

The background of the entire image consists of vertical stripes in a light pink color alternating with white. A central white rectangular box with a thin pink border contains the text.

UNDRESSING THE ARABIAN GULF

Research topic

Victoria's Secret in the Arab Gulf States: Its expansion, success and future

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A full-page photograph of two women posing against a white brick wall. The woman on the left is wearing a white lace bra and matching underwear, with a thick white fur coat draped over her shoulders. She is smiling broadly and has her arm around the other woman. The woman on the right is wearing a pink lace bra and matching underwear, with a thick pink fur coat draped over her shoulders. She is also smiling. The word "CONTENTS" is overlaid in large, bold, red capital letters in the center of the image.

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INTRODUCTION

Victoria's Secret, the famous American lingerie brand, which is known in the entire world vehicles a very confident, sexy and modern image. This brand has proven how they can expand internationally by having various shops in the most important cities.

Victoria's Secret has expanded to the Middle East, more particularly in the modest market of the Arab Gulf States, which can seem surprising according to the image the brand has. It is extremely interesting to see how it expanded and why it is successful there.

In this work, we start by understanding how Victoria's Secret is perceived and how well it operates internationally. Since our focus is on the Arab Gulf States, we will also evaluate each country to properly understand this heterogeneous region.

A section about Victoria's Secret in the Gulf will make it possible for us to see how and when the brand expanded to these states and especially why it works so well in an area with conservative views of women, especially regarding clothing.

Thanks to precious sources, we will be able to see how the lingerie brand expanded and why it has that much success in the Gulf. This will lay the basis for the last part of our research.

In fact, the future of Victoria's Secret will be analyzed to see the opportunities and challenges. We will gather enough information to be able to come to a conclusion and see if the lingerie brand can count on this area of the world to augment sales and promote the brand.

CHAPTER

1

VICTORIA'S SECRET

History

Victoria's Secret is an American lingerie retail brand founded in 1977 that also sells beauty products and accessories. Since 1982, the brand is part of the Limited Brands group created by Leslie Wexner, as reported by Victoria's Secret's official company LinkedIn page (2018). As reported by L Brands (2018), the group also owns Victoria's Secret PINK, Bath & Body Works, La Senza and Henri Bendel. Victoria's Secret counts two brand extensions; their clothing line for teenagers called PINK and their sports line under the name VS Sport. Victoria's Secret can be separated in two types of stores. One offers lingerie, beauty products

and accessories and the other, under the store name "Victoria's Secret Beauty and Accessories", strictly offers its beauty and accessories line. For our research, we will focus on the Victoria's Secret full line stores that offer a variety of the brand's products.

Victoria's Secret is a brand that represents itself as feminine, glamorous, sophisticated and desired worldwide, as reported by Victoria's Secret's official LinkedIn company page (2018). To properly understand how this brand functions, we will analyze their communication and marketing strategy.



1.2

Communication and marketing strategy

Firstly, we shall mention its strong communication. In fact, a couple of points should be mentioned to see how the brand communicates. In fact, the Victoria's Secret models, called "Angels", are the focus point concerning their communication strategy. The brand creates an exclusive image by using the most beautiful models on earth to represent the brand.

Secondly, one advantage the brand has in terms of communication is their annual fashion show. The Victoria's Secret Fashion Show has been happening

every single year since 1995 and costs up to 1 million dollars, as reported by Willett (2010). On top of talented performers, famous models, quality lingerie and VIP guests, the brand has been presenting the Fantasy Bra since 2009. It is made out of precious gemstones with a price that can go up to 2 million dollars. This luxurious bra has been created every year by the Swiss and Emirati jewelry brand: Mouawad Jewelry, as reported by Mouawad Jewelry official website (2018). This point shows a link between the Gulf region and one of the key items of the Victoria's Secret Fashion Show.





4: Adriana Lima during the 2016 Paris campaign.
(Farandula, 2016)



5: Bella Hadid and singer The Weeknd at the 2016 Victoria's Secret's Fashion Show
(International Business Times, 2016)

Victoria's Secret, as mentioned, is known worldwide and has various stores all over the globe. The first most influential area of the world is North and Central America counting up to 1100 stores. Another very important area is Europe that has more than 150 stores and finally Asia and the Middle East that both individually count more than a 100 stores, as reported by L Brands (2018).

Victoria's Secret works well in the States and is still going global. However, its provocative image,

underlined by their quite sexualized advertisements, scandalous product names and revealing lingerie can be a potential challenge for them to expand in some areas of the world. Despite this aspect, it seems like the brand is successful in traditional and conservative regions. One particularly interesting place that this applies to is the Gulf region with its 6 principle Arab Gulf States that we will analyze in chapter 2 to properly understand the success of the brand as well as its future in the region.



6: Victoria's Secret store in Las Vegas
(Biz Journal, 2017)



7: Victoria's Secret store in London
(Luxxu, 2017)

CHAPTER

2

THE ARAB GULF STATES

We shall now focus on the Arab States, bordering the Gulf in the Middle East, which is the region for this research. The area is very complex because each country deals with its own issues, whether political or economical. Our research is concentrating on Victoria's Secret's expansion, success, future opportunities and eventual challenges in the region. Therefore, we will underline the main characteristics of the area we are interested in.

The Arab countries bordering the Gulf are: Bahrain, Iraq, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates. Iran also borders the Gulf, on the opposite side of all of the states mentioned previously. This Persian state is a non-Arab state. Therefore, we won't concentrate on it throughout our work.

Our focus will be on the 6 Arab States out of the 7 mentioned above.

In fact, it excludes Iraq. The reason for this is that Victoria's Secret does not operate in Iraq at all, mostly due to the Iraq-Kuwait war of 1990 with the American invasion of Iraq (Baron & Vallaud, 2010, p. 58) as well as the Iran-Iraq war that lasted from 1980 to 1988, as reported by USIP (2017). Both events led to Iraq being an unstable country, thus also not making it a focus in our work.

The 6 Arab states we are focusing on are part of the Gulf Cooperation Council, or GCC, created in 1981, which guarantees cooperation and coordination between the states to avoid any possible conflicts within the region, as reported by Country Studies (1993). We will analyze the situation in each country to be able to gather a summary of the region to understand the brand's success there as well as the potential future of Victoria's Secret, mentioning opportunities and challenges.



8: Map of the Arab Gulf States part of the GCC
(Tehran Times, 2017)



9: The Gulf Cooperation Council symbol
(Naseej, 2016)



10: GCC Member States Representatives in 2017
(The National Interest, 2017)

2.1

Bahrain



11



12



Bahrain is the smallest country out of the 6 Arab states. Its religion is Islam just as all of the 6 Arab countries. Most of its population is urban, meaning they live in cities (Baron & Vallaud, 2010, p. 46).

Economically, they must not only depend on oil, since they do not have enough of it, which creates an uncertain economical future (Baron & Vallaud, 2010, p. 46).



Concerning the media there, the main sources are the TV and Internet. Bahrain is modern with its high skyscrapers, bars, restaurants, shopping centers and various nightclubs. It is also quite tolerant and open and seems to be the most liberal, socially speaking, in the region, as reported by the BBC (2016).



Women do not have to wear any headdress and are allowed to participate in politics as well as vote since 2002, as reported by Kermeliotis (2010). Bahrain was actually the first GCC country to guarantee women's right to vote (Seikaly, M., Roodsaz, R and Van Egten, C., 2014, p. 77).



16: View of Bahrain
(Bahrain Association of Banks, 2018)

2.2

Kuwait



17





This small country is modern, offering various shopping hubs and restaurants, as reported by Carlton Leisure (2015). It is politically open compared to its neighbors.

Kuwait's wealth turns around oil, making 90% of their revenue. (Baron & Vallaud, 2010, p. 60). However, the main issue for the country, as it is for nearly all Arab Gulf states, their dependence on oil needs to change since the future of the resource is uncertain.



The media is big in Kuwait and the population is among the most digitally connected in the region of the Gulf with Saudi Arabia and the United Arab Emirates. The press and media in general are rather open even though it is controlled, especially regarding anything offensive towards religion, as reported by Chapin Metz (1993).



In Kuwait, as reported by the BBC (2017), women are allowed to vote since 2005 and can also take part in politics.



19: View of Kuwait (Vital Certificates, 2017)

2.3

Oman



20



21



Oman used to count on oil for its main revenue. However since 2009 it has been in decline with only 20 years of possible oil exploitation (Baron & Vallaud, 2010, p. 64). Oman is clearly suffering from the low oil prices and their unemployment rate is more than 17%, as reported by O'Toole (2017).



The media in Oman is one of the most monitored of the Arab world. Social media, the press and phone calls are all monitored and censorship is widespread. All medias are taken care of by the government making sure nothing that should be censored goes out in the media, as reported by the BBC (2017).



Women's situation in Oman is more delicate than in other countries of the region because it is rather introvert and conservative thus not focused on promoting women's rights (Seikaly, M., Roodsaz, R and Van Egten, C., 2014, p. 139). However, since 2002 women are allowed to vote and take part in politics. The country is trying its best to unsure women get as much recognition as possible even though religion stays at the center of everything, as reported by Islam in Oman (2018).



22: View of Oman
(Arabian Business, 2017)

2.4

Qatar



23





Qatar, despite being a conservative country, is surely one of the Arab states that has shown some significant growth in the past years, following the UAE, mostly due to immigration. What used to make Qatar's economy before oil was pearl hunting (Baron & Vallaud, 2010, p. 68). However, as the documentary (Imeneo, 2016) explains, oil exploitation is bound to decrease. Thus Qatar's desire to expand tourism in the region thanks to impressive skyscrapers, luxurious hotels and various shopping malls.



The media in Qatar is mostly known because of the international TV broadcaster: Al-Jazeera, owned by the government. This channel approaches various themes and reaches a large target. The Committee to Protect Journalists underlined the importance of journalists working freely and expressing themselves without any fear, as reported by the Committee to Protect Journalists (2017). However, the online world is controlled by the government that makes sure nothing against religion and morals is spread as reported by the BBC (2018).



Since 1999, women have the right to vote and run for office, as reported by Human Rights Watch (2016). However, as reported by King (2017), the majority of women are for the most part completely covered. We will explain how conservative Qatar is regarding women in the section about the United Arab Emirates since the two countries show a similar situation.



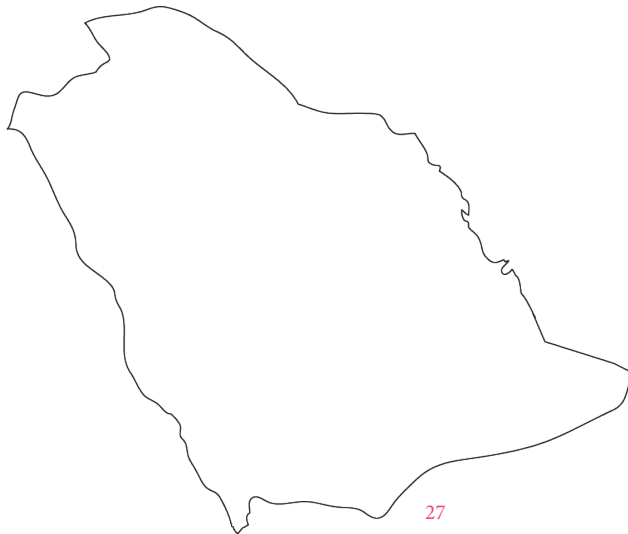
25: View of Qatar (Piacenza Online, 2017)

2.5

*Saudi
Arabia*



26



27



Saudi Arabia is the biggest Arab state, mainly made up of desert. Therefore, cities are not the main part of the country. Saudi Arabia's wealth depends on oil. In fact, they own about 21,9 % of the total global reserves, coming second in the world after Venezuela with 24,9 %, as reported by the Organization of the Petroleum Exporting Countries (2016). Its power also lies on Islam, since it is its birthplace (Baron & Vallaud, 2010, p. 44).



The media in Saudi Arabia is appreciated, especially social media. This is notably due to the amount of people owning a smartphone. However, political websites are banned and what is online is monitored to make sure nothing against religion and the government spreads, as reported by the BBC (2015).



Despite Saudi Arabia being conservative and following tradition when it comes to women, the country has demonstrated modernization and tolerance since September 2017 by allowing women to drive, as reported by the Hubbard (2017). This change demonstrates a country willing to move forward and eventually give more freedom to women. (Seikaly, M., Roodsaz, R and Van Egten, C., 2014, p. 171).



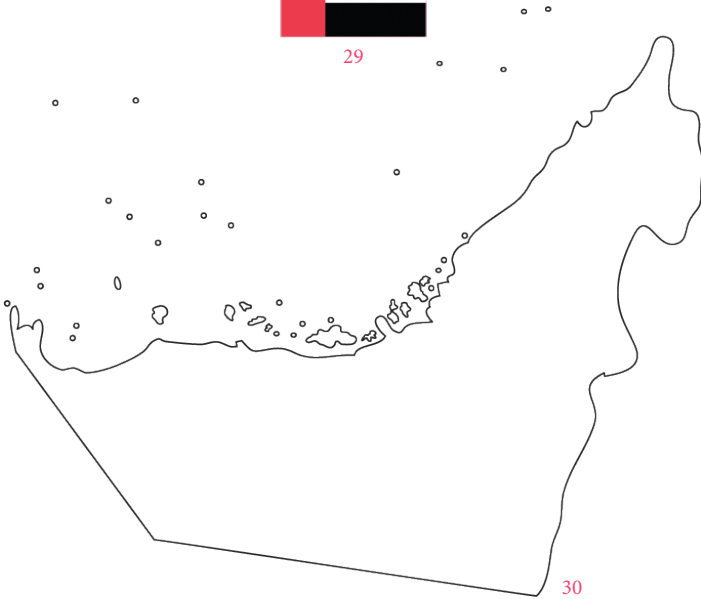
28 View of Saudi Arabia (Iuvmtch, 2017)

2.6

The United Arab Emirates



29



30



Finally, the United Arab Emirates is the last state we will discuss. Dubai is certainly the most popular emirate out of the seven that the country counts. Its economical growth, thanks to oil, has boomed in the last few years and is shown through the modern architecture as well as technological advances and various touristic attractions. Despite this growth, the oil reserves are presumed to last only a dozen years (Baron & Vallaud, 2010, p. 50).



The country is seen as liberal and accepting of many different cultures. Freedom of speech is given but the media content is controlled, especially if anything against religion and the government is published as reported by the BBC (2017).



In terms of the women's situation, suffrage is limited and does not apply to women. Just like Qatar, the United Arab Emirates revolves around its wealth. Since the situation in both countries is quite stable, little has been done concerning issues with women's rights since no resistance or desire for change has been raised. Also, since wealth can be notably demonstrated by women's achievements, the promotion of women education and social presence is often underlined (Seikaly, M., Roodsaz, R and Van Egten, C., 2014, p. 18). The main restriction in the UAE is regarding religion since women must not go against the rules of Islam, which are very strict, as reported by the Human Rights Watch (2016).



31: View of The United Arab Emirates
(Destination Luxury, 2018)

2.7

Overview

After analyzing the situation in all 6 Arab Gulf States, we can come to a short conclusion allowing us to understand the overall market and environment.

Economically, all countries are wealthy. However, for the most modern and advanced countries, their wealth, which depends on oil, might not last for a long time.

Tourism is expanding in most regions and can seem to be a promising aspect for these states.

The media in all countries is incredibly advanced, offering various TV channels and showing an overly connected population through the latest technologies. It creates a population that is aware of what is going on globally, allowing them to acknowledge international brands.

Finally, since Victoria's Secret targets women, the women's situation is a very important topic. As previously mentioned, their rights and treatment is different from state to state.

Interestingly, small changes can be noticed in the most conservative and traditional countries and the desire for change is slowly noticeable.

As we can see, the success of a provocative and modern lingerie brand like Victoria's Secret can definitely come as a surprise. The modernity of the Arab Gulf States overshadows the fact that they stay quite traditional, thus the interest in finding out how the brand expanded and why it is appreciated in the region.



CHAPTER

3

IMPACT OF VICTORIA'S SECRET IN THE ARAB GULF STATES

3.1

Arab Gulf States' Market

Before going into detail on how Victoria's Secret entered the Arab Gulf States and enjoys a certain level of success there, we must mention how the retail market, with a focus on lingerie, functions in the region.

In fact, it's interesting to note that this market, thanks to the wealth acquired from the oil industry, grew tremendously over the past years. The Arab Gulf States' wealth, population buying power and good tax system is the perfect place for international brands to expand to. The UAE and Saudi Arabia represent the two biggest retail markets in the Middle East, as reported by Cegid

(2018), which underlines the power of the region. It is also where Victoria's Secret has most of its stores, as stated in chapter 3.2. Furthermore, since 2014, women in Saudi Arabia are allowed to work as sales assistants in lingerie shops, as reported by Toumi (2014). This underlines the possibilities for women to be closer to lingerie brands, thus also buying more easily from them.



33: Faisaliah Mall in Saudi Arabia
(Arabian Business, 2018)



34: Mall of Qatar in Doha (Zeitoun, 2017)

3.2

Victoria's Secret in the Gulf

Victoria's Secret started to expand to the Middle East at the end of 2014 as a result of the CEO of L Brands International, Martin Waters, expressing his desire to open shops in China and the Middle East, as reported by Eaton (2014).

As we see on figure 1, 2015 showed how promising the Arab

Gulf States were in terms of market attractiveness. This proves that Victoria's Secret managed to expand to the Gulf region at the right time.

Since we focus on the Arab Gulf States we will mention how many Victoria's Secret full line shops the brand has in each country.

Victoria's Secret managed to expand to the Gulf region at the right time.

4th place: Qatar
7th: The United Arab Emirates
17th: Saudi Arabia
26th: Oman
27th: Kuwait

2015 rank	Country	Market attractive-ness (25%)	Country risk (25%)	Market saturation (25%)	Time pressure (25%)	GRDI score	Change in rank compared to 2014	Population (million)	GDP per capita, PPP (thousand)
1	China	66.7	55.7	42.3	96.6	65.3	+1	1,364	13
2	Uruguay	93.3	60.4	68.0	38.9	65.1	+1	3	20
3	Chile	98.2	100.0	13.0	37.9	62.3	-2	18	23
4	Qatar	100.0	89.4	34.3	12.8	59.1	N/A	2	144
5	Mongolia	22.4	19.9	93.1	100.0	58.8	N/A	3	10
6	Georgia	36.5	39.1	78.8	79.2	58.4	+1	5	8
7	United Arab Emirates	97.6	84.0	16.5	33.9	58.0	-3	9	65
8	Brazil	98.0	60.4	45.2	28.0	57.9	-3	203	15
9	Malaysia	75.6	68.8	29.3	52.7	56.6	—	30	25
10	Armenia	35.4	37.1	82.1	66.3	55.2	-4	3	7
11	Turkey	83.1	48.1	40.2	44.8	54.1	—	77	20
12	Indonesia	50.6	35.5	55.1	65.9	51.8	+3	251	10
13	Kazakhstan	49.6	34.2	72.5	50.7	51.8	-3	17	24
14	Sri Lanka	15.8	34.4	77.8	78.8	51.7	+4	21	10
15	India	30.5	39.8	75.7	58.5	51.1	+5	1,296	6
16	Peru	48.9	43.9	58.6	51.8	50.8	-3	31	12
17	Saudi Arabia	78.6	64.4	30.4	27.0	50.1	-1	31	54
18	Botswana	49.2	62.5	33.3	54.2	49.8	+8	2	16
19	Panama	62.3	46.8	49.7	37.6	49.1	-5	4	20
20	Colombia	55.6	49.3	52.0	39.1	49.0	+1	48	13
21	Russia	94.9	28.4	24.5	46.6	48.6	-9	144	25
22	Azerbaijan	33.9	26.9	82.4	46.8	47.5	+8	10	18
23	Nigeria	19.6	8.3	94.0	66.5	47.1	-4	178	6
24	Philippines	39.6	36.0	51.6	60.7	47.0	-1	100	7
25	Jordan	51.1	35.5	64.2	36.8	46.9	-3	8	12
26	Oman	75.0	77.3	24.9	9.8	46.7	-9	4	44
27	Kuwait	81.0	68.1	33.2	0.0	45.6	-19*	4	71
28	Costa Rica	66.9	49.2	38.7	25.1	45.0	-4	5	15
29	Mexico	82.5	56.1	0.2	38.8	44.4	-4	120	18
30	Angola	22.4	9.2	99.4	45.0	44.0	N/A	22	8

Figure 1: ATKEARNEY 2015 Global Retail Development Index page 2

In Bahrain, country that counts 1.4 million inhabitants for 717 sq km, as reported by the BBC (2018), Victoria's Secret counts two stores, as reported by L Brands (2018).

In Kuwait, 4 million inhabitants for 17, 818 sq km, as reported by the BBC (2018), Victoria's Secret counts one store, as reported by L Brands (2018).

In Oman, as reported by the BBC (2017), with 2.9 million inhabitants for 309, 500 sq km the lingerie brand does not have any store located in this country, as reported by L Brands (2018). This point will be analyzed further on, since it is vital to understand why in a country with more inhabitants than Bahrain and Qatar, no Victoria's Secret stores can be found.

Qatar with 2.7 million for 11, 437 sq km, as reported by the BBC (2018) has two Victoria's Secret stores, as reported by L Brands (2018).

In Saudi Arabia with 32 million inhabitants for 2.24 million sq km counts five Victoria's Secret stores.

Finally the United Arab Emirates that has 8.1 million inhabitants for 77,700 sq km, as reported by the

BBC (2017), counts 6 Victoria's Secret stores, as reported by L Brands (2018).

Most of the brand's stores are located in cities, where malls and shopping centers can be found. For countries such as Saudi Arabia, which is primarily made up of desert, all the stores are concentrated around urban areas.

Concerning Oman, after our country presentation in chapter 2, we can understand why the Victoria's Secret full line store hasn't expanded in the region, yet. The "Victoria's Secret Beauty & Accessories" line counts 6 stores in Oman, as reported by L Brands (2018), which underlines the preference for beauty products in the region. The media is also extremely monitored, which also shows how traditional the state is. This can be a barrier to the expansion of an international lingerie brand like Victoria's Secret. We will further address the challenges.

After seeing where Victoria's Secret has some of its stores, it will make it possible to analyze how and why they are successful in the Arab Gulf States.



35: A Victoria's Secret store in Saudi Arabia
(Pop Sugar, 2017)



36: A Victoria's Secret store in the United Arab Emirates
(Dubai Shopping Guide, 2015)

3.3

Analysis of Victoria's Secret's success



37: Chapter on Local Distortion from the
L Brands 2017 Investor handout page 22

Why does Victoria's Secret has so many stores in the Gulf states when the area is known to still be rather conservative? The brand clearly works in the area. In fact, Victoria's Secret even created a dedicated Instagram page for the Middle Eastern and North African region, underlining the power of these places in terms of international lingerie retail despite, once again, their traditional views and morals.

Focusing on the Gulf States, the lingerie brand has 16 full line stores in total in five of the Arab Gulf States when Europe has 24, as reported by

L Brands (2018). This is one crucial aspect that can only prove how influential and attractive the market in the Gulf is for a brand such as Victoria's Secret. There are a couple of reasons why the brand works so well in the region. We will mention the key international marketing strategy of the brand as well as the importance of tourism.

Furthermore, a customer from Dubai will also give her own views on the lingerie brand to further understand what makes Victoria's Secret so desirable in the country that counts the most stores in the Gulf.

The CEO of L Brands international, Martin Waters, underlined one key factor in the latest Investors web handout that shows why Victoria's Secret works well in the Middle Eastern countries. What he mentions is local distortion. This term means that the brand simply adapts to its location. For the Middle East, one thing the brand modified was its underwear assortment, more particularly panties. In fact, the customer's preference concerning under garment is to have a more covering piece of clothing. Therefore, full coverage panties are what the brand decided to go for, for the region. This shows why a very sexy brand like Victoria's Secret can still work outside of its normal market. In fact, local distortion is the way a brand can adapt to a different market from the usual they are used to. This is to make sure the products appeal to the customer in that specific area of the world as reported by Waters (2017).

We can also mention that their visual merchandising is different in the Middle East. In fact, none of the shopping windows show the Victoria's Secret models in lingerie as it is shown in the rest of the world. This is mainly because of how conservative the region is and the brand knows it has to adapt to the views and morals.

An interesting point to mention is an error concerning beauty products the brand made at the beginning of its expansion in the Arab Gulf States. In fact, the scent "Strawberries & Champagne" was banned in Qatar, as reported by Macaluso (2015, because of its allusion to alcohol, which goes against religious beliefs. Therefore, we can see how important adapting to the market we decide to work in is. By adapting, we make sure we present only products that will satisfy that specific type of client.



LEVERAGING OUR CAPABILITIES

LOCAL DISTORTIONS

- High demand for 32 band and XS in China; expanded choices in 32 bands for this market
- Distorted our panty assortment in the Middle East to satisfy customer preference for full coverage panties
- Offer heavier BBW fragrances in response to customer demand

38: Local Distortion explanation from the L Brands 2017 investor handout page 23

Tourism is another reason that makes international lingerie retail so successful in the Arab Gulf States. In fact, as shows Figure 3, the United Arab Emirates is the top country in the Middle East in terms of tourists and is ranked 29th internationally. Qatar comes as the second touristic location in the Middle East followed by Bahrain, Saudi Arabia and Oman. Kuwait is the country of the Gulf that stands further behind.

Despite the desire for tourists to discover new places, they find themselves attracted by what they know back home, meaning international brands, something

Martin Waters also underlines. This is one of the reasons why malls in these Gulf countries offer brands such as Bath & Body Works and Victoria's Secret, as reported by Felsted (2014). Therefore, even though we are talking about a conservative and modest region, tourists come from various cultures and will find themselves buying from lingerie brands known globally. Another fact, principally valid for Qatar, particularly Doha, is that many expatriates like to find products they find back home as shown in the documentary Doha, la folie des grandeurs (2018).

Tourists (...) find themselves attracted by what they know back home.

Country	Rank
UAE	29
Qatar	47
Bahrain	60
Saudi Arabia	63
Oman	66
Jordan	75
Lebanon	96
Kuwait	100
Yemen	136

Figure 2: Middle East and UAE Tourism
in 2017 (Gulf News, 2017)

The last point for this analysis of Victoria's Secret's success is concentrating on the United Arab Emirates, especially Dubai, which is the place where the brand expanded the most. Layal Kaufeler, consumer of Victoria's Secret and from Dubai, answered a few questions in the form of an interview, to show how and why the lingerie brand works so well there.

The main type of consumers found in the Victoria's Secret stores are tourists, which confirms our point of tourism as being a reason of the brand's success, notably thanks to international sales assistants. Young women between 20 and 35 years old buy from the brand, according to Kaufeler, which aligns with the brand's target.

The consumer interviewed seems to particularly appreciate the designs of Victoria's Secret's lingerie but dislikes the shops' overall disposition, which is a personal point of view. Despite this, she mentioned how lingerie works well but beauty products in the Victoria's Secret full line shops get less recognition. One aspect that leads to this lack of success for beauty products in these stores is that there are the "Victoria's Secret Beauty & Accessories" stores available as well, specified in beauty products, which is where consumers would potentially go to buy these specific items.



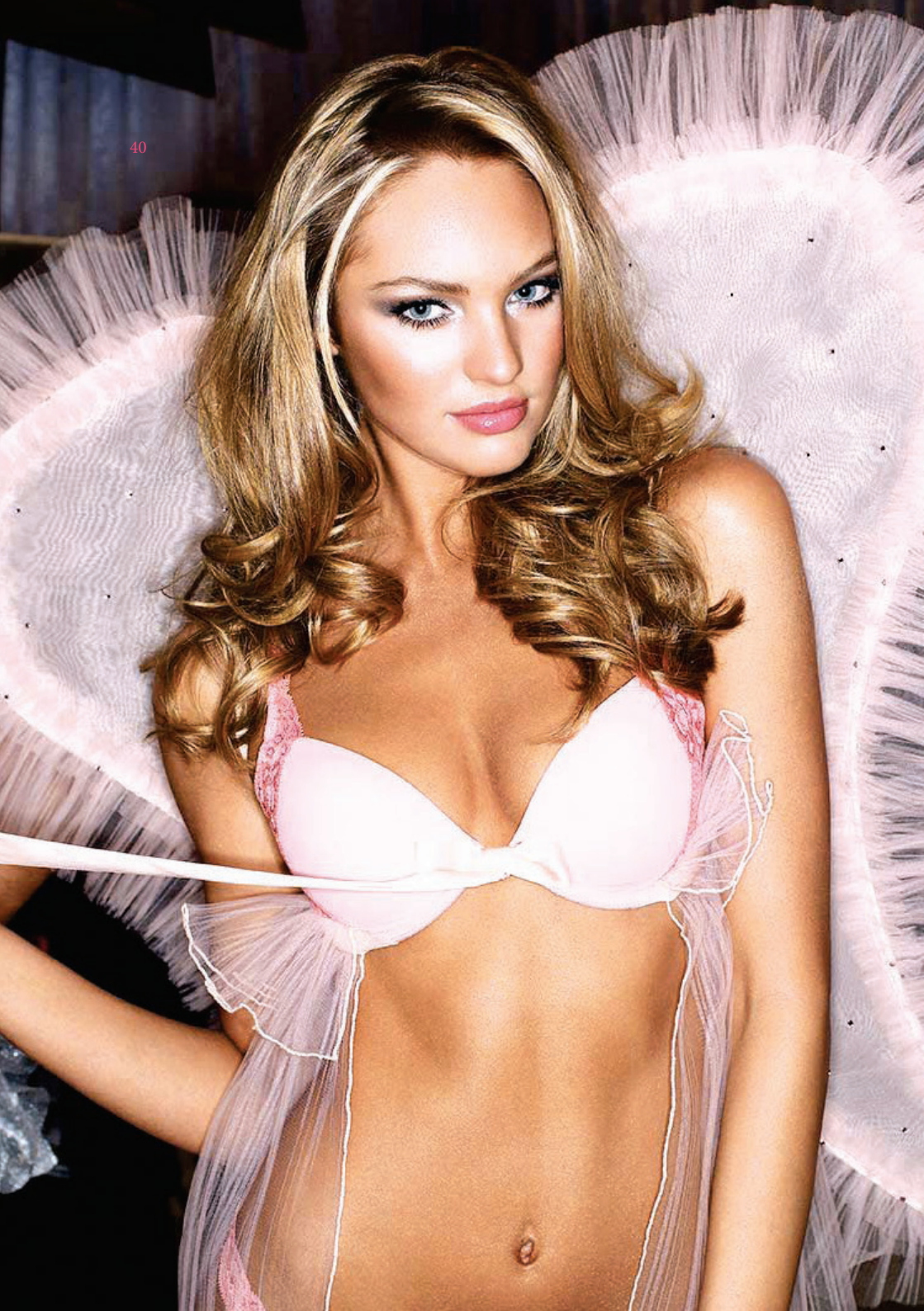
CHAPTER

4

VICTORIA'S SECRET'S FUTURE IN THE ARAB GULF STATES

Victoria's Secret has expanded to the Gulf countries and proved that a lingerie brand with a reputation of being provocative, feminine and modern can work well in a place where morals and views are still very much traditional and conservative.

However, is there an equally successful future for the brand in the region? Are opportunities still growing? Are there any challenges that would unable Victoria's Secret from expanding further in the region or continue its rise? We shall analyze all the positive points of the Arab Gulf States as well as the challenges to come to a conclusion on the future of the brand in the area.



4.1

Opportunities

EVENTS



41

TOURISM



42

RETAIL SALES



43

As we've seen, the market in the Arab Gulf States is promising. This is still going to be the case in the following years. Furthermore, according to Deulgaonkar (2017), the region will see a population growth and the market will develop in a favorable way at least until 2021. The Arab Gulf States' tourism will also increase notably thanks to two major events happening in the next years: the Expo 2020 in the United Arab Emirates and the FIFA World Cup in 2022 in Qatar.

Concerning Saudi Arabia, which already counts numerous Victoria's Secret stores, the region is looking into diversifying its economy from oil to retail, attracting more tourists, as reported by Ben-Shabat, Mukherjee & Petrova (2017). In fact, by focusing on retail sales and tourism, the country is guaranteed to have its economy still working despite oil exploitation that will inevitably decrease in the long term (Baron & Vallaud, 2010, p. 44). As we've seen, Saudi Arabia is modernizing in terms of women's rights which makes it less complicated for a lingerie brand like Victoria's Secret to open more stores in the region.

Kuwait is also trying to diversify its economy, since only relying on oil is not an option for the future anymore. The country is in fact trying to reduce its amount of expatriates, that are taking most jobs in the region, and employ more of its own population, as reported by Sophia (2017). A better economy is a hopeful future for brands to expand, since it makes a more stable country.

Bahrain is used to not being able to purely rely on oil since it does not have enough of it. Therefore, many exhibitions and events that happened in 2016, such as the Bahrain International Garden Show, skyrocketed the amount of tourists attracted to the region, as reported by Gulf Insider (2017). In fact, foreign investors seem extremely interested in the region, which makes it a very interesting market for Victoria's Secret's full line stores to expand to more in the future. Bahrain's long term economical situation seems really bright and offers various opportunities for Victoria's Secret.

Finally, Oman's economy could potentially get better in the future, thanks to their desire to focus on tourism, mining and manufacturing, as reported by O'Toole (2017). This is a good opening for Victoria's Secret, which could benefit from more tourism in Oman. In fact, the brand could easily open a Victoria's Secret full line store with a better economy and more diversification in the country. Women's situation is also bettering itself since various clubs and equal opportunities are available for these women who are

able to vote, as reported by Islam in Oman (2018), unlike in the UAE and Qatar.

In regard to opportunities, Victoria's Secret will be able to mainly benefit from tourism in the region, as it has in 2015, if the Arab Gulf States manage to implement any goals they have regarding developing tourism. However, since oil used to be the main source of revenue and is still the main one in most of the states, the post-oil era might be extremely tough for the region, creating a less attractive market for Victoria's Secret.



44: FIFA logo
(World Soccer Talk, 2014)

**EXPO 2020
DUBAI, UAE**



45: Expo 2020 Dubai logo
(Expo Consults, no date)



46: Bahrain International Garden Show
(Polarmoss, 2016)



47: Saudi Woman
(The Independent, 2017)

4.2

Challenges

WOMEN'S CONDITION



48

OIL DECREASE



49

After analyzing the opportunities of each Arab Gulf States, it is now possible to underline the eventual challenges the region holds for a brand such as Victoria's Secret.

The only country, which future seems to be extremely positive is Bahrain. In fact, as mentioned previously, not only were they the first GCC country to guarantee vote for women and make the traditional headdress optional, but their economical situation is good thanks to tourism and positive aspect linked to foreign investors wanting to invest in the country. Victoria's Secret already counts two full line stores in this rather small country compared to its neighbors, this underlines a bright

future for the brand in the country.

For the other Arab States, since oil is decreasing, it makes the economical situation of most countries tougher.

Concerning the United Arab Emirates and Qatar The main challenge for these two countries and the expansion of Victoria's Secret could potentially be the restrictions women from the area have. In fact, as previously mentioned, both states haven't given women the right to vote, which can greatly affect women's freedom and therefore confidence to shop in an international lingerie brand shop. Tourism is at its peak in both Arab States but the local population must also be taken care of to guarantee Victoria's Secret a warm welcome.

Kuwait and Oman are both trying to diversify their economies in their own most suitable ways. A challenge arises from Kuwait's desire to reduce the number of expatriates. In fact, as seen for Qatar, expatriates are happy to find the brands they know back home in the place they work in. Even though, the economy might get better, the desire for a brand like

Victoria's Secret might not increase, which make it a challenge, especially since the brand only counts one full line store there.

Oman does not have any Victoria's Secret full line store, as mentioned before. If their tourism augments, it will permit Victoria's Secret to open a full line store in the country, guaranteeing them some success.



50: Bahrain's skyline
(Gulf Insider, 2018)



51: Oil pipeline between Saudi Arabia and Bahrain
(MEED, 2017)

CONCLUSION

In conclusion, Victoria's Secret found the right moment and the right way to expand to the Middle East, most precisely in the Gulf. This rich region, which is currently trying to open itself to more international views while still maintaining its own culture, offered countless possibilities for the brand.

Adapting to the region, made Victoria's Secret desirable for the more traditional states and population. They experimented success thanks to tourism, bringing people from all over the world and happy to find international brands available for them. Their success is also due to the modernization and openness of some of the countries, such as the United Arab Emirates.

However, Victoria's Secret hasn't expanded further since 2015 and its future can be as bright as it can be uncertain. In fact, if these countries fail in reaching their goals, such as augmenting tourism or retail sales, to

depend on oil exploitation won't last and could be tough for the economy and growth of these states.

Victoria's Secret needs to also analyze and adapt to the different countries from the region to expand more. In fact, Bahrain, being the most certain future wise, is a place where the brand could open a few more full line stores. Concerning the other regions, since tourism is slowly increasing, there is a real possibility for the brand to open more stores as well.

We can therefore say that Victoria's Secret's expansion to the Arab Gulf States is not finished as it is potentially just the start of it. The only factor influencing their further expansion and success is how well the Arab Gulf States will rectify the eventual future issue regarding their economy and give more confidence in women by giving them more rights and freedom.

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BIOGRAPHY

Mélissa Gargiullo is a 22 year old swiss student. In 2014, she graduated with a Maturité Fédérale from Collège Champittet in Switzerland. In 2015 Mélissa took a gap year during which she tutored as a part time job and then moved to Milan in Italy for her studies.

Mélissa graduated with a Bachelor degree in fashion communication and new media at Istituto Marangoni.

In 2017, she was an intern at the Geneva Centre for Security Policy, where she worked for the marketing team. There, she obtained further knowledge on marketing and communication and values her experience in a field other than fashion.

Mélissa's mother tongue is French but she is fluent in English and has an upper intermediate level in German and Spanish. She also has knowledge of Italian and is currently studying Arabic. As editor of her father's website, a Swiss runner, she enjoys writing online. Mélissa is also at ease with softwares such as InDesign and Photoshop, which allow her to further explore her creativity.

Alongside her Master in fashion communication that she will follow in Paris, Mélissa wishes to gather as much experience as possible through internships related to communication. The digital ways of promotion such as websites and social media are the fields that interest the most Mélissa. Social media strategist could be an interesting path for her.

Finally, she will not restrict herself to fashion and is ready to explore other fields such as luxury and sports.

