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Sustainability, Saudi Arabia and Luxury Fashion Context: An Oxymoron or a New Way?

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5.1 Introduction

This chapter focuses on the Kingdom of Saudi Arabia (KSA) and its drive towards sustainability by further it focusing attention on the luxury fashion industry, which has seen a dramatic increase in uptake. Assomull (2020) has highlighted that Saudi consumers are treating luxury fashion increasingly like fast fashion, which implies that these garments and accessories are consumed often and in large quantities. Seeing as the KSA has recently undergone quite dramatic changes with the introduction of the Vision 2030, there is a need to explore not only what the government seeks to achieve with the introduction of their sustainability roadmap but also what implications might be for the luxury fashion industry, which is addressed in this chapter.

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Although the luxury fashion industry has seen increased interest, studies focusing on sustainable luxury remain limited (Athwal et al., 2019; Grazzini et al., 2021), with those that are available showing an obvious bias towards Western consumers. This could be seen as quite surprising, given the fact that the luxury market in the Middle East accounts for over 39% of the entire global luxury industry (Dogan-Sudas et al., 2019). The Saudi luxury market has reached \$15.7 billion in 2020 and is forecasted to hit \$23.6 by 2026, which is an increase of 7% between 2021 and 2026 (Expert Market Research, 2021). This highlights the importance of Middle Eastern luxury consumers (e.g., Dekhili et al., 2019; Hammad et al., 2019) as the Middle East has one of the world's most prosperous youth populations, where millennials are the next Arab luxury consumer crowd (Mishra et al., 2020).

Perhaps one explanation as to why there is only limited research into the Middle Eastern market could be accessibility and ability to conduct research, whilst a further might be the fact that Middle Eastern countries, which are guided by Islamic principle, are often seen as being anti-luxury. To explain, some authors (e.g., Alam et al., 2011; Abalkhail, 2021) indicate that luxury and Islam are not compatible as religion can have an impact on consumers' attitudes, whilst others contradict this opinion (Farrag & Hassan, 2015; Ashraf et al., 2017). What becomes apparent here is that the argument of whether or not luxury can be seen as accepted with Islamic principles might be country dependent. We see the complexity of sustainable luxury and Islamic principles emerge, which might become even more apparent when focusing on the KSA, which is not only Asia's fifth-largest country and the Arab world's second largest (Nurunnabi, 2017) but also the birthplace of Islam and home to the two holy cities and mosques, Mecca and Medina (important objects of Islamic pilgrimage) (Alsubaie et al., 2015; Nurunnabi, 2017; Abuljadail & Ha, 2019).

As alluded to, a paradox emerges in that consumption of luxury goods is a conservational issue in Islam, because Muslims are supposed to live thoughtful and modest lives, whereas luxury fashion consumption has long been related to extravagance (Ashraf et al., 2017). Yet, the KSA seems to be one of the largest luxury consumer markets, where the average luxury fashion consumer spends more than twice as much on luxury

fashion as the average consumer in China (McKinsey & Company, 2020). Coming back to an earlier statement made, it seems as if Saudi consumers are treating luxury fashion in a similar manner as others do fast fashion (Assomull, 2020). This is especially prominent among millennial consumers, who form a majority of the Saudi population and have often been described as material collectors (Sadekar, 2020).

With increased luxury consumption practices come increased issues, including waste, recycling and pollution, which provides a key issue for the KSA. In 2016, the Saudi government introduced the Vision 2030 as a roadmap that guides the KSA to create a more diverse and sustainable economy, safeguards the environment by increasing the efficiency of waste management, establishes comprehensive recycling projects and reduces different types of pollution. In doing so, the country attempts to preserve the environment and natural resources, and fulfil Islamic, human and moral duties (Vision2030, 2016), which are now challenged due to overconsumption.

The interplay between having introduced the Vision 2030, which seeks a more sustainable future and increased luxury fashion consumption, makes the KSA an interesting context. To explain, the meaning of sustainability in this context needs to be further explored because there seems to be a paradox between the government's growing expectation on improving sustainable development and the luxury consumers' consumption practices. To encourage sustainable consumption in developing countries, it seems that there is a need to learn more about the practices and drivers to sustainable consumption within those countries (Hammad et al., 2019). Here, sustainable consumption refers to a resource-efficient and socially just method of consuming resources without jeopardising the needs of future generations (Hammad et al., 2019), which has become a widely discussed topic within consumer and marketing research (Henninger et al., 2016; Athwal et al., 2019). Therefore, it is critical to explore what sustainability and sustainable practices are within luxury fashion, which showcases the relevance of this chapter. Sustainability is not only a key priority for the Saudi government but is also critical in the luxury industry (Athwal et al., 2019; Donato et al., 2020), especially within the KSA, given the growth of the luxury market and the sales in the country, which are expected to continuously increase at around 7%

by 2026 despite the recent economic turmoil caused by COVID-19 (Expert Market Research, 2021; Fabre & Malauzat, 2021; IMARC Group, 2021). Particularly, there is an increased market demand for Western-branded luxury products in Gulf countries, including the KSA where the average spending on fashion reaches between \$500 and \$1600 per person (McKinsey & Company, 2020). The luxury industry is gaining public interest as a result of its high-profile background, which includes a wide range of environmental and social challenges that must be tackled, yet there seems to be a lack of consumer uptake for the reform (Kapferer, 2010; Cheah et al., 2016; Osburg et al., 2021). Unlike in developed countries where sustainable development and practices have been included in policies for a number of years, leading to consumers becoming more aware of sustainability issues and an increasingly positive attitude towards it (Dekhili et al., 2019; Kong et al., 2020); in the KSA, like any other developing country, the situation is different where the integration of sustainable development remains low, and thus authorities face major challenges in the adoption of sustainable development, including a lack of stakeholder interest and public awareness (Dekhili et al., 2019).

5.2 Background to Sustainability and Sustainability Practices in the KSA

5.2.1 Sustainability Through the Vision 2030

Sustainability is defined as meeting society's current needs without compromising on fulfilling those of future generations, by focusing on people, the planet and profit (Elkington, 1994). In the KSA, the Vision 2030 was introduced in 2016 and acts as a roadmap that guides the country to create a more diverse and sustainable economy, safeguard the environment by increasing the efficiency of waste management, establishing comprehensive recycling projects and reducing different types of pollution. In doing so, the country attempts to preserve environmental and natural resources; fulfil Islamic, human and moral duties; and secure

future and current generations quality of everyday lives (Vision2030, 2016; Surf & Mostafa, 2017).

Thus, a key focus is on implementing a long-term strategy, which focuses on sustainable growth and development, thereby fostering diversity and moving the country towards becoming the centre of foreign trade (Alshuwaikhat & Mohammed, 2017; Rana & Suliman, 2018). The KSA seeks to reduce its dependency on oil and develops more environmentally friendly ways to conduct business (Rana & Suliman, 2018). As a result, the country has invested in a variety of sectors, including the (luxury) fashion industry, thereby fostering entrepreneurship and the creation of new market opportunities. Yet, a challenge is a fact that the (luxury) fashion industry is not only resource intensive but also one of the most polluting ones globally (Brown, 2020; Clark, 2020). How the luxury fashion industry can promote a sustainable outlook and support the Vision 2030 is addressed later in this chapter.

The Saudi government has adopted different efforts to promote sustainability through the Vision 2030, where different ministries, organisations and government bodies have begun restructuring to reconcile their practices and roles with the needs of this period (Alshuwaikhat & Mohammed, 2017; Rana & Suliman, 2018). The first step is to establish governance to oversee the plan's execution, and the second focuses on improving the country's strategies and incorporating them into long-term sustainability targets (Alshuwaikhat & Mohammed, 2017; Rana & Suliman, 2018). There are many promises in both the Vision 2030 and the government to reposition the KSA on the road to sustainability and guarantee that the KSA is included within the top 20 environmentally friendly nations globally and that the KSA's sustainable development targets are met by 2030 (Blaisi, 2019). Examples of these commitments include the Green Riyadh and the Green KSA projects, which seek to provide more greenery (e.g., trees and flowers) to cover the country and thus improve the overall air quality, lower the carbon dioxide emissions and improve impurity levels (Haddad, 2020; Saudi Press Agency, 2021a).

Additionally, the Saudi government has made a significant investment in different projects, including constructing and improving waste management and recycling facilities (Blaisi, 2019); providing high-quality sustainable goods and services; achieving water protection (Open Access

Government, 2021); building new urban societies and cities without noise or environmental pollution; creating more pedestrianised areas (Saudi Press Agency, 2021b); developing energy stream diversification, including renewable and alternative energy; decreasing the emissions of buried gases from landfills and turning them into energy; and protecting wildlife and plants by restricting hunting for wild birds and animals, as well as trade in endangered species (Unified National Platform, 2021). A majority of these suggestions are welcomed by the population and taken up, as there is a positive impact that becomes immediately obvious. Yet, when it comes to luxury fashion and its consumption, we see resistance, which is explained in the next section.

5.2.2 Sustainability and Luxury Fashion

As indicated, in an attempt to move away from its oil dependency, the KSA has heavily invested in other sectors, including the luxury fashion industry, by creating the Fashion Commission, which was established in 2020. The aim of the Fashion Commission is to nurture the growing industry, whilst ‘it also seeks to enable the development of a fashion industry that is sustainable, inclusive, fully integrated along the value chain, and maximizes local talent and experience’ (Arab News, 2021). Thus, it is taking an active role in promoting and fostering sustainable and ethical fashion innovations that can enable the KSA to become a global leader. It is commissioned to evaluate and report on the effect of various sustainability measures may have on local brands and entrepreneurs, as well as disseminate examples of best practices and share information on how to create more sustainable business models (Arab News, 2021; Fashion Commission, 2021; Mille, 2021). Examples of these sustainable business models include Sadeem, which focuses on cradle-to-cradle design (Assomull, 2019), or Abadia, which creates timeless design pieces and fosters local artisanry (Westernoff, 2019).

Saudi born 2020 Fashion Forward winner Yousef Akbar is a further forerunner for sustainable fashion, highlighting that whilst the country is changing through the Vision 2030 and people are becoming more environmentally conscious, the designer feels there is still a lot that needs to

be done in order to make the industry as a whole more sustainable. In an interview with Saja Elmishri, Akbar insists that the two things that need to be further improved when it comes to sustainability are the education of both consumers and designers alike to create and buy into this type of fashion, as well as government support to facilitate this type of education (Curated Today, 2021). The notion of heritage, craftsmanship and artisanry is further reflected in the way the Fashion Commission has advertised sustainability to the public. Their aim is to foster and upgrade the fashion sector in the KSA through culture, promoting national heritage and identity in addition to achieving a positive impact on the national economy and thus creating a more sustainable economy (Fashion Commission, 2021).

It is noteworthy that what is seen as sustainable might differ, depending on the brand, designer and/or consumers' perceptions. The luxury industry has in the past been criticised, as often questionable materials (e.g., animal skins) or precious materials (e.g., gold) are used within the production process, which raises ethical concerns in relation to animal rights, but also in terms of exploitation of natural resources and the treatment of humans in the process of gaining these raw materials (Athwal et al., 2019; Luo et al. 2021). Moreover, a majority of the fashion production processes are based in low labour cost countries, which are often not geographically close to the country in which the products are consumed. This further provides environmental constraints, as goods that are imported and/or raw materials created come at an environmental (e.g., CO₂ emissions) and social cost (e.g., lack of living wage and unsafe working conditions) (Henninger et al., 2016; Brydges & Hanlon, 2020; Mukendi et al., 2020). Within the KSA currently, the fashion manufacturing industry is at a crossroads: 'there is a need for more employees as opportunities expand, but it is a youthful nation where industrial jobs in a lower-paying sector than oil are not always wanted' (Textile Journal, 2018). Although the country has a growing textile and fashion sector, a majority of the raw materials and/or garments are still imported (ibid).

Sustainability within the fashion industry was not explicitly advertised to the public through the KSA vision and the Fashion Commission, which mainly focuses on promoting national heritage and identity in addition to achieving impact on the national economy (Fashion

Commission, 2021). Therefore, sustainability remains a recent phenomenon in the KSA that has yet to be thoroughly explored, where Saudi consumers may not be aware of the Commission's mission of developing sustainable fashion or even associate it with their luxury fashion consumption. Therefore, it is critical to explore what sustainability and sustainable practices mean within luxury fashion, showcasing the relevance of this chapter.

5.2.3 Sustainability Practices in the KSA

Diverse perspectives exist on what sustainability entails and how it might be accomplished (Alshuwaikhat & Mohammed, 2017). Particularly, a careful review of existing literature on said field revealed that within existing Saudi consumer behaviour literature some contradictions are recognised. Some studies highlighted that sustainability is not practised or even exists within the KSA consumers (e.g., Assad, 2006, 2008; Dekhili et al., 2019). For example, there is a growing concern in the KSA about the negative effects of excessive consumption (Assad, 2006, 2008; Mohamad & Asfour, 2020; Sadekar, 2020). To illustrate, second-hand consumption in the KSA is not seen as a feasible option, as used fashion items are for charity and not for sale or not to be worn by the majority of Saudis (Al-fawaz, 2014; Assomull, 2020). Saudi consumers pack their old clothes and transport them to charitable societies such as the International Islamic Relief Organisation, where they are distributed to the poor all over the world (Al-fawaz, 2014; Assomull, 2020).

Additionally, Dekhili et al. (2019), for example, emphasised that sustainability information negatively impacts Saudi consumers' liking of luxury fashion items and lower the perceived quality. Luxury and social and environmental issues were viewed as incompatible by Saudi consumers, and thus, communicating that luxury products are made of alternative materials (e.g., vegetable leather) leads them to experience mental inconsistency (Festinger, 1962), evaluate the product quality negatively and reject it (Dekhili et al., 2019). Dekhili et al. (2019) provided a religious explanation as Muslims believe that nature was created by God alone and that only God can affect it. The Quran has around 500 verses

that provide Muslims with environmental counsel (Achabou et al., 2021). God is believed to predetermine each person's future, rendering humans unaccountable for their actions' repercussions (Tsalikis & Lassar, 2009; Achabou et al., 2021); therefore, Saudi consumers may downplay their role in environmental conservation. This lack of consumer interest and awareness, in turn, confirms the major challenges that the country is facing in the adoption of sustainable development. Questions also aroused here are: how could this perception be changed? and what would the government and brands need to do to make sustainable consumption acceptable in the future?

On the other hand, other literature discusses some consumer practices that can be linked to sustainability. Whilst literature on Western consumers discusses consumers' rising ecological consciousness and underlines the significant gap between what customers profess to think and their actual behaviour (e.g., Joergens, 2006; Niinimäki, 2010), within the Saudi context the literature suggested different paradoxical behaviours exist between consumers' actual practices and their awareness of sustainable consumption. Saudi males, for example, are obliged to dress conservatively by wearing the traditional Saudi dress of loose white robes, the national 'thobe,' the headcover 'ghutra' and the black head-band 'iqal' in the workplace, schools and for different occasions and on a daily basis, regardless of their occupation, age or standing (Buchele, 2008; Gorney, 2016; Abdulaziz, 2019). Moreover, from an Islamic perspective, males are prohibited from wearing some luxury items (e.g., silk and jewellery) (Al-Mutawa, 2016; Abdulaziz, 2019), which means they have limited fashion consumption that is shaped by strong Islamic norms that require Saudis to dress modestly. Although this type of consumer practice seems to be driven by their belief system that reminds them to adhere to the moderate Islamic dress code, it can be considered as a sustainable practice, where they may not need multiple of those outfits as they look similar and do not change with the continuing fashion trend shifts.

While in developed countries globally luxury consumers have increasingly raised their expectations for environmental and social sustainability (De Angelis et al., 2020), there is a dearth of understanding among Saudi customers about sustainable clothing and its significance in environmental protection (Alghani & Al-Dabbagh, 2020). A study conducted on

Saudi mothers' awareness of sustainable fabrics by Berry et al. (2020) found that they purchase eco-friendly clothing for their children and inspect the eco-friendly labels not because they are environmentally friendly but because they look for clothing that protects their children against the harms of unsafe fabrics. While some brands communicate their sustainability information and efforts, this may have negative interpretations within Saudi consumers such as lack of quality perception of luxury items that are made of alternative materials or it might be back translated into the fact that eco-friendly clothing is safer for children. Both Berry et al.'s (2020) and Dekhili et al.'s (2019) findings highlighted the need to promote the notion of sustainability among Saudi consumers because those studies found Saudis to be less educated on what sustainability entails. This emphasised the government's need to take a step further and educate consumers to be able to comprehend and accept what brands communicate about their sustainability efforts and accept sustainable consumption practices.

5.3 Conclusion and Implications

Sustainability has emerged as a significant concern within the KSA because of the interplay between the Vision 2030, which seeks a more sustainable future and the increased luxury fashion consumption, where the country faces challenges in its mission. This chapter has explored sustainability issues within the Vision 2030 and its implementation, from the luxury fashion industry perspective. It also highlights the challenges the country may face in its mission to achieve the Vision 2030, where there is an increase in spending and subsequent luxury consumption, as well as sustainably questionable raw materials associated with the luxury fashion industry.

Although the country strives to establish environmentally friendly economic practices and invest in the fashion industry to move towards sustainability, still some sustainability challenges remain because sustainable development depends on how issues surrounding it are interpreted. Whilst there are some efforts to nurture the growth of the fashion industry and move away from the oil industry (see Fig. 5.1), the fashion

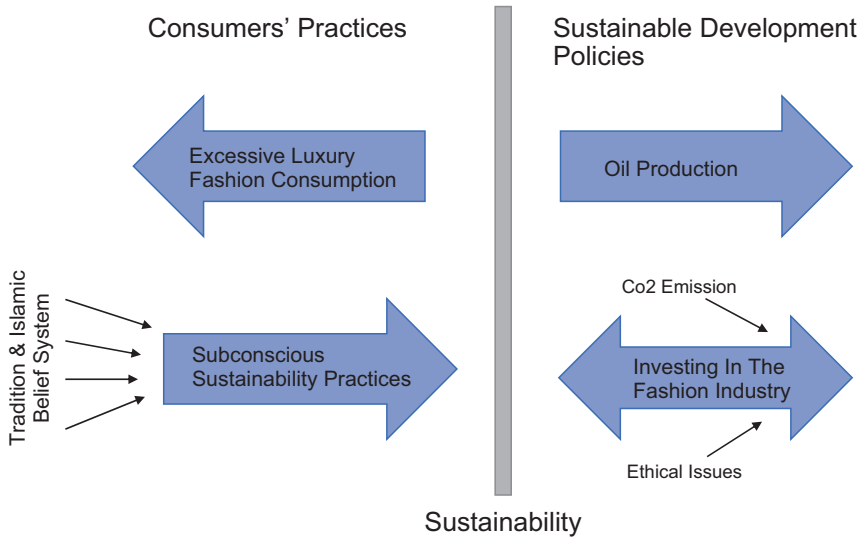


Fig. 5.1 Paradoxical framework for sustainability and luxury within the Saudi context

industry is not that much better since it is renowned as the second-greatest polluter behind the oil sector because of its significant carbon emissions, massive volumes of landfill debris, wastewater and low-quality working conditions (Colucci et al., 2020). The situation is quite similar to metaphorically speak 'sitting in a fence.' On the one hand, the country has started to move forward and can be more sustainable especially if sustainability is interpreted as not relying on oil. On the other hand, a question regarding sustainable development in the country remains because there are still hidden issues of sustainability that are not visible associated with the luxury fashion industry. Rather than relying on oil, some issues must be considered including the use of questionable materials such as leather or silk, which are animal products and have ethical issues, some fashion products use oil in their reproduction such as polyester, and CO₂ emission whether items are produced in the KSA or imported. Therefore, while some sustainability issues are sorted and some steps are taken towards sustainability, there are other issues that remain

because the issue is not about the homegrown luxury fashion industry but rather consider different areas of hidden sustainability aspects that need to be incorporated.

Additionally, there is a gap between the government policies and efforts and consumers perception and practices of sustainability. Therefore, a paradox emerges between the government's growing expectation on improving sustainable development and luxury consumers' consumption practices, as illustrated in Fig. 5.1. Even when consumers consider being sustainable, it is difficult because they might have limited knowledge of what sustainability entails in the first place. Excessive consumption exists besides unconscious sustainable consumption practices. There are some limited types of sustainability practices that have been recognised among Saudi fashion consumers despite the lack of consumer awareness, yet it is still not clear what sustainability means for them. It is also obvious that some existing sustainable practices are driven by either Saudi tradition (e.g., traditional Saudi male dress) or Islamic belief system and norms (e.g., used fashion items given to charity, males not consuming jewellery and dress modestly). Sustainability is subconsciously practised through religion by following the rules prescribed in the Islamic belief system and trying to be a good Muslim in following God's instruction—which implies a key implication discussed in the following paragraph. Therefore, sustainable development and sustainable practices are overwhelmingly seen.

Therefore, this chapter suggests reconsidering policy improvements towards the Vision 2030 in the KSA, allowing both luxury fashion brands and consumers to follow specific guidelines that would assist them in behaving and consuming sustainably. Since the country strives for sustainability, it is suggested that the government introduce a set of rules and regulations concerning communication strategies to reach a wider audience. These rules can clearly outline criteria and implementation for sustainable practices not only to local luxury fashion brands but also to consumers. The government needs to educate both consumers and local fashion brands, regarding what sustainability means and how to create and consume environmentally friendly fashion items. As consumers are

unconsciously behaving sustainably due to religious beliefs and norms, it is suggested to the government and brands to link their communication strategies and education programme to religion, which could facilitate the process of education and adoption of sustainability practices. Both the KSA government and luxury fashion brands should also not overlook the role of religion in major Muslim nations such as the KSA, where Islam is a strong factor that influences consumer decisions.

Besides educating Saudi local fashion brands about environmental challenges related to their work, brands also require assistance in developing strategies to reduce their brands' carbon emissions and move them towards a sustainable path. Those brands in turn need to hold educational seminars and workshops for their markets and managers to bring a great level of awareness that can be clearly communicated to consumers. Key managerial implications also for luxury brands marketers is that in order to sell luxury fashion items that are known as sustainable, it is recommended to apply an acculturation approach to Saudi society by undergoing a cultural assimilation process to better understand how their communication of sustainable fashion is back translated within Saudi consumers. Understanding the various viewpoints and unconscious practices that exist is vital for marketers, who can understand what makes luxury fashion sustainable from the consumers perspective and try to package it in a way that consumers understand better and promote it through different channels, which eventually helps to enhance sustainable development.

As this review reveals that there is a lack of awareness and limits of sustainability practices, future work may consider exploring how best practices developed outside of the KSA can be adapted to better suit local environmental and cultural conditions. Research can also explore the effectiveness of implementing specific sustainable fashion consumption practices (e.g., swapping, renting and second-hand buying). Future research should aim to identify what sustainability means for consumers to help the government to develop their education strategies to make sustainable consumption acceptable in the future.

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