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**RESEARCH ARTICLE**

## **A Survey-Based Study on Fashion Ateliers in Kuwait: Challenges and Opportunities**

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**ABSTRACT**

This article investigates the loss and challenges of several Kuwaiti fashion ateliers. It also makes recommendations in an attempt to revitalize the business by providing insights into the issues and possibilities that these ateliers face across Kuwait. The research investigates the impact of historical events on high-street fashion enterprises and surveys fashion designers, supervisors, and female clients in Kuwait, drawing on international fashion background. That is, statistics on the impact of the coronavirus epidemic on local ateliers and female customer shopping behavior will be gathered. I hope that this study will heighten awareness about our local fashion studios and pave the way for initiatives that boost the industry's future.

**KEYWORDS**

Fashion Ateliers; shopping malls; Corona Virus Pandemic; Fashion designers; bride wedding; evening party; Dara'a / Kaftan dresses; Lower Diffusion Line; High Street; online shopping

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**1. Introduction**

Local fashion ateliers in Kuwait have been a source of fascination for me since returning to Kuwait back in July 2003 after completing a bachelor's degree in fashion design in the UK. I have observed the disappearance of many fashion ateliers located throughout Kuwait's main municipal areas, which has raised questions about their sustainability and originality. This study aims to investigate the reasons behind the disappearance of local fashion ateliers in Kuwait in the past 4-6 years, particularly due to recent events related to the coronavirus pandemic.

Drawing on international fashion resources, the paper provides a comparative analysis of how high street fashion companies have coped with the crises caused by the coronavirus pandemic. I also look into how many local ateliers produce similar designs, which raises questions about their originality and sustainability with the changing demands of consumers. To gather data, the study will conduct surveys with fashion designers/supervisors and female customers in Kuwait to examine the impact of recent events on the fashion industry and shopping behaviour. The findings of this paper will provide insights into the challenges and opportunities faced by the local fashion ateliers and offer recommendations for revitalizing the industry. The study seeks to identify the factors that have contributed to the industry's struggles, particularly in light of the recent crisis caused by the coronavirus pandemic. By examining the impact of past events on high-street fashion companies, the study will provide a comparative analysis of how the local industry can learn from international practices to enhance its resilience.

The paper will be conducted using surveys with fashion designers/supervisors and female customers in Kuwait. As part of the investigation, I will personally visit, observe and document the latest state of a number of fashion ateliers. Through the surveys, I will gather data on shopping behaviour and the impact of the coronavirus pandemic on these ateliers. Furthermore, the study will also explore the potential for the local fashion industry to develop more innovative and original designs, which could help to revive the fashion industry. Thus, the findings of this paper will contribute to a better understanding of the local ateliers' challenges and opportunities while offering recommendations for supporting their growth. These findings will be a valuable contribution to the

fashion industry in Kuwait through providing insights into how ateliers can remain competitive and innovative in a rapidly changing local market.

I divide this paper into several sections, starting with the literature review, which covers an overview of the international fashion industry. I will also examine the evolution of the local fashion industry in Kuwait and its challenges, including some potential solutions that can be used to address these challenges. In the methodology section, I will describe the study's approach, including the survey questions and data analysis. As for the results section, I will present the findings of the research. I will follow that with a discussion of the implications of the results, the recommendations for local ateliers, and lastly, the study's limitations.

In conclusion, the paper's contribution to the local fashion industry in Kuwait lies in its potential to provide ateliers with insights into how the industry can remain competitive and innovative in a rapidly changing local market. The study's survey-based approach will provide a comprehensive understanding of the industry's challenges and opportunities, enabling fashion designers to develop tailored strategies to support their growth. The findings will also contribute to the academic literature on fashion ateliers in Kuwait, providing further research for future investigation within this field.

## **2. Review of Literature**

### ***2.1 Reflections on International Fashion Companies: Impact of Coronavirus Pandemic and Online Retailing***

Numerous international fashion establishments, both big and small, have been adversely affected by the outbreak of SARS-CoV-2, which caused the COVID-19 pandemic. The pandemic, which lasted from early 2020 to 2022, led to government shutdowns and the enforcement of curfews and full lockdowns around the world, resulting in the classification of retail shops operating in high streets and indoor shopping malls as "non-essentials." This prevented the general public from physically interacting with each other in close proximity to prevent further spread of the virus. As a result, retailers suffered, and people's livelihoods were affected, causing social morale to reach an all-time low in 2020 and 2021 (Bruce, 2020; BEHRMANN, 2021).

The knock-on effect of the pandemic was felt across all regions of the world, including the United Kingdom, where two fashion retailers, Arcadia Group Ltd and Debenhams plc, ceased to exist physically and now only operate online (Ziady, 2020). The closures of these companies resulted in thousands of job losses (Forrest, 2020).

Arcadia Group Ltd<sup>1</sup> and Debenhams plc were already heading towards financial troubles and losing their appeal even before the pandemic (Butler, 2019). However, the pandemic sealed their fates, and both companies filed for bankruptcy and protection. They were later forced to close completely in 2021, partly because they did not act fast enough in restructuring their retail operations and failed to invest enough in their online shopping infrastructure compared to their main competitors, such as ZARA and H&M.

ZARA and H&M had far stronger and more appealing online experiences when purchasing clothes and accessories online than Arcadia and Debenhams combined (Li, 2019). Furthermore, two online retailers, Boohoo Group plc and ASOS plc, had already seized the online shopping opportunity before the pandemic even existed. Boohoo and ASOS operate solely through online shopping, with no physical retail stores. In 2021, they acquired 100% ownership of the defunct companies of Arcadia Group Ltd and Debenhams plc, but without keeping any of their retail store premises across the UK, resulting in a vast number of empty stores and shops across UK high streets and shopping malls during the height of the pandemic in 2020 and 2021 (Forrest, 2020; CNBC, 2021).

During the golden years of Arcadia and Debenhams, both had large footprints on retail store premises across UK high streets and shopping malls. However, in their last few years of existence, they were no longer nimble nor stylishly relevant in what customers wanted to buy, compared to the likes of ZARA and H&M, who offered Fast Fashion approaches (MUKHERJEE, 2020; Industries, 2021; PARIETTI, 2021).

Today, Debenhams plc no longer exists as a physical department store in the UK, but it does exist online, as do some Arcadia brands through ASOS online. However, Debenhams department stores still exist in the Middle East region, both as physical department stores and online. Boohoo Group plc, which now owns Debenhams plc, struck a deal with Kuwaiti company AL-Shaya Co., a franchiser, allowing Boohoo to sell its clothing merchandise within AL-Shaya franchised Debenhams.

### ***2.2 Reflections on local Kuwaiti ateliers: from their rise to their latest struggles caused by Coronavirus Pandemic***

After the discovery of oil in Kuwait in 1933-1938, oil exports began a few years later but were abruptly put on hold due to the outbreak of World War II in 1939-1940 until the end of 1945 (Company, 2012; Rasoul Sorkhabi, 2012). After the war, Kuwait resumed oil exports from 1946 onwards, and a few years later, in the 1950s, Kuwaiti oil brought in the revenue needed to transform the country into a modern, affluent state. This led to the establishment of government institutions such as those in health,

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<sup>1</sup> Previously the parent company of fashion retail brands such as Topshop, Topman, Miss Silfridge, Wallis, Warehouse, Burton, Dorothy Perkins, Evans, and British Home Stores (BHS).

education, information, telecommunication, finance, and defence, as well as private sector companies in trade, commerce, industry, banking, aviation, and more, including The National Bank of Kuwait and Kuwait Airways Corporation, all of which emerged during the early 1950s. This period was Kuwait's Golden Age, famously known as the "Pearl of the Arabian Gulf," a title it held from 1950 until 1982.

As Kuwait became prosperous, more foreign goods and expertise, including labour, started entering the country. Readymade Western-style fashion clothing became popular among customers, but they had limited choices in Kuwait's initial heyday. Clothing items were not always readily available due to limited stocks or slow imports. Additionally, the fashion retail sector was significantly small, with very few stores around at the time. Those responsible for importing readymade clothes into the country - the merchant traders - had limited knowledge of what or how many items of clothing to bring in, not to mention what styles or trends were considered relevant at the time.

Customers had the option to take their purchased items of clothing to a nearby tailor shop. Tailors would deal with customer instructions on garment alterations, if needed, or create an entirely new outfit resembling Western-style fashion attire. Thanks to cheap labour costs, this proved to be a lucrative business among tailor shop owners. Perhaps these tailor shop owners felt the need to establish another type of business after noticing the lack of limited readymade Western-style fashion clothing entering the country and the frustration it may have caused among the general public who desperately needed certain items of clothing at the time. This led the way in opening up a fashion business, not another tailor shop.

During this era, a number of Kuwaiti and other Arab nationals, mainly from Lebanon, Syria, Palestine, and Egypt, most likely women, came up with the idea and decided to start their own fashion businesses, known as fashion ateliers<sup>2</sup>. Those who initially started their fashion ateliers were Lahore Fashion, A'Watiff AL-Hai, and Rowriya AL-Ghanim during the early and late 1980s (Abdulkareem, 2022).

In Kuwait, many fashion ateliers tend to occupy the first, second, or both floors of residential apartment buildings, typically located in and around Kuwait's main commercial and residential municipal areas such as Hawally, Maiden Hawally, Jabriya, and most particularly Salmiya. Fashion ateliers usually create a number of different styles of fashion attires for different occasions, mostly for evening wear, consisting of Bridle Wedding, Evening Party, to Dara'a/Kaftans dresses, generally ranging from hundreds to thousands of Kuwait Dinars for just one outfit. Fashion ateliers usually display their latest fashion creations within their atelier premises, allowing customers to enter and view their latest creations. If a customer likes what they see, they will purchase it or have one especially made for them.

After the invasion of Iraq in 2003 on the belief of the "War on Terror", the collapse of the Iraqi government and the capture of Iraqi President Saddam Hussein allowed Kuwait's government, local investors, real estate developers, and contractors to embark on never-before-seen, newer, and larger construction projects throughout the country's history (News, 2004; Editors, 2010). This defined the start of Kuwait's second construction boom, which lasted from approximately 2004 until 2014, a ten-year period (Marcopolis, 2010; Group, 2022). This period defines the opening of new shopping malls across Kuwait, which coincidentally had an adverse effect on some if not many, local fashion ateliers.

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<sup>2</sup> An atelier is a private sector company consisting of workshops and sometimes accompanying retail space within it. It is important to note that the term "atelier" should not be confused with another commonly used French term, "Haute Couture." The latter term refers to the highest form of dressmaking or high fashion. The word "atelier" originated in France and was heavily used in Lebanon and Syria due to their colonial history and influence with France. Lebanese individuals who migrated to Kuwait introduced the word "atelier" to the country, with a mix of their Arabic and French dialect pronunciations (Oxford Learner's Dictionaries, n.d.).



Figures 1a and 1b Selection of Bridle Wedding dresses by, Khalid AL-Modayan in Salmiya, Kuwait.  
Figure 1c Exterior view fashion atelir shop, Khalid AL-Modayan in Salmiya, Kuwait.



Figures 2a and 2b Evening Party and Dara'a/Kaftan dresses by, Malika Charqri in Salmiya, Kuwait.  
Figure 2c Exterior view fashion atelier shop, Moda De Malika, Malika Charqri in Salmiya, Kuwait.

During the second construction boom, many new construction projects were initiated around the country, including new high-rise office towers, residential apartments and private housing, hotels and resorts, schools, colleges, and university campuses, hospitals and clinics, roads, bridges, and new shopping malls (AGI-Architects, 2018; Kapadiya, 2017; Nilsson, 2017). These new shopping malls offered a wider range of clothing options for many different occasions at competitive prices, which many local fashion ateliers could not compete with or match. As a result, a number of customers left the fashion ateliers altogether and began to frequent the new shopping malls instead. The convenience and services that the new shopping malls provided under one roof also made

the experience of going from one fashion atelier to another time-consuming and frustrating for customers, leading to a gradual disappearance in the number of fashion ateliers in Kuwait from around 2010 until the early 2020s (AL-Modayan, 2022).

In 2014, there was a sudden drop in oil prices, which led to a drastic decrease in demand for oil worldwide. Firstly, many countries had an oversupply of oil reserves, making it unnecessary to order more oil (World Bank, 2016). Secondly, America's pursuit of Fracking, extracting natural gas and petroleum from the Earth's deep-rock formations as a new source of energy, though damaging to the Earth's environment (CHO, 2014; McGrath, 2017). Finally, China's industry was slowing down dramatically, leading to less demand for Chinese goods and a decrease in the amount of oil China ordered to run their factories (Reuters, 2014). All three factors had an unexpected negative impact on Kuwait's government oil revenue, affecting both Kuwaiti and non-Kuwaiti purchasing and expenditures, especially when it came to importing and buying clothes and other commodities. This, coupled with the halt of several key construction projects, further weakened local fashion ateliers in Kuwait during a period of negative financial factors in the country.

These challenges have been further exacerbated by external factors, such as the outbreak of SARS-CoV-2, also known as COVID-19 or the Corona Virus Pandemic, which dealt a severe blow to the global economy. The pandemic, which was first reported in late 2019 in China, rapidly spread throughout the world, resulting in government shutdowns, curfews, lockdowns, and social distancing measures. This created a difficult and miserable environment, ultimately leading to the closure of many small and medium enterprise companies (S.M.E), including a number of fashion ateliers in Kuwait.

In response to these challenges, there have been calls for reforming the current laws governing small and medium enterprise companies operating in Kuwait. This includes restructuring and amending loan packages provided by the Kuwait National Fund, which supports small and medium enterprise companies, to help them recover from the impacts of the pandemic. Fortunately, there have been some positive developments for the Kuwaiti economy.

Fortunately, during this period, the price of oil, which is a significant source of revenue for the country, has stabilized thanks to an increase in world demand. This has led to more favourable price levels from around 2021 to 2022, which is a welcome relief for oil exporting countries like Kuwait. However, when it comes to the fashion industry, it seems that many local fashion ateliers in Kuwait have lost their creative edge and are no longer seen as competitive in the international fashion realm. Some customers have expressed that they are tired of the repetitive nature of local fashion ateliers and their emphasis on traditional dresses such as Bridal Wedding, Evening Party and Dara'a/Kaftan dresses. This lack of originality in their designs and garment construction practices may be due to a reluctance to change and an entrenched work ethic, which is impeding their progress in the international fashion industry.

### **3. Methodology:**

This survey-based study employs a quantitative methodological approach that includes data collection and analysis. The study's sample comprises fashion designers/supervisors and female customers of local fashion ateliers in Kuwait. Female participants are sampled because they are the only customers of these ateliers. To accomplish the research objectives, two questionnaire surveys were carried out, one for female participants (customers) and the other for fashion designers/supervisors of local fashion ateliers in Kuwait. The respondents were selected based on their behavioural, social, and financial influences, including their tastes and reflections towards local fashion ateliers, shopping malls, and online shopping.

As an efficient and reliable online approach, I prepared both questionnaire surveys using Google Forms and generated a link to distribute it among participants. This makes data collection a lot faster than if I were to distribute the surveys in the traditional way. The data collected from both surveys was analysed and compared to each other, resulting in valuable findings that support the paper's argument.

The first questionnaire was conducted with fashion designers/supervisors to learn about the challenges and opportunities facing their ateliers, including their perspectives on the impact of the coronavirus pandemic on their businesses. The second online survey was distributed to female customers of local fashion ateliers in Kuwait to examine their shopping behaviour and preferences. The survey questions were designed to learn more about the participants' views on the quality and style of local fashion products. Besides, it also covered questions on their online shopping behaviour during the coronavirus pandemic.

This survey highlights the curiosity of respondents in exploring new and innovative fashion designs, especially more affordable fashion lines. However, the stigma that ateliers are perceived as outdated and lacking in originality, the preference for shopping at malls, poses a significant challenge for many ateliers in Kuwait. The study also revealed a clear trend towards online shopping, which presents an opportunity for local fashion ateliers to expand their online presence and reach more consumers. Therefore, local fashion ateliers should leverage the opportunities presented by online shopping and focus on adapting to new ways of marketing their products.

The present study aimed to investigate consumer behaviour regarding local fashion ateliers and shopping malls in Kuwait. A total of 89 participants (female customers) were surveyed. As for the second survey directed at fashion designers and their supervisors, a total of 24 participants answered the survey. Along with the surveys, I carried out fieldwork where I personally visited 45 fashion ateliers in Kuwait and provided this paper with photographic pictures of the interiors and exteriors of fashion atelier premises, including fashion work practices. Following that, the data analysis aimed to examine the findings from both questionnaires, which included hidden gaps based on behavioural, social, and financial influences, and to identify patterns, trends, and relationships. The findings were presented using colour pie charts to provide a visual representation of the data results.

In conclusion, the methodology employed in this paper is appropriate for accomplishing the research objectives. Furthermore, the use of two different questionnaire surveys provides valuable insights into the challenges and opportunities facing the local fashion industry in Kuwait. The study's sample, the data collection methods, and the data analysis techniques used have been carefully selected to ensure the reliability and validity of the study's findings.

**4. Results:**

The study's results highlight several challenges facing the local fashion industry in Kuwait. Firstly, the industry suffers from a lack of innovation and originality, with many fashion ateliers producing similar designs and styles. Secondly, the coronavirus pandemic has had a significant negative impact on the industry, with declining sales and increased operational costs. Thirdly, customers expressed dissatisfaction with the quality and pricing of local fashion products, leading to a decline in customer loyalty and retention.

However, the study also revealed opportunities for the industry's growth and development. Firstly, customers expressed a preference for creative fashion products, indicating a potential market for such products. Secondly, the online shopping behaviour of customers during the pandemic presents an opportunity for local fashion ateliers to expand their online presence and reach a wider audience.

**4.1 Survey 1 results: fashion designers/supervisors**

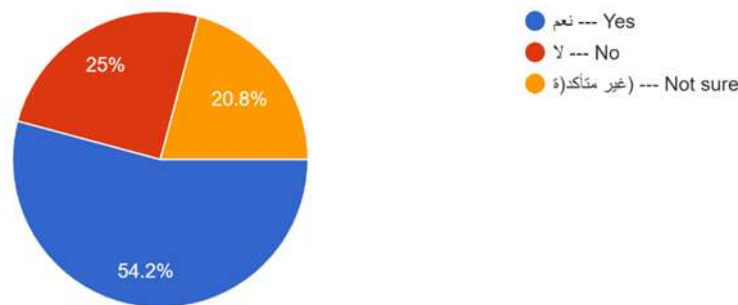


Chart 1: Survey 1 Question 1 results

Question 1 aimed to determine the impact of shopping malls on the fashion atelier businesses. The majority of respondents, 54.2%, strongly believed that shopping malls have had a negative impact on their businesses. In contrast, 25% of respondents indicated that their businesses had not been affected by the opening of shopping malls in Kuwait. The remaining 20.8% of respondents were unsure.

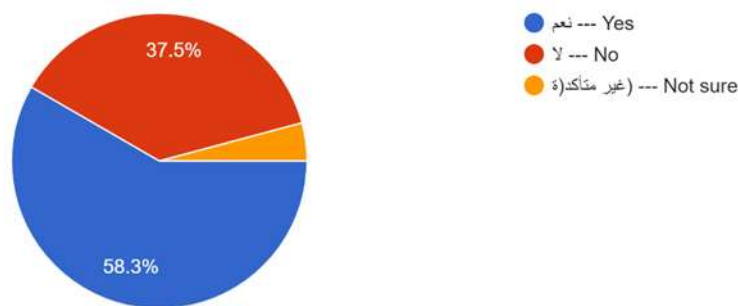


Chart 2: Survey 1, question 2 results

Question 2 looked into the effect of online shopping on fashion atelier businesses. More than half of the respondents, 58.3%, believed that online shopping had a negative impact on their businesses. On the other hand, 37.5% of respondents believed that online shopping had not affected their businesses, while the remaining respondents were unsure.

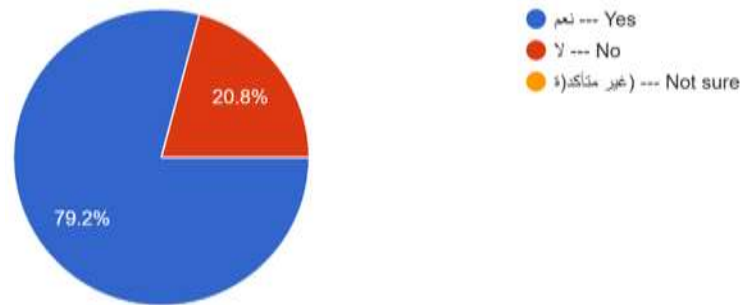


Chart 3: Survey 1, question 3 results

Question 3 aimed to determine the percentage of fashion atelier owners who promote their fashion collections online through their business website or Instagram. The results showed that the vast majority of respondents, 79.2%, promote their fashion collections online. In contrast, 20.8% of respondents were not promoting their fashion collections online.

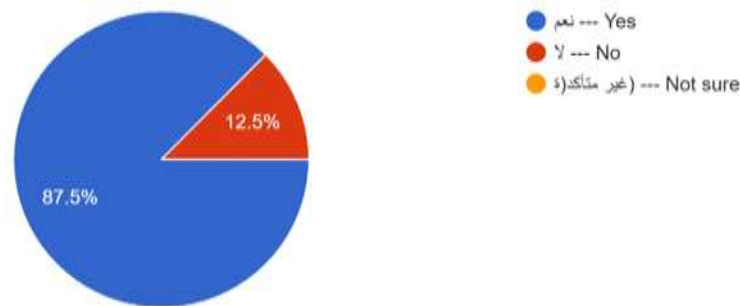


Chart 4: Survey 1, question 4 results

Question 4 aimed to investigate the types of dresses that fashion atelier owners design, make, and sell. The majority of respondents, 87.5%, indicated that they primarily design, make, and sell Bridal Wedding, Evening Party, and Dara'a/Kaftan dresses. The remaining 12.5% of respondents were creating something other than Bridal Wedding, Evening Party, and Dara'a/Kaftan dresses.

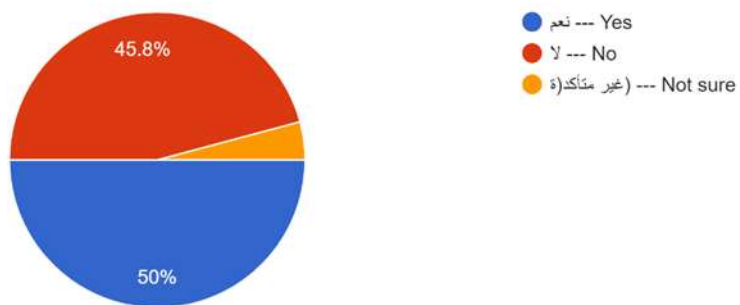
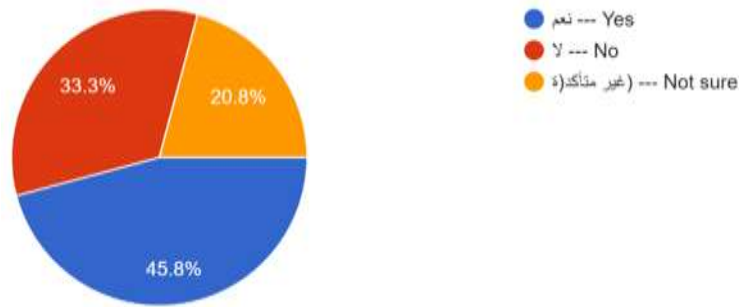


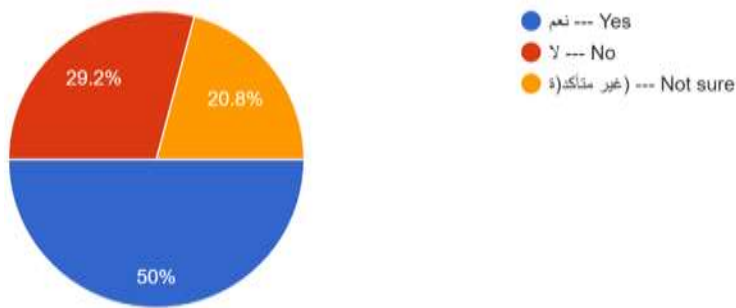
Chart 5: Survey 1, question 5 results

Question 5 explored whether fashion atelier owners would consider creating a "Lower Diffusion Line" or "High-Street Fashion Line" while continuing with their existing Bridal, Evening, and Dara'a/Kaftan dress lines. Half of the respondents, 50%, were open to creating a new and affordable fashion line. The remaining respondents were divided between those who were reluctant to change and those who were unsure.



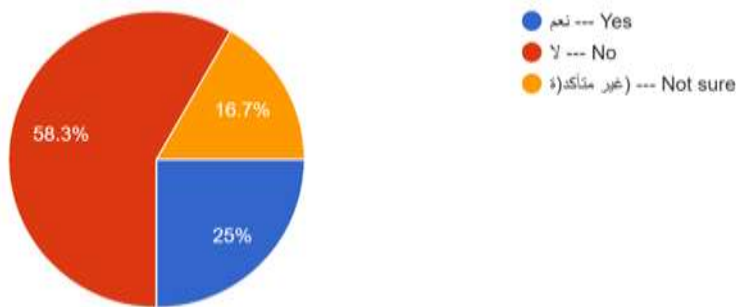
*Chart 6: Survey 1, question 6 results*

Question 6 aimed to determine whether creating a “Lower Diffusion Line/High-Street Fashion Line” would generate more revenue for fashion atelier businesses. Less than half of the respondents, 45.8%, were optimistic about generating more revenue. On the other hand, 33.3% of respondents were pessimistic, and 20.8% were unsure.



*Chart 7: Survey 1, question 7 results*

Question 7 aimed to determine the sales performance of fashion atelier businesses from early 2014 to early 2020. Half of the respondents, 50%, considered the six-year period to be positive for their businesses. In contrast, 29.2% of respondents considered it to be a negative period, while the remaining respondents were unsure.



*Chart 8: Survey 1, question 8 results*

Question 8 explored the sales performance of fashion atelier businesses from the middle of 2020 until late 2022. The results showed a stark contrast to the responses to question 7. While 25% of respondents believed the period to be positive, the majority, 58.3%, indicated that their sales performance had not improved. The remaining respondents were unsure.



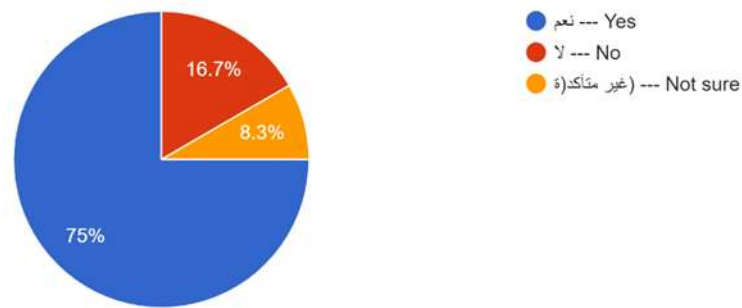


Chart 9: Survey 1, question 9 results

Question 9 aimed to explore whether the coronavirus pandemic had created a more cautious and frugal society, leading to fewer purchases of dresses from fashion ateliers. The results showed that 75% of respondents claimed that customers were not purchasing dresses from their fashion ateliers due to the pandemic. The most common reasons cited were financial difficulties and a lack of occasions to wear dresses. However, 16.7% of respondents reported still purchasing dresses from fashion ateliers during the pandemic.

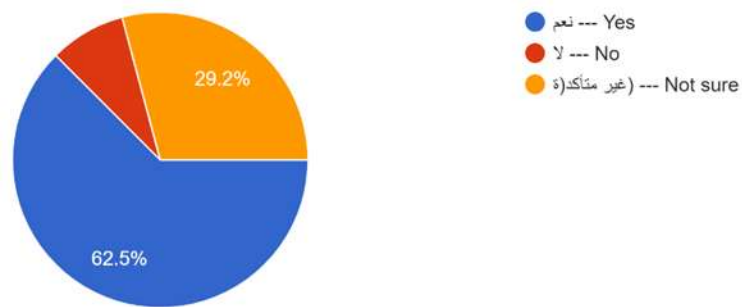


Chart 10: Survey 1, question 10 results

Finally, Question 10 asks if ateliers would be prepared for another coronavirus pandemic outbreak or some other type of outbreak. Nearly Three-Quarters selected “Yes” at 62.5 %. Those selected “No” came at a fraction of a mark, as shown on this pie chart.

Overall, the survey provided interesting results on the current state of fashion ateliers in Kuwait, including the impact of the pandemic, the rise of online shopping, the importance of originality/ creativity in their product making (clothes), and the influence of social media platforms on fashion trends such as Instagram and TikTok.

**4.2 Survey 2 results: local female participants**

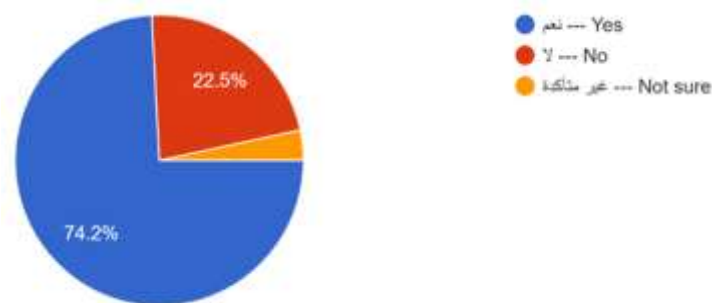
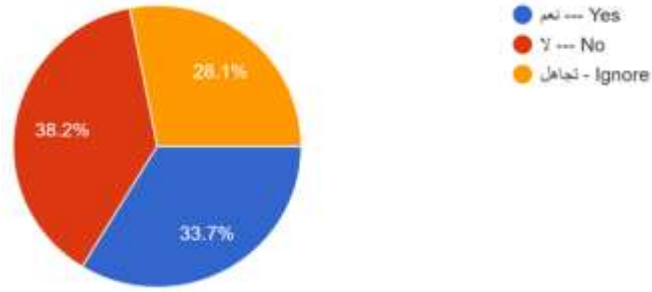


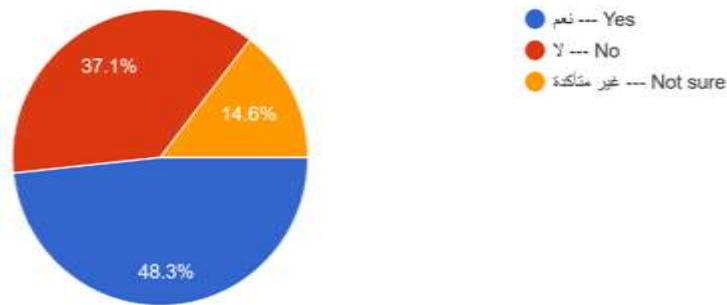
Chart 11: Survey 2, question 1 results

The 1<sup>st</sup> question asked whether participants preferred visiting and buying new clothes from main shopping malls around Kuwait or local fashion ateliers. The majority of participants, 74.2%, selected “Yes,” indicating that they prefer shopping at malls more often than local fashion ateliers. About one-quarter of participants, 22.5%, selected “No,” indicating a preference for local fashion ateliers. The remaining participants were not sure.



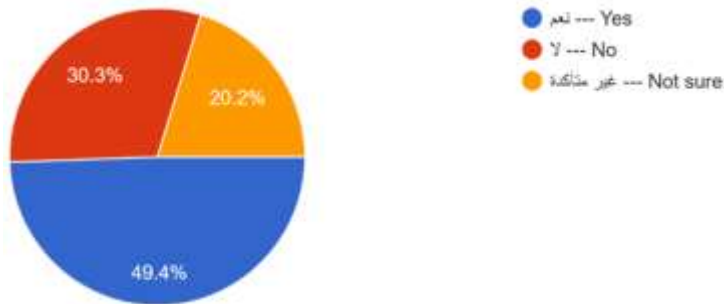
*Chart 12: Survey 2, question 2 results*

For those who selected “Yes” or “Not Sure” in the previous question, the 2<sup>nd</sup> question asked if they would consider visiting a local fashion atelier in the near future. Among those who answered this question, 33.7% were willing to visit a local fashion atelier in the near future, while 38.2% were not willing to visit. The remaining participants chose to ignore the question.



*Chart 13: Survey 2, question 3 results*

The 3<sup>rd</sup> question asked if participants thought that local fashion ateliers were uninteresting and outdated in their fashion creations, with a focus mainly on Bridle Wedding, Evening Party, and Dara’a/Kaftan dresses. Nearly half of the participants 48.3% selected “Yes,” suggesting that local fashion ateliers are no longer stylishly relevant or aligned with female participants' tastes when it comes to purchasing new clothes. About 37.1% of participants selected “No,” and 14.6% were not sure.



*Chart 14: Survey 2, question 4 results*

The 4<sup>th</sup> question asked if participants agreed that most local fashion ateliers are doing the same thing in terms of their fashion designing and dressmaking processes through style, cut, and techniques. Half of the participants, 49.4%, selected “Yes,” indicating that most local fashion ateliers are constantly repeating their fashion work practices. About 30.3% of participants selected “No,” and 20.2% were not sure.

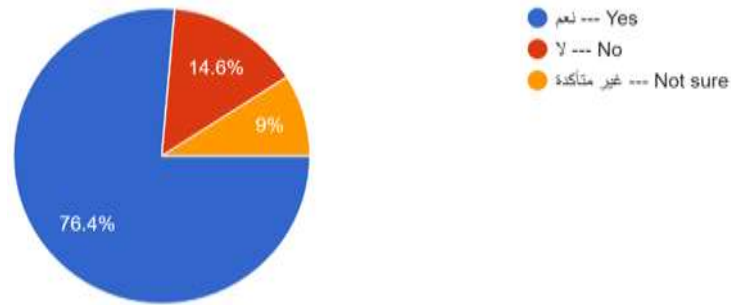


Chart 15: Survey 2, question 5 results

The 5<sup>th</sup> question asked if participants were interested in looking for local fashion ateliers in Kuwait that create new, innovative, and up-to-date fashion designs, reflecting a true sense of originality and avant-garde imagination through their dressmaking processes (style, cut, and technique). Over three-quarters of participants, 76.4%, selected “Yes,” suggesting that more experimental and creative work should be carried out among all local fashion atelier’s fashion designing and garment making. About 14.6% of participants selected “No,” and 9% were not sure.

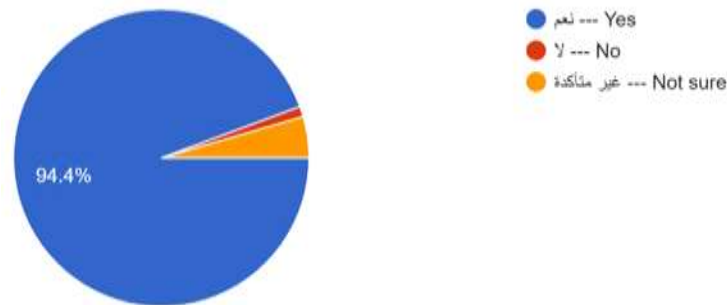


Chart 16: Survey 2, question 6 results

The 6<sup>th</sup> question asked if fashion ateliers should start rethinking how to create a new, simpler clothing line, for example, “Lower Diffusion Line” or “High-Street Fashion Line,” meaning an affordable fashion line for the general public, to be worn either day or night, on the street or at the office. Almost all participants, 94.4%, agreed, suggesting that fashion ateliers in Kuwait should start rethinking and re-evaluating their work ethics concerning an affordable fashion line. The remaining participants either disagreed or were not sure.

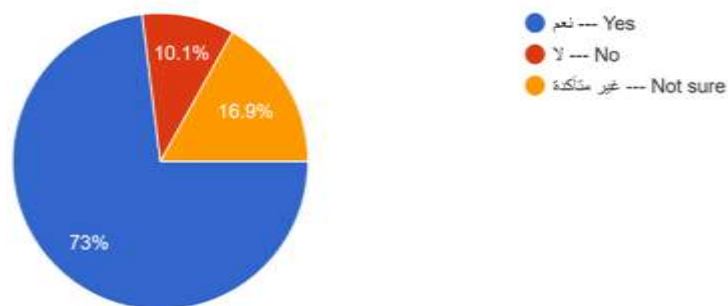


Chart 17: Survey 2, question 7 results

The 7<sup>th</sup> question asked if fashion ateliers should showcase their latest fashion creations at the main shopping malls and department stores across Kuwait, thereby eliminating the need for customers to visit local fashion ateliers themselves. Nearly three-quarters of participants, 73%, selected “Yes,” demonstrating that they were willing to purchase new clothes made by local fashion ateliers but only to be purchased at shopping malls and department stores rather than visiting local fashion ateliers themselves. About 10.1% of participants selected “No,” and 16.9% were not sure.

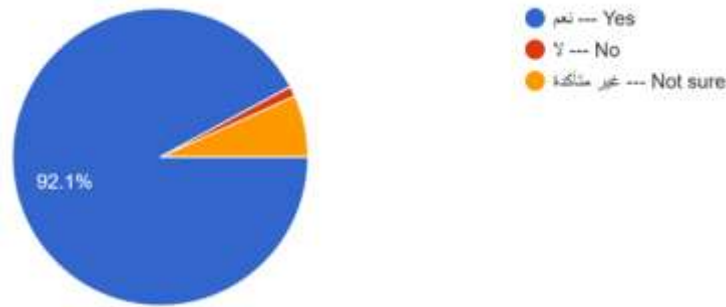


Chart 18: Survey 2, question 8 results

The 8<sup>th</sup> question asked if all fashion ateliers in Kuwait should promote their fashion creations online through fashion websites and Instagram. In response to this question, nearly all respondents, 92.1%, agreed that fashion ateliers in Kuwait should promote their fashion creations online through fashion websites and Instagram. This indicates that there is a high level of support for online marketing and promotion among the survey participants.

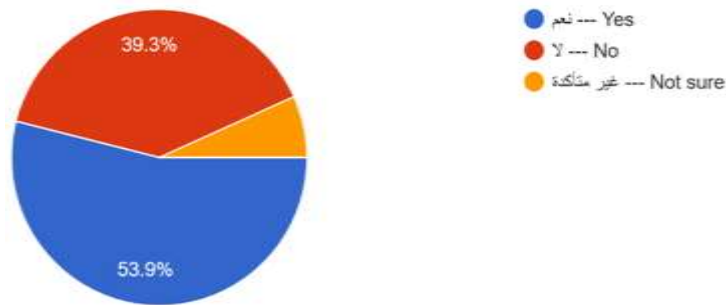


Chart 19: Survey 2, question 9 results.

For the 9<sup>th</sup> question, when asked about their shopping habits in the past year or so, over half of the respondents 53.9% reported that they had increased their purchasing of new clothes online since the coronavirus pandemic outbreak. In contrast, 39.3% reported that they were still continuing to purchase newer clothes at physical retail stores.

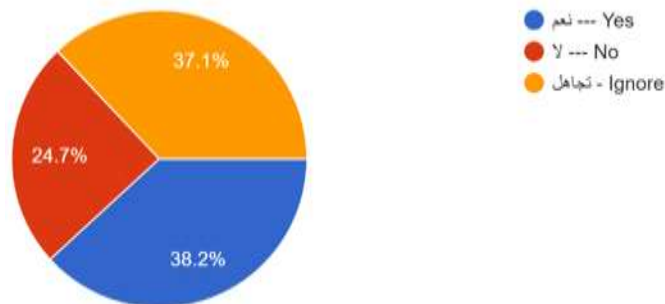


Chart 20: Survey 2, question 10 results

For the 10<sup>th</sup> question, of those who indicated that they had increased their purchasing of new clothes online since the coronavirus pandemic outbreak, 38.2% reported that they intended to purchase new clothes from popular international fashion brands or websites rather than from local fashion atelier brands and websites based in Kuwait. Meanwhile, 24.7% preferred purchasing newer clothes online from local fashion ateliers, while the remaining respondents were either not sure or did not answer the question.

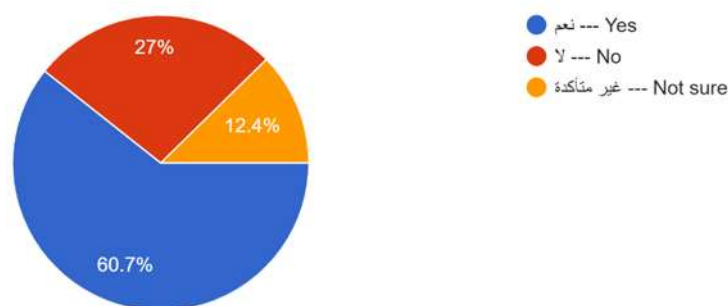


Chart 21: Survey 2, question 11 results

The 11<sup>th</sup> question asked if the negative effects of the coronavirus pandemic, both globally and locally in Kuwait, have made many people more blasé, cautious and frugal when it comes to buying new clothes, whether at physical retail stores or online. For this question, nearly three-quarters of respondents selected “Yes” at 60.7%, indicating a significant impact on their shopping habits. Only 27% selected “No,” while 12.4% were not sure.

Overall, the results of the survey suggest that there is a strong interest among respondents in exploring new and innovative fashion designs, as well as more affordable fashion lines. At the same time, there is also a significant preference for shopping at malls over local fashion ateliers, with many respondents perceiving local fashion ateliers as outdated and lacking in originality. Finally, there is a clear trend towards online shopping, with more than half of the respondents indicating that they had increased their purchasing of new clothes online since the coronavirus pandemic outbreak.

##### 5. Discussion:

After analysing the results of both questionnaire surveys, it has been found that the responses were both diverse and similar. The data was presented through Google Forms' colour pie charts, which enabled a clear visualisation of the data and facilitated discussion of the findings.

Question No. 1 on both questionnaire surveys asked about the impact of shopping malls in Kuwait. The majority of female participants in Survey 1 preferred shopping at malls and department stores, with 74.2% selecting “Yes” compared to 22.5% who preferred local fashion ateliers. This trend suggests a decrease in female participants' interest in local fashion ateliers, resulting in fewer visits. Shopping malls in Kuwait seem to have exceeded the expectations of female participants by offering contemporary and new fashion clothing. However, more than half of the fashion designers and supervisors who participated in the survey believe that shopping malls have negatively impacted their business livelihoods, with 54.2% selecting “Yes.” Shopping malls are perceived as a significant threat to their fashion atelier establishments, which are facing significant challenges. Nonetheless, 25% of respondents did not feel affected, while 20.8% were unsure, indicating a lack of awareness.

Questions No. 3 and 4 in the female participants' survey and the fashion designers and supervisors' survey, respectively, aimed to gather opinions about local fashion ateliers in Kuwait. Nearly half of the female participants, 48.3%, believe that many local fashion ateliers in Kuwait are outdated and not in line with contemporary clothing tastes. Similarly, almost half, 49.4%, of the participants found local fashion ateliers uninteresting and repetitive. The lack of creativity in the designs being offered might be contributing to the decreasing interest in local fashion ateliers. On the other hand, the fashion designers and supervisors' survey revealed that 87.5% of local fashion ateliers in Kuwait follow similar fashion designing and garment construction practices, with most of them focusing on Bridal Wedding, Evening Party, and Dara'a/Kaftan dresses. These results suggest that there is a need for local fashion ateliers in Kuwait to revamp their design practices and create more contemporary and diverse fashion offerings.

Questions No. 8 and 9 from the female participants' survey and questions No. 2 and 3 from the fashion designers and supervisors' survey dealt with the promotion of local fashion ateliers through official websites and Instagram. Not surprisingly, nearly all female participants, 92.1%, agreed that all fashion ateliers in Kuwait should promote their businesses through websites and Instagram. Furthermore, the preference of female participants for shopping for newer clothes online has significantly increased compared to those who still prefer physical retail stores during and after the coronavirus pandemic outbreak. More than half of the fashion designers and supervisors surveyed, 58.3%, believe that online shopping has negatively impacted the number of customers visiting their fashion ateliers, likely due to increased competition. Meanwhile, the majority of these designers and supervisors, 79.2%, reported promoting their brands online, with only 20.8% not utilizing online promotion. Currently, the interaction between female participants and local fashion ateliers is rather weak, creating a dilemma for the publicity of local fashion ateliers. Therefore, these fashion ateliers should start promoting themselves more through the Internet to attract more potential customers.

Question No. 6 from the female participants' survey and question No. 5 from the fashion designers and supervisors' survey focused on creating an affordable and contemporary "Lower Diffusion Line" or "High Street Fashion Line". An overwhelming 94.4% of female participants favoured "Yes," signifying that fashion ateliers in Kuwait should re-evaluate their work ethics towards affordable and contemporary fashion lines. This proves that female participants prefer affordable and contemporary "Lower Diffusion Line/High-Street Fashion Line". They would like to see local fashion ateliers take an experimental approach to clothes making and display new forms of creativity at competitive prices. Half of the fashion designers and supervisors would consider creating a new affordable fashion line, while the other half were hesitant to pursue this direction. Their reluctance could be due to fear of risks, uncertainty of how to proceed, or simply a lack of interest in the concept.

Question No. 7 from the female participants' survey and questions No. 7 and 8 from the fashion designers' and supervisors' survey discussed the sales performances of local fashion ateliers and whether they should sell their collections at shopping malls and department stores. 73% of female participants indicated they would be willing to purchase clothes made by local fashion ateliers, but only if they were available at shopping malls and department stores instead of atelier shops. Before the pandemic, 50% of fashion designers and supervisors saw a positive trend in sales over six years, while 29.2% viewed it as negative. During and after the pandemic, 58.3% saw a decline or stagnation in sales, with only 25% seeing a positive trend. 16.7% were unsure. These findings suggest that local fashion ateliers should consider selling their merchandise at main shopping malls and department stores throughout Kuwait to increase their visibility and profitability.

Questions No. 9 and 11 from the female participants' survey and question No. 9 from the fashion designers and supervisors' survey addressed the negative impact of the coronavirus pandemic on customers' shopping habits. Over half of the female participants, 53.9%, now prefer shopping for clothes online, while less than 40% still prefer physical retail stores. Nearly three-quarters of female participants, 60.7%, said that the pandemic has significantly impacted their shopping habits. 75% of fashion designers and supervisors also agreed that customers have become more cautious about spending, leading to changes in their shopping behaviour. To adapt, fashion designers/supervisors must focus on affordable fashion lines, network their distribution of clothing with shopping malls and department stores, and increase promotion through business websites, Instagram, and TikTok for Business. As more customers turn to malls and online shopping, fashion designers/supervisors must evolve their practices and engage with potential customers in new and innovative ways of clothing.

The data indicates that female participants in Kuwait are more likely to visit shopping malls than local fashion ateliers due to the former's offerings of contemporary fashion clothing. Local fashion ateliers are seen as outdated and repetitive in their work practices. Online promotion of local fashion ateliers is necessary to attract more customers. Finally, there is a demand for affordable and contemporary fashion lines, which local fashion ateliers can consider as a potential avenue for their businesses.

### ***5.1 Strategies for local fashion ateliers in Kuwait to remain relevant and competitive***

In order to avoid future business disasters based on human tragedies, such as the coronavirus pandemic, and the strong dominance that shopping malls have over local fashion ateliers in Kuwait, it is imperative that fashion designers and supervisors start re-evaluating their current work practices. They should review their strongest fashion work elements made previously, such as Bridal, Evening, and Kaftan dresses, and bring them to the next level to produce a new fashion line, known as a "Lower Diffusion Line" or "High Street Fashion Line". This contemporary but affordable fashion line is designed for the general public to wear, either for day or night on the streets or at the office.

To stay competitive and relevant, fashion designers/supervisors should adopt a more modern approach to fashion design and explore new ways of creating contemporary and affordable fashion lines. While they can continue their current practices on Bridal, Evening, and Kaftan dresses, these collections should no longer be their mainline or main source of revenue. Instead, they should become a side-line or separate collection line, offered on request by an individual customer or made-to-order only.



Figure 1a (Previous image) Bridle Wedding dresses by, Khalid Modayan.

Figures 3a and 3b Evening Party dresses and Dara'a/Kaftan dress by, Malika Charqri.

Fashion designers and supervisors can look up to Zara and H&M's creative and business methods to design, make, distribute and sell contemporary affordable clothing at a much smaller scale, to begin with, which could be helpful, inspiring, and lucrative once they revolutionize their current, sluggish, and somewhat old-fashioned fashion atelier businesses. They can still create a wonderful, affordable fashion line through their signature styles, showcasing their identity, origin, and authenticity, their Arabesque embellishments, for example, elaborate/ornate handmade embroidery, which they have developed and perfected so well over the years from their previous fashion creations.

To reach a wider audience, local fashion ateliers can present their affordable fashion line at shopping malls and department stores, which would allow greater exposure within and outside Kuwait. This way, customers would not need to visit fashion designer ateliers to find their latest fashion creations, thus making it the easiest and most preferred way to shop for female customers.



Figures 4a, 4b and 4c Samples of elaborate/ornate handcrafted embroideries applied onto Lace/ Mesh/ Net fabrics of different shapes and sizes by, Mitra AL-Abdullah, Mitra Couture Atelier in Salmiya, Kuwait.

Another helpful way to promote a local fashion atelier is through online shopping, especially if they are in a weakened position. It is considered professional to present a fashion brand and its collection online through their official business website. Additionally, social media platforms such as Instagram and TikTok for Business can be used to promote fashion brands, reaching a wider and younger demographic audience at a much quicker pace.

For those working in fashion ateliers, it is crucial to get out of their comfort zone, broaden their horizon, and capture a newer and younger demographic audience while staying relevant and moving forward with the times. The effects of the coronavirus pandemic on the human psyche have left a sociological damaging impact on the human mind when venturing out to purchase new clothes, resulting in a number of fashion retailers disappearing completely, leaving a vast amount of empty retail stores across high streets and shopping malls, particularly in the Western Hampshire Countries. A similar fate could befall Kuwait, with the adverse effects of the pandemic making the matter worse and resulting in a number of fashion ateliers downsizing or closing their businesses altogether. Therefore, it is crucial for local fashion ateliers in Kuwait to stay competitive, relevant, and innovative to survive the current and future challenges of the fashion industry.





Fig. 5a

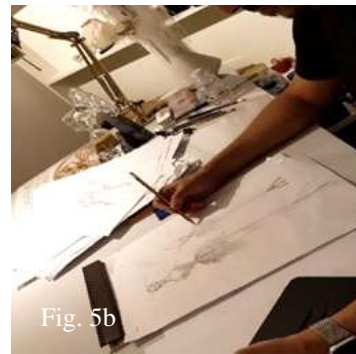


Fig. 5b

Figures 5a and 5b Fashion Designer Khalid AL-Modayan at work sketching a dress inside his fashion atelier in Salmiya, Kuwait.



Fig. 6a



Fig. 6b



Fig. 6c



Fig. 6d

Figures 6a, 6b, 6c and 6d Fashion technicians at work, cutting and sewing dresses inside Moda De Malika Atelier, Malika Charqri in Salmiya, Kuwait.



Fig. 7a



Fig. 7b

Figures 7a and 7b Row of finished sewn-up dresses hanging on a rail inside Moda De Malika Atelier shop, Malika Charqri in Salmiya, Kuwait.

**6. Limitations and research recommendations:**

The use of Google Forms to collect data from female participants and fashion designers/supervisors proved to be a useful and informative tool for this paper. However, there were certain limitations that affected the outcome of the study. One of the limitations was the difficulty some participants faced in opening the survey link on their smartphone devices. Some participants were not familiar with the technology or were afraid of catching a virus from an unknown sender, which may have resulted in fewer responses to the survey.

Moreover, the number of female participants could have been higher if they had forwarded the survey link to more people in their contact lists. Unfortunately, many participants did not take this initiative and just left the survey without sharing it with others. In addition, while visiting 45 fashion ateliers in Kuwait's main municipal areas, it was not always possible to meet with every fashion designer or supervisor. Instead, the survey link was passed on to some of their secretaries or close associates, which may have resulted in a lower response rate.

Furthermore, during the initial investigation, the limited sources of information available made it challenging to put together this scientific research. The negative impact of the coronavirus pandemic on the private sector companies in Kuwait was clearly visible, but little was reported on their handling of the situation compared to reports on human life aspects.

Most of the local press in Kuwait focused on medical, health, and social aspects rather than business and commercial aspects, with only a few reports on small and medium enterprise companies. These reports were often vague and did not mention which type of companies were affected, making it harder to obtain information about local fashion ateliers and their coping strategies during the pandemic.

Based on these limitations, it is recommended that future studies use a more user-friendly platform for data collection, and participants should be encouraged to share the survey link with others. Additionally, researchers should consider expanding their sources of information and conducting interviews with key stakeholders to obtain a more comprehensive understanding of the situation.

**7. Conclusion:**

In conclusion, this scientific research has shed light on the ways in which the coronavirus pandemic has tangled the private sector and government in unforeseen ways. Specifically, the pandemic led to unprecedented business closures and lockdowns, affecting small, medium, and large enterprises worldwide and causing ripple effects throughout the global economy. In the context of Kuwait, where local fashion ateliers faced particular challenges, this research has provided important insights into the impact of the pandemic on the fashion industry, including the difficulties faced by retailers considered "non-essential" and the limitations of available information about local fashion businesses.

Although limitations existed in terms of the available sources of information, the two questionnaire surveys conducted for this research have proven to be an essential contribution. While a larger sample size would have provided even greater insights into the thoughts and interpretations of fashion ateliers owners and shoppers, the results have allowed for a thoughtful discussion and comparison of findings, leading to important recommendations for the fashion ateliers in Kuwait.

It is important to note that this scientific research would not have been possible without the unfortunate events of the coronavirus pandemic, which necessitated significant changes in business operations and life in general. If governments around the world had been more alert and steadfast in quickly eradicating the coronavirus, and if there had been a clear business strategy in place for the private sector, the negative effects faced by business retailers and fashion ateliers may have been minimized or mitigated.

Reflecting on the process of this scientific research, it is clear that hard work, patience, and determination were necessary to bring the study to its current state. I am grateful for the contributions of others, including their knowledge, ideas, and support, which have allowed for the retrieval of valuable information for this research. Overall, this study provides an interesting and important contribution to the topic of local fashion ateliers and the impact of the coronavirus pandemic on the fashion industry, and it is hoped that it will inspire further research in this area.

**Acknowledgment:**

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Lastly, I would like to thank all the female participants and fashion designers/supervisors in Kuwait who took the time to complete the questionnaire surveys, as their participation was essential to the success of this research. Their contributions have been integral to the depth and richness of the findings presented in this study.

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