Fashion Marketing in Arab World: Brand Identity vs. Adaptation

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ABSTRACT

Purpose – the Middle East (ME) stands to be one of the fastest-growing markets and embodies a destination for fashion retailers. However, this promising market represents, arguably, the most misunderstood marketing territory in the world today (i.e., Arab/Islam). Therefore, this paper aims to determine the adaptation degree of the global fashion brands' offerings in Saudi Arabia and identify how Arab customers perceive the fashion global brands' personality and image.

Design/methodology/approach – in our exploratory research, Saudi Arabia was selected as a proxy of ME. We used structured interviews with global brands' agents in Saudi Arabia (i.e., GUESS, Levi's Burberry and H&M), combined with a consumer survey.

Findings – The findings show that global fashion brands tend to apply an adaptation perspective to Saudi market, but that was not consistently across marketing implementations. Further, we found that some aspects of marketing adaptation produce undesirable influence in Saudi market; they caused differences between the perceived brand image and the brand personality that are promoted by companies.

Research limitations/implications – The relatively small number of global fashion brands available for the study. However, this paper provides useful insights for fashion marketers to design their marketing strategy to Arab markets based on a good understanding of buyer behavior and to avoid misunderstandings in such increasingly significant markets.

Originality/value – This is one of the pioneering studies that empirically investigate the global fashion marketing in Arab markets. Also, it contributes to understand buyer behavior of Arab consumers in fashion market and opening the way for further research in the other Arab countries.

Keywords: Emerging Markets, Saudi Arabia, International Marketing, Branding, Standardization/Adaptation Strategy, Buyer Behavior, Factor Analysis

I. INTRODUCTION

As a successful development of international marketing lies in '*Think global! ... Act local!'* (Wills *et al.,* 1991), companies today are willing to offer their product across borders to get marketing opportunities. However, there are many factors, which might force companies to go abroad. Clearly, the economic factor is the most important one. The indicators point out that "the rich world will continue to suffer from anemic growth for years to come" (Wooldridge, 2010). The emerging world, by contrast, is witnessing a remarkable growth level. This change in growth is perfectly applicable on fashion markets. The Middle East (ME) stands to be one of the fastest-growing markets as it embodies a destination for fashion retailers (Jones, 2003) and has posted 15% growth in 2010, with expected further growth in the future (GAN, 2010). However, the companies operating in different countries could find marketing tasks (e.g., understanding buyer's behavior) intimidating (Armstrong and Kotler, 2008).

In the ME markets, the key challenge that global marketers face is not only the uniqueness of the emerging markets' characteristics (Grail Research, 2009), but also the difficulties of understanding their culture context (Arab/Muslim markets; Busnaina *et al.,* 2010). Therefore, the companies who have penetrated fashion markets in such regions have to decide whether to standardize or adapt their offerings. Accordingly, marketers, on one hand, want to standardize their offering in order to simplify operations and take advantage of cost economics (Viswanathan and Dickson, 2007). On the other hand, adapting marketing offerings within each country can result in programs that better satisfy the needs of local consumers (Mooij, 2004). In fashion marketing, the brand image, personality and identity are critical success factors of a brand (Lee *et al.,* 2000), so although adapting brand to target market will satisfy local customers there, it might negatively affect, or even deform, the brand identity. Investigating this marketing dilemma, with taking Saudi Arabia as a proxy of the region, this paper addresses two questions; to what degree do global fashion companies actually adapt/standardize their brands offerings for Saudi Arabia? Do Arab consumers perceive the global fashion brands in Arabic countries differently than in brands' home market? Most specifically, this paper's objectives in this paper are: (1) determine the adaptation degree of the fashion global brands offerings in Saudi Arabia (2) explore how Arab customers perceive the fashion global brands' personality and image and (3) identify the influence of global fashion strategies on behavioral aspects of Arab customers toward these brands.

II. RESEARCH BACKGROUND AND CONTEXT

A. *FASHION MARKETING WITHIN ARAB CONTEXT*

International fashion markets can generally be classified into three types; global fashion hubs (e.g., USA, UK, France and Italy), growing markets (e.g., Singapore, Russia and Brazil) and emerging fashion markets (e.g., Middle East, South Africa and India) (Grail Research, 2009). The business attention, nowadays, has been given to the third type (Sheth, 2011), which has witnessed a significant increase in purchase power (Wooldridge, 2010) as well as the number of fashion events (Grail Research, 2009). This paper focuses on the most important and exciting region to the fashion and retailing emerging markets; the Arab World (Young, 2001; Jonse, 2003; Marinov, 2007). This region (also called Middle East and North Africa) consists of 22 countries, across two continents, with a combined population of approximately 358 million people, the majority of which use one language (i.e., Arabic) (LAS, 2012). Thus, it embodies a promising market for global companies; most of the Arabic countries' economies are characterized by young populations compared to most developed

economies, and a higher standard of living and disposable incomes than other non-western economies (Fry, 2001; Jonse, 2003).

In the fashion industry, however, some Arabic countries can be considered as raw markets in terms of market research and entering global brand (e.g., Libya and Tunisia), but some of them are clearly emerging markets (e.g., Saudi Arabia and UAE). For example, approximately 18 global fashion brands and retailers just started entering Libya last year (e.g., M&S, Levi's Bhs, Lacoste), although most of them have entered via franchise mode (Jonse, 2003; Shebani, 2012, pers. comm., 7 January) which is low mode-of-entry involvement (Kotler, 2003). The Arabic emerging fashion markets, on the other hand, have made further strides in this industry. European brands are planning to open more retail outlets within its existing markets in UAE and Saudi Arabia and most of the key suppliers, such as Christian Dior and Coty, are expected to follow (Khraim, 2011). Further, the UAE holds 9-12 global fashion shows per year and provides government support to the fashion industry.

At the level of consumer, researches revealed that UAE consumers have a purchase intention to buy luxury goods and global fashion products (e.g., clothing, accessories and jewelry) (Grail Research, 2009). Saudi consumers, too, have similar characteristics in terms of fashion preferences. Consumer research there, though limited, revealed that they spend more than 10% of their disposal income in global fashion products (UBA, 2006). The Saudi market has witnessed an excessive consumption in recent years, especially in fashion products. Women and younger generations' dress has become more Westernized. Also, middle-class consumers are highly global fashion brand conscious (Assad, 2007). However, Saudi Arabia is a large country (870,000 sq. miles; the largest country in the Middle East and the 13th over the world), so there are there are differences between its regions in terms of lifestyle and national context. For example, Jiddah in the west is more open to foreign culture that than Riyadh in the north (Fry, 2001; Jonse, 2003). Consequently, it can be said that the Middle East has become an attractive fashion market for global companies (e.g., European and US) (Jonse, 2003).

However, penetrating Arab markets 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 customer satisfaction in these markets. Additionally, cultural and contextual factors play a significant role in shaping their buyer's behavioral aspects (Marinov, 2007; Busnaina *et al.,* 2010), which are heavily influenced by the values, norms and religion (Khraim, 2011). This role appears complex in purchasing fashion products, as fashion is an inter-disciplinary sector and has social and psychological functions (Fernie *et al.,* 1997). Therefore, global fashion businesses there need to act with a great sensitivity and it is vital to understand Arab culture, as it is intertwined with how the consumers behave (Fry, 2001; Jonse, 2003). Accordingly, this paper explores how Arab customers perceive the fashion global brands' personality and identity, and the influence of global fashion strategies on behavioral aspects of Arab customers toward these brands.

B. BRAND IDENTITY AND PERSONALITY

'*How to brand a product*?' is a crucial question in marketing management (Kotler, 2003). Marketers brand their products with the aim of distinguishing them in the consumer's mind by creating and promoting brand image. The brand image denotes the perception of a brand in the mind of consumer (Roth, 1995). It is a mirror reflection of the brand personality or product (Thakor, 1996; Azevedo and Farhangmehr, 2005; AMA, 2012). Here, it is necessary to mention that some previous brand image studies seemingly use the term brand image, but are actually performing brand personality studies (Lee *et al.,* 2000).

Specifically, brand personality is defined as the way in which a consumer perceives the brand on dimensions that typically capture a person's personality (Aaker, 1997; Freling and Forbes, 2005). In other words, it can be considered as the set of human characteristics associated with a brand, which requires consumers to process the brand's image more actively in a personally meaningful way (Kim, 1993).

The brand personality, and its influence on consumer behavior, has emerged as a critically important research topic (Freling and Forbes, 2005). Marketing research reveals that brand personality is crucial to purchase choice (Lee *et al.,* 2000) and, also, has a positive effect on purchase intention; the more positive the brand personality, the higher consumers' purchase intention is toward the brand (Wang and Yang, 2008). In fashion and lifestyle context, brand personality is a determinant variable in advertising designing and message (Lee *et al.,* 2000; Ko *et al.,* 2007). Furthermore, as the brand personality embodies a major component of brand identity (Chematony, 1999; Geuens *et al.,* 2009), its importance is not limited by consumer level (i.e., effect on consumer's purchases), but extends to a company identity. The brand identity, in this context, is a brand's meaning as put forward by the company and it is the way a company wants to present its brand to its target groups (Kapferer, 2008). Thus, brand identity should be well-fitted with company identity to transfer, successfully, the company's desirable image to the target consumers. The idea here is stronger brands result from a homogeneous brand identity, with congruent identity components.

Therefore, marketers seek effective strategies to minimize incongruence and develop more powerful brands (Aaker, 1997; Chematony, 1999). In fashion marketing, brand personality congruence is significantly influenced by some personal characteristics, such as gender. For example, some brands are perceived as female brands (e.g., Calvin Klein and La Redoute), so here,

the girls' self-congruence is naturally higher (Thomas and Sekar, 2008). This reveals how much a brand personality's traits can influence brand positioning and, consequently, the company's image. Marketers, therefore, should act with caution toward designing their brand personality, as they have to consider the target consumer's characteristics and the company's identity. In global markets, this task could be daunting (Kotler, 2003), as apart from the complexity of brand personality, marketers must manage uncontrollable factors, such as cultural and contextual differences. Fashion marketers attempt to develop well-founded brands across different markets through creating soiled brand identity, a distinctive brand name and an array of advertising images reflecting the values of the brand and the target customer group (Fernie *et al.,* 1997). However, in some cases, global companies adapt their brand personality according to the target foreign market's characteristics. For example, Levi's creates different brand images; a very social, group oriented image is used in USA, whereas a much more individualist, sexual image is maintained in Europe (Roth, 1995). Such changes made from country to country raise the question that; to what extent should marketers adapt the brand personality to satisfy foreign markets' context and preferences, and what level of adaptation might cause a negative effect on the brand identity. Therefore, the author investigates the actual adaptation degree of fashion global brands in Saudi Arabia, as one of the most important fashion market in the Arab region (Grail Research, 2009).

C. GLOBAL BRANDING: ADAPTATION VS STANDARDIZATION

Successful fashion brands require careful management of marketing mix elements (Fernie *et al.,* 1997; Lee *et al.,* 2000), especially across countries, as this embodies a difficult challenge for international marketers (Kotler, 2003). Further, Sheth (2011) stated that when marketers go abroad to emerging markets, they have to rethink

the core marketing practices, such as market orientation and market segmentation. The degree to which international marketing programs must be standardized or adapted has been a contentious issue for more than three decades now (Theodosiou and Katsikeas, 2001). The focus in this paper, however, is on the branding decisions of global fashion brands in the Arab World, and how this might affect the brand image and identity.

Marketing literature (e.g., Levitt, 1983; Dawar *et al.,* 1997; Viswanathan and Dickson, 2007) has supported the notion that the speed and spread of the world's changes drive the consumers across countries to behave similarly. In this context, some global brands use standardization perspective across different countries (Fernie *et al.,* 1997). This perspective is appropriate to promote very well known worldwide brands, because such brands try maintaining the same position using similar marketing methods all over the world (Foscht *et al.,* 2008). Also, managing global brands' characteristic and keeping it consistent across foreign countries is considered as a key competitive advantage of the brand (Holt *et al.,* 2004). However, fashion products have an interaction effect with social life (e.g., one's own dress is influenced by the appearance of others; or one dresses to be seen by others; Miller, 2005). Thus, marketers should be concerned toward the convergences and differences in buyer's behavior.

Marketers, also, must decide on the degree to which they will adapt their brands' personality to meet the unique cultures in various markets, as this clearly affects the brand's image (Roth, 1995). As discussed above, the Arab region is a promising and unique fashion market; consumers there are unique due to the dual effect of Arabic culture and Islamic aspects. Further, the Arab region could be targeted as one market, characterized by similar aspects (Marinov, 2007). In this context, some marketing research (e.g., Souiden, 2002; Assad, 2007)

has implied that the cultural/national boundaries within Arabic countries are less important criteria in designing marketing offerings to Arab consumers.

Accordingly, it is easier for global fashion brands to target the Arab region (i.e., North Africa and Middle East) with similar brand's personality than other heterogeneous markets, which require developing different brand image strategies (Roth, 1995). Wigley and Chiang (2009) stressed that, as brand image is attributed as being the most important factor, it should remain consistent globally. Similarly, Foscht, Maloles, Swoboda, Morschett and Sinha (2008) concluded that if a company wishes to achieve the same brand perception in different countries, it needs to create brand positioning strategies that emphasize the characteristics that enable consumers to perceive the product in a similar way. In Figure 1, the author depicts the factors of marketing program decisions (i.e., the degree of standardization/adaptation) and market influencing factors (i.e., mode-of-entry and competition) that affect the perceived brand image in the foreign markets. It can be realized that the brand personality of a global company might produce two perceived brand images in the consumer's mind (perceived brand image A and B; Figure 1). These two brand images should be similar, as the divergence between them (A and B) embodies a threat to brand identity.

However, although several global marketers succeed in developing a similar brand image across Arabic countries, this image might be extremely different than the original brand identity. In such cases, the adapted brand personality might negatively affect – or even deform – the original brand image of the brand that company wants to deliver. When a global company focuses on how to satisfy the foreign target market (i.e., Arab markets) by a high level of adaptation, it may drift away from its core brand identity, as the brand image in the foreign target market would be viewed completely differently than

the original brand image that reflects the company's identity. For example, the Burberry brand has entered Saudi market with a similar product line and offerings. However, as female Saudi fashion style is highly influenced by Islamic and Arab's customs aspects, Burberry scarves have been promoted by word-of-mouth and blogs (e.g., www.hijabic.com or www.hijabvogue.blogspot.co.uk) as hijab clothing. Although this promotion might be uncontrollable by Burberry, it obviously affects the Burberry's brand identity as an 'Iconic British Brand' (Burberry, 2012). Therefore, this paper aims to determine the adaptation degree of the fashion global brands offerings in Saudi Arabia and identify its influence on the brand identity.
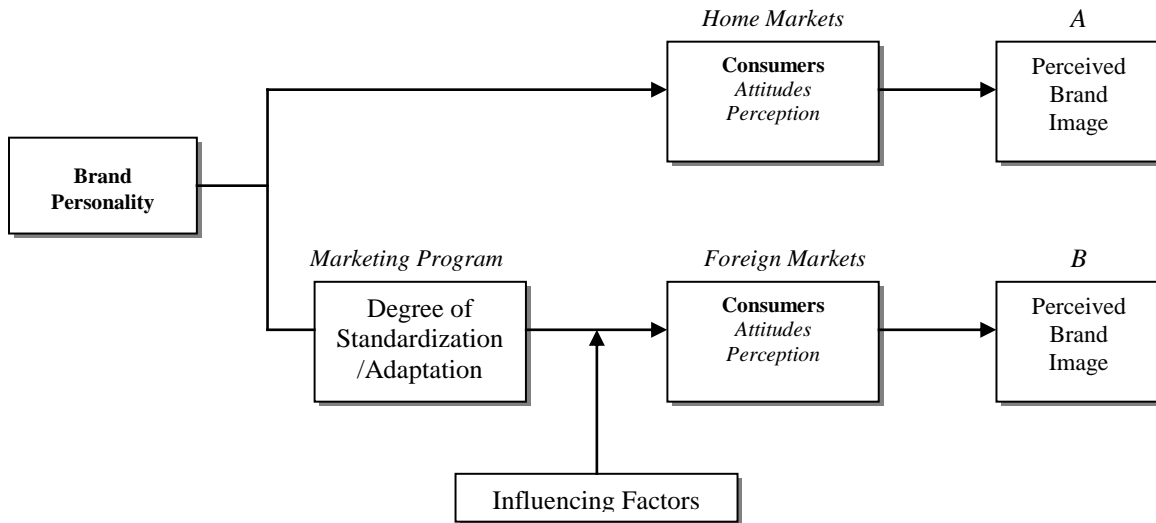

Figure 1. The influences on brand image in foreign markets
(Adapted from: Mrugank and Thakor, 1996; Jain, 1989; Kotler, 2003)

III. METHOD AND MEASUREMENT

Despite the global economic recession, the Middle East fashion market is expected to grow 2% in the recent years. Particularly, the Saudi market has been ranked among the top-10 most attractive emerging markets with increasingly purchasable global brands (Grail Research, 2009). Moreover, by taking into account the growing awareness towards the Arab markets (Marinov, 2007) and the cultural similarity of Arab consumers (Hofstede, 2001), this research potentially offers insight into a concurrently emerging and growing Arab market, as Saudi Arabia can stand as a proxy for this region (i.e., Middle East and North Africa). Therefore, Saudi Arabia has been selected to conduct this research to understanding how global fashion brands' agents presently interpret the need for brand adaptation in this part of the world and, also, how consumers view the global brands' images.

The author uses fashion products (clothing, accessories and jewelry) as a context. It has been observed though, that international fashion brands were slightly early to recognize the commercial promise of the region. Therefore, this product category was chosen as a context for the research. In aiming to explore the actual adaptation aspects in branding decisions in Saudi market, structured interviews with the agents of Burberry, GUESS, H&M were conducted (Hennes and Mauritz) and Levi's. In investigating the consumer's point of view, the author delivered questionnaires to the purposive sample. 45 Arab consumers who

purchased these brands' products and have shopping experience in Western markets were asked about their response toward the brand personality. The reason beyond the selection of this sample is that the author needs respondents who are able to compare between these brands' offerings; in Saudi and Western markets.

This paper adopts a broadly deductive approach and reviews the literature to establish how others had conceptualized the notion of adaptation/standardization (Viswanathan and Dickson 2007). The author reviewed a number of frameworks describing the factors relevant to this dilemma (e.g. Jain 1989; Ozsomer and Simonin 2004; Viswanathan and Dickson 2007) and drew extensively on these, disregarding some attributes as being too specific to their original research context, and adding others to better reflect particular Arab markets' conditions pertaining to local infrastructure and environment. The interview's questions fell into two parts: (1) general information regarding the company's brand, markets and sales, and (2) the actual marketing practices in Saudi market.

Similarly, using the cognitive approach (Freling and Forbes, 2005; Thomas and Sekar, 2008), the author derived the measures and items of questionnaire from the relevant literature and previous research on branding (Kim, 1993; Mrugank and Thakor, 1996; Aaker, 1997; Chematony, 1999; Lee *et al.,* 2000; Desai and Keller, 2002; Azevedo and Farhangmehr, 2005; Freling and Forbes, 2005; Ko *et al.,* 2007; Thomas and Sekar, 2008; Wang and Yang, 2008; Geuens *et al.,* 2009). As discussed earlier, brand personality forms embody a major component of brand identity (Geuens *et al*., 2009) and shape the brand image in the consumer's mind (Thomas and Sekar, 2008; AMA, 2012). The brand personality is a psychological nature of a particular brand as intended by its sellers, though persons in the marketplace may see the brand otherwise (i.e., brand image). Therefore, this paper

measures brand personality using Aaker's (1997) dimensions (Sincerity, Excitement, Competence, Sophistication, and Ruggedness) in aiming to explore how Arab consumers perceive the fashion global brands' personality.

A self-administered questionnaire was used as a research instrument; it is common in survey research and an efficient means of data collection when the researcher knows what data is required to answer the research questions, and how to measure the research variables. The questionnaire includes the section "*few things about the consumer*". The questions were about the individual characteristics, such as gender, age and the origin country. The author designed the questionnaire to be consist of three item batteries (measures); consumer's attitudes toward the fashion brands (4 items based on Likert 5-point scale; 'Strongly Disagree' to 'Strongly Agree'), brand loyalty (3 items based on Likert 5-point scale), brand personality (17 items based on 5-point scale; 'Not Descriptive' to 'Extremely Descriptive') and differences in brand image between Arab markets and brand's home market (11 items based on 5-point scale; 'Very Different' to 'Very Similar'). A pilot test of the questionnaire was conducted on some graduated Arab students in the UK to confirm the suitability of the content.

IV. ANALYSIS AND RESULTS: MARKETING PRACTICES IN SAUDI MARKET

Face-to-face structured interviews were conducted with 3 marketing/sales managers of Saudi companies (local agencies) who are the agents of GUESS, Levi's Burberry and H&M in Saudi market. These fashion companies are observed as the biggest and most important fashion retailers in the Saudi market. Preferred 'mode of entry' was investigated. The author found that all fashion retailers companies for the Saudi market used 'representative office' as a mean to establish their presence. This appears to be a relatively well-supported strategy for penetrating markets in

developing countries (Griffith *et al.,* 2002). For purposes of confidentiality, Saudi companies have been coded SaCo 1, SaCo 2 and SaCo 3 (see Table 1).

Table 1. Fashion Brands under Investigation in the Saudi Market

Company name	Arab distribution	Interviewee	Mode of entry	How long in Saudi market	Fashion Brands
SaCo. 1	13 countries	Retailer Director	Representative Office	20 years	GUESS and Levi's
SaCo. 2	7 countries	Retailer Director	Representative Office	22 years	Burberry
SaCo. 3	10 countries	Retailer Director	Representative Office	22 years	H&M

This research sought to establish, '*to what degree do global fashion companies adapt/standardize brands' offerings for Arab markets?*'. Table. 2 reveals the marketing practices (MP) of the four major overseas players (SaCo's) in the Saudi fashion market. Interviewees' replies were analyzed/interpreted to obtain an aggregate response for each of four marketing program activities on a three-point scale constituted as 'standardized', 'slightly adapted' or 'adapted'. The three Saudi companies are large retailers in the market and have their own distribution strategies, which makes it not significant to reveal the similarities/differences to the brands' home markets. Therefore, the distribution/delivery activity was excluded.

Table 2. Analysis of marketing programs - brands under investigation

Marketing Activity	Brands under investigation			General level of similarity (mean)*
	SaCo. 1	SaCo. 2	SaCo. 3	
Marketing Research	Adapted	Adapted	Adapted	1.00
Product	Standardized	Slightly Adapted	Slightly Adapted	4.33
Pricing	Slightly Adapted	Slightly Adapted	Slightly Adapted	1.33
Promotion	Adapted	Adapted	Adapted	1.00

* Scale values: 1 (Different); 5 (Similar)
The high mean the high similarity

It will be noted that the market research and promotion were the activities to be adapted by all four companies. The three companies realize that Saudi customer's needs and preferences are quite different than Western markets, so they rely on their own designed and conducted market research. In promotion activity, the companies stressed that there is no choice to success promotion, but considering and adapting according to Arab/Islamic cultural context. However, the Saudi cultural context itself has become more open and Westernized (e.g., Souiden, 2002; Jonse, 2003; Assad, 2007). Thus, adapting the promotional message nowadays requires less change than two decades ago. Table 2 also shows that product decision is the less adapted activity. This can be ascribed to that, according to interviewees, the four global investigated brands (i.e., GUESS, Levi's Burberry and H&M) use the regional product design (e.g., Middle East) which does not require core adaptation for a particular market (i.e., Saudi Arabia) within the region.

As well as revealing adaptation practice, interviewees were also asked to provide their view on the degree of similarity between specific program features in, a) Saudi Arabia and, b) the brands' home markets (Ozsomer and Simonin, 2004). On a scale of '1 = *different, to 5 = similar*', results showed that 'product decisions' was the most common feature ($M = 4.33$). Not surprisingly, market research and promotion practices were the least standardized element ($M = 1.00$), with managers declaring that companies in the Saudi market should consider the unique characteristics of Saudi consumers and consider the values of Saudi society.

The author next looked to investigate some factors that might influence the companies' marketing strategies. In order to evaluate the headquarters-subsidiary relationship, interviewees were asked if there was any disparity regarding strategy and/or business objectives between the global fashion company and its agent in the Saudi market. Answers revealed considerable consensus over a range of issues, not least in respect of standardization/adaptation, and showed that perceived levels of accord were a major factor in forming the characteristics of current marketing programs. Competition-related factors that might impact decisions concerning adaptation/ standardization were explored. The results showed that the three companies' perspectives of current competition at the fashion market include possible substitutes – or other products in other categories that might represent alternative spending opportunities (indirect competition). This observation implies that the three Saudi companies are aware of the wider impact/nature of competitors. In his commonly used model, Jain (1989) suggested that a relatively low level of competition was likely to foster a tendency toward standardization, whereas in high competition markets, organizations may feel compelled toward adaptation. As noted earlier, the three Saudi companies have a remarkable tendency toward adaptation (see Table 2), it can be said that the extensive level of competition in Saudi fashion market plays a significant role toward adaptation perspective in fashion marketing.

V. ANALYSIS AND RESULTS: BRAND'S IDENTITY

Using purposive sampling, data were collected from 45 Arab consumers from Saudi Arabia. This paper evaluated the internal consistency of the questionnaire items using Cronbach's Alpha (DeVellis, 2003). The author found the reliabilities of the four scales are; consumer's attitudes 0.78, brand loyalty 0.77, brand personality 0.95 and differences in brand image 0.80, which represent an acceptable level of Alpha reliability (Burns and Burns, 2008).

A questionnaire, completed by Arab consumers, was used to assess their attitudes toward the global fashion brands and the perceived brand image. Table 3 shows the respondents' characteristics (i.e., gender, origin country, current location and age). About half of the respondents were male (47.5%) and their average age was 33 years,

which is an appropriate age to study the chosen four brands. In recent purchases, 87% of respondents have an experience in past purchases of the four brands. Therefore, the sample is deemed appropriate for this research. 37.8% of the respondents purchased Burberry and 26.7% of them purchased GUESS and H&M. It is interesting to note that Burberry adopts a business model that facilitates the expansion of the product portfolio to include a wider customer base internationally (Moore and Birtwistle, 2004). This might explain why it has been the most preferred brand for the respondents.

Table 3. Respondents' profile

Gender		
	Male	47.5%
	Female	52.5%
Current location		
	In Saudi Arabia	42.5%
	Outside	57.5%
Average age		33 Years
Recent purchases		
	Burberry	37.8%
	GUESS	26.7%
	H&M	26.7%
	Levi's	8.9%

As this paper focuses on the influence of global brands on consumers' responses and perceptions, it is necessary to investigate the consumer attitudes toward the fashion brands (Freling and Forbes, 2005; Geuens *et al.,* 2009; Alamro and Rowley, 2011). These attitudes were measured through 4 items to determine consumer reactions toward fashion brands. The answers in Table 4 demonstrate that Arab consumers have notable positive attitudes (*M > 3.00* of all items). The level of uncertain responses is relatively low for all items, which implies that Arab consumers have clear attitudes toward fashion brands. More than 50% of respondents agreed (SA and A) that purchasing and wearing fashion products of famous brands provide them prestigious value, considered a signal of quality and they can rely on them. Clearly, this result indicates that familiar fashion brands, generally, have an influence on the purchase decisions of Arab consumers.

Table 4. Consumers' attitudes toward fashion brands

Items in brief	Level of agreement on 5-point Likert scale* (%)					Mean	Std. D
	SA	A	N	D	SD		
Wearing famous brands helps me to be acknowledged by others	11.1	57.8	15.6	11.1	4.4	3.60	.986
Brand name as a signal of quality for purchasing clothes and accessory	4.4	64.4	13.3	17.8	0	3.56	.841
Familiar brands excel compared to the competition	6.7	51.1	28.9	11.1	2.2	3.49	.869
I rely on familiar brands	11.1	57.8	26.7	4.4	0	3.76	.712

Note: percentages do not sum to 100 due to rounding effects
* Strongly Agree (SA), Agree (A), Neither (N), Disagree (D), Strongly Disagree (SD)

Brand loyalty as a relevant aspect of Arab consumers shopping behavior (Freling and Forbes, 2005) was also explored. Four items were used to identify two types of shopping behavior based on their loyalty (i.e., loyal customers to their seller and non-loyal customers) (Weisbuch *et al*., 2000; Mcim, 2001).

Customer loyalty is a significant competitive factor on marketing strategy (Omar *et al.,* 2009). Therefore, global brands, especially in such emerging fashion markets, consider it as a part of their marketing strategies (Sheth, 2011). Also, some research showed that consumer's brand loyalty could be an indication of a stable brand personality (e.g.,

Tommy Hilfiger; Lee *et al.,* 2000). Accordingly, consumers were asked about their loyalty. Table 5 exhibits the consumers' responses toward these items descriptively. The two categories of customers (loyal and non-loyal) were determined based on the level of agreement. The majority of consumers (64.4%) consider their preferred brand as the highest quality. Also, 57.7% of consumers value their preferred brand history. These results show that Saudi customers have a remarkable tendency to be a loyal customers to their preferred fashion brands, which support findings of Arab customers' brand loyalty to cosmetic products (Khraim, 2011).

Table 5. Customer loyalty

Items in brief	Types of shopper based on the level of agreement				
	Loyal			Non-loyal	
	SA	A	N	D	SD
I value my preferred brand history.	13.3	44.4	26.7	11.1	4.4
I would recommend my preferred brand to my friends	11.1	37.8	20	24.4	6.7
My preferred brand is of the highest quality	11.1	53.3	22.2	8.9	4.4

Note: table does not sum to 100 due to rounding effects

The third part of the questionnaire is a 17-item brand personality scale based on Aaker's (1997) work and following recent marketing research (e.g., Lee and Rhee, 2008; Wang and Yang, 2008; Geuens *et al.,* 2009; Alamro and Rowley, 2011). Respondents were asked; to what extent does the brand that they recently purchased fit 17 characteristics (5-point scale; from 'Not Descriptive' to 'Extremely Descriptive'). Exploratory Factor Analysis (EFA) was conducted (see Table 6) to examine interrelationships among brands for the 17 brand personality traits measured in the study. The aim of this exploratory analysis procedure is to identify the fashion brands' profile from the Arab customers' view through the scores (i.e., factor loading) of the personality traits. Table 6 reports the scores of these traits for each brand (Burberry, Guess and H&M) using principal components extraction with a Varimax Rotation Method. Levi's brand was excluded, because just 8.9% of respondents purchased its products recently.

Table 6. Brand personality dimensions scores (rotated component matrix)

Brand Personality's characters	Fashion Brands								
	Burberry [a]			GUESS [b]			H&M [c]		
	Loading	Mean	Std. Deviation	Loading	Mean	Std. Deviation	Loading	Mean	Std. Deviation
Honest	.603	3.63	1.09	**.946**	3.50	1.09	.707	4.17	0.83
Caring about you	.735	3.50	0.82	**.925**	4.00	0.85	.772	4.25	0.97
Exciting	.693	3.75	1.00	**.925**	4.00	0.85	.696	4.17	1.19
Up-to-date	.685	3.88	0.72	.614	3.83	0.72	**.898**	4.33	0.89
Reliable	.729	4.06	0.93	**.792**	3.67	0.78	.696	4.17	1.19
Successful	**.841**	4.13	0.72	**.848**	4.17	0.94	**.950**	4.58	0.67
Charming	**.851**	3.88	1.02	**.848**	4.17	0.94	.890	4.25	0.97
Feminine	**.905**	3.81	0.99	.594	3.83	0.83	.844	4.08	1.16
Active out door style	.400	3.88	0.50	.671	3.67	1.07	.679	4.50	0.67
Tough/strong	.495	3.75	1.06	.776	3.75	0.87	.678	4.00	1.13
Pioneering	**.866**	3.94	0.85	.693	3.58	0.67	.769	3.83	1.34
Feeling of energy	.646	3.38	0.89	**.966**	3.42	0.79	**.927**	3.67	1.30
Global	**.877**	4.06	0.77	.636	4.25	0.87	.897	4.33	0.98
Feeling young	**.833**	3.44	0.96	.693	3.92	0.90	.772	4.25	0.97
Sexy	.740	3.00	1.10	.549	3.75	0.75	.779	3.92	1.24
Pride	.725	3.56	0.90	.594	3.67	0.78	.686	3.83	1.53
Personalized luxury	.790	3.69	0.79	.685	3.83	0.83	.847	3.67	1.61

Extraction method: principal component analysis; rotation method: Varimax with Kaiser normalization.
(a) Rotation converged in 6 iterations, (b) rotation converged in 6 iterations, (c) rotation converged in 3 iterations
Numbers in **bold** *are significant factors' loading scores*

As shown in Table 6, the brands' traits explained by each factor components and rotated high-factor loadings for the three brands. Burberry and GUESS can be grouped based on six personality traits, whereas H&M can be grouped based on two. The analysis of brand personality dimension scores (see the numbers in '**bold**'; Table 6) led to determine the brands' profiles, as Arab customers perceive. From the 17 personality traits across the brands, based on the significant factors' loading scores (Kim, 1993), three brands profiles were determined as follow:

- Burberry (*Successful .841, Charming .851, Feminine .905,*

Pioneering .866, Global .877 and Feeling young .833).

- Guess (*Honest .946, Caring about you .925, Exciting .925, Reliable .792, Successful .848, Charming .848 and Feeling of energy .966*).
- H&M (*Up-to-date .898, Successful .950 and Feeling of energy .927*).

These significant high scores characters embody the underlying factor structure of each brand. Accordingly, the results showed that Arab customers perceive these three brands differently than some research revealed in the Western countries (e.g., Aaker, 1993; Azevedo and Farhangmehr, 2005).
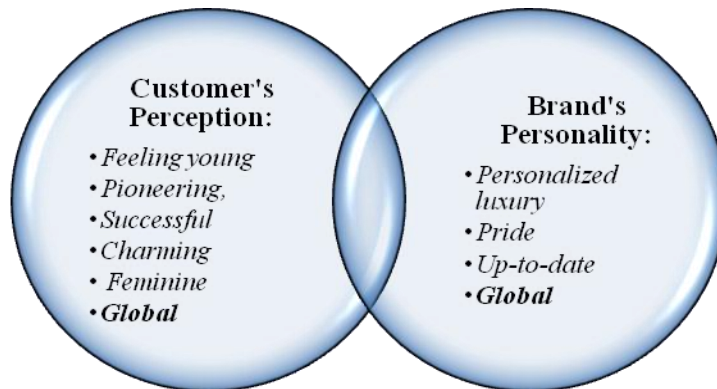
Furthermore, the Arab customers' perceived brand personality (Table 6) with the brand personality that are launched in the three studied fashion brands' official websites were compared. Using a content analysis of the brand personality statements in the websites (Burberry, GUESS and H&M), The author picked up the personality traits (e.g., GUESS's brand statement; http://www.guess.com/worldofguess/#/mission-statement). In Figure 2 (A, B and C), Venn circles depict the differences and intersections between customer's perception and brand's personality. The author found a huge difference between what Arab customers perceive and what fashion brands promote as a brand personality. Just a '*global*' trait was shared between what Burberry's brand personality promotes and what Arab customers perceive (see Figure 2; A). Similarly, the author found '*up-to-date*' is the only trait that was intersected between the brand personality and Arab customer's perception (see Figure 2; C). The interesting result was on GUESS brand, as there was no

intersection between the promoted GUESS brand personality through its website and the Arab customers' perception (see Figure 2; B). These results reveal that the three brands failed to create a brand image in Arab consumers' mind to be fitted with these brands' personalities.
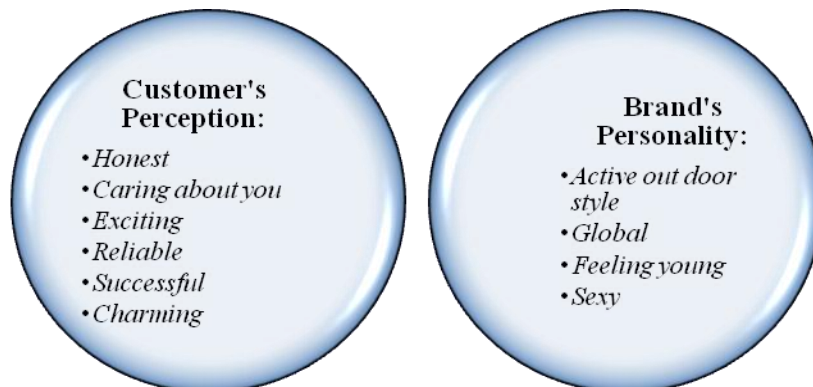
This clear mismatching between customer's perception (brand image) and brand personality can be ascribed to the adaptation implementations that these companies conduct on marketing programs (see Table 2). In other words, the adaptations in the brands' offerings in Saudi market might lead customers there to perceive these brands' images differently and, also, not in the way that these companies target. Therefore, the respondents were asked to which extent do they believe the fashion products are similar or different, using existing measures of several aspects of marketing program (Lee *et al.,* 2000; Luna and Gupta, 2001; Teng *at el,* 2007; Gaski 2008; Geuens *et al.,* 2009). They answered 11 items; comparing the Arab markets with Western countries' market (e.g., UK).

The top sub-table in Table 7 shows the scale of difference/similarity of marketing aspects from customers' view through mean values. It can be realized that customers view product-related items (i.e., quality and packing) similar in the UK and Arab market (*M > 3.00*). This, clearly, can be ascribed by that such global fashion brands maintain a key standard of their products across markets. Also, respondents consider that the service provided in the store is similar (*M = 3.09*). This can be explained by that such global brands' stores employ people who have experience with Western life (e.g., people who studied or trained abroad).

(A) Burberry

Customer's Perception:
- *Feeling young*
- *Pioneering,*
- *Successful*
- *Charming*
- *Feminine*
- **Global**

Brand's Personality:
- *Personalized luxury*
- *Pride*
- *Up-to-date*
- **Global**

(B) GUESS

Customer's Perception:
- *Honest*
- *Caring about you*
- *Exciting*
- *Reliable*
- *Successful*
- *Charming*

Brand's Personality:
- *Active out door style*
- *Global*
- *Feeling young*
- *Sexy*

(C) H&M

Customer's Perception:
- *Successful*
- *Feeling of energy*
- **Up-to-date**

Brand's Personality:
- *Caring about you*
- *Feminine*
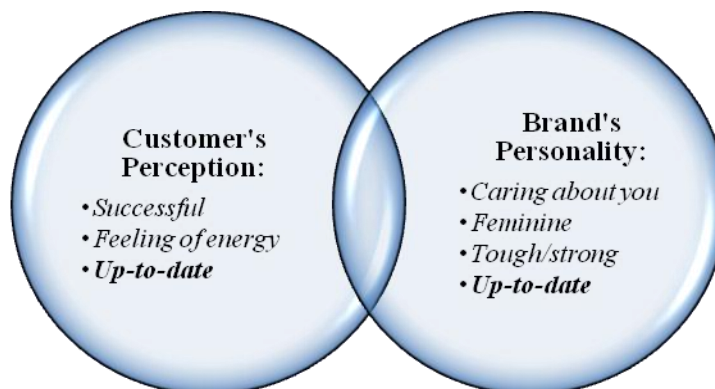- *Tough/strong*
- **Up-to-date**

Figure 2. Customer's perception vs. brand's personality

Regarding the promotion, pricing and delivery method items, it is not surprising that Arab customers view them, in Saudi market, quite different to the UK market *(M < 3.00)*, because the implementations of such marketing activities are highly dependent on the market contextual factors (e.g., disposal income, infrastructure and culture); the interviewees reported.

Table 7. Differences/similarities of fashion marketing between Arab and western markets of the four brands

5-point scale from Very Different (1) to Very Similar (5)		
Items in brief	**Mean**	**Std. D**
The quality of brand's products (e.g., clothes)	3.62	1.193
The instructions on the pack and packing material	3.64	1.190
The product guarantee	2.82	1.211
The adverting message and copy (e.g., used Ad models)	2.51	1.141
The frequency and spread of advertising	2.56	1.159
The levels of price and discount	2.53	1.014
Price changes (low or high)	2.62	1.134
Sales promotion campaigns	2.64	1.111
The delivery method and process	2.02	1.340
The store layout	2.96	1.167
The help of a salesperson in store	3.09	1.019

Descriptions						
Brands	**N**	**Mean**	**Std. D**	**Std. Error**	**95% Confidence Interval for Mean**	
					Lower Bound	**Upper Bound**
GUESS	12	32.17	7.578	2.188	27.35	36.98
Levi's	4	24.50	.577	.289	23.58	25.42
Burberry	17	33.59	8.269	2.006	29.34	37.84
H&M	12	28.42	5.368	1.549	25.01	31.83
Total	45	31.02	7.421	1.106	28.79	33.25

ANOVA					
	Sum of Squares	**df**	**Mean Square**	**F**	**Sig.**
Between Groups	379.277	3	126.426	2.536	.070
Within Groups	2043.701	41	49.846		
Total	2422.978	44			

In order to examine the effect of a brand name on customers' responses toward marketing aspects (differences/similarities), ANOVA test was carried out. The second sub-table in Table 7 provides descriptive statistics. It can be noted that, through mean values, the Burberry' recent customers view its marketing activity in Saudi market is the most similar to the UK *(M = 33.59)*, comparing to the other brands. However, ANOVA final sub-table reveals that the effect of brand names on customers' responses toward marketing aspects was not significant *(F (3, 41) = 2.536, p > 0.05)*. Generally, it can be said that Arab consumers consider fashion marketing in Saudi Arabia different than global market regardless of the fashion brand names. This implies that the studied fashion brands have a common concern for the market contextual factors which leads Arab consumers view their offerings similarly.

VI. DISCUSSION, CONCLUSIONS AND IMPLICATIONS

Standardization, or adaptation, is considered appropriate only to the extent that they have a positive perceived relationship to market performance. This research contributes to the existing knowledge on associated decision-making criteria in an emerging Arab market (Saudi Arabia) by empirically investigating the actual marketing practices of four overseas fashion brands (i.e., GUESS, Levi's Burberry and H&M), in three fashion product categories. Further, this paper explores how Arab customers perceive the fashion global brands' image and influence of global fashion strategies on their behavioral aspects. And, based on Hofstede's (2001) definition of national culture, the shared norms and values (e.g., those derived from Islam), customs (e.g., Arabic tribes), history (e.g., Islamic and Ottoman Empire) and language (Arabic), evident across the Arab region tends to suggest the existence of a highly convergent regional character. It is likely that Saudi Arabia can stand proxy for this nation in terms of consumer behavior. Accordingly, the current paper provides a point of departure for establishing the effectiveness of fashion marketing strategies in the Arab markets.

To start with, using one particular model of marketing management, derived from the relevant literature, the author developed measures to investigate the actual marketing practices of the four global fashion brands. The author found that all fashion retailers in Saudi market rely on their own designed and conducted market research. As most global companies view Arab countries as homogeneous markets, regional product design (e.g., Middle East) is commonly used by the four studied brands. This adopted design does not require core adaptation for a particular market (i.e., Saudi Arabia) within the region.

Although Saudi market as an emerging fashion market (Grail Research, 2009) is appropriate for standardization perspective and, also, Saudi cultural context itself has a recent tendency to become more Westernized (Assad, 2007), global fashion companies adapt their promotion in Saudi market according to Arab/Islamic cultural context. Marketing managers of the fashion brands explained this by that some of adaptation implementations are compulsory to operate in Saudi market (e.g., advertising restrictions; Melewar and Vemmervik, 2004). But, some adaptation aspects are necessary to tackle with the high competition level of Saudi market. However, the results show that product-related attributes were most likely to be standardized (see Table 2) and marketing managers considered these elements likely to be of similar appeal in both Saudi and home markets.

Moving to Arab customer survey, which explores their responses toward global fashion marketing, the author found that the Burberry brand is clearly in a favorable position (37.8% of the respondents preferred it). It's notable that Burberry was the only brand that completely standardized its fashion products (see Table 2). This is a clear indication that maintaining the product design and quality across country has a positive influence on Arab customer's preferences. This is a remarkable advantage of Burberry in such emerging market, which is featured by customers having positive attitudes toward global fashion brands in general (see Table 4). Further, Saudi customers revealed a tendency to be a loyal customer to their preferred fashion brands. The results showed that a fashion product's quality and brand history are the most important factors on loyalty of Saudi customers (see Table 5), which support previous research findings in Arabic countries (Khraim, 2011).

As the main aim in this paper is to identify the fashion brands' profile from the Arab customers' view through the scores of the personality traits (Aker, 1997), the results reveal a notable mismatching between the

Arab customer's perception (i.e., brand image) and the promoted brand personality (see Figure 2). An interesting finding is that such differences have no effect on Arab costumers' preferences, as there was no intersection between the promoted GUESS brand personality through its website and the Arab customers' perception toward GUESS (see Figure 2; B), whereas it was the second preferable brand for the costumers (see Table 3).

In order to visualize the complete scene of Arab customers' responses toward global fashion marketing, the author explore the extent to which they believe the fashion products in Arab market are similar or different to western market. It can be realized that Arab customers view product-related items (i.e., quality and packing) similarly in the UK and Arab market. Clearly, this finding is ascribed to that the marketing managers reported that product-related attributes were most likely to be standardized (see Table 2).

An interesting finding is that the four global fashion brands implement marketing adaptation in their programs to the Saudi market (see Table 2). However, Arab consumers, who have shopping experience with these brands in both the Saudi and UK markets, did not recognize these marketing implementations (see Table 7). It seems that, ironically, these marketing adaptations produce undesirable effect on consumers in Saudi market, as they perceived the global brands' personality different to what these brands promote (see Figure 2). Accordingly, international fashion marketers should implement marketing adaptations with caution in Arab market, and design their marketing program based on good understanding of buyer behavior in this region. Furthermore, the results provide insights for fashion marketers on branding decisions in Arab markets; it is necessary for them to consider Arab markets' characteristic before deciding whether they should to create different brand image (e.g.,

Levi's in USA and Europe; Roth, 1995) to target Arab markets.

VII. DIRECTIONS FOR FURTHER RESEARCH/LIMITATIONS

Limitations of the research are noted. The relatively small number of global fashion brands available for study as well as Arab customers means data volume is necessarily constrained, whilst the used systematic approach to data collection limits the richness of this paper's output. However, it provides a useful initial insight into global fashion branding in Saudi Arabia and Arab consumers' perception toward these brands whilst, coincidentally, providing a point of departure for further research to study a large number of international fashion brands across Arab countries.

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