arabia have significant growth potential? What about the market?
3. Is it beneficial for the local fashion manufacturers to forge partnerships with foreign brands? If so, then why?
4. Can you describe the current situation of the industry?
5. Does this influence the local market?
6. Does the overall Western brand prevalence in the society tend to affect the local production?
7. How do you see the future of the fashion industry in Saudi Arabia?
8. How important is the development of the fashion industry to the Government of Saudi Arabia?
9. Is there any attempt to establish a developmental programme based on understanding the consumer demand and behaviour?
10. Do you have any other comments with regard to the industry or the market?

Thank you for participating. I really appreciate your time.

Appendix 14: Academics' Interview Consent Form

Dear respondent,

In order to complete my PhD degree in Consumer Behaviour at De Montfort University UK, I am currently conducting extensive research on the clothing and fashion market in Saudi Arabia, which aims to understand the role of sociocultural drivers in influencing the consumption pattern of fashion behaviour among Saudi women. This requires gathering necessary data and opinion from professionals like you.

In this interview, you are requested to answer some questions related to the Saudi fashion market. This will then help me correlate these findings with other research studies in the literature. Please be aware that answering any questions is optional for respondents and you may wish to skip any question which you feel is not applicable to you, or which you do not feel comfortable answering.

Please note that all the information collected through this interview will be only be used exclusively for this research purpose, and **WILL NOT** be shared with any other party without your prior consent. This information will be used for similar academic purposes only if you do allow me to use it. In addition, it will be saved securely and destroyed after using it.

If you need any further information regarding this questionnaire, please feel free to contact me on P09000859@myemail.dmu.ac.uk

Many thanks for your anticipated cooperation.

Elham Abu Nab

I have read the information above and

I permit information to be used in publications

I prefer to be anonymous

I (do / do not) give permission for the interview to be recorded

Name..... Position.....

Signature..... Date / /

Questions for the Semi-Structured Interview with Academics

- 1- What is the role of the educational institutions that contribute in improving the efficiency of the local industry?
- 2- Do fashion and clothing departments of Saudi universities conduct any research related to the local market?
- 3- Do marketing departments have a partnership with local companies to cooperate in conducting consumer research?
- 4- In your opinion, what is the market's significant weakness?
- 5- Can you explain the characteristics of curricula? Strengths and weakness.
- 6- What do you think are the reasons behind the low social status given to this field in Saudi society?
- 7- What kind of challenges face the academics and the curricular development?
- 8- How this can be addressed?

Thank you for participating. I really appreciate your time.