Luxury fashion start-up brands' digital strategies with female Gen Y in the Middle East

Abstract

Purpose – With USD 320 billion spent on luxury fashion in the Middle East and a growing digital consumer presence, local start-ups must form an integrated online relationship with millennials in order to recruit and retain a viable customer base. Nonetheless, these elements are yet to be extensively and properly researched as the literature is still scarce vis-à-vis this area.

Approach – A mixed qualitative approach was adopted using both in-depth interviews and focus groups. Two qualitative studies were conducted, with a total of 13 elite respondents and 28 consumer respondents from Saudi Arabia and the United Arab Emirates using semi-structured interviews. Four focus groups were also conducted in both countries with 6 participants each group for triangulation of the findings.

Findings – The findings enhance current understanding pertaining to Gen Ys' motivations when selecting and engaging online with a luxury fashion start-up brand. The study suggests a detailed strategic framework that can be used in an integrated omni-channel approach. It also discusses the different touch-points that play a role in influencing luxury consumption across different motivation stages.

Originality – The literature relating to digital strategies for luxury fashion start-up brands in the Middle East is still nascent. This study fills a considerable gap in the literature related to such brands that are aiming to stay relevant amidst the growing impact of the digital landscape on luxury fashion brand shoppers in the Middle East.

Keywords: *Digital Marketing; Start-ups; Fashion; Luxury; UAE; KSA*

Introduction

The fashion industry is considered to be amongst the most prominent sectors in many countries (Okonkwo, 2010). It composes the fourth largest sector in France, is amongst the largest in Spain, Italy, and the United States of America, and is rapidly growing in China and India (Okonkwo, 2010). Tungate (2018) estimates that around USD 1 trillion a year is being spent on clothing and footwear around the world with USD 320 billion spent on luxury fashion in the Middle East (Usher, 2017). The Middle East is an incredibly diverse region with over 350 million people who are adapting to the growing digital economy (Wendlandt and Fuchs, 2011; Al Shehhi et al., 2019). While businesses and governments in this region are constantly trying to embrace the digital revolution, it is important for them to consider the different dynamics that play a role in shaping this market. These dynamics have considerably affected the utilization of luxury products by generation Ys specifically in Saudi Arabia and the United Arab Emirates (Ramadan and Mrad, 2017).

Generation Y, also known as Gen Y, millennials, or internet generation, are born in the 1980s and 1990s and have a strong sense of patriotism, morality, are highly sociable and value family (Eisner, 2005; Sheahan, 2005). Gen Ys socialize mainly in the digital world and are highly literate when it comes to technology and multitasking (Eisner, 2005; Bolton et al., 2013). In 2018, generation Y had more spending power than the Baby Boomers. Marketers in the retail industry realize the economic power of this generation, and hence are allocating higher budgets on understanding and targeting Gen Y (Lazarevic, 2011; Mrad et al., 2018). Female Gen Ys are obsessed with fashion and are considered to be prime consumers for luxury fashion brands (O'Cass and Choy, 2008; Williams and Page, 2011; Valaei and Nikhashemi, 2017). In the Middle East specifically, this segment of population tends to outspend any millennial in other markets (Visa, 2016; Mrad et al., 2018). The rapidly growing usage of digital and ecommerce platforms in the UAE and Saudi Arabia further accentuated the importance of generation Y as they are affluent with digital channels where they express distinct social attitudes (Bolton at a., 2013; Visa, 2016). This highly lucrative consumer segment made luxury brands change their focus from traditional media to digital channels in order to stay relevant to generation Y shoppers.

While marketers are eager to tap into the social networks to connect with young consumers, it is not certain that a millennial shopper will be greatly influenced by what emerges there especially for start-up local companies (Emarketer, 2015). Start-ups in the fashion industry are driven by nascent entrepreneurs in this industry seeking to transition from being creative individuals to business innovators (Mills, 2012). They heavily rely on their social capital to establish and manage their business (Mills, 2007), and hence, digital channels. Accordingly, start-ups luxury fashion businesses must form a concrete integrated online relationship with millennials by first understanding their customers' motivations (Smith, 2012) and the extent to which their identity and purchase behavior is shaped by digital media. Nonetheless, these elements are yet to be extensively and properly researched as the literature is still scarce in Middle Eastern markets.

Accordingly, this paper aims to analyze the current digital marketing approaches of luxury fashion brands in KSA and UAE from both experts and consumers' perspectives, in order to identify the key drivers behind female Gen Y's online luxury fashion consumption in those two key lucrative markets. Consequently, with the aim of unravelling and understanding the different types of strategies that can be used by start-up luxury fashion brands in order to stay competitive in the Saudi and Emirati markets, this study's research questions are as follows:

1. What is the role of digital media in shaping luxury female Gen Ys' identity in the Middle East?
2. What are the key digital marketing strategies that start-up luxury fashion brands need to implement in order to differentiate themselves from global brands and to reach and retain Middle Eastern female Gen Y customers?

Gen Y Arab consumers of luxury fashion

In the Saudi and Emirati markets, luxury fashion marketers face a key challenge of understanding the cultural context in which they should position their brands (Ramadan and Mrad, 2017). This challenge is further developed by the uniqueness of the characteristics of such emerging markets especially on social platforms (Abosag et al., 2019). Consequently, companies who want to penetrate the luxury fashion markets in those countries are challenged on deciding whether to standardize their offerings or adapt to the local culture of the region. The latter approach has resulted in programs that have been observed to yield better customer retention and even leading to the creation of brand ambassadors and brand addicts in such regions (Cui et al., 2018; Mrad, 2018; Mrad and Cui, 2018, 2020; Mrad et al., 2020).

Western consumer culture has been proliferating steadily in the Middle East region. Such changes have spurred the dilemma between adopting modernity or maintaining the local culture and identity (Sobh, Belk, and Gressel, 2011). Indeed, fashion stereotypes and stigmatization in the Arab Gulf region have been changing at a faster pace in the past decade (Sandikci and Ger, 2010; Sandikci and Jafari, 2013; Ramadan and Mrad, 2017). Following a dispute between domestic traditional and foreign modern, the final solution found by prior research is "hybridity". Hybridity has been seen to include a mixture of the local and global (Ger and Belk, 1996; Kjeldgaard and Askegaard, 2006) which would address the clash between tradition and modernity in clothing applications (Sobh, Belk, and Gressel, 2014). Transparent abayas are one example whereby the intent is to obviously manifest the fashionable outfits and garments underneath them (Sobh, Belk, and Gressel, 2014).

The clothing and footwear retail sector has developed into an increasingly lucrative part of the Saudi and Emirati retail sectors. Wealthy nationals are increasingly brand conscious and, as a result, are demanding large volumes of luxury clothing. Indeed, prior studies about Arab consumers' perceptions revealed that Emirati consumers have an intention to purchase luxury goods and global fashion products (Ramadan and Mrad, 2017). Saudi consumers too were shown to have similar characteristics in terms of fashion preferences. The Saudi market has witnessed an excessive consumption in recent years, especially in luxury fashion products (Ramadan and Mrad, 2017).

In Saudi Arabia and UAE, luxury garments are usually purchased for their social meaning as well as status symbols (Marciniak and Mohsen, 2014) aided by both the physical and emotional characteristics of the luxury brand (Kapferer and Bastein, 2014). In fact, consumption behavior in the Arab region symbolizes a social class position, which is a more significant determinant of one's buying behavior than just income (Ramadan and Mrad, 2017). In addition, consumers are expected to buy branded products that convey affluence, wealth, and social class (Al-Mutawa, 2013). According to Marciniak and Mohsen (2014), Arab women's luxury fashion consumption is motivated by both personal and interpersonal values found within their culture. Furthermore, inside the Arab world, many purchase choices are taken commonly either by the family or a gathering of companions rather than on an individual premise (Ramadan and Mrad, 2017). In participating in luxury consumption, the Arab consumer is hence ready to keep up her status in her collectivist companion group.

Luxury fashion brands in the Middle East

People associate the term luxury with wealth, indulgence, exclusivity and aristocracy (Chevalier and Mazzalovo, 2008). In fact, luxury fashion brands are distinguished by people as brands that are characterized by global recognition, high quality and innovation, core competence, powerful and influential advertisement, flawless in-store presentation and superb customer service (Mrad et al., 2018). Luxury fashion brands portray an image of exclusivity, premium process, image and status (Ramadan and Mrad, 2017; Ramadan, 2019).

According to a report by Global Data (2018), the Middle East and Africa's luxury goods market had the fastest growth worldwide between 2014 and 2018, growing at an annual compounded rate of 7.2% despite conservative shopping behavior. In Saudi Arabia, the apparel retail sector has grown very fast over the past 15 years, spurred by the young and fashion-oriented population whose disposable income has increased. Saudi Arabia, a country that has often been described as traditional and conservative, has been experiencing rising consumption of luxury brands lately. In fact, women from the Middle East have become the world's biggest buyers of high fashion (Wendlandt and Fuchs, 2011).

Arab women's clothing has been researched extensively in relation to Muslim and local culture dressing codes (see Gole, 2002; Sandikci and Ger, 2007; and Tarlo, 2007). Under that context, fashion and modesty can turn into opposing viewpoints as consumers in this region transition towards Western like styles that integrate a sense of local and personal touch (Al-Mutawa, 2013). Luxury fashion start-ups have also been emerging in Saudi Arabia lately and are being showcased during fashion weeks in Jeddah (Paton, 2018). Development of infrastructure, growth of the e-commerce industry, increasing internet penetration and the burgeoning travel and tourism sector are all contributing to the growth of the luxury start-up retail market in Saudi Arabia. In 2018, the market value reached Euros 12.9 billion, and is expected to exceed 19.6 billion by 2024 (Morris, 2019).

It is wrong to assume that there is a West versus Middle Eastern luxury fashion consumption. The extant literature has shown that in the past decade, hybridity between local traditional and foreign modern has been highly trending (Sobh, Belk, and Gressel, 2014). Indeed, globalization has been argued to lead to a blur in cultural differences between consumers (Ger, 1999), especially through digital media (Kamal et al., 2013). Nonetheless, an apparent difference has been always the local need for integration, whether socially or with one's self (Ramadan and Mrad, 2017). Indeed, fashion for Arab consumers has been closely related to freedom, empowerment and autonomy. This, alongside the particular example of local dressing codes, what makes local brands so unique versus their Western counterparts. Accordingly, brands that want to succeed in this lucrative and unique marketplace have to follow the theory on "hybrid glocalization", whereby fears of globalization and cultural take-over are alleviated through the localization of common differences (Kamal et al., 2013).

The changing digital landscape

The rise and expansion of the internet and new technologies exert a positive impact on the economy (Ramadan, 2017; Dabbous and Tarhini, 2019). When it comes to media usage, millennials enjoy using the internet, social media, and other digital channels. According to studies conducted by eMarketer, nearly all millennials are internet users, and about nine in ten online millennials use social networks (Emarketer, 2015). In the Middle East, UAE and KSA are considered the top two Arab countries in internet usage. In Saudi Arabia alone, there were 25 million connected consumers using different social media platforms in 2018 (Global Media Insight, 2018). Those consumers are active users of several social platforms such as YouTube (71%), Facebook (66%), Instagram (54%), and Twitter (52%) (Global Media Insight, 2018).

The digital landscape in KSA and UAE holds several opportunities for luxury brands. E-commerce is growing fast in the region that has a young demography and affluent customers. This means that with the proper kind of support, e-commerce can grow and become a major stream of revenue for luxury fashion brands. In fact, the growth of digital savvy consumers led luxury brands to pull away from traditional advertising and focus more on digital media in the hope of becoming more visible and relevant for Gen Y Arab shoppers. Prior research have particularly argued that the localization of communication in line with the local culture would be much more effective (Chun et al., 2015; Singh et al., 2004). In fact, in a digital context, studies suggests that such cultural adaptation provides higher hedonic benefits and improves the brand's competitive edge (Singh et al., 2017; Benmamoun et al., 2019), positively affects consumers' attitudes and intentions.

In a study conducted by Kamal, Chu and Pedram (2013), the findings showed that Arab luxury fashion consumers have higher levels of materialism and social media usage. They respond more to social media advertising than American consumers and express a higher interest than American consumer in showcasing their brands to indicate social success (Kamal et al., 2013) as it enhances their feeling of integration within the global marketplace (Kraidy, 2007). Nonetheless, while digital technologies and methods are considerably changing the ways luxury brands market themselves, brands in the region are yet to have a complete grasp and understanding on how to effectively and efficiently use them within their marketing strategy.

Methodology

This research aims to identify the role of digital media in shaping luxury fashion female Gen Ys' identity in two key markets in the Middle East; Saudi Arabia and the UAE. The study consequently focuses on providing recommendations relating to the digital marketing strategies that start-up luxury fashion brands targeting female Gen Ys in KSA and UAE need to adopt. These start-ups, also considered as emerging luxury fashion brands, are defined as such due to the potential they have in becoming established strong brands with a significant sales and revenue stream in the future despite their current new or small status. As no prior studies have been conducted on this topic and the literature is still scarce vis-à-vis this area, this research adopts an exploratory approach using a mix of two qualitative methodologies: in-depth interviews with both experts and consumers, as well as focus groups. This approach was adopted in order to determine the necessary tactics marketers should use to enhance consumers experience, improve market positioning as well as keep up with evolving customer needs. Purposive sampling was used to recruit the participants for both the in-depth interviews and focus groups based on the ease of access and using the following criteria: local (Saudi and Emirati) female Gen Ys that are regular customers of luxury fashion brands and who are active on digital channels. Millennials in this region account for a large percentage of the population and outspend their global peers mainly in high value products and services (Visa, 2016). Emirati and Saudi generation Ys are estimated to have generated respectively US$40,000 and $18,000 in average annual income in 2019 (Euromonitor, 2019).

While the literature provided a general overview and direction that guided the design of the research questions, an inductive thematic analysis was conducted in order to analyze the data that were collected from the in-depth semi-structured interviews and accordingly to identify, analyze and report patterns (themes) within the data (Braun and Clarke, 2006; Farah, 2017). The elite participants' sample consisted of luxury fashion brands' managers and owners (both local and global brands) overseeing the Saudi Arabian and Emirati markets, as well as experts in the digital marketing field. The sample was recruited using a convenience snowball approach. After each interview, interviewees were asked to recommend other potential experts in the related field of study. The sample included 13 participants (7 females and 6 males) with experience ranging between 6 and 22 years. Given that the sample was based on elite interviewing, the sample size was deemed to be acceptable following Creswell's (1998) recommendation to carry out between 5 and 25 interviews. The interview guide involved questions relating to the targeted consumers as well as the digital strategies that are used to reach them when they are targeting Saudi and Emirati markets. As for the consumers' sample, it consisted of 28 female interviewees residing in UAE and KSA with an age bracket between 23 and 35 years old. The semi-structured interview questions for the consumer sample were categorized as follows: (1) personal information, (2) purchasing behavior vis-à-vis established as well as emerging luxury fashion brands, and (3) consumer journey stages and the related relevant and effective marketing activities per stage. The interviews for both elite and consumers were conducted using Skype calls or face-to-face interviews, and lasted an average of 44 minutes each.

Four focus groups were then conducted in both Saudi Arabia and the UAE, and were based on a set of six respondents in each group. The participants were all females aged between 25 to 38 years as per the following split: two groups of 24–31 years old, and two groups of 32–39 years old. The "ice-breaking" technique was first used (Stewart and Shamdasani, 1990) through having the participants coming up with a brief introduction about themselves and their preferred luxury fashion brands. The moderator then used pre-set open-ended questions to stimulate the discussion regarding global and start-up luxury fashion brands, current digital practices of these brands in Saudi Arabia and the UAE, and consumers' preferences in terms of these digital channels and tools.

The Emirati and Saudi female generation Y participants were highly tech savvy, followed luxury fashion brands on several digital platforms, enjoyed a higher disposable income than other peer groups, and travelled frequently. The majority of the participants were married and were currently employed. All of them had a university degree.

Both, the elite and consumer interviews as well as the focus groups discussions, were recorded after receiving the participants' consent. They were then transcribed and analyzed based on the extracted themes. The data was analyzed following the thematic analysis procedure (Braun and Clarke, 2006) and the constant comparison technique (Glaser and Strauss, 1967). Validity and reliability of the findings were checked through having two different researchers conducting separately the coding and themes extraction and then comparing the results (Griggs, 1987). Triangulation of the data was performed through the different research techniques (in-depth interviews and focus groups), affirming here forth the reliability of the findings. Table 1 summarizes the lists of participants in the in-depth interviews and focus groups.

Insert here: Table 1 – Summary table of the research participants

Findings

This study focuses on expanding the understanding of the digital marketing drivers that would lead to long-term relationships between luxury fashion start-up brands and Middle Eastern female Gen Y consumers. The triangulation of data between the elite interviews, consumer interviews and focus groups brought forward two main insights: (1) Gen Ys' shifting identity and luxury fashion consumption behavior in the digital environment, and (2) utilitarian, social and hedonic motivations pertaining to the digital marketing drivers that are relevant to this particular market segment.

Gen Ys' shifting identity and luxury fashion consumption behavior

Through the conducted in-depth interviews and focus groups, the findings showed that Middle Eastern female Gen Ys' general fashion consumption behavior has changed. As their highly connected lives are driven today by intense social sharing, the need for uniqueness and trendiness are becoming key determinants in apparel buying and consequently identity shaping.

> "*We live in a digital world that is available 24/7. It puts pressure on us to keep on innovating with our posts and gain likes and followers. For this we have to be seen as trendy and highly fashionable." (27 years old, Saudi Arabia)*
>
> *"Fashion is what defines me. I love to be seen as somebody who is unique and original. Social media helps me to bring up and show this identity with my friends." (34 years old, Saudi Arabia)*
>
> *"I rely on social media to see what's trending and how to stand out when I go out with friends. I consider social channels to be my new closet in which I build and match how I want to be seen in the real world." (24 years old, UAE)*

Following this new digital lifestyle that motivates consumers to express themselves with an air of differentiation and uniqueness, Gen Ys particularly see luxury fashion start-ups as enablers and facilitators of such needs.

> *"Local start-ups have been extremely creative and trendy lately. They understand our needs and help us express ourselves with their unique designs." (30 years old, UAE)*
>
> *"Everyone is fascinated when I share online a new luxury garment I just bought from a start-up. They're like wow, that's so stylish and so you! Start-ups are my favorite, I feel like they're helping me gain in style and trendiness in front of my friends." (29 years old, Saudi Arabia)*

Furthermore, they have helped female Gen Ys to both shape their collective community identity while differentiating themselves from other generations.

> *"We're a group of girls that always post and share similar products and styles online. We're different from other generations in our styles; less funky than teenagers these days and definitely more trendy and stylish than older generations. Local brands helped us establish and boost that image." (35 years old, Saudi Arabia)*
>
> *"We're very different from our parents. We look for the unique, and that's definitely not in buying another Chanel or Dior." (26 years old, Saudi Arabia)*

Indeed, female Gen Ys have been migrating from global to local luxury fashion start-ups as a way to stand out on digital channels.

> *"If I show another Chanel product online that I recently bought, there would be a lack of interest really. It's not something that stands out anymore. It lost its wow effect." (27 years old, Saudi Arabia)*
>
> *"Just check the kind of comments I get when I post something on a new start-up. The comments are crazy and many! I feel like I'm creating a hype and becoming a trendsetter." (32 years old, UAE)*

They have also embraced the idea of becoming digital brand ambassadors for these local luxury brands in this particular region.

"I consider myself a brand ambassador for these start-ups. As a loyal customer who wants to share a new product I just bought from them, I find myself talking passionately about the brand and encouraging others to try it." (23 years old, Saudi Arabia)

"it's my duty to support them! These are promising local brands of my own country and I'm very proud of them. I would gladly feature them on my own social media accounts." (25 years old, UAE)

Nonetheless, for consumers to be interested in a brand and share its content and products online, it has to be highly active on digital channels. Indeed, low levels of engagement tend to be less attractive and trustworthy to consumers.

"A lot of people are buying followers these days and then you go to their posts and you see barely likes and comments compared to their 'thousands of followers.'" (27 years old, UAE)

"Engagement is key and social discussion is very important for our brand. We focus on genuine interaction with our followers rather than just to post irrelevant content." (Luxury Fashion Start-up Owner)

Digital marketing drivers

Utilitarian motivation

Utilitarian based benefits are based upon the functional and practical sides of a brand (Chitturi, Raghunathan, and Mahajan 2008; Dhar and Wertenbroch 2000). Utilitarian motivation is cognitive in nature and primarily responds to consumers' basic expectations of quality, trust and overall user satisfaction (Sarkar, 2011; Chitturi, Raghunathan, and Mahajan, 2008).

(a) Global brands versus local start-ups

Established global brands thrive on this particular motivation as they already have strengthened deeply the trust of consumers. According to the respondents, established brands already have their history, and buying from them makes consumers feel empowered as the brand is well recognized worldwide and is enriched with the brand's values.

"Honestly, I prefer known luxury brands, so I am not someone that would go for a fashion luxury start-up as I prefer to buy brands that are already trustworthy." (32 years old, UAE)

"When you buy a luxury fashion brand that is already established, you are already buying the name of the brand. There is a lot of history there." (30 years old, UAE)

Luxury fashion start-ups on the other hand face a challenge under these sets of motivations as they do not have an extensive history and need to prove and establish themselves in the marketplace. The difficulty arises from the early stages of awareness building as the new start-up needs to communicate the brand's values, image, and most importantly the quality of the product. Accordingly, the focus in the awareness campaign stage should focus on utilitarian factors where the brand would feature the materials and know-how of the new entrepreneur.

"People don't know us as they know global brands. If I'm charging a premium on my products, they have to make sure first that it's a quality product. I have to build trust while encouraging them to come and see, test and try the product." (Luxury Fashion Start-up Owner)

"For me, start-ups have to focus first on supporting their quality claims especially when they launch. Credibility is key and it starts with basic quality. They should encourage us to visit their store or even send us products to try. This would create a big hype online." (29 years old, UAE)

(b) Authenticity of start-ups

Nonetheless, luxury fashion start-ups are perceived as more authentic and genuine than global brands when it comes to marketing messages. They do not have a strict set of digital marketing guidelines and hence are seen as more trustable when it comes to their content marketing efforts. They have the ability to experiment and can play around with the different digital visual strategies of their content. Authenticity and genuine social posts that allude to the local culture provide start-ups with a digital competitive advantage when it comes to utilitarian benefits. Indeed, consumers nowadays are extremely sensitive and aware of the reality of what is authentic and what it not (Zgheib, 2017). As they are constantly bombarded with a distorted reality on social media where everyone works hard on only showing a perfect identity, brands get pushy to make consumers buy their products. Viewers tend to see emerging brands that are not behaving in a typical way as an unusual and cooler side to discover. The more the brand feels effortless and not picture-perfect, the more online viewers seem to get attracted to it.

"Luxury brands already have established ways, they have their own rules and codes which they have to be followed so you start expecting their work. While with the emerging brands, since they just started, they have nothing to lose, right? So, they try new things, it is more exciting, you do not know what to expect. I am sure anything that is posted on the Chanel page has a whole consulting team whereas emerging designers would be more spontaneous." (34 years old, UAE)

"…people nowadays are tired of everything looking perfect and this is the advantage of a start-up because whatever they do they will end up looking like authentic and I think they should use that in their power to make it professional but also to keep it raw and spontaneous." (27 years old, Saudi Arabia)

Consumers and experts alike also reiterated on the fact that start-ups should stand out from established luxury brands by focusing on transparency, efficiency and convenience. Indeed, the respondents related trusting the brand to the showcasing of its products by their own consumers which would make the experience genuine and more trustable.

"This luxury emerging jewelry brand called "CHOKA" It just caught my attention how the designs were displayed, it looked very relatable and not fake models posing but REAL as in real people wearing the designs and the designs itself were very creative and unusual." (27 years old, UAE)

"Using influencers these days it's the way to go! We need real people to transfer the vibe of the brand or else we will not trust it as much. I rely mostly on those bloggers and influencers." (26 years old, UAE)

(c) Product sampling and showrooming

Finally, to satisfy and respond to utilitarian motivations, stores (whether ongoing or pop-up stores) featuring actual products are needed so that consumers can interact and tangibly feel the product. During the purchase stage, utilitarian factors become crucial to convert all past engagements into actual sales. These touchpoints should be accompanied by an integrated campaign across relevant digital channels whereby live testimonies are either broadcasted or quoted.

"To instill a level of trust in our products, consumers have to be able to come into contact with it in several places, such as pop-up stores or even in fashion events. Seeing the product

also in parallel on digital channels while reading comments from other consumers would boost our brand's presence." (Head of Marketing and Communication)

"The brand has to consistently deliver and be always present around us. This omni-presence would increase top of mind recall and give ongoing satisfaction that the brand is active." (Luxury Division - Marketing Manager)

Social motivation

Luxury consumption is obvious in KSA and UAE, which share comparative consumption behaviors. The study shows in general that economic wellbeing assumes a noteworthy job in luxury purchasing, whereby luxury items are perceived as social images that mirror one's identity in a given social circle. Individuals will in general give careful consideration when settling on choices with respect to luxury merchandise. Saudis and Emiratis unequivocally trust that the luxury items they possess is a reflector of their social picture, thus, are extremely careful in their selection of such items. Furthermore, the respondents stated that they would remain loyal if luxury fashion start-ups are more conversational and are more engaged with the consumer while having relatable content. In line with Ramadan and Mrad's (2017) work on the set of fashion motivators that Arab women experience when buying apparels, the findings indeed show that Saudi and Emirati consumers mainly favor brands that reflect their personalities and sense of uniqueness. This need for self-expression is closely related to the brand's own image that is integrated into its content marketing strategy.

"They need to be more conversational. They have to talk to me as a person. They need to be more engaged, to relate. If the brand is local and creating something new, they need to reflect their vision in a natural way. Simultaneously, they have to be involved with the consumers' needs, keeping the content interesting and sustaining the identity." (25 years old, UAE)

"I buy brands that I feel represent me. They have a certain character that I feel are similar to mine, so that when I wear them in public, people would perceive me in a certain way that I want them to see me in. Local new luxury fashion brands have this power as they are so trendy and reflect our age." (26 years old, Saudi Arabia)

Respondents who often consider buying from boutiques tend to buy online only when their friends confirm to them that this luxury fashion start-up is a reliable source or purchased their products with a perfect fit, good quality and positive reviews. Consumers who trust their surroundings tend to be influenced by what their friends or family recommend. In fact, social adherence and integration was particularly highlighted by both experts and consumers, and in line with prior research (e.g. Ramadan and Mrad, 2017), as being one of the key fashion motivators in the Middle East

> *"The only times I would shop online is if my friends tell me they already shopped online from this store and the fit and quality were great." (23 years old, Saudi Arabia)*
>
> *"When I see good luxury products from start-ups that my other blogger friends display and specially that I trust the taste and opinion of those girls, it makes me want to discover those brands." (27 years old, Saudi Arabia)*

Start-ups rely on social media marketing to update their followers about relevant information and new products without saturating them with product specific content (Ramadan, 2017). Indeed, according to the experts, female Gen Ys in the Middle East are the perfect target for emerging luxury fashion brands as they are at an age where they are at a stage in life where they do not only purchase in small doses but also feel that they are investing in themselves. This social motivation develops a meaningful connection with consumers that strengthens aspects such as brand retention and loyalty while building brand ambassadors (Ramadan et al., 2018).

> *"When I buy from start-up brands I feel unique. I'm a non-conformist and my friends love that about me. They even try to copy me constantly." (32 years old, Saudi Arabia)*
>
> *"Socially driven benefits out of luxury fashion consumption are key in this region. We are better placed as local brands to satisfy this need as we understand better the local culture and how peer pressure work here." (Luxury Fashion Start-up Owner)*

Hedonic motivation

Hedonic motivation is experience and emotion centric versus the attribute centric characteristic of utilitarian motivation (Dhar and Wertenbroch, 2000). These enjoyment-rooted benefits induce favorable emotional and behavioral consequences with consumers in post-consumption stages (Lim and Ang, 2008). Such highly subjective responses of excitement and spontaneity lead to consumer delight, especially when it is unanticipated (Chitturi, Raghunathan, and Mahajan, 2008).

Experts believed that the new generation that is evolving with the digital world is becoming more and more intrigued with emerging local brands in the Middle East. Consumers echoed this belief as they considered that buying known luxury brands has become a sort of a stigma.

> *"With time, I shifted from luxury brands to buying emerging ones for the simple reason that the generation we are in is breaking this stigma of being 'in' because they wear the known luxury brands. In our days, the definition of cool are those emerging edgy rugged brands that start from nowhere and the more they are fresh and never seen before, this 'careless' vibe, not trying hard, not posy or too extreme posy but in an unusual way is what gets me to shop these brands." (26 years old, Saudi Arabia)*

Furthermore, it is not only crucial to be present on the social media platforms but most importantly to focus on the content. Consumers are so sensitive and aware of the presentation of the posts of luxury brands. As soon as they enter the account of the brand to check them out, they judge instantly the photography of the products, the storytelling provided with a consecutive coherency, the color palette that strengthens the mood of the brand, the atypical image of the brand and the quality of the products displayed. More importantly, they look for the hype and intriguing engaging experience that these brands provide them with alongside a certain surprising effect that established brands cannot offer.

> *"What I love about emerging brands is the rawness and authenticity of their photography, it is not expected and it is less commercial. I feel it is more intriguing, there is always an interesting storytelling… it is disruptive eccentric. When it is disruptive, this is when you stop and look: the shock effect!" (30 years old, UAE).*
>
> *"Is the brand authentic, unusual and attractive? Does it match the identity of the brand? If the brand is artistic, the product has to be quite creative and the page should reflect that." (23 years old, UAE)*
>
> *"I am mainly attracted by the unconventional experience start-ups provide us with. Surprising products and with it surprising and unexpected campaigns on social media. Established old brands cannot achieve this." (34 years old, Saudi Arabia)*

To build successful content strategies, marketing experts advise that brands have to segment their audience based on their state of mind rather than their demographics and thus allowing them to build bespoke communication that relate with their core desires. By doing so, they get to further explore the brand personality since a brand reflects its core target. In particular, Gen Ys are motivated by enjoyable experiences, excitement and spontaneity. When using Instagram in specific, the content needs to be more interactive, video-based, and re-sharable. Interestingly enough, it seems that established brands are trying to mimic start-up brands' strategies in order to attract the Gen Y segment when it comes to the enjoyment space;

> *"Gen Ys are our core customers in which we are well positioned to have a huge advantage with. Global brands are now aware of this and are trying to copy us." (Digital Media and Content Manager at a Start-up luxury fashion brand)*
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> *"To attract and retain Gen Ys, the brand should act as a Gen Y person itself. It's all about being spontaneous and bringing excitement to whatever we do and talk about. It's a style of life." (Luxury Fashion Start-up Owner*)
>
> *"The opinion leaders and influencers we use have to also reflect the brand's identity and cater to Gen Ys need for enjoyment." (Head of Digital and Social Media)*

Omni-channel based motivation strategy

Following the three sets of motivations that Gen Ys are characterized with in relation to luxury fashion brands, an omni-channel approach should be adopted when the brand is communicating with its followers. An omni-channel strategy is based upon an integrated communication plan, whereby consumers have one brand experience in contrast with having multiple unrelated channel based experiences. An array of platforms and touchpoints should hence be considered while making sure that the content and experience is unified.

> *"I become aware of the start-up luxury brands usually from social media mainly Instagram or a friend." (31 years old, UAE)*
>
> *"I go back and forth between Instagram, Facebook, Youtube… for a brand to catch my attention it has to be present in all of these channels while having a concrete same message and experience. Sometimes you see them there but you don't understand what they're trying to do as it's so unrelated." (27 years old, UAE)*

Other important touchpoints that the Arab consumer use to engage with luxury fashion start-ups are fashion discovery platforms such as Moda Operandi, Net-a-Porter, Farfetch and SSENSE, as well as fashion shows that are also broadcasted jointly on social media channels.

"I find Moda Operandi to be a perfect channel to get to know more about emerging designers/brands and check their collections - collaborations with celebrities/influencers/bloggers and posting about it on social media - Meeting the designers personally during exhibitions and popups." (35 years old, UAE)

"Social media, specifically Instagram and the fashion shows I attend, can sometimes help introduce new start-ups if they collaborate with known brands then disperse it all over social media for better exposure." (27 years old, Saudi Arabia)

An omni-channel approach stipulates as well to have an effective integration of online and offline channels, namely with the physical stores. The message, layout, content, colors and experience would have to be similar across these virtual and offline channels. Respondents also see pop-up stores as beneficial that allow people to connect with the brand particularly when it is transmitted online. They often go to pop-up stores to see and feel the items before sometimes buying it online the next time.

"Linking the store to the digital content we're seeing is a great opportunity to continue with that great experience we have with the brand. It all feels genuine and coherent." (32 years old, UAE)

"Building excitement on digital channels then not seeing any in the physical store is such a bad experience. You feel that the brand is schizophrenic and not consistent." (27 years old, UAE)

Implications

From a scholarly perspective, this paper fills a gap in the literature in relation to the digital marketing strategies of luxury fashion start-up brands that are targeting female Generation Y consumers in KSA and UAE. While marketers are eager to tap into the emerging digital landscape in these markets, a more developed and integrated strategy needs to be devised in order to influence millennial shoppers.

This study has shown that digital channels have affected greatly female Gen Y luxury fashion consumers in UAE and KSA. It has shaped their personal and collective identity, and has influenced their luxury fashion consumption to be more focused on the trendy and unique offering of local start-ups. Furthermore, the research has shown that female Gen Ys are motivated via utilitarian, social and hedonic oriented benefits. These intertwined benefit-driven motivations are translated into a tangible consumer understanding and behavior vis-à-vis luxury fashion consumption within a digital context and alongside the purchasing journey. The scholarly contributions of this study accordingly aid in the current scarce body of research relating to the proper understanding of female Gen Y consumers in this particular region, alongside the proper strategies luxury fashion start-ups should consider through each stage of the consumer journey.

From a managerial perspective, this research picks up an extensive understanding on the elements influencing customers' purchases of luxury merchandise in two key Arab markets. Although luxury fashion start-up brands are not yet rooted enough, they are able to use different strategies than known luxury brands use. They do not need to follow the footsteps and rules of the established brands to get to their goals as the digital environment can drastically level-up start-ups' competitiveness with female Gen Y consumers. Indeed, based on the findings of this study, the different sets of motivations that female Gen Ys experience can be integrated and synthesized into an Omni-channel based motivations strategy as depicted in figure 1.

Insert here: Figure 1 – Omni-channel based motivations strategy

The encompassing approaches presented in figure 1 provide a framework for start-ups to use when devising their digital strategy in the Middle East as follows:

- **Utilitarian-hedonic motivation**: the iterative relationship between a utilitarian and hedonic motivation stage is when the consumer is exploring the tangible and functional benefits of the product while also experiencing some added enjoyments. As consumers seek reassurance that the actual product is of good quality and consistent in delivering on its promises, the tangible experience and encounter becomes crucial in this space. Accordingly, in that particular area, a clear focus should be made on physical stores, pop-up stores and fashion shows where consumers can clearly see and touch the product. The communication on these venues and events should also be integrated across the different digital channels, whether paid, owned or earned media in order to maximize exposure and generate word of mouth. The awareness and purchase stages are crucial under that area, whereby start-ups are trying to establish their credibility in relation to the quality of the product. An omni-channel approach would be advised here to feature for example personal testimonies from within the store and share them on digital platforms. Giving a free sample to the most engaging follower on their social media pages could also enhance the utilitarian-hedonic space with an actual real experience and a genuine review of the product's quality. Response times can play a large role in customer satisfaction and this is arguably the biggest contributor to customer retention. There should be also direct answers from the brand, which will lead to the comfort and trust of the customer.

- **Utilitarian-social motivation**: this motivation space is driven by the need to achieve social and culture adherence, whereby consumers feel the urge to follow their social circle's and opinion leaders' recommendations. This motivation area is particularly important for the consideration stage during the shopping journey. As consumers are now aware of the brand, they seek more information about the start-up. The main digital touchpoints that start-ups need to prioritize accordingly would be blogs, social posts, specialized forums, Instagram based influencers as this will help luxury fashion brands connect with consumers on a more personal level. Indeed, the brand value added by celebrities/influencers is immediate and palpable (Ramadan and Farah, 2020). When a celebrity/influencer signs an endorsement deal with a product, an element of legitimacy is suddenly present in the company, simply because of the power of the name backing it up. The combination of social media, influence tactics, and opinion leaders' traits form a new phenomenon practiced and experienced by people in the Middle East region.
- **Hedonic-social motivation**: in this motivation space, consumers mainly look for social enjoyment and self-expressive benefits. Influencers targeting Gen Ys are key in this area. The sponsored content must be relevant to the brand's identity, and they must be consistent across all social media accounts. The engagement and loyalty stages of the consumer journey are dominant in this motivation space. Emotional connections are key to build here with customers in order to enhance the relationship with the brand and to attain retention and loyalty. For that purpose, an omni-channel integration of real-life stories with the brand, personal content tackling how the brand helped the consumer's self-expression and how she stood out within her community, will be fundamental to the long-term success of the start-up. In an age of interaction and conversation where everything a brand does is

likely to be dissected very quickly, starting with something that is real and authentic is a very solid foundation to begin telling a brand story.

In the fashion and luxury industry, marketing strategies on social media are based on key dimensions such as interaction, entertainment, customization, word of mouth, and trendiness (Kim and Ko, 2012; Godey et al., 2016). Intimacy and immediacy are also crucial components which brands need to apply in order to succeed in the digital landscape (Kim, 2017; Lee, 2017). These dimensions have to be integrated throughout the consumer journey which starts with awareness, followed by consideration, engagement, purchase then loyalty (Edelman, 2010). Throughout the journey, experience and relationships are built and developed (Itani et al., 2019). In each stage, consumers are highly influenced by the content strategy of the brand, which makes it imperative for companies to implement it in the right way that is relevant to their target market (Farah et al., 2019). Indeed, the findings showed that Middle Eastern female Gen Ys rely today more on luxury fashion start-ups as a way to enhance their trendy and modern style while staying unique. This further complements prior studies on hybridity (Ger and Belk, 1996; Kjeldgaard and Askegaard, 2006) which local start-ups are now enabling and enhancing. While fashion stereotypes and stigmatization in that particular region of the world has been extensively discussed and debated within the context of modernity versus local culture and identity (Sobh, Belk, and Gressel, 2011; Sandikci and Ger, 2010; Sandikci and Jafari, 2013; Ramadan and Mrad, 2017; Sobh, Belk, and Gressel, 2014), this study shows that this clash is being addressed by the high integration of digital media into the lives of consumers alongside the growing launches of luxury fashion start-ups and their usage of digital platforms. Indeed, the findings showed that with a proper implementation of omni-channel content marketing strategy relevant to each stage of the consumer journey, start-ups will be able to reach and retain the highly lucrative female Gen Y consumers in the Middle East. Figure 2 depicts a practical model based on the discussion of the findings and implications that provides start-ups with an easy way to map and identify the proper type of content that they need to implement per consumer stage.

Insert here: Figure 2 – Content marketing strategy per consumer stage

Conclusion and future research

This research study was aimed toward exploring the strategies that luxury fashion start-up brands could use to cater for female Gen Y consumers in Saudi Arabia and the UAE. Accordingly, findings in this research have shed the light on the understanding of female Gen Ys' changing luxury fashion consumption behavior and shaping of their identity within the digital landscape. The identification of their motivations when selecting and engaging with a luxury fashion brand online alongside a suggested detailed strategic framework that would be used in an integrated omni-channel approach have been presented. The study looked into female Generation Y consumers closely and the different touchpoints that played a role in influencing their luxury consumption across different motivation and journey stages. The importance of conducting the research was to build a holistic structure of recommendations for emerging luxury brands in the Middle East market while also investigating strategic solutions for them to use in order to win digitally.

This study is not free from limitations as it was specific to two markets, whereby it considered solely their targeted population, economy and socio-cultural background. Furthermore, given that in-depth interviews and focus groups expand our understanding on given notions, the study's results cannot be generalized beyond the sphere of the examined groups given the limited sample number. Accordingly, future research could tackle other markets and demographics, alongside other brand categories and industries in order to address the generalizability of the research findings. Furthermore, future studies could measure quantitatively the degree of response and effectiveness of each suggested digital strategy and in different motivations settings.

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