

## The influence of religion in market research in Islamic countries: case study of rice market in Saudi Arabia

## La influencia de la religión en la investigación de mercados en países Islámicos: caso de estudio del mercado del arroz en Arabia Saudí

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SUSANA BEATRIZ CHECA PRIETO

EAE Business School  
Joaquín Costa, 41 (Madrid)  
scheca@eae.es

LISARDO DE PEDRO NAVARRO

EAE Business School  
Joaquín Costa, 41 (Madrid)  
[ldepedro@eae.es](mailto:ldepedro@eae.es)

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**Abstract** The relationship between globalization and religion is one with furthering challenges. In globalization processes, when a company considers going into a new market the first concern that raises immediately is the development of an *ad hoc* market research. The launching of a product like rice, which target audience is the housewife, has important challenges in Arab countries such as Saudi Arabia. How can you tackle people who for religious or cultural reasons have limited contact with people who are not in their family environment? How can a firm determine purchasing decision factors or affinity to brands?

**Keywords:** Market research, rice, new launching, internationalization, Islamic religion, Arab women.

**Resumen:** Cuando una empresa se plantea el lanzamiento, o modificación de un producto dentro de su gama, para un mercado determinado, lo primero que siempre se plantea de manera inmediata es la realización de un “Estudio de Mercado” o Investigación ad-hoc. Pero ¿qué ocurre cuando en dicho mercado, por ejemplo, el del arroz, el target o público objetivo – que es el ama de casa- por razones religiosas y culturales tiene limitado el contacto con personas

que no son de su ámbito familiar? ¿Cómo conocer los factores decisores de compra? ¿Cómo saber la afinidad a las marcas?

**Palabras clave:** Investigación de mercados, arroz, nuevos lanzamientos, internacionalización, religión islámica, mujer árabe.

## 1.INTRODUCCIÓN

The relationship between globalization and religion is one with furthering challenges. In globalization processes, when a company considers going into a new market the first concern that raises immediately is the development of an *ad hoc* market research.

The launching of a product like rice, which target audience is the housewife, has important challenges in Arab countries such as Saudi Arabia. How can you tackle people who for religious or cultural reasons have limited contact with people who are not in their family environment? How can a firm determine purchasing decision factors or affinity to brands?

This is the challenge that the Company ARI rice Co with its brand Abu bint had to face when its Board of Directors decided to launch new variety of rice into Saudi Arabia.

On top of difficulties for designing the market research, rice is also a product with many cultural connotations. Therefore, it was compulsory to find an environment of trust where women could speak without any taboo and where researchers could use techniques that allow getting into the reality of the said market, even talking to women whose communication skills are limited by the lack of frequent relationships apart from their private environment.

Some companies have developed alternative methodologies and approaches to help mine consumers and tap into societies seemingly



inaccessible to marketers and marketing researchers through the new philosophy called Al Taqarub (“Getting Closer”)<sup>1</sup>.

Which where the results?

## 2. IS RELIGION IMMUNE TO GLOBALIZATION?

The lowering cost and widespread use of communication and transportation technology, together with the role played by the media has contributed to the blurring of boundaries making the world, apparently, a small village where people and cultures standardize in a face to face contact with each other.

Globalization as a human fact unfolds in multiple aspects and can be approached from any of them. In this way, globalization will have its own definition according to the area in which it is considered. Certainly, it is very difficult to elaborate a definition that covers the entire phenomenon<sup>2</sup>.

From an economic point of view, globalization has its own dialectic. In the words of Guillermo de la Dehesa, it constitutes "*a dynamic process of increasing freedom and global integration of labour, goods, services, technology and capital markets*"<sup>3</sup>.

However, not all countries are globalized since, since they do not all have the same economic resources and, consequently, some of them are moving away from markets, becoming increasingly impoverished.

As Pope John Paul II states in his message *Dialogue between cultures, for a civilization of love and peace* - the "*globalization process increasingly unites the destinies of the economy, culture and society*"<sup>4</sup>.

The influence of globalization on religions is linked to the influence of globalization on the development of human thought.

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<sup>1</sup> This method drills into each cluster (after having segmented the market), identifying emotions that brands can leverage in order to understand the Gulf Arab housewife.

<sup>2</sup> Cancelo, J.L., 2004, *Influencia de la globalización en las religiones*, Ars Brevis: anuario de la Càtedra Ramon Llull Blanquerna, ISSN 1136-3711, núm 10, 2004, págs. 280-332.

<sup>3</sup> García de la Dehesa, *Comprender la globalización*, Alianza Editorial, Madrid 2002, p. 17.

<sup>4</sup> Pope John Paul II, 2001, *Dialogue Between Cultures for a Civilization of Love and Peace*; Message of his Holiness Pope John Paul II for the Celebration of the World Day of Peace, 1<sup>st</sup> January 2001 ([http://w2.vatican.va/content/john-paul-ii/en/messages/peace/documents/hf\\_jp-ii\\_mes\\_20001208\\_xxxiv-world-day-for-peace.html](http://w2.vatican.va/content/john-paul-ii/en/messages/peace/documents/hf_jp-ii_mes_20001208_xxxiv-world-day-for-peace.html)).

Undoubtedly, religion is not immune from these changes, but not in every place religion is just a question of inner nature and, in our case of study, Islam's norms and values are incompatible with the liberal values of globalisation.

Let's give another clear visual example; the message that appears in the Temple of Ayun (Bali). The following can be read at the entrance: "*Your attention please. During menstruation, ladies are strictly not allowed to enter the temple. Thank you*".

From the point of view of consumption, the globalization process makes us have the false feeling that the extension of brands and products beyond their local spheres has generated a practically worldwide unification, where the differences between the different types of consumers are reduced, with habits and tastes becoming more standardized regardless of where we are. However, as we analyse different markets and the use of the products in each of them, we can clearly see that this supposed globalization does not necessarily imply the loss of identity of the more local habits and aspects that, sometimes due to cultural heritage, it is still rooted in consumers, and in other occasions, due to the difficulty of adopting other global patterns, due to the absence of raw materials, or due to the cost of getting them to far destinations.

As an example, we can think about the olive oil market. This product is the main fat of the culinary base of the countries of the Mediterranean area (Portugal, Spain, Italy or Greece). However, in many other countries in northern Europe, America, or Asia, this product is used only as dressing, which is used in very specific dishes and in a highly dosed manner included, for example, the case of Mexico where one of the most typical Christmas dishes is cod that is cooked with olive oil. In many cases its purchase is only made to prepare such a dish.

On the other hand, we can find the case of India, where the use of olive oil is extensive in cosmetics since it is used as shampoo. It implies that its commercialization, as well as the habit of buying and its usage is totally different from any of the countries mentioned above.

As consequence, differences in habits and uses of products mark differences beyond their own consumption, clearly affecting business decisions such as the way of labelling and presenting the product in each country, as well as the sales system itself.

In countries where consumption is frequent, formats are larger and packages less implicative, more basic, mainly plastic. However, in countries where consumption is occasional, most frequent format is

smaller (500 ml or 250 ml), and packages are more sophisticated (mainly cans and glass containers). In addition to format, we must take into consideration the use of the brand itself, as differences in use make it very difficult to use a single brand for all countries and, logically, a global positioning for all of them.

We can find a similar case regarding cookies. The consumption of cookies in Spain is very different from the rest of the world. The predominant use of cookies in Spain is at breakfast, which is quite atypical worldwide, where cookies are used mainly as a snack product. As a result, both the formats and the products themselves are different in Spain and in other countries. In Spain, the most frequent cookie is “María” and packages are usually medium / large (half a kilo or even more). On the contrary, in the rest of the countries, the products are filled with chocolate (“Oreo”), and packages are smaller, which is logically for occasional use.

Beyond products and packages, different habits in consumption implies significant variations in its distribution. In Spain we find extensive cookie displays in supermarkets, with a variety of brands and products. However, in countries where its use is occasional, displays are much smaller, and the offer of brands is very limited.

Thirdly, we can analyse the use of rice, object of this article. This product in Spain has a very restricted use, mainly paella, or Cuban-style, and in a much more residual way, rice with milk or salads. However, this product has wider use in other countries.

In Latin America in general, rice is the basis of its cuisine, being the complement or side dish typical of most of its dishes (which in Spain



could be equivalent to potatoes). If we take into account the consumption of rice in Arab countries, its consumption even has a symbolic meaning, since rice represents wealth and abundance, as rice

is used to show off. In many cases just 20 % of cooked rice is eaten, and the rest is wasted since its function is basically symbolic.

Consequently, variations in consumption generate again important differences in packaging again. In Spain the most frequent package is 1 kilo, given its restricted use.

However, in other countries the most frequent packages are 2 kilos and 5 kilos, and even in Arab countries,

given the special use of rice, the most frequent packaging is 10 Kilos, as can be seen in the chart.

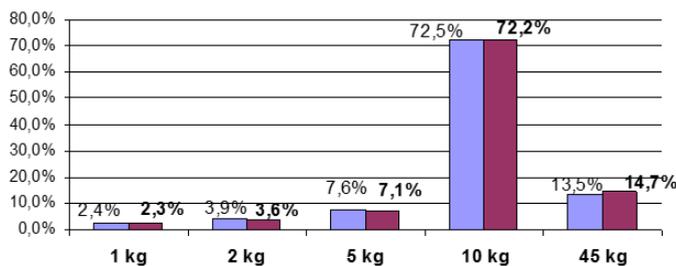
For these reason Grupo SOS, a Spanish company have different brands in each country. In Spain the main brand is SOS, in USA Adolphus and Comet, and for Arabia the main brand is Abu Bint.

## 2. 1. Evolution of Islamic religion

Nearly a quarter of the people on earth subscribe to Muslim beliefs. The Islamic religion is the second largest religion in the world, and it has very specific rules for all facets of life<sup>5</sup>. One controversial belief of Muslims concerns the role of women in society. There are restrictive rules governing the way women should dress and act. Only certain segments of the Islamic faith strictly conform to these rules, but a large number of women follow them step by step.

How women are supposed to dress is outlined specifically (Hijab): Muslim women are required to cover their entire bodies, with the exception of the hands and face. The material of the clothing must not be

**FORMATS AMERICAN RICE – All outlets**



Source: Nielsen

<sup>5</sup> Sánchez González, P., (2014), Marketing e Islam: análisis de la Religión como nueva variable de microsegmentación en España *Historia y Comunicación Social* Vol. 19, núm. esp, marzo (2014) 117-127, p. 125.

transparent and must hang loose. Female clothing cannot resemble men's clothing and should not resemble the common clothing of non-believers.

On top of that, Islamic women are expected to hide any action that may display attraction to men, including eye contact. In consequence, they must keep the gaze lowered.

The status of Islamic women varies in different Muslim countries, which interpret Islamic religion and law in a different way, especially with regard to their attitudes toward women: women are isolated, secluded, forced to pray at home and removed from most sectors of society. Women's status and their freedoms are essentially abolished, specially, after the increase in fundamentalist groups.

### 3. CONNECTING TO CONSUMERS: BRAND EXPERIENCES

Nowadays, brands can not simply be a product or a service that is offered. They must engage consumers, connect people and have a purpose which is led by the consumer itself.

The focus is the user experience more than the products themselves, connecting people's values, on top of ensuring quality in its products and spaces<sup>6</sup>.

How are brands supposed to achieve this objective if their consumer is invisible?

We usually talk about seven reasons<sup>7</sup> why consumers choose brands:

1. Brands provide peace of mind

Consumers do not want problems, but comfort and satisfaction through the products they buy. If brands deliver a positive experience, users are likely to rely on them.

2. Brands save decision making time

If you search a product on any browser, how many results will you find? Picking a brand makes it easier to find what you are looking

3. Brands create difference

If a consumer can find "its" brand in a store, he will instantly decide without a thought to decide.

4. Brands provide safety

<sup>6</sup> Accenture Strategy, 2018, *To Affinity and Beyond, from me to we, the rise of the purpose-led brands*.

<sup>7</sup> <https://microarts.com/insights/7-reasons-why-brands-matter-to-your-consumers/> [Fecha última consulta: 26 de agosto de 2019].

Consumer like brands which provide safety, meaning familiarity and safety, reducing the risk of disappointment.

5. Brands add value

And consumers pay higher prices for brands compared to generic products considering not only the quality, but also their look and feel and their stature in society.

6. Brands express who we are

Brands make a statement not only on who we are, but what we want to be, reflecting personalities, self-perceptions and the feeling of belonging to a group.

7. Brands give consumer a reason to share

Consumers spread the benefit of brands if they have good experiences and become better brand ambassadors than the company itself.

In order to deepen the perception that consumers have of each of the brands in all these aspects, there are multiple market research techniques. In general, these techniques can be framed into those of qualitative types or quantitative types. In both types of research one of the fundamental aspects is the interaction with consumers, so that through structured techniques and a psychological analysis, researchers can determine what location (positioning) the brands have in the mind of the consumer.

If this interaction is, precisely, a limiting factor in Arab society<sup>8</sup>, given its limitation in maintaining contact with people who do not belong to its family environment, this ability to investigate is very limited. Even in the use of research techniques, we find limiting factors. One of the most common techniques in qualitative studies is the projective technique called the "Brands Party". In order to use this technique, participants are invited to simulate a party where the guests are the brands or products belonging to the target market of research. The way to operate in this case is that the participants indicate how the brands interact in said party, for example, if the consumers indicate that they have arrived at the party very well dressed and arranged, usually indicates that said brand it represents the expensive or premium part of the market, and in this way every perception or opinion they have about the performance of the brands, is interpreted and transferred to the market's interpretation mode.

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<sup>8</sup> [https://es.portal.santandertrade.com/analizar-mercados/arabia-saudita/llegar-al-consumidor?&actualiser\\_id\\_banque=oui&id\\_banque=17&memoriser\\_choix=memoriser](https://es.portal.santandertrade.com/analizar-mercados/arabia-saudita/llegar-al-consumidor?&actualiser_id_banque=oui&id_banque=17&memoriser_choix=memoriser).

In this sense, if on the one hand Arab women have very limited the way and way in which they can express their perceptions, and on the other hand we take into account the obvious context change that involves a party between Arab women and a party between people Western, the interpretation and analysis of the information provided by consumers is always more limited and difficult to interpret if the person who analyses it is not very imbued in the cultural context of reference.

### **3. 1. How can brands connect with the Arab woman?**

Arab women have been perceived by many companies as standard monoliths, being unable to unlock their mystery. Far from that idea, Arab women are a heterogeneous group who are unlikely to be all interested in the same product.

NFO<sup>9</sup> identified for the first time Gulf Arab typologies, being able to explore some of them in depth. The first large qualitative study was conducted in 1987 and later followed up in 2001.

As NFO explain, the challenges that NFO had to face to deliver the survey where the following:

1. Arab women operate in a close religious context almost inaccessible.
2. Marketing research companies are primarily operated by expatriates.
3. Traditional market research methods speak modern language very different to Arab way of living.
4. Most clients operate far away from Arab market. Nearest offices are just in Bahrain or Dubai.
5. Focus group discussions and projective exercises, extraordinary useful in market research, face passive consumers reluctant to use their imagination.

Al Taqarub focus on personal reasoning of consumers rather than brands, in order to use the method as a predictive tool to find an opportunity that brands can use.

On top of that, it is also essential to take into account the symbolism that food has in family and in society in Arabia<sup>10</sup>.

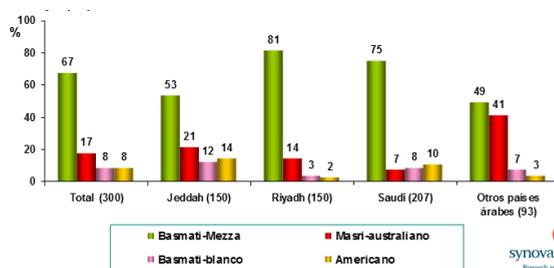
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<sup>9</sup> NFO WorldGroup: Internation market research company, founded in 1946 as National Family Opinion.

<sup>10</sup> Censydiam Reserch Institute.

1. General cultural context: traditionally, they give more importance to the group/family than other countries and women have less freedom. Generous, but just inside the group/family. Attached to their own culture. Pride in their origin / Proud to have Mekkah Al Mukarama in their country. Richness and Opulence.
2. Context regarding meals: Preparing abundant food is part of the duties of the mother. Meals are rich, varied and with full, wholesome and nutritious ingredients. Wholesomeness and fullness and little worrying about fat ingredients.
3. Meals are a sign and source of vitality and energy: power, energy, vitality and dynamism, symbol of stamina and strength.
4. Physical pleasure of great importance: Middle Eastern people attach a lot of attention to good food. Attach very big importance to pleasures of eating Rice is very important (eaten with hands – three fingers). Share one tray of rice placed on the table. Specialty dishes: Kabsa (rice and chicken or meat with special spices)/ Saleek (rice cooked with milk, chicken and spices such as cardamom)
5. Rice is an essential element in everyday kitchen. Traditional and most common meal component Most people eat rice an average of 5/6 times a week (all countries). Rice stands for Middle Eastern norms.
6. Rice is considered to be wholesome and nutritious. Especially carries important elements for children growing up. Important intrinsic characteristics
7. Rice is varied and divers. Rice suits with every meal and is never boring. Can both take the qualities of meal as have a distinct taste of its own
8. Rice is a symbol of saturation and abundance. Rice is main satisfier of hunger, cheap, abundant and will secure a full stomach. Rice enriches the table and will show plenty.
9. Rice has an important aesthetic value: neatness, whiteness or possibility to give many colors, aptness for merging and harmonizing with other colors

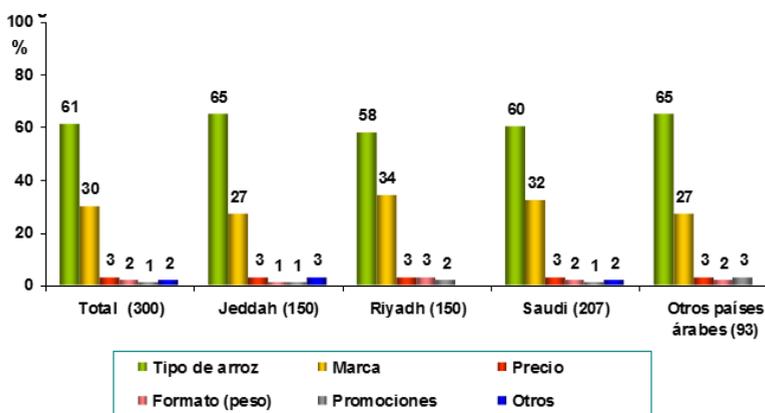
The most commonly used rice in Arabia is the Basmati Mezza type, and its main use is associated with the dishes that



represent the basis of the food of that country.

BASMATI MEZZA	Total (213)	Jeddah (106)	Riyadh (107)	Saudi (144)	Otros p. árabes(69*)
	%	%	%	%	%
Kapsah	82	67	97	84	78
Arroz blanco	32	33	30	34	26
Biryani	28	23	34	31	23
Bokharv	25	30	20	24	28
Magloba	19	9	30	17	23
Mandv	14	19	9	17	9
Savadeyah	11	21	1	10	12
Mafalfal	9	14	5	8	12
Kablv	8	16	-	11	1
Arroz con verduras	8	12	3	6	10
Zirbiyan	6	11	-	7	3

When buying rice, the decisive elements of purchase are mainly related to the brand having the desired variety, secondly, that the brand is trustworthy and longer aspects such as price, packaging or promotions.



### 3.- THE NFO'S METHOD

Regarding cooking and Arab women, Al Taqarub method provided with interesting conclusions. Cooking is the housewife's domain and central to her role as a housewife, as she finds a place where she can demonstrate her talent and attract appreciation from family and friends. Arab women seek admiration and appreciation and find it cooking desserts and foreign dishes.

Cooking is a source of self-expression and creativity, as well as a source of self-worth and esteem.

#### 3. 2. The Experience of Abu Bint Rice (Ari Rice Co from Grupo SOS) in Arabia

SOS Grupo also had its own internationalization experience in Arabia, with its brand Abu Bint (ARI Rice Co). In order to achieve this objective, the company developed a survey that pursued a double objective. On the one hand, it was necessary to understand the habits of uses and attitudes of rice consumption in Saudi Arabia<sup>11</sup>, in order to propose a future strategy for the Abu Bint brand. Secondly, once the strategy was established, it was necessary to evaluate the communication activity that the said strategy implied to implement<sup>12</sup>. Qualitative techniques were used for the first survey, which involved the gathering of women responsible for the purchase who could talk about their habits and relationship with rice. In this sense, and taking into account the strong restrictions imposed by Arab culture on women<sup>13</sup>, the way to carry out these groups was the search for a woman with a certain background who exercised the role of moderator and, based on her network of friends and acquaintances, to organize a meeting of friends at the home of one of them, where they can carry out the field of such research.

This survey was led by Censydiam Institute, which, supported by local staff, was able to gather the necessary information to prepare the conclusions and recommendations.

As for the second survey, its target was to evaluate the advertising campaigns launched as a result of the strategies established for the Abu bint brand. In this case, it was conducted quantitative market research, where women had to go to an office where interviews were conducted. As in the previous case, the biggest problems faced were in the recruitment phase due to the difficulties in contacting potential candidates for the survey. In the same way as for the qualitative study, it was needed to contact networks of known people who, in turn, contacted other people who could carry out the study.

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<sup>11</sup> USDA Foreign Agricultural Service, 2010, GAIN REPORT. Global Agricultural Information Network (<https://www.globaltrade.net/international-trade-import-exports/f/business/pdf/Saudi-Arabia/Processing-of-Food-and-Agricultural-Products-Retail-Foods-2010.html?folderId=3423>).

<sup>12</sup> U.S. Commercial Service, 2010, Trade Promotion and Advertising in Saudi Arabia (<https://www.globaltrade.net/international-trade-import-exports/f/business/text/Saudi-Arabia/Selling-Distribution-Networks-Trade-Promotion-and-Advertising-in-Saudi-Arabia.html?folderId=3423>).

<sup>13</sup> Sánchez González, P; De la Orden, M.C., (2019), *Ética, marketing y finanzas islámicas. El consumidor musulmán*, ESIC, Madrid, 1ª edición, p. 78.

In this case, the survey was developed by a local partner called CRC in association with SYNOVATE, an Eastern company that piloted the analysis of results and conclusions. Since the number of people required to arrive at a representative quantitative sample was higher than in the qualitative study, it was very difficult to be able to start the survey without local logistical support. On the other hand, in all the surveys, people who had to carry out the interviews had to be women, since otherwise they could not have had any interviewee.

All these limiting factors and way of working has as a consequence, the requirements that need to be complied with in Saudi Arabia to be able to gather information, increases mistakes, given that the random factor (essential element in any investigation ) is very limited when participating in the surveys, basically, friends or acquaintances of people who initially serve as a reference.

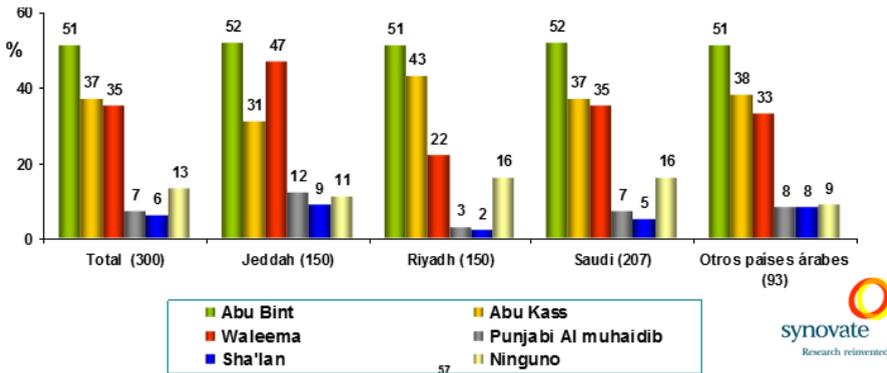


**4.- LEARNINGS AND DECISIONS**

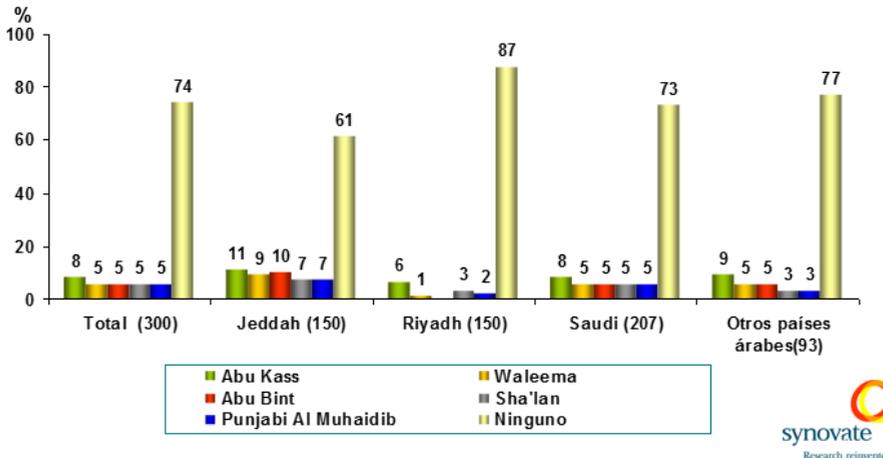
As a result of these surveys, the company had the opportunity to learn very relevant aspects of rice consumption in the Saudi Arabian market. In the first place, the company until then only traded in this country the steamed variety (parbolied). Following this study and knowing the main variety used in the market, it was decided to take out the Basmati mazza variety.

As for the media, TV was clearly the main reference, as can be seen in the following pictures. Regarding other media, the influence on brand recall was very low. Therefore, the brand concentrated its efforts on TV during the following years. In this particular case, and being such an inbred society, the favourite way for brands to is using the closest circles, mainly friends and family, as can be seen in the chart. For this reason,

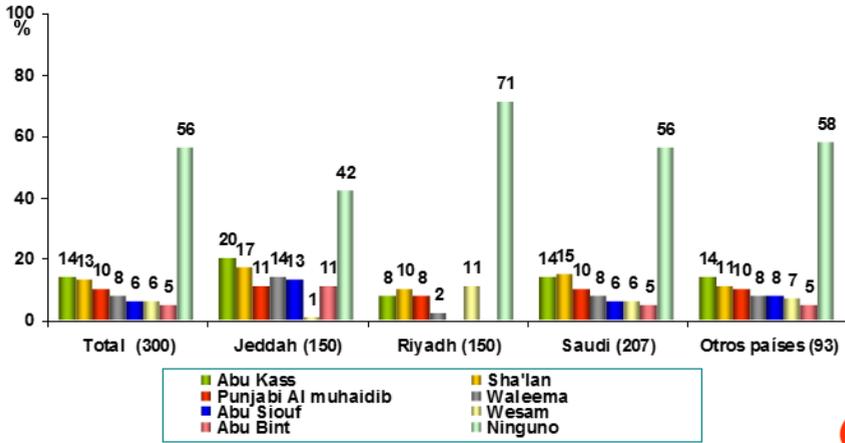
and trying to enhance this factor, it was decided to develop a promotion in order to help those consumers who wanted to transmit the promotion into their nearby circles; what we can call a “brand heroes” strategy. In the images we have some communication elements of this promotion, which included several domestic gifts, such as aprons and kitchen utensils, as well as a special prize (a trip). This promotion was actually successful as it was very attractive and quite new in the Arab market.



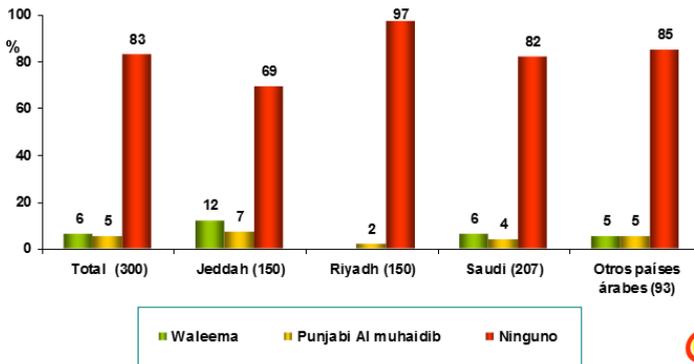
TV awareness



Print Awareness



Outdoor Awareness



Radio awareness

5.- CONCLUSIONS

As most important conclusions and aspects to highlight, we consider relevant to point out the following:

- Globalization processes increase brands capillarity and greater access to new markets, but it is an improtant mistake to think that consumers are globalized.

- There are significant differences in consumption between countries that companies have to take into account to define an appropriate strategy.
- One of the aspects with great importance is determined by religion.
- Specifically in the case of Saudi Arabia, market research had to face two limiting factors: on the one hand, the role of women in Arab countries and, on the other hand, the perception of rice as a product that goes far beyond from being just a food ingredient.
- In order to be able to develop the surveys, researchers had to create new tools that were consistent with the cultural context and make it possible to obtain accurate information.
- It is reinforced the idea that companies have to launch the right product to gain access to as many consumers as possible.
- On top of that, the approach to consumers must respect communication habits and the context and culture of each society in order to be successful.

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