

A STUDY OF PERCEPTION OF GEN 'Z' OF INDIA ABOUT SUSTAINABLE APPARELS AND ITS IMPLICATIONS IN THE APPAREL INDUSTRY

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Abstract

The purpose of this study is aimed at understanding the perception of Generation 'z' towards sustainability in apparel within the geographic boundaries of India. The study aims to understand the importance of sustainability in the apparel industry and understand the new emerging application of the concepts such as green washing, green companies and brown company. The research methodology adopted for this research has been about secondary data obtained from published sources and industry reports whereas the primary data collection includes personal interaction with Gen 'Z' as well as through questionnaire circulated to prospective respondents within the age segment. The results of the study aim to provide clear viewpoints and perception of consumers within the generation 'z' which could be further used to determine marketing strategies as well as awareness campaigns. This also could be used by apparel organisations planning to enter into the sustainability space or already into the apparel space to further plan their strategies and create an outreach plan for acquiring more gen 'z' customers.

Keywords: *Consumer Behaviour, Green Apparel, Green Washing, Perception of Gen 'Z', Sustainability.*

INTRODUCTION

Perception is a broad term and is defined as the interpretation of a concept or commodity. Generally, consumers do have a pre-existing perception towards each and everything that they interact with. The research aims to gather insights and further analyse the contributors towards parameters that influence the buying behaviour of Gen 'Z' towards sustainable apparel including awareness levels towards the concept of sustainability, green apparel, greenwashing etc. The study is intended to help academicians as well as organisations to develop understanding of the current market scenario and accordingly devise plans and strategies to address their target market and ensure profitable returns as well as acknowledgement of the concept.

Objective of the study:

- To study the perception of Gen 'Z' towards sustainable apparel
- To identify key perception parameters responsible for buying behaviour of Gen 'Z' towards sustainable apparel purchase

REVIEW OF LITERATURE

The Indian apparel industry has been in existence as an established sector since a long time now and over the time the concept associated with apparel has ever changed targeting various generations as and when time comes.

There are a lot of opinions about the generation nomenclature in the world, however there are predominantly three categories which remain in talks today which are Generation X, Y, Z. (Betz, 2019) ¹

Generation X are the successors to Baby boomers which talks about people born between 1965 and 1979, whereas Generation Y also known as millennials are the ones born between 1980 and 1994 and Generation Z is the most recent generation which includes people born between 1995 and 2015. (Betz, 2019)

The Indian apparel industry is set to expand by 67.9% by 2025 as compared to 2020 (MarketLine, 2021) which states that there is a lot of potential to be realised in the space of sustainability for these generations.

Major global brands and retailers such as H&M, Mark & Spencer, Nike, Tesco, Timberland and Walmart etc. have over the years contributed a lot in the space of creating a sustainable supply chain strategy. Basis on that, a lot of companies have started working on the same space further aggravating the level of awareness. (Jakhar, 2015)

Changes in demographics and availability of global clothing brands have brought several changes in Indian apparel industry. Green or organic clothing brands are becoming popular among Indians and likely to contribute to the revenues of apparel sector (Khare & Sadachar, 2017)

Research has emphasized the importance of social conformance, peer influence and group identity on green buying behaviour. However, these studies have not examined the role of social and peer influence with reference to a specific green product category. The current study extended the research on green buying by examining the effect of social and peer influence on Indian youth's green apparel buying behaviour. (Khare & Sadachar, 2017)

Sustainable clothing has been described as 'clothing which incorporates one or more aspects of social and environmental sustainability, such as Fair Trade manufacturing or fabric containing organically-grown raw material. (Goworek, Fisher, Woodward, & Hiller, 2012)

A lot of previous studies has been conducted in and around this space majorly concerning sustainability in the apparel industry. However, our focus has been on certain key parameters which have been discussed further.

Semi-structured interviews conducted with a range of experts in the field of sustainable clothing to increase understanding of the challenges for the same revealed that a focus on sustainability alone

will not drive the necessary changes in consumers' clothing purchase, care and disposal behaviour for three reasons: (i) clothing sustainability is too complex; (ii) consumers are too diverse in their ethical concerns and (iii) clothing is not an altruistic purchase. The findings identify the challenges that need to be addressed and the associated barriers for sustainability in clothing. (Harris, Roby, & Dibb, 2016)

The apparel industry in India is extremely important. It not only generates cash revenue, but it also provides vast employment opportunities. It contributes to around 2.3 percent of India's GDP, while textile exports account for 12 percent of the country's foreign exchange earnings. Almost 45 million people work in this business, either directly or indirectly. (Vishwakarma, Meena, Dangayach, & Gupta, 2021)

It is essential to use natural resources in a responsible manner and to avoid contamination. These activities are connected to environmental pollution avoidance, such as reducing the use of colour dyes, reducing greenhouse gas emissions, recycling clothes, and using organic fabric. Consumer awareness techniques such as the adoption of eco-labels, a reduction in rapid fashion, and the removal of the consumer throwaway culture are all examples of consumer awareness practices. (Vishwakarma, Meena, Dangayach, & Gupta, 2021)

In the textile sector, environmental dimension measuring has been sufficiently established and standardized. However, cost analysis and employee welfare and safety were prioritized in all the research analysed from an economic and social standpoint. As a result, greater research into social and economic factors is required, as well as validation in the textile industry. High polluting characteristics, limited resources, and labour-intensive nature, the textile and clothing industries have given sustainable development a lot of attention across the world. (GbolarumI, Wong, & Olohunde, 2020)

Good practices aimed at enriching and favourably influencing the community, community culture, other species, and the environment, as well as respecting and supporting variety, were also included in sustainable fashion. Green fashion is a new term for "fashion with a conscience," and it refers to a growing number of ethical fashion firms who are attempting to appeal to mainstream fashion customers by selling fashionable items. (Shafie & Kamis, 2019)

Several tools have been developed to compare the environmental impact of textiles. The most widely used are Higgs Materials Sustainability Index (MSI) and MADE-BY Fiber Benchmark.

They use data from production to evaluate the environmental impacts of textiles differentiated by fibre type. (Laitala, Klepp, & Henry, 2018)

According to the research, a good fit between environmentally friendly products and a fast fashion brand is important for fashion consumers, and a good fit between the parent brand and the sustainable extension line increases consumers' perceptions of the parent brand and the sustainable extension line. Consumers' evaluations of the extension line's cause-effectiveness worth and monetary value both had an impact on their purchase intention and willingness to pay a higher price. (Moon & Lee, 2018)

Peers are an important part of our social lives. They include a wide range of people who surround us in our daily lives, right from infancy to old age. Peer groups in the same school, neighbourhood, workplace, or sports team are essential and have highly relevant impact on our environments. We

also seek and maintain a variety of interpersonal connections with peers, such as with a close friend, an acquaintance, a flatmate, a co-worker, a fellow student, or a neighbour. Given the pervasiveness of peers in our life, it's likely that they have an impact on who we are. This may be especially true in today's culture, as people exchange partners more frequently than in the past and families are dispersed across greater distances, developments that may make peers a powerful social determinant. (Reitz, Zimmermann, Hutteman, Specht, & Neyer, 2014)

The media can programme its structure to achieve desired results inside a society or for the individuals who live there. Whatever media is available; it intends to push some subjects as the most essential of all. According to Maxwell & McCombs, media (typically the news media) is not only successful in feeding us what to think but they are amazingly successful in telling us what to think about. A similar situation exists in public perception; people form perceptions according to what media present to them.

Perception plays a very crucial role in making some issues important and some unimportant, this is due to many reasons; sometimes perceptions are affected by lots of other things. According to Severin (2001), different psychological factors influence perceptions and they include past experience, cultural expectations, motivations, moods, needs and attitudes. According to Feldman (1999), "Perception is the sorting out, interpretation, analysis and integration of stimuli involving our sense organs and brain". (Sadaf, 2011)

Hypothesis Statement:

- **H_{Null}:** Perception of Gen 'Z' is not influenced by any parameters
- **H_{Alt}:** Perception of Gen 'Z' is influenced by certain parameters
- **H₁:** Perception of Gen 'Z' is influenced by peer influence
- **H₂:** Perception of Gen 'Z' is influenced by price
- **H₃:** Perception of Gen 'Z' is influenced by media advertisements

DATA COLLECTION

The methodology adopted towards the research has been inclusive of both primary as well as secondary analysis.

- **Primary data collection:** For the primary data collection, a pilot study was conducted through a questionnaire developed and circulated across the country to collect responses and analyse them.
 - **Sample Size:** 143 Respondents
 - **Location:** Pan India
 - **Target Audience:** Students within age bracket of 18-25 Years
 - **Type of data obtained:** Quantitative as well as qualitative data

- **Secondary data collection:** For the secondary data analysis, various existing research work and industry reports has been taken into consideration to broaden the understanding of the concept as well as form the base for preparing the questionnaire for the survey.

Data Analysis:

The questionnaire was divided into two parts which provided two types of data namely:

- Demographic data
- Analytical data
 - Awareness analysis
 - Perception parameters analysis

Furthermore, the questionnaire circulated aimed at receiving both qualitative as well as quantitative data which was carefully embedded within the structure of the questions.

Demographic Analysis:

Based on the gathered data, it has been noted that most of the respondents are present across various cities of India and across all regions. Also, the age has been between 18 to 29 years with 113 respondents within the age bracket of 18 to 25 years, followed by 27 respondents within the age range of 26 to 29 years. The age range of 26 to 29 years is also crucial as they have just stepped out of Gen 'Z' category and can provide some important insights regarding the same.

Moreover, the gender ratio has been 13:7 with 93 male respondents and 50 female respondents.

Table I

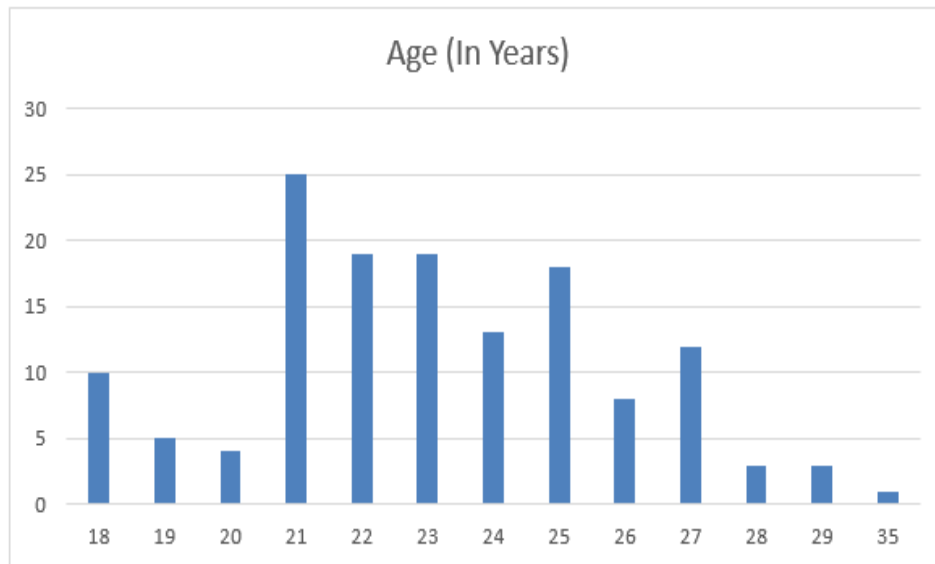
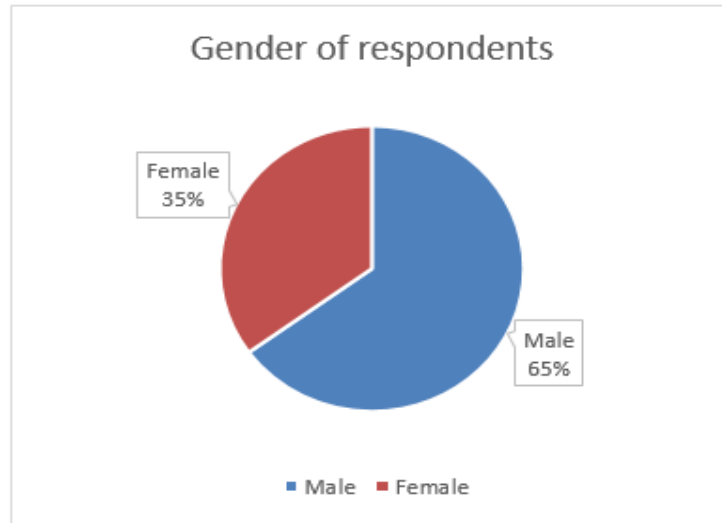
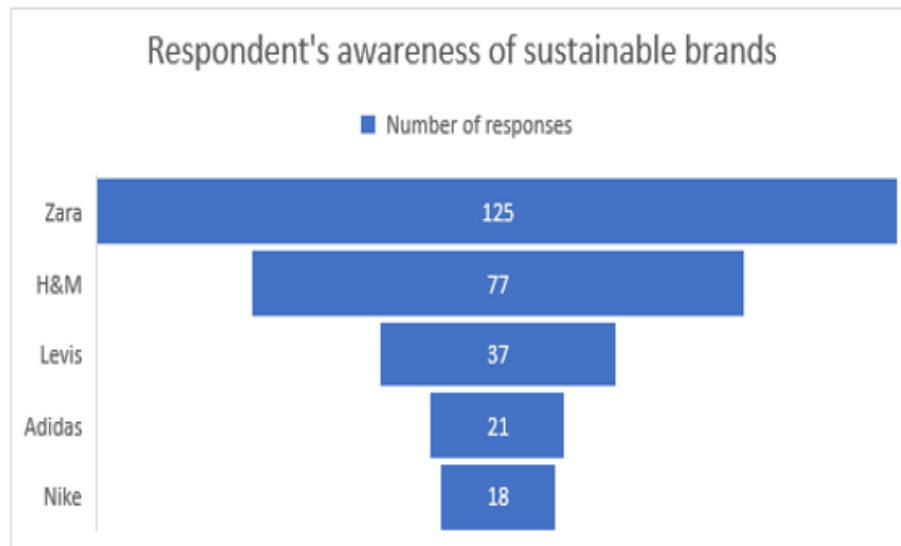


Table II



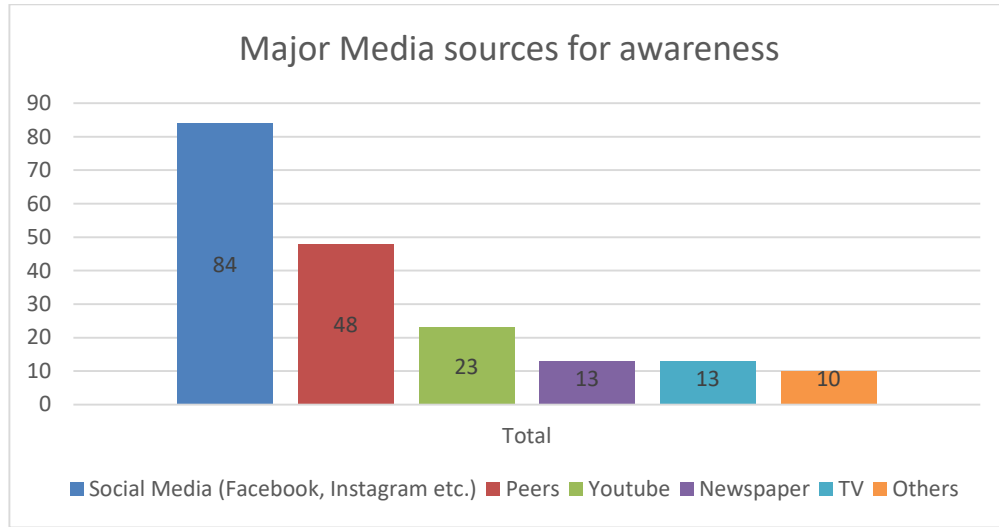
Based on the questions raised on naming a few brands involved in sustainable apparel production which the customers are aware of, a mix of responses were received of which the respondents mentioned the following brands repeatedly as depicted in the chart below.

Table III



Based on further research conducted on the resulting brands, some of their best practices have been noted and further recommendations have been made on their basis in the next section.

Table IV



The second important aspect to look into has been the sources of awareness that exists in the open world today and which channels contribute more in order to enhance awareness levels of the Gen ‘Z’.

From the collected data, it has been noted that 44% of the respondents have addressed social media for their level of awareness towards sustainable apparel brands followed by 25% of awareness from peers which is definitely crucial in choosing apparel and motivation.

It is also worth noting that TV and newspaper are no longer a credible source for enriching Gen ‘Z’ towards promoting brands as only 7% of the respondents have attributed TV or Newspaper for their awareness level in this domain.

Sustainable apparel awareness analysis:

The first part of the analysis involves understanding the awareness levels of Gen ‘Z’ towards sustainable apparel and their understanding of the concept, for which a set of questions were injected into the questionnaire for which the responses were analysed as shown below:

Table V

How often have you heard of sustainable fashion?				
	Value Points	Frequency	Percent	Cumulative Percent
Very Often	5	16	11.19	11.19
Sometimes	4	36	25.17	36.36
Neutral	3	52	36.36	72.73
Rarely	2	32	22.38	95.10
Never	1	7	4.90	100.00
Total		143	100.00	

From the above table, there can be clear interpretations indicating that approximately 72% of the Gen ‘Z’ respondents have some ideas and clarity about the concept of “Sustainable Fashion”.

Table VI

Sustainable apparel/fashion is just a hype/fad.				
	Value Points	Frequency	Percent	Cumulative Percent
Strongly Agree	5	12	8.39	8.39
Agree	4	32	22.38	30.77
Neutral	3	47	32.87	63.64
Disagree	2	35	24.48	88.11
Strongly Disagree	1	17	11.89	100.00
Total		143	100.00	

A very generic opinion was also asked for with regards to the perception of sustainable fashion, to which 32% of the respondents stated neutral views whereas 36% of the people differed from stating it to be a hype or fad.

The next factor to understand lies in the linkage of buying behaviour, awareness and perception which can be clearly understood from the below mentioned data:

Table VII

How much is an apparel made of sustainable elements important to your buying decision?				
	Value Points	Frequency	Percent	Cumulative Percent
Strongly Agree	5	17	11.89	11.89
Agree	4	40	27.97	39.86
Neutral	3	56	39.16	79.02
Disagree	2	21	14.69	93.71
Strongly Disagree	1	9	6.29	100.00
Total		143	100.00	

From the above data, it can be easily understood that approximately 40% of the respondents have stated importance to apparel made of sustainable elements whereas 40% of the other respondents have neutral views about the contribution of sustainable elements in apparel manufacturing at their buying behaviour which indicates a lot of potential within this space for Gen 'Z' consumers.

Perception parameters analysis:

Based on previous studies conducted, there is a possibility of certain parameters that influence the perception of Gen 'Z' towards making choices in sustainable apparel purchase. Through our research questionnaire, attempt has been made to analyse and understand the level of relation between such parameters and their influence on Gen 'Z'.

a) Peer Influence: The first parameter which has had considerable evidence from past research is the peer influence. To study this, two questions were designed to extract the original essence of its influence and the following can be concluded:

Table VIII

Do your friends and social circle influence your apparel fashion choices?				
	Value Points	Frequency	Percent	Cumulative Percent
Strongly Agree	5	19	13.29	13.29
Agree	4	54	37.76	51.05
Neutral	3	42	29.37	80.42
Disagree	2	20	13.99	94.41
Strongly Disagree	1	8	5.59	100.00
Total		143	100.00	

From the above data table of responses received, it can be interpreted that out of a total of 143 respondents, 51% of the Gen 'Z' respondents agree that they have an impact of peer influence on their apparel choices.

Table IX

Would you buy a sustainable apparel if your peer wears one, even though the price may be high?				
	Value Points	Frequency	Percent	Cumulative Percent
Strongly Agree	5	12	8.39	8.39
Agree	4	21	14.69	23.08
Neutral	3	61	42.66	65.73
Disagree	2	30	20.98	86.71
Strongly Disagree	1	19	13.29	100.00
Total		143	100.00	

Furthermore, from the second table it can also be seen that the respondents do not much associate peer influence with pricing and that pricing has a major influence on their buying behaviour even though their peers might use sustainable apparel.

b) Price Influence: Second most important parameter for Gen 'Z' is depicted by financial liberty or monetary allowances which was tapped in the questionnaire through various questions directly as well as indirectly. The results of which are as shown below:

Table X

How important is price in making an apparel choice?				
	Value Points	Frequency	Percent	Cumulative Percent
Strongly Agree	5	57	39.86	39.86
Agree	4	53	37.06	76.92
Neutral	3	24	16.78	93.71
Disagree	2	7	4.90	98.60
Strongly Disagree	1	2	1.40	100.00
Total		143	100.00	

From the above shown tabular representation, it can be clearly observed that price plays a major role in perceiving an apparel choice. This indicated that Gen 'Z' is highly price sensitive as 77% of the respondents agree to the statement that price plays a major role in making an apparel choice.

Table XI

On a scale of 1 to 5, how would you rate your financial independency in terms of making purchase decisions relating to apparel?				
	Value Points	Frequency	Percent	Cumulative Percent
Extremely Dependent	5	27	18.88	18.88
Dependent	4	53	37.06	55.94
Neutral	3	45	31.47	87.41
Independent	2	11	7.69	95.10
Extremely Independent	1	7	4.90	100.00
Total		143	100.00	

Also, based on the second question directed towards financial independence, 55% percent of the respondents from Gen 'Z' mentioned that they are financially dependent on someone else while making an apparel choice.

c) Media and Advertisement Influence: The third and very critical parameter which is looked upon through this research is the influence on sustainable apparel awareness and purchase motivation through media and advertisement intervention. The results of the same has been depicted below:

Table XII

Do you buy apparel based on advertising by the brand?				
	Value Points	Frequency	Percent	Cumulative Percent
Strongly Agree	5	8	5.59	5.59
Agree	4	47	32.87	38.46
Neutral	3	55	38.46	76.92
Disagree	2	26	18.18	95.10
Strongly Disagree	1	7	4.90	100.00
Total		143	100.00	

Hereon, from the above depicted chart it can be clearly interpreted that almost 38% of the respondents depend upon advertisements from the brand while making a choice for apparel buying. While getting the importance of advertisements, it is imperative to understand the relationship between sustainable practices advertisements with sales in order to have some managerial implications.

For which the below depicted table shows some indicative data which are as follows:

Table XIII

Do you think companies who advertise more about their sustainable initiatives will have more sales?				
	Value Points	Frequency	Percent	Cumulative Percent
Strongly Agree	5	25	17.48	17.48
Agree	4	46	32.17	49.65
Neutral	3	56	39.16	88.81
Disagree	2	13	9.09	97.90
Strongly Disagree	1	3	2.10	100.00
Total		143	100.00	

From the shown table, it can be interpreted that around 50% of the respondents believe that the companies with more advertisements directed towards their sustainable practices would attain more sales and hence be more accepted by Gen 'Z'.

FINDINGS AND OBSERVATIONS

Based on the above quantitative and qualitative analysis, it was observed that some of the most common brands which Gen 'Z' perceived as sustainably active brands or "Green companies" are as follows and some of their global goals and communications have also been mentioned below:

1. **Zara:** They have moved to sustainable production and branding through various initiatives such as 50% Join Life collection by 2022, 100% renewable electrical energy by 2022, 100% sustainable fabrics, zero waste by 2023 and most importantly 0% net emissions by 2040. (ZARA, 2022)
2. **H&M:** Another striking brand working towards sustainability through various fashion initiatives such as bottle2fashion using plastic waste in apparel manufacturing, lucrative reward policy for sustainable choices, fashion from grapes, recycle and repair etc. (H&M, 2022)
3. **Levi's:** The focus here is simply on sourcing more sustainable materials and less use of water. Collections such as "WellThread" which uses less water for apparel upkeep, plastic bottle waste into fabric and many more such initiatives project Levi's as a sustainable brand in the eyes of Gen 'Z'. (Levi's, 2022)
4. **Adidas:** The brand aims at producing 9 out of 10 articles as sustainable intended to showcase environmental benefits, decarbonisation across its entire value chain. Adidas also aims at 0% net emissions or "climate neutrality" by 2050. (Adidas, 2022)
5. **Nike:** A very innovative aspect that Nike has been focusing on is providing suggestions for apparel and accessories upkeep through sustainability in mind. They have a campaign under "Move to Zero" which aims at sustainable article production with zero carbon and zero waste. (Nike, 2022)

Also from the above primary data analysis, the following points have been noted which are as follows:

1. 44% of the respondents have attributed to social media for their level of awareness in the domain of "sustainable fashion"
2. 25% of the respondents believe that peer influence has made them aware of using sustainable apparel
3. 72% of the respondents are fully aware of the concept of sustainable fashion.
4. 51% of the respondents have an impact of peer influence on their apparel purchase decision making.
5. 77% of the respondents believe that price is a major factor while choosing an apparel followed by 55% of the respondents being financially dependent.
6. 38% of the respondents have influence of advertisements on their apparel buying decision while 50% of the respondents believe that companies with more advertisements directed towards sustainable practices would have higher revenues.

Managerial Implications:

Based on the research study conducted, following implications can be devised and stated clearly at the end:

- The perception of Gen 'Z' consumers in India is highly motivated by peer influence, pricing of apparel and media and advertisements.
- It is evident enough that brands must invest more into social media to enhance awareness levels of Gen 'Z' consumers regarding sustainable apparel.
- It is also noted that Gen 'Z' consumers in India are highly price sensitive and hence pricing has to be looked at to increase favourability of consumers towards sustainable apparel purchasing
- It is perceived by consumers that a brand with more advertisements and promotions would have higher revenues and hence that would create a perception of value for new Gen 'Z' consumers.
- Since peer influence is highly valued by Gen 'Z', companies must invest more into creating marketing campaigns targeted towards word of mouth as well as showcasing how peer consumers perceive of their product and offerings.

Scope for Further Research

From the collected responses and questions framed, a very key insight was established indicating that approximately 50% of the Gen 'Z' respondents considered sustainable apparel selection as a way of self-expression with only 14% of the respondents disagreeing to it. It is estimated that there is a wide scope of research within this area and further studies can be conducted to analyse the relation between self-expression and buying behaviour for Gen 'Z' consumers in India.

Limitations

The research has been conducted with a few limitations which are as follows:

- The number of responses received has been quantitatively less making the sample size equivalent to that of a pilot study.
- Other limitation of the study could be number of factors/parameters considered for influencing perception of Gen Z.
- There is always more scope for a wider extensive literature review.

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