

Stylish and Sustainable: How Gen Z in Indonesia is Shaping the Future of Fashion

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This study aims to explore Generation Z's perspectives on sustainable fashion consumption and the marketing strategies used within the Indonesian market. By analyzing their purchasing behavior, the research seeks to gain a deeper understanding of how this generation engages with and interprets sustainable fashion. This study examines Generation Z's attitudes toward sustainable fashion consumption and marketing through a deductive qualitative approach, drawing on fashion business theory, consumer motivation, and sustainable consumption. Framing research questions as hypotheses, it tests existing theories using insights from 11 purposively selected Gen Z participants in Makassar who have studied abroad and engaged with sustainable products. This study identifies four key themes shaping Generation Z's attitudes toward sustainable fashion: Design, Diversity, Desirability, and Digitalization. These reflect how Gen Z responds to external psychological, cultural, and social factors that influence their purchasing behavior.

INTRODUCTION

The fashion industry has increasingly focused on sustainability in recent years, driven by environmental concerns and changing consumer demands. This shift is evident in the adoption of sustainable practices such as circular fashion, the use of eco-friendly materials, and greater supply chain transparency (Rathore, 2017). The industry's environmental impact has gained attention through comprehensive reports and sustainability campaigns, such as the Global Fashion Agenda's 2020 Commitment (Jennifer Xiaopei Wu & Li Li, 2019). Green marketing approaches are being implemented to mitigate negative impacts, with companies integrating environmentally friendly practices into their value chains. However, challenges remain in balancing business objectives with environmental concern (Sagapova et al., 2022). In India, a significant player in the global textile market, there is a growing focus on assessing readiness for sustainable fashion practices by considering current challenges, initiatives, and future prospects (Arora, 2023).

Recent studies highlight the growing importance of sustainable fashion in Indonesia. Consumer attitudes, environmental awareness, and fashion engagement significantly influence sustainable fashion consumption patterns (Panjaitan, 2024a). Research indicates that pro-environmental attitudes and fashion involvement positively correlate with sustainable fashion consumption across generations (Gazzola et al., 2020). Similarly, (Panjaitan, 2024b) explain that sustainability significantly contributes to a brand's image and the perceived attractiveness of its products, ultimately influencing consumer purchasing behavior. To promote sustainable practices, influencing consumer perceptions and raising environmental awareness are crucial.

Some Indonesian brands have adopted sustainability principles, but comprehensive guidelines for sustainable fashion design are still needed. A case study of LamaLama Indonesia demonstrates how businesses can implement sustainable fashion practices through services such as buying and selling used clothes, upcycling, and donations (Rahmatullah et al., 2023). These findings underscore the potential for sustainable fashion in Indonesia and highlight the need to integrate economic, social, and environmental sustainability into business models.

Generation Z exhibits increasing environmental awareness and positive attitudes toward sustainable fashion, particularly in luxury brands (Grazzini et al., 2021a). However, sustainable fashion marketing faces challenges; despite positive consumer attitudes, purchase rates remain low (Lundblad & Davies, 2016). Additionally, greenwashing-making misleading sustainability claims without transparency-may hinder truly sustainable purchasing decisions (McNeill & Moore, 2015). This issue poses a significant challenge, potentially eroding consumer trust. To address this, brands must adopt transparent communication strategies backed by verifiable data and independent certifications (Moons et al., 2021). The fashion industry's environmental impact has prompted companies to take action, yet consumer decision-making regarding sustainable fashion remains complex (Grazzini et al., 2021b). Therefore, brands must communicate the value of sustainability more effectively.

Generation Z, as digital natives, presents unique challenges and opportunities for marketers in Indonesia. This cohort exhibits a strong preference for online shopping and relies heavily on social media for brand interactions (Simangunsong, 2018). They prioritize brands that emphasize social values, environmental concerns, and sustainability (Salam et al., 2024). (Suryaputra et al., 2024) explain that, compared to other generations, Gen Z adult consumers are at the forefront of the sustainable movement. Social media influencers play a crucial role in disseminating information about sustainability and shaping Gen Z's purchasing decisions.

To effectively engage this generation, brands should focus on personalized experiences, value co-creation, and sustainable practices (Salam et al., 2024; Suryaputra et al., 2024). The fashion industry, in particular, can benefit from understanding how social media marketing activities, brand experience, and brand trust influence brand equity among Gen Z consumers (Vidyanata et al., 2024). These insights can guide businesses in developing more effective and sustainable marketing strategies to reach Generation Z in Indonesia's dynamic consumer market. However, research on how brands communicate sustainability to consumers in Indonesia remains limited, resulting in an unclear understanding of Generation Z's response to sustainable fashion marketing.

RESEARCH METHOD

This study analyzes Generation Z's attitudes toward sustainable consumption in fashion marketing, drawing on fashion business theory, consumer motivation, and sustainable consumption. Using a deductive approach (Collis & Hussey, 2014), it reality formulating research questions as hypotheses (Pearse, 2019). A qualitative method is employed to gain an in-depth understanding of Generation Z's behavior and motivations (Yauch & Steudel, 2003). Unlike an inductive qualitative approach, this study focuses on verifying existing theories, aligning with the characteristics of marketing research (Hyde, 2000). To minimize bias in data analysis, a conceptual framework and literature review serve as objective guidelines (Bell et al., 2022).

This study uses purposive sampling to ensure reliable results by selecting respondents based on specific criteria (Denieffe, 2020):

1. Generation Z (born between the mid-1990s and early 2010s).
2. Residing in Makassar City, South Sulawesi, Indonesia.
3. Studied and lived abroad for at least one year.
4. Have experience purchasing or understanding sustainable products from abroad.

Studying abroad provides a broader cultural perspective, making these individuals representative of sustainable fashion consumers in the global market (Özkan, 2017). Their exposure to international fashion and luxury brands also enhances their relevance to this research. The interview questions were structured based on a conceptual framework using a “Why” and “How” approach to gain deeper insights (Yin, 2014). Qualitative research requires a minimum of 10 participants (Vasileiou et al., 2018), and this study successfully collected 11 valid samples. All respondents were over 18 years old, with a predominance of female participants.

This study employs reflective thematic analysis to identify patterns in qualitative data (Braun et al., 2022). The process includes data familiarization, coding, and developing and refining themes. This method is theoretically flexible and applicable across various contexts and research types, whether inductive or deductive. This approach is well-suited for examining individual perceptions and experiences, aligning with the study’s focus. The study applies deductive reflective thematic analysis, where coding and theme development are guided by existing concepts and theories (Braun et al., 2022).

Phases in doing reflexive thematic analysis

The approach to TA that we developed involves a six-phase process for *doing* analysis.

Although these phases are sequential, and each builds on the previous, analysis is typically a *recursive process*, with movement back and forth between different phases. These are not rules to follow rigidly, but rather a series of conceptual and practice oriented ‘tools’ that guides the analysis to facilitate a rigorous process of data interrogation and engagement. With more experience (and smaller datasets), the analytic process can blur some of these phases together.

1. **Familiarisation with the data** | This phase involves reading and re-reading the data, to become immersed and intimately familiar with its content.
2. **Coding** | This phase involves generating succinct labels (codes!) that identify important features of the data that might be relevant to answering the research question. It involves coding the entire dataset, and after that, collating all the codes and all relevant data extracts, together for later stages of analysis.
3. **Generating initial themes** | This phase involves examining the codes and collated data to identify significant broader patterns of meaning (potential themes). It then involves collating data relevant to each candidate theme, so that you can work with the data and review the viability of each candidate theme.
4. **Reviewing themes** | This phase involves checking the candidate themes against the dataset, to determine that they tell a convincing story of the data, and one that answers the research question. In this phase, themes are typically refined, which sometimes involves them being split, combined, or discarded. In our TA approach, themes are defined as pattern of shared meaning underpinned by a central concept or idea.
5. **Defining and naming themes** | This phase involves developing a detailed analysis of each theme, working out the scope and focus of each theme, determining the ‘story’ of each. It also involves deciding on an informative name for each theme.
6. **Writing up** | This final phase involves weaving together the analytic narrative and data extracts, and contextualising the analysis in relation to existing literature.

RESULTS AND DISCUSSION

Empirical Findings

Four main themes were found in the data analysis: Consumer Perception of Design, Diversity, Desirability, and Digitalization. Each theme has associated subthemes which will be explained further.

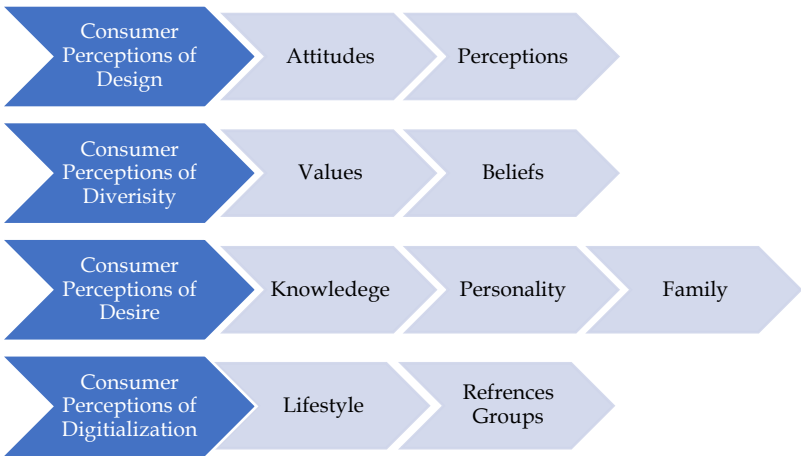


Figure 1. Themes Structure

Analysis

Consumer purchasing behavior is influenced by individual psychological factors as well as the external environment, such as cultural, social, and marketing. As each consumer has different perceptions of external stimuli, purchasing decisions vary. Cultural, social and psychological factors cannot be directly controlled by fashion marketing. However, by analyzing consumers' perceptions and responses to the marketing environment, marketers can identify key stimuli to devise more effective branding strategies.

Consumer Response to External Stimuli: Design

Respondents agreed that design is a crucial aspect of fashion products, not only in terms of patterns and colors but also in Generation Z's interest in and tolerance for new materials and manufacturing technologies. They view technological innovation as a key step toward brand sustainability. Piñatex (Zeithml., 2021), an innovative material made from recycled pineapple leaf fibers, is not only environmentally friendly but also provides social benefits, such as job creation and education in pineapple-producing regions. Many sustainable brands have adopted it, and consumers appreciate its quality.

International brands like Rothy's produce shoes from eco-friendly materials, with uppers made entirely from recycled plastic. Burberry has also developed Econyl, a high-quality textile made from ocean waste nylon and other recycled materials (Kapferer & Michaut-Denizeau, 2014). In addition to using sustainable materials, these brands maintain their distinctive design aesthetics.

In Indonesia, several local fashion brands are beginning to innovate with sustainable materials. SukkhaCitta, for example, uses natural dyes from local plants and empowers artisan communities to create high-quality fabrics ethically. Another brand, Pijakbumi, develops shoes made from natural fibers and recycled rubber, prioritizing sustainable production and responsible consumption.

For Gen Z who enjoy experimenting with fashion, plant-based fabrics and recycled materials offer exciting innovations. Consumer testing and purchasing further reinforce the future prospects for developing innovative textiles (Blackburn, 2015). Both global and local brands have significant opportunities to adopt eco-friendly technologies, combining aesthetics with sustainability while meeting the preferences of increasingly environmentally conscious consumers.

Consumer Response to External Stimuli: Diversity

Gen Z values diversity but they also have strong principles and beliefs when evaluating a brand. With today's communication technology, they can assess whether a brand aligns with their values before making a purchase.

The 2018 Dolce & Gabbana case demonstrated Gen Z's sensitivity to social issues. Their advertisement in China, which featured an Asian model struggling to use chopsticks to eat Italian food, was perceived as stereotypical and racist (D'Arco et al., 2019). The backlash on social media intensified after offensive statements from designer Stefano Gabbana surfaced. As a result, D&G faced a massive boycott, their event in Shanghai was canceled, and their products were removed from various e-commerce platforms ("China Crisis," 2021).

A similar situation occurred with other international brands, such as H&M, which faced a major boycott in China after criticizing the use of Xinjiang cotton due to human rights concerns. Strong consumer reactions led to the closure of several H&M stores in China and the removal of their products from local e-commerce platforms. Meanwhile, global brands like Patagonia and Stella McCartney have been widely appreciated by Gen Z for actively supporting sustainability and social issues, including their policies on using eco-friendly materials and maintaining transparent business practices.

In Indonesia, awareness of brand values is also increasing. Local brands like Sejauh Mata Memandang have gained Gen Z's attention for their commitment to sustainability and community empowerment. The brand uses recycled fabrics and natural dyes while educating consumers on the importance of responsible consumption. On the other hand, some local brands have faced criticism for

marketing strategies perceived as culturally or gender-insensitive, highlighting the fact that young Indonesian consumers are becoming more selective in choosing the products they buy.

These cases prove that Gen Z is highly concerned about a brand's stance and actions. Brands involved in racist, sexist, or discriminatory advertising risk losing their reputation and profits while also causing psychological and social consequences (Kwate, 2014). Conversely, brands that actively uphold inclusivity, sustainability, and clear ethical business practices are more likely to be accepted by Gen Z. These findings reaffirm that values and beliefs are key factors for Gen Z in embracing brand diversity, both globally and locally.

Consumer Response to External Stimuli: Desire

Gen Z has a strong desire for self-expression and tends to choose brands that reflect their personality. They prefer unique, high-quality, and affordable products, including in their consumption of sustainable fashion (Priporas et al., 2017). Although price is not the main factor, financial support from their families influences their shopping habits, while they also play a role in family purchasing decisions (Özkan, 2017).

In sustainable fashion consumption, Gen Z favors high-quality products, classic trends, and buying less to reduce environmental impact. However, only a small percentage purchase solely for sustainability reasons, such as eco-friendly packaging (Priporas et al., 2017). Women tend to be more conscious of sustainable consumption than men, particularly in clothing and fashion, which remain their primary focus (Henninger et al., 2016b).

At a global level, various fashion brands have adjusted their strategies to attract sustainability-conscious Gen Z consumers. Patagonia, for instance, is known for its ethical production approach and use of recycled materials, while Stella McCartney continues to innovate with eco-friendly, animal-free materials. In the footwear sector, brands like Veja utilize natural rubber from the Amazon rainforest and plant-based leather to create high-quality shoes without harming the environment. Additionally, Uniqlo, with its "LifeWear" concept, combines minimalist aesthetics with fabric technology innovations that enhance product durability, making it an appealing choice for Gen Z consumers who prefer to buy fewer but higher-quality items.

In Indonesia, local brands are also responding to the demand for sustainable fashion with various innovations. Sejauh Mata Memandang uses recycled fabrics and natural dyes in its collections while actively educating consumers on responsible consumption. Pijakbumi develops shoes made from natural fibers and recycled rubber, emphasizing sustainable production principles. Other brands, such as SukkhaCitta, promote fashion with a social impact, empowering local artisans through fair wages and environmentally friendly dyeing techniques.

Although awareness of sustainability is increasing, challenges remain, such as difficulties in identifying sustainable products and limited product options (Park & Lin, 2020a). Unlike other groups, Gen Z accesses information through various sources, including social media, young opinion leaders, and short video platforms (Fromm, 2015).

Consumer knowledge plays a crucial role in their purchasing decisions. If their experience with sustainable products is positive, they become more sensitive to external stimuli influencing their shopping behavior (Su & Chang, 2018a). Therefore, efforts by sustainable fashion brands to build their image, select the right communication channels, and offer unique products that align with Gen Z's personality significantly contribute to increasing their purchase interest (Jackson & Shaw, 2009). Both international and local brands have great opportunities to leverage this trend by combining aesthetics, innovation, and sustainability in their marketing strategies.

Consumer Response to External Stimuli: Digitalization

Gen Z's shopping habits and preferences indicate an increasing reliance on digital resources and a reluctance toward traditional marketing (Jackson & Shaw, 2009). Social media serves as their primary source of information, making effective digital marketing strategies essential for strengthening communication and building brand trust (Kaur, 2014). Additionally, opinion leaders and reference groups significantly influence their purchasing decisions (Fromm, 2015).

Their experience with sustainable fashion shopping also reflects that purchasing decisions are closely tied to their lifestyle and personal values. Therefore, marketing sustainable products should also promote a sustainable lifestyle, targeting consumers who share similar values (Kent et al., 2016). Effective communication can be achieved through digital channels to foster engagement, while offline shopping experiences remain crucial in enhancing consumer interaction.

Internationally, sustainable fashion brands have adapted their strategies to appeal to Gen Z's ethical and environmental concerns. Brands like Patagonia and Stella McCartney emphasize sustainability through eco-friendly materials, ethical production processes, and transparent supply chains. Footwear brands like Veja use natural rubber and plant-based leather, while Uniqlo integrates durable, high-quality fabrics into its "LifeWear" collection, appealing to Gen Z consumers who prioritize longevity and minimalism in fashion. The digital presence of these brands, combined with their strong sustainability narratives, plays a crucial role in maintaining consumer trust and engagement.

In Indonesia, local fashion brands are also responding to the demand for sustainable fashion with innovative approaches. Sejauh Mata Memandang incorporates recycled fabrics and natural dyes in its collections while educating consumers on responsible consumption. Pijakbumi develops footwear from natural fibers and recycled rubber, focusing on sustainable production principles. Meanwhile, SukkhaCitta emphasizes social impact by empowering local artisans through fair wages and eco-friendly dyeing techniques. These brands leverage digital platforms, influencer collaborations, and immersive storytelling to connect with Gen Z consumers who value authenticity and sustainability.

Despite the rising awareness of sustainability, challenges remain, such as the difficulty in identifying sustainable products and the limited availability of options (Park & Lin, 2020b). Unlike other consumer groups, Gen Z actively seeks information from various sources, including social media, young opinion leaders, and short-form video platforms (Fromm, 2015).

Consumer knowledge plays a vital role in their purchasing decisions. When they have positive experiences with sustainable products, they become more responsive to external stimuli that influence their shopping behavior (Su & Chang, 2018b). Therefore, sustainable fashion brands-both international and local-must focus on building strong brand narratives, selecting the right communication channels, and offering unique products that align with Gen Z's identity. By combining aesthetics, innovation, and sustainability in their marketing strategies, brands can enhance Gen Z's interest and commitment to sustainable fashion.

CONCLUSION

Gen Z consumers highly value design innovation in fashion, particularly when it integrates sustainable materials and advanced manufacturing technologies. They appreciate brands that use eco-friendly materials, such as Piñatex, Econyl, and recycled plastics, as seen in international brands like Rothy's and Burberry. Similarly, Indonesian brands like SukkhaCitta and Pijakbumi are embracing sustainability by incorporating natural dyes and recycled materials while empowering local communities. These innovations align with Gen Z's experimental approach to fashion, reinforcing the growing potential for eco-friendly textiles in both global and local markets.

Beyond design, Gen Z prioritizes diversity and ethical business practices when selecting brands. Cases like Dolce & Gabbana's controversial ad in China and H&M's backlash over Xinjiang cotton demonstrate how Gen Z holds brands accountable for social and political issues. Conversely, companies like Patagonia and Stella McCartney are celebrated for their sustainability and inclusivity efforts. This trend

is also evident in Indonesia, where brands like Sejauh Mata Memandang gain favor for their ethical production, while others face scrutiny for culturally insensitive marketing. These cases highlight that brands maintaining ethical values and transparency are more likely to secure Gen Z's loyalty.

Digitalization plays a crucial role in shaping Gen Z's purchasing behavior, as they rely on social media, influencers, and online reviews over traditional marketing. Sustainable brands that effectively communicate their values through digital platforms can engage this audience and build long-term trust. Both global and Indonesian brands are leveraging these strategies, integrating sustainability with strong brand narratives to resonate with Gen Z's identity and ethical concerns. However, challenges persist, such as limited awareness of sustainable products and accessibility issues. By combining digital engagement, innovative designs, and sustainability, brands can strengthen their appeal to Gen Z and foster greater commitment to responsible consumption.

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