Adhlal للتصميم
Adhlal for design

LET'S DESIGN LOCAL
LET'S DESIGN SAUDI

Enabling the creative journeys of local designers by deeply listening to market demands in the Kingdom of Saudi Arabia

About Adhlal

Adhlal is a venture founded by Nourah Alfaisal in 2018 to serve and champion the local design industry in the Kingdom of Saudi Arabia. Design, in the world of Adhlal, ranges, for example, from architecture and interior design, to visual graphics, fashion, and products.

Our impact mission is to enable a thriving local community of designers, supply chains, mentors, buyers, and patrons. We aim to invest in research, share knowledge, build capacity, and host marketplaces that serve as a true meeting point for supply and demand.

Adhlal endeavors to grow with the Kingdom of Saudi Arabia. Throughout this journey, we pledge to support our local industry, not only as a mentor to homegrown talent and an advisor to government, but also as an investor in an authentic industry that stands for Made in Saudi Arabia.
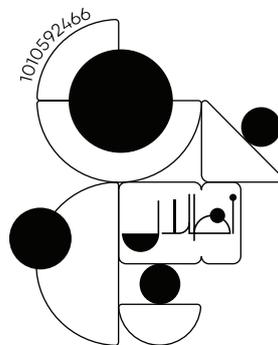
Letter by the founder

Dear readers,

I am absolutely delighted to be sharing with you our second white paper dedicated to the local design community on the occasion of Saudi National Day!

During our first research mission, we listened loud and clear from clients, patrons, and mentors who shared with us their strong vote of confidence to buy local and buy Saudi. They passionately insisted that local designers be given stronger access to inspiring and committed mentorship opportunities. It was therefore only suitable that our second white paper be a loud and clear mentorship focal point for our budding local design industry.

Building on the inaugural white paper of our first paper series, this second white paper is a proposed manual to equip and fortify the local creative journeys of designers in the Kingdom of Saudi Arabia. I invite you to explore its pages and discover the many opportunities we see to strengthen the meeting points between supply and demand in our local market. Inspired by this unique data bank, we present 35 guiding questions that we strongly encourage our local designers to consider and integrate into their creative journeys, product development cycles, and go-to-market strategies.

We could not agree more with our research participants: Buying local is an absolute necessity. And as such, designing for a local audience is imperative!

I would really like to once again thank our focus group discussion participants for joining us in a deep learning experience that continues to bear fruit to local industry-building opportunities! I am honored to be sharing your many voices with our readers in this second white paper, forever committed to equipping our local community with open source knowledge.

I am grateful to my team at Adhlal for really stepping up in service to our local design industry. I am excited about our many adventures that lie ahead as the Kingdom makes even stronger commitments to building up our private sector and civil society.

I would like to thank the research team at The Zovighian Partnership for your deep listening research methodologies and supporting Adhlal's commitment to investing in research and high-quality data.

May this white paper support the knowledge development of you, our readers, as you continue to invest in and strengthen your designs, businesses, teams, and our local design industry.

Yours sincerely,

Nourah Alfaisal
Founder,
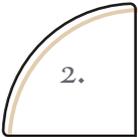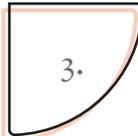Adhlal for design

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Framing local design as industry: Background & key terms

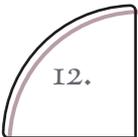We live today in a Kingdom of Saudi Arabia that is investing with full force in culture, heritage, and art, enabling new economies of domestic and international tourism. Our investments into infrastructure, construction, and real estate are an open-air laboratory for design innovation. With Vision 2030 creating a nurturing and cathartic space for us to create and innovate, we have the privilege of building a society that is intentional in its impactful outcomes.

Design is at the core of this potential. Design is first and foremost a means to meet socio-cultural and economic needs. It is a tool to enable productivity and a conduit for feasibility and expression. It necessitates the use of critical thinking to develop new ideas, problem-solve, create, test, and innovate functional solutions for society, businesses, and the environment. Without design, communities and economies cannot connect, engage, and generate value. In so many ways, it is a value creator that we take for granted!

At Adhlal, we are believers in the potential of design, and are advocates of not just utilizing design, but transforming it from the ecosystem it is today into a full-fledged local industry. This industry has already been seeded and bears important roots. Our heritage is testament to its bearings. The design industry of tomorrow can be one that sustainably diversifies our economy from oil and contributes greatly to our society and national brand on the global stage.

For the purposes of this white paper, design is defined as an all-encompassing industry of multiple sectors, ranging from architecture and interior design, to visual graphics, fashion, and products.

Like any industry, it is structured with the economic dynamics of supply and demand, driven by social and regulatory dynamics. The supply-side of this industry is defined as local designers and businesses that are based in and growing in the Kingdom of Saudi Arabia. That includes designers of Saudi nationality, as well as all nationalities who are committed to designing in the Kingdom as their base. The supply-side includes not only freelancers, employed designers, design businesses, and charities dedicated to design, but also an entire supply chain that allows designers to achieve the complete value chain of creative journeys and product development.

The demand-side is characterized as buyers, clients, collectors, and patrons of local design creations, products, and services from all walks of life. Not only does our supply-side include individuals and households, but also enterprises and government entities who also have demands and needs for local design.

The glue that brings both our supply and demand-sides together includes our regulatory environment and infrastructure, education services and mentors, all of which are crucial enablers to elevating and providing for this industry.

It is our privilege to give you an insider view into the ins and outs of our local design industry in the Kingdom of Saudi Arabia, beginning with the pages of this white paper.

Objectives of this paper & white paper series

This second white paper of our inaugural paper series is written for the local design community in Saudi Arabia. It speaks to local designers and their teams, as well as their supply chains and partners.

The data collected for this white paper series comes from the findings and insights of the first Adhlal scientific research mission. We commissioned this research to understand the current state and potential of design as an industry in KSA.

Focus group discussions were conducted in October and November 2018 with both high liquidity and strong purchasing power demand-side industry participants. The demand-side is defined as buyers, clients, and collectors, as well as donors, patrons, and mentors of local design products and services in Saudi Arabia. Our decision to start with the demand-side of the industry is described in the Methodology section of this white paper.

Our research objectives with our demand-side participants were to:
1. Understand local market demands, particularly their needs, requirements, desires, and priorities;
2. Identify market challenges and opportunities, especially dynamics, enablers and disablers, growth drivers, and expected trends; and
3. Explore the capacity of the local industry to serve as a meaningful socio-economic contributor to GDP, economic diversification, and society-at-large.

This paper builds upon the findings of our first white paper in this series, which had examined the rationale and mindsets of our research participants to buy local from the available market offering. This paper offers a guiding manual for local designers to further refine their creative journeys and product development processes, helping designers deliver more demand-centric offering. This starting toolkit aims to help evolve the local market culture into one that invests in trusted designer-consumer relationships. These insights can therefore directly inform creative identities, as well as pricing, marketing, and sales strategies. As such, it offers a direction on how the local design ecosystem can breed homegrown standards to enhance local, regional, and global perceptions of Made in KSA.

We hope this evidence-based series, a gateway to an upcoming industry report, serves as a contribution to the data and literature on the design industry in KSA. We desire that this series brings to light the opportunities for a thriving economic sector, calling on the private sector, investors, academia, civil society, and the government to strategically support the local design ecosystem.

Methodology

RESEARCH DESIGN
Beginning with a demand-side analysis

Adhlal commissioned The Zovighian Partnership to design and conduct our first research mission, focused on understanding the demand-side of the local design industry.

Starting with a demand-side examination allowed us to investigate the extent to which industry dynamics are driven by demand fundamentals. The spirit of this methodological decision was to explore local design from an industry lens, meaning there can be no supply without demand. It enabled us to gain a detailed understanding of economic potential, willingness to pay, and desire to invest in the local offering of design products, services, and talent.

Key research questions

To achieve our research objectives explained in the *Objectives of this paper & white paper series section*, we defined the following research questions:

1. How does the demand-side perceive the design industry in Saudi Arabia today, and how does it interact with the industry at large?
2. Looking at the design industry in KSA today, what are the challenges and opportunities facing clients, investors, and donors when engaging with local designers, manufacturers, and sales teams?
3. What does the local design industry need today in terms of support — regulatory, ecosystem infrastructure, capacity-building, financial, and other — to enable the industry to thrive and become a formally-recognized, high contributing socio-economic force to the GDP of the Kingdom?

Adopting a qualitative research method

Due to the paucity of information on the design industry in KSA, an exploratory, deep listening qualitative approach needed to be adopted. To fully portray the opinions and views of our research participants, focus group discussions (FGDs) were deemed the most appropriate form of inquiry to ensure the collection of valid, reliable, and insightful data.

Each FGD was designed to include six to eight participants, allowing for 90 minutes of rich and open discussions. FGD questions were meticulously and iteratively designed to answer our research questions. Experienced facilitators and notetakers were also rigorously custom-trained for this investigative effort.

To complement the FGD data, short intake forms were also designed and supplied to our research participants at the start of each FGD, in an effort to capture more personal and demographic information.

Study limitations

Given the early-stage interest in studying and researching the local design industry in KSA, one principle limitation in our research was its nature as being the first scientific assessment of the industry. As such, an exploratory research direction was adopted. Despite the limited number of respondents recruited, the insights generated serve as a testbed for future research inquiries.

Our *Committing to further research* section of this *Methodology* section sheds light on the opportunities to further build much-needed local research content and literature on the industry, its dynamics, key market players, and emerging trends.
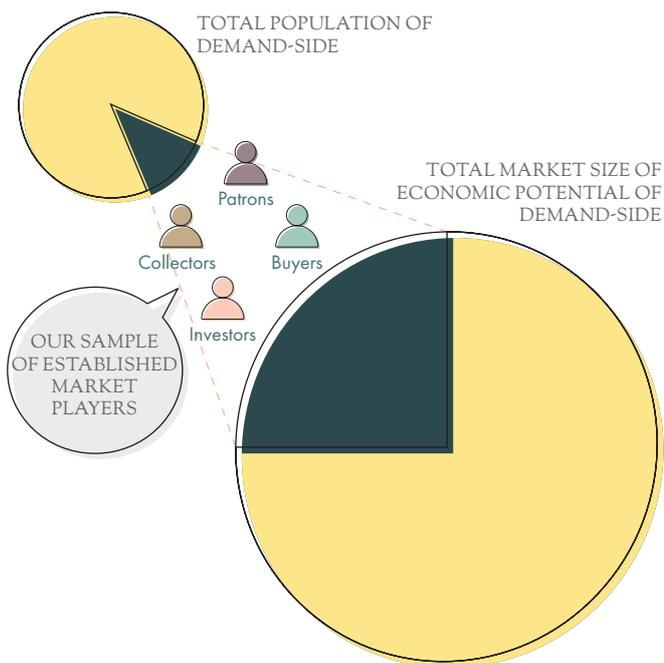
DATA COLLECTION
Research participants

Given our demand-side focus, our FGDs were designed for buyers, clients, and collectors, as well as donors, patrons, and mentors with both high liquidity and strong purchasing power. Participants were invited to self-identify as one or more of these market segments. They were also asked to specify the number of years they have served in such a capacity.

Each research respondent was selectively recruited by Nourah Alfaisal, as opposed to random sampling. This ensured a similar and calibrated level of expertise amongst all our research participants.

EXHIBIT 1:
EXPLORED MARKET SEGMENTS: SAMPLE POOL OF OUR RESEARCH PARTICIPANTS

TOTAL POPULATION OF DEMAND-SIDE

Patrons

Collectors   Buyers

Investors

OUR SAMPLE OF ESTABLISHED MARKET PLAYERS

TOTAL MARKET SIZE OF ECONOMIC POTENTIAL OF DEMAND-SIDE

Sources: Adhlal analysis; ZP analysis

Fieldwork

FGDs were conducted between October and November 2018 at the Adhlal offices in Riyadh. Our strict participation selection criteria allowed us to host and conduct three focus groups, with a total of 18 participants.

Language

While all FGDs were conducted in the English language, the facilitator welcomed responses and participation in the language respondents were most comfortable speaking in, either English and / or Arabic, to maximize inclusivity. Similarly, all formal procedures of communication prior to and following data collection, including recruitment, consent forms, information briefs, as well as intake and outtake forms, were available in both languages.

Research ethics

Participation during data collection was completely voluntary. In line with strict ethical research standards, no financial incentive was offered to participate in any FGD. All research participants were promised complete anonymity; therefore, our research results have been fully anonymized to respect the identity and privacy of all participants. Consent forms detailing a confidentiality agreement and permitting the research team to audio-record and anonymously quote the data collected during the FGD were signed by all participants.

DATA ANALYSIS
Data management & coding

All raw data was meticulously transcribed and / or translated, anonymized, and then coded following the Boyatzis thematic analysis method of qualitative analysis and open coding.

Following the development of a codebook and selective coding, our researchers extracted quotes that represented group sentiments to inform key findings and initial themes. More extensive thematic analysis was conducted via axial coding and memoing for strategic implications. All data collected and coded was presented in a proprietary *Collected Raw Data* compilation to facilitate strategic analysis.

This specific white paper required a critical review of the findings posited by our demand-side research respondents, making sure that all the collected data be carefully contextualized. Any biases, potential for misinformation, and ambiguous remarks were not heavily weighted to ensure our findings and analysis would not be influenced by non-specific or misplaced answers to FGD questions.

Findings & insights

Strategy workshops were then conducted with the Adhlal team, facilitated by The Zovighian Partnership. These workshops examined the final *Collected Raw Data* compilation from a multi-stakeholder perspective to ensure that all analysis conducted would be inclusive in its design and not exclusive in its potential for impact.

The process of data analysis revealed the depth of insights and information garnered from this first commissioned research mission. After publishing our first white paper exploring these many insights, the Adhlal team, with the support of The Zovighian Partnership, moved to publish this white paper to emphasize the learnings designers can adopt and integrate into their creative journeys. Our *Objectives of this paper & white paper series* section details our aspirational impact for our local design community and ecosystem.

Market representation & inferences

It was not intended at this stage to conduct a full-fledged ethnographic data collection of all demand-side market segments. As such, findings cannot be assumed to be representative of the total demand-side market. However, the abovementioned segment of both high liquidity and strong purchasing power is understood to be a very small market size[1] in the Kingdom. Our ability to capture 18 participants does offer indicative representation of the total population in that specific demand-side segment.

COMMITTING TO FURTHER RESEARCH
Examining the supply-side of the local design industry

Completing our first research mission on the demand-side of the industry afforded us a solid methodological base to commence a separate dedicated research mission focused on the supply-side. We look very forward to bringing the insights and findings of both research missions together and presenting our readers and design community with the first industry report on the local design industry in the Kingdom.

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[1]No scientific data exists on the market size of this specific segment represented by our research participants. Any market sizing exercise when this research mission was conducted would have been very assumptions-based and largely qualitatively-defined.

Key findings & insights

Our first white paper in this series detailed five key decision-making factors that drive the local design purchasing and patronage of high liquidity and strong purchasing power clients and patrons. There was general consensus that designers needed to acknowledge that clients want to be treated more and more as consumers and buyers, rather than as donors who are often taken for granted. From there, we got to learn about how patriotism; trust in the designer; original, unique, high quality, and appealing products; as well as purchasing experiences make or break a decision to buy local.

EXHIBIT2:
DECISION-MAKING FACTORS WHEN BUYING LOCAL

1. CONSUMER MINDSET: FROM DONOR TO BUYER

2. PATRIOTISM & SENSE OF DUTY	3. TRUST IN THE DESIGNER	4. PRODUCT DEVELOPMENT	5. PURCHASING EXPERIENCES
		ORIGINALITY & AUTHENTICITY	AVAILABILITY
		UNIQUNESS & EXCLUSIVITY	FACILITATED ACCESS
		QUALITY ASSURANCE	
		PRODUCT AESTHETIC APPEAL	

from donor to consumer

Sources: Adhlal analysis; ZP analysis

MENTORSHIP: A LAGGING MARKET DEFICIT?

While our research participants taught us what excites them and pushes them to buy local, a critical theme emerged in our focus group discussions. Respondents spoke about the importance of offering mentorship and constructive criticism to enable local designers to thrive. Some remarked that this was especially important given the tougher demands of the local market, as well as the rise of global standards and competition.

A respondent explained this from a perspective of a mentor to local talent, saying many of the young local designers he has supported come "not knowing the know-how; how to start, how to produce in high quality, how to market themselves, and there is a big lack [...] of mentorship. You don't find a proper education or mentorship programs that are developed in order to support these people."

Research participants consistently blamed the lack of access to strong education, as well as specialized expertise and capacity-building programs in the local market, making it very difficult for local designers to take their original product concepts and bring them to life.

As one respondent remarked in defense against

the consensus perceptions of poor quality in local design, "I think, before focusing on the creatives, we need to focus on the people, and educating them on how to take it all and support [local designers]."

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- An FGD participant
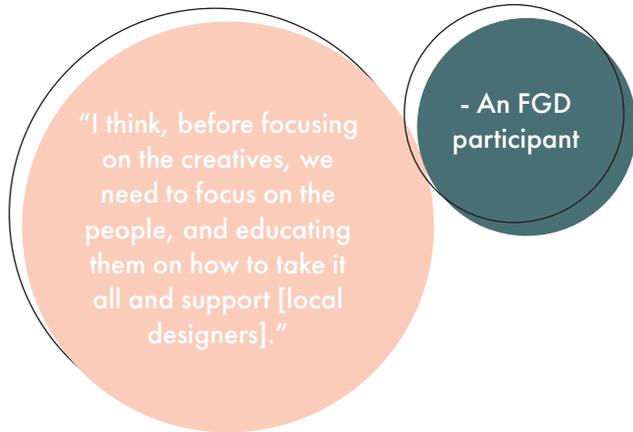
OUR RESPONSE: INFORMATION POWER FROM US TO YOU

As Adhlal, we saw the space to step up and provide what we hope is high quality and inspiring mentorship and guidance for our local ecosystem of designers, their teams, their supply chains, and their partners.

This white paper is a dedicated space to guide and bolster creative journeys, bringing them closer to the demands and needs of the local market we have been exploring in our research. Based on our key research findings and data analysis, this guide can act as a companion for designers, positing key questions that are strategic, often intuitive, and we hope, will become habitual in local design conceptualization, development, and delivery to market.

Our aim for this published paper is that it empowers local designers with a confident sense of information power, equipping our readers with market knowledge that can be translated into tangible actions and decisions.

In the Key Findings section of this guiding white paper, you will find:
- Guiding questions that explore the five decision-making factors to buy local design that we explored in our first research mission;
- A repository of research-based evidence

and information that will allow our readership to be very informed about the market needs and desires, represented by our research participants; and, as such,
- Actionable opportunities to bridge the gap between the supply of local design and the demands of the market.

As a general disclaimer note, this guide is not a conclusive or definitive tool that replaces the unique perspectives, creativity, and market research of local designers in KSA.

DEEP LISTENING TO MARKET DEMANDS

We invite you to pick up the second edition of our first white paper, titled *We buy Saudi We buy local: Purchasing & patronage decision-making mindsets & trends of established buyers & collectors of local design in the Kingdom of Saudi Arabia* for a detailed breakdown of the five decision-making factors we learned are critical for buyers and clients who choose to buy local. We learned that every decision factor is a make or break to buy from a local designer in KSA, or not.

A crucial wake-up call that has emerged on multiple occasions during our commissioned research missions has been the clear disconnects that do exist between the demands of clients and the supply provided by the local marketplace. While we will be exploring this in more detail in our industry report, we also hope this second white paper offers a first step to evolving local design production into demand-centric design and creative journeys.

As designers, we recognize that it is imperative to understand the demands and desires of our market(s) in order to design and deliver products that speak to our clients directly. Thus, deeply listening to the needs and perceptions of the demand side of the Saudi market is imperative to that designers are not disconnected from clients, buyers, consumers, donors, and patrons of design in Saudi Arabia.

This *Key findings* section reminds us of the key definitions and characteristics of each decision-making factor we presented in our first white paper

to you, while going a step further and framing key questions to inform and inspire local creative journeys.

1. CONSUMER MINDSET: FROM DONOR TO BUYER

Our focus group discussions brought to our attention the changing nature in purchasing habits and buying decision-making styles, which strongly governed the impetus to write this second white paper. There is a timely opportunity to prevent the supply of local design from lagging with local market demands. Ensuring a deep listening response to what might become a transformative mindset shift will help ensure that supply and demand do not disconnect.

As one patron of design in our focus group discussions described the growing trend away from treating design like a charitable case: "You need support and space? I give it to you. But now I am very selective with whom I choose and put on display. There is no space for treating design as charity."

> "You need support and space? I give it to you. But now I am very selective with whom I choose and put on display. There is no space for treating design as charity."
>
> - An FGD participant

As such, we have found five strategic questions to be essential for local designers in KSA to consider and stress-test during their business-building and creative journeys:

Q1. Is my current business model based on the expectation that my clients will treat my local design and craftsmanship as an obligation to support charitably?

Q2. How can I engage with my clients to learn from them what their buying needs are and receive their honest feedback about the extent to which my

designs and services are treating them as a donor versus a buyer?

Q3. What are the business opportunities I can seize, given my design identity and craftsmanship, to generate stronger client relationships based on more consumer-based buying decisions?

Q4. How can I evolve my business model, as well as my local designs, product development, and go-to-market strategy to ensure that I am receptive to a changing mindset amongst buyers, and do not fall out of market expectations and relevance?

Q5. How can I integrate client education into my design and sales experiences so that clients can better recognize and appreciate the value-add of my local products?

2. PATRIOTISM & SENSE OF OBLIGATION

National pride and reflection of identity were clear indicators for purchasing local design products amongst many of our focus group discussion participants. This reflection of patriotism often comes in the form of a dutiful sense to support local designers, production, design, and help enable 'Made in KSA' as a national trademark and cultural diplomatic asset.

As such, design products that speak to buyers with a stronger sense of national identity can be more favored amongst local buyers and patrons of design. The trademark of Made in KSA excited many of our research participants, with one speaking to the deficit in the market for identity: Clients "need more Saudi identity" design products. However, importantly, the other decision-making parameters taught us that Saudi identity alone would be insufficient to seal the deal in a purchase and needs to come with other design attributes that are explored further in this *Key findings* section.

Three questions can be relevant for local designers studying how they can achieve a strong sense of identity in their design works:

Q6. To what extent does your design product reflect parameters of local identity?

Q7. What local identity characteristics come hand-in-hand with your design concept and product?

Q8. How can you ensure that local identity and patriotism are not force-fit into your design, and as a result, diluting rather than enriching your concept?

3. TRUST IN THE DESIGNER

The majority of our research participants expressed a strong interest to empower local talent and have a vested relationship with local designers, especially young and emerging talent. Research respondents spoke to the importance of building trust with designers they buy from; a cornerstone for long-term client relationship-building.

Trust was viewed as an iterative build-up over time, mainly through personal interactions with designers. As such, how designers conduct themselves, build rapport with the market, and invest in their personal and professional development are important for clients to see at face-value. Key questions come up to help guide this strategic thinking and efforts:

Q9. How can I build a personable brand that fosters trust and confidence in my products and who I am as a person in front of my clients, prospective buyers, and the market at large?

Q10. How can I develop my personality and character as I evolve in my career as a designer, not just in terms of my hard skills, craftsmanship, and creativity, but also in who I am as a person?

Q11. How can I ensure that there is strong alignment between my personality and values and the design products I am taking to market?

4. PRODUCT DEVELOPMENT
Originality & authenticity

In the face of an undersupply of authentic Saudi identity and Saudi-made design products, a product concept and its symbolism found echo with many of our research participants. As one research participant said, "Original. It has to be original." We learned from our focus group discussions that both originality and authenticity are gaining stronger importance in the decision-making behaviors of buyers, especially those who are

keen to no longer be treated as donors but rather consumers of local design.

Intellectual property management was highlighted throughout our research as an important practice that local designers should dedicate time and resources to, especially before going live to market. With intellectual property regulations in KSA beginning to surface, local designers have the opportunity to provide their design identity and product personalities with a legal confirmation stamp. It was acknowledged that intellectual property rights can help prevent the replication and infringement of identifying features of a local design product. We recognize that this would also help bolster the trust of design consumers and buyers in the legitimacy of a local designer and the credibility of a design product or service.

Three guiding questions help frame the primordial decision-making factors of originality and authenticity:

Q12. Is my product an original design and work from the point of conception and creative development to its packaging and presentation to the market?

Q13. How can I safeguard and protect my designs through intellectual property rights?

Q14. How can I communicate my legitimacy as a designer, whilst also humanizing my professional honest efforts to design and deliver products to my clients?

Uniqueness & exclusivity

Importantly complementing authenticity and originality, we learned from our research respondents that uniqueness and exclusivity were also very important drivers to buy a local design product. Bespoke pieces were viewed as particularly appealing.

An FGD participant explained this, saying, "So, on the question of what compels me to acquire, it's the uniqueness." Another research respondent highlighted this importance, stating, "I certainly think [it is about] the uniqueness of the design, or having something that is custom that you will not find anywhere else." In this sense, uniqueness and authenticity are quite a priority to this demand-side.

On this matter, we identified some questions for local designers to consider integrating into your local creative journeys:

Q15. **What are the business opportunities to introduce uniqueness as a stronger design parameter in my creative journey?**

Q16. **Should I diversify my product portfolio and grow the capacity of my product development cycle to include bespoke pieces?**

Q17. **How can I strengthen my client targeting for clients who are sensitive to by better communicating my custom-made signature designs?**

> So, on the question of what compels me to acquire, it's the uniqueness."
>
> - An FGD participant
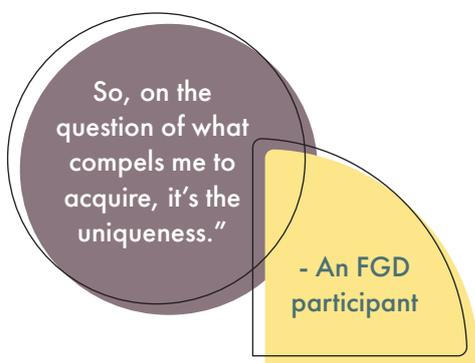
Prioritizing & investing in quality assurance

The high-quality execution of a design was repeatedly highlighted as paramount by our research respondents. Ensuring consistent quality of design specifications for mass-produced products was also brought to our attention. The concerns of quality, as well as inconsistent and poor craftsmanship, were viewed as consequences of the lack of available mentorship in the local ecosystem.

One of our participants explicitly said, "I'll look for [...] craftsmanship" One participant added, "The quality of the product, will drive you and guide you to buy [...]."

As such, we identified guiding questions to help frame a quality assurance and quality control (QA / QC) framework for local designers:

Q18. **Am I regularly capacity-building my own talent and that of my team to become more meticulous in our craft and design abilities?**

Q19. **How can I ensure that the quality of my design or product speaks for itself?**

Q20. **What is my monitoring and control checklist to ensure that my products are maintaining a high quality from the start to the end of my product development cycle, including any outsourced or insourced development and manufacturing delivered by my suppliers and partners?**

As well, we identified questions to frame the business opportunities that can come with a stronger strategic focus on quality:

Q21. **How can quality help me gain leverage and strengthen my design reputation in the market to grow my market share and attract more clients?**

Q22. **How can I integrate quality as a core principle for design in my supplier and client education efforts?**

Product aesthetic appeal

While we learned from our research respondents that many are increasingly sensitive to the aesthetic appeal of a local design product that could either make or break a purchasing decision, we also appreciate that aesthetic appeal is quite personal. Our guiding questions below bring opportunities for local supply to strongly listen to local demand for design:

Q23. **How can I integrate regular feedback from my clients to ensure that my designs meet their aesthetic interests and desires?**

Q24. **What are the trends in the market that can help me better direct my design concepts from an aesthetic perspective?**

Q25. **How can my marketing strategy intentionally introduce more unusual designs that need to be tested in the market, and how can my marketing help my designs gain traction amongst local buyers?**

5. PURCHASING EXPERIENCES
Availability and facilitated access to local products

Given the inconsistent and irregular availability of local design, designers and products that are reliably available were described as more

sought-after amongst our research participants. Poor inventory management, inconsistent stock management between online and in-store purchases, and untimely product delivery to market are important hindrances to closing a sale that must be identified and rectified. Respondents also spoke to the need for a platform that connects the demand for local design with the existing market supply and talent.

As such, we defined a set of questions to help guide the go-to-market offering of local designers:

Q26. **How do I manage my product development cycle to ensure proper inventory and stockage of my designs while assuring quality assurance and control of my products?**

Q27. **What is the balance between maintaining a proper inventory and stock of my designs and managing exclusivity when that is also a requirement?**

Q28. **Does the market know that my supply of local design products exists and to what extent are my designs and products easy to find?**

Q29. **What can I do to strengthen my sales points to my local design products and what is getting in the way of providing facilitated access for my clients?**

Q30. **What platforms and channels can I utilize, and possibly even encourage, to ease market access to my local designs?**

Bringing accountability to local pricing

The majority of our research participants critiqued the prices of local design products and highlighted the need for more efficiently calibrated pricing so that purchasing local products can make more financial sense. Fair and trusted pricing were repeated themes of concern and increasingly a make or break to a local purchasing decision. With the market becoming increasingly price sensitive, ensuring that pricing is transparently communicated so that clients can vouch for fairness is primordial.

- An FGD participant

"If it's a really aggressive price, I don't want to buy this if I feel that it is really, really ridiculous."

Respondents also spoke to the growing tension between quality and pricing. There was an appreciation for high quality costing more. However, there was evidence of lack of patience with poor value for money characterized by unreasonably high prices. As one participant explained, "If it's a really aggressive price, I don't want to buy this if I feel that it is really, really ridiculous." They added, "If it's reasonable and [...] made by someone here or [...] who grew up here, I would get it."

Our last set of guiding questions are defined to inform the pricing strategies of local designers in KSA:

Q31. **Are the clients I am targeting ready to pay for my local design products?**

Q32. **How have I integrated feedback from my clients to confirm my pricing is viewed as genuine, sensible, and with a clear sense of value-for-money?**

Q33. **What are the key contributors to my cost structure and am I receiving fair and transparent prices from each of my suppliers and partners?**

Q34. **Where could I introduce cost-control to make my pricing more competitive?**

Q35. **How can I position myself and become known in the market as a local designer with fairly-priced products and / or services?**

Looking forward: A call to action to invest in our local designers

We hope that this white paper offers a strong guide into ways of thinking, frameworks, and key questions for designers and their teams. It is our ambition that local designers in KSA do take ownership of this data bank and step into a deep listening mode to welcome the many teachings of long-term buyers and patrons of local design.

Importantly, we recognize, as do our research participants, that we cannot expect the local supply side of the market to invest in itself and evolve without access to dependable, long-term, and cutting-edge mentorship, learning and development, and capacity-building. It was why we felt a necessary call to action, as Adhlal, to make sure the evidence and data presented in these pages are a public source of information for all. We do, however, insist that the broader ecosystem join this call to action as well.

MEETING MARKET DEMAND: INVESTING IN LOCAL TALENT

Our FGD respondents often highlighted the deficit in quality training and apprenticeship programs. As one rightly said, "nobody is investing in teaching these people [local designers] quality." We also know that investing in local designers makes tremendous business sense because the growing market demand for dependable and high-quality products will be met more consistently and efficiently. One research participant explained this further, saying "If you give them [local designers] quality, if you teach them how to do what they are doing in a better quality, everybody would buy it in their homes." They added, "but they buy [local design] for charity now."
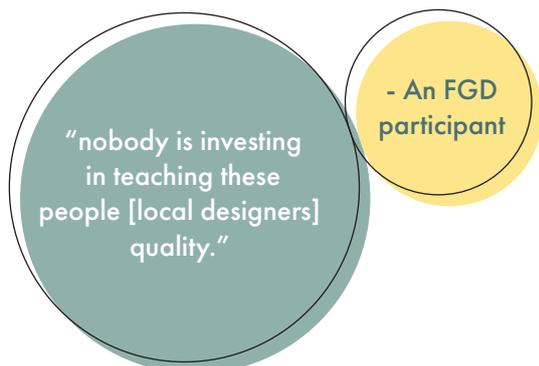
> "If you give them [local designers] quality, if you teach them how to do what they are doing in a better quality, everybody would buy it in their homes."
>
> — An FGD participant

Participants regularly flagged the need to strengthen craftsmanship of products during the execution of their design concepts. It was noted by some participants that developing the necessary ecosystem and culture as a country takes generations of development and investment. "We are really brand new in this artisanat market, and we have to be patient, either as a designer or as a market," explained one of our participants.

> "We are really brand new in this artisanat market, and we have to be patient, either as a designer or as a market."
>
> — An FGD participant

Some participants spoke to the challenges of safeguarding craftsmanship and expertise, making it difficult for a younger generation of eager and energetic local designers to learn from and innovate from a historic foundation of workmanship. "A lot of the traditional [...] crafts," explained one participant, [are] "disappearing because [the] expert practitioners of it are passing away [...] there is like a big gap [...]." Acknowledgment of these challenges aside, the majority of our participants stressed the importance of delivering local products to the market with apparent and notable skilled workmanship.

> "nobody is investing in teaching these people [local designers] quality."
>
> — An FGD participant

"In the end, it is really about talent. So, in your original question about what compels you, what makes you want to buy something... whether it's a table [...] or a painting or a piece of clothing, it's really the universal answer, which is: if you actually like it."

To develop and grow a thriving local design industry, we know that local design can no longer be treated as just a charity case. Our upcoming industry report sheds even more evidence into the industry-building opportunities in KSA today.

NEXT STEPS: COMMITTING TO AND ENABLING LOCAL DESIGN

Commissioning this research and white paper helped us understand in much detail the challenges clients and buyers are seeing local designers face today. The market is calling for local designers to be given the support they rightly need. Mentorship opportunities should no longer be a luxury or privilege of the few; this is why a nurturing local design community has never been so important to encourage. Internship and apprenticeship programs will equip our local designers with various design principles and practices that many of our research respondents are increasingly demanding. Learning and development programs and training curricula have never been so essential for local designers to deep dive into creating their own Made in Saudi expertise.

There is much to be said of the important regulatory and public sector-supported milestones achieved thanks to the leadership of the Custodian of the Two Holy Mosques King Salman bin Abdulaziz and His Royal Highness Crown Prince Mohammed bin Salman bin Abdulaziz. Public entities such as the Saudi Ministry of Culture, Ministry of Commerce & Investments, and the Chambers of Commerce in 2020 have been steadfast in their strong support to the community and industry. Licensing freelancers, cheerleading intangible cultural assets, identifying design fields within the world of culture, and safeguarding our heritage and craftsmanship with strategic budgets and policies is all very empowering. As a country, serving on the UNESCO Executive Board, and just now in September of this year, being elected into the UNESCO Intangible Cultural Heritage Committee

creates an amplified platform for local design.

There is a local demand to buy local that is desiring to be met. The business and investment case are clearly there to help supply and demand meet at a stronger point of market efficiency. Who will pick up the baton to take on this important industry-building challenge? The Adhlal team is committed to doing our part. We look forward to doing so hand-in-hand with the patrons and believers in our local design talent, and invite the public and private sectors to join us in this national pledge.

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About the author

The Zovighian Partnership is a family-owned social investment platform, established by father and daughter in 2013. Deeply invested in R&D, we are committed to delivering ethical, inclusive, and innovative design, research, and prototypes. Our methodologies apply homegrown and sustainable frameworks, models, and mechanisms.

Our team of researchers, strategists, and analysts serve communities, nation-builders, organizations, and governments. We are commissioned at every step of your journey, from early-stage ideas to already-established impact initiatives, programs, and ventures.

The team is privileged to be serving Adhlal, under the vision of Nourah Alfaisal.

The research team of research analysts, fieldwork experts, and data scientists are committed to building information power with integrity. All commissioned research is scientific with customized deep-listening methodologies that safeguard strong participation and self-determination, all to deliver meaningful and ethical data.

Our venture and the family re-invest our financial, political, and intellectual capital into the Peace Collection, our growing peace-building impact portfolio.