

Sustainable Fashion: A Case Study on South Korean Generation Z Consumers' Perceptions of Corporate Practices through Online Questionnaires

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Abstract

This research undertook a comprehensive exploration of South Korean Generation Z's perceptions regarding sustainable fashion and the associated corporate practices. Adopting a quantitative approach, an online survey methodology was employed, leveraging the digital proficiency of Gen Z. The study spanned various domains, including demographic patterns, fashion consumption habits, sustainability awareness levels, perceptions surrounding eco-conscious fashion, and corporate green initiatives. A particular focus was placed on Patagonia, and the study of future consumption behaviors was conducted. The data, sourced from 119 participants, elucidated intricate patterns. While the allure of fast fashion persists, an emerging consciousness for sustainable choices is evident. A substantial segment recognizes the ethos of sustainable fashion, yet there's a perceivable gap between mere acknowledgment and profound understanding. Brands like Patagonia, with transparent sustainability endeavors, resonate positively with this audience. However, there exists ambivalence regarding corporate sustainability drives, accentuating a potential area for brand development. In conclusion, while Gen Z in South Korea navigates a matrix of trendiness, affordability, and product longevity, there's an unmistakable tilt toward sustainability, paving the way for brands to weave genuine sustainable practices into their core strategies.

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1 Introduction

As there is a global shift towards sustainable practices, the fashion industry remains a significant contributor to environmental pollution [1]. Fashion contributes to approximately 10% of worldwide carbon dioxide emissions [2]. South Korea, with its fusion of traditional heritage and technological metropolis, stands at an interesting juncture in the global fashion industry. Often heralded for its influence on beauty, entertainment, and pop culture, the country's fashion dynamics are undergoing a tectonic shift, particularly in the realm of sustainability. As global dialogues pivot towards environmental consciousness, South Korea's Generation Z emerges as a compelling demographic to study. As Generation Z is entering the workforce more and more, the spending power is estimated to be over \$300 billion and growing each year [3]. Their choices, forged at the crossroads of technology, policy, and societal change, could potentially define the trajectory of sustainable fashion in the nation. This research sets forth to examine this evolution, particularly focusing on the consumption behaviors and sustainability perceptions of South Korea's Generation Z. Rooted in a quantitative methodology, the study harnessed an online survey, capitalizing on the technological proficiency of the target group. As the demographic's intricate patterns emerge from the data, we capture a multifaceted understanding of their fashion choices, motivations, and sustainable allegiances. Positioned against the backdrop of South Korea's evolving PESTEL landscape, the research unearths crucial insights. Recent political endeavors, such as conferences targeting green material usage and textile recycling, have solidified the government's commitment to sustainability. Concurrently, economic shifts influenced by global events and currency fluctuations have prompted introspective brand evaluations. Societal shifts, imbued with a refreshed consciousness around consumption, are influencing the country's youth to advocate for sustainable fashion choices. Technological prowess, always a hallmark of South Korean innovation, is finding resonance in sustainable fashion practices, ranging from the adoption of biodegradable components to advancements in 3D printing. All these facets are further underscored by evolving environmental and legal paradigms, pushing the fashion sector towards a more eco-centric approach. While fast fashion's allure remains potent, there's an unmistakable tilt towards sustainable choices. To capture this transformation in its entirety, the study delves deep into the demographic details, fashion consumption habits, sustainable brand awareness, and potential future trajectories. Brands like Patag-

onia emerge as exemplars, testament to the advantage of integrating environmental consciousness into core philosophies. In essence, as the crosswinds of politics, economics, society, technology, environment, and law shape South Korea's fashion domain, Generation Z stands poised to navigate and possibly redefine this evolving landscape. Their behaviors, perspectives, and inclinations could well serve as both a beacon and a blueprint for fashion brands seeking to harmonize style, substance, and sustainability.

2 Literature Review

This research is related to the studies of sustainable corporate practices. A. Stauropoulou et al. [4] studied SDG impacts in the banking industry and found that the trust, fair pricing, image, and loyalty of bank customers were influenced by economic and socially related SDGs. Daniel G. J. Kuchinka et al. [5] and David Servera-Francés et al. [6] found that implementing corporate social responsibility policies enhances consumers' perceived value of the company, leading to increased trust, commitment, satisfaction, and loyalty. Minimal regional and gender differences were observed in attitudes. Environmentally concerned individuals exhibited greater loyalty, while individuals in developing countries displayed significant environmental concerns. Rahman and Nguyen-Viet's [7] study on green marketing in the Vietnamese context revealed that green advertising receptivity and green brand image positively influenced consumers' trust in brands, which in turn impacted their purchasing intentions. L.M. van Bussel et al. [8] focused on the food industry and found that consumers prioritized factors like price, taste, and individual health over sustainability concerns when making food choices. Somi Yu and Jieun Lee's [9] investigation of consumer perception toward repurposed products found that green, emotional, and aesthetic values positively influenced product attitudes and purchase intentions. Wilert Puriwat et al. [10] studied DESG (Digital Environmental, Social, and Governance) and found that it impacted customer attitudes more among young and higher-educated groups. However, Hyuck Jin Lee and Tae-hwan Rhee's [11] research on ESG (Environmental, Social, Governance) management showed that environmental initiatives did not positively influence brand-related values. Hee-Kyung Koh et al. [12] studied ESG and consumers' responses in South Korea and found that perceived ESG's social and governance dimensions had direct positive effects on brand-related values, while the environmental

dimension did not show any direct impact. Similarly, Suchart Tripopsakul et al. [13] investigated the impact of ESG on customer engagement and found that all elements of ESG had significant positive effects on brand trust and customer engagement, contrary to previous research.

3 PESTEL Analysis of the Fashion Industry

In recent years, South Korea's political fabric has experienced marked changes, particularly concerning sustainability endeavors. Urban development and global eco-movements have found synergy, leading to a fresh wave of policies in the nation. South Korea's administration has displayed a profound understanding of the fashion sector's ramifications on society and the environment. As a result, In 2022, South Korea's Ministry of Trade, Industry, and Energy held a conference in Seoul to accelerate eco-friendly initiatives, targeting advancements in textiles recycling, promoting green material usage, and supporting the eco-transformation of the nation's fashion industry [14]. Moreover, a commendable governmental initiative has been to invigorate green entrepreneurship by weaving in fiscal motivators, such as tax concessions, aimed at fashion stakeholders who espouse sustainability [15].

Economic dynamics, too, have seen perturbations, especially in the shadow of global events like the COVID-19 pandemic. The consumer palette has evolved, veering towards choices that seamlessly merge value and ethics. This nuanced shift hasn't spared the fashion sector [16]. Moreover, the oscillations in the value of the Korean Won have catalyzed introspective evaluations within fashion brands, nudging them to restructure pricing paradigms and assess dependencies within their supply matrices [17].

In parallel, societal shifts in South Korea have been palpable. The nation's discourse, influenced by global conversations and native reflections, has manifested a burgeoning awareness around consumption ethos. The nation's youth, equipped with expansive knowledge networks and global interconnectivity, have emerged as torchbearers of this transformation. Their voice finds echoes in documents like the "Net Manifesto" and the gradual ascendancy of the "slow fashion" doctrine, underscoring the populace's yearning for fashion that embodies both style and substance.

Technology has always been South Korea's strong suit, and its ripples are evident in the fash-

ion domain. Breakthroughs spanning from computational prowess in the form of Artificial Intelligence to avant-garde material research have found applications in promoting sustainable fashion. Elements like biodegradable constituents and recycled plastic-derived fabrics are not merely technological milestones; they represent the sector's unwavering commitment to sustainability. Additionally, embracing innovations such as 3D printing amplifies the industry's resolve to curb wastage.

Environmentally, While metropolitan regions like Seoul grapple with air purity challenges, a more encompassing national focus revolves around optimizing waste management protocols. The fashion sector's past environmental footprints have been catalysts, prompting a conscientious drive towards waste minimization, championing eco-centric sourcing, and fortifying recycling initiatives. Contemporary brands, acutely aware of the prevailing ethos, have embedded these principles at the heart of their operations.

Legally, South Korea's framework exhibits a marked evolution, mirroring global and regional environmental sensibilities. This legal reshaping is steering enterprises, including those rooted in fashion, towards heightened operational responsibility. A broad-spectrum legal vista now envelops facets from sourcing ethics to rights protection across operational chains. With a fortified regulatory scaffold and the specter of penalties, legal conformance has evolved into a linchpin for brands. Yet, it's more than just legal adherence; it's metamorphosing into a pivotal element defining a brand's essence and its resonance with the consumer base.

The PESTEL analysis paints a comprehensive picture of South Korea's fashion context. In navigating the constantly shifting terrains of politics, economics, society, technology, environment, and law, it is paramount for brands to be nimble and adaptive. As each facet of this analysis reveals, sustainability emerges not just as an ethical choice but as an essential component for brands seeking to flourish and maintain their significance in the contemporary landscape.

4 Methodology, Sampling, and Data Collection

This research adopted a quantitative methodology through an online survey to gauge the perceptions of South Korean Generation Z consumers regarding sustainable fashion and corporate

practices. The online mode was chosen due to its reach and the technological adeptness of the target group. The methodology aimed to shed light on the following aspects: demographic details, current fashion consumption habits, awareness of sustainable fashion, perception towards sustainable fashion, opinion on corporate sustainability practices, specific perception about Patagonia's sustainability efforts, and anticipatory future consumption habits in relation to sustainability.

The design of the survey was approached with precision, bearing in mind the significance of clarity, impartiality, and inclusiveness, especially given the socio-cultural intricacies of South Korea. The survey was initiated with a section capturing demographic information. This foundational segment solicits details like age, gender, and educational background, offering a comprehensive profile of our participants.

From this foundation, the survey transitioned to explore the fashion consumption habits of South Korea's Gen Z populace. Here, the study aimed to understand the frequency of their purchases, their gravitation towards certain types of clothing – be it fast fashion, high-end labels, or second-hand items, and their typical expenditure thresholds for apparel. To further contextualize these habits, the study incorporated a section dedicated to measuring their awareness level of sustainable fashion. Through this segment, we gauged the participants' conceptual grasp of "sustainable fashion", their ability to identify brands that echo sustainable philosophies (with a notable mention of Patagonia), and their history of purchases from these eco-conscious brands.

As the survey progressed, we delved into the perceptions surrounding sustainable fashion. This critical juncture was designed to unearth participants' sentiments, evaluating how they perceive the style quotient of sustainable fashion, their readiness to allocate a premium for environmentally-friendly garments, and the overall weightage they assign to sustainability in their fashion choices. Building on this, we then broached the broader landscape of corporate sustainability practices. Our objective was to decipher Gen Z's assessment of corporate green endeavors, their familiarity with distinct eco-initiatives by brands, and the influence such initiatives might exert on their purchasing inclinations.

Given the survey's mention of Patagonia, we dedicated a separate segment to this brand, hoping to extract insights specific to Patagonia's sustainable overtures from the vantage point of our respondents. This part was tailored to evaluate their cognizance of Patagonia's green drives, their

history of transactions with the brand, and a comparative appraisal of Patagonia facing its market contemporaries in terms of sustainability.

As a culminating touch, the survey pivoted to gaze into the horizon, attempting to sketch the possible trajectories of our respondents' future fashion consumption. We probed into the likelihood of their inclination towards sustainable fashion in upcoming years and contemplated the array of factors that might inform such a shift, be it the allure of design, price points, or the overarching brand narrative.

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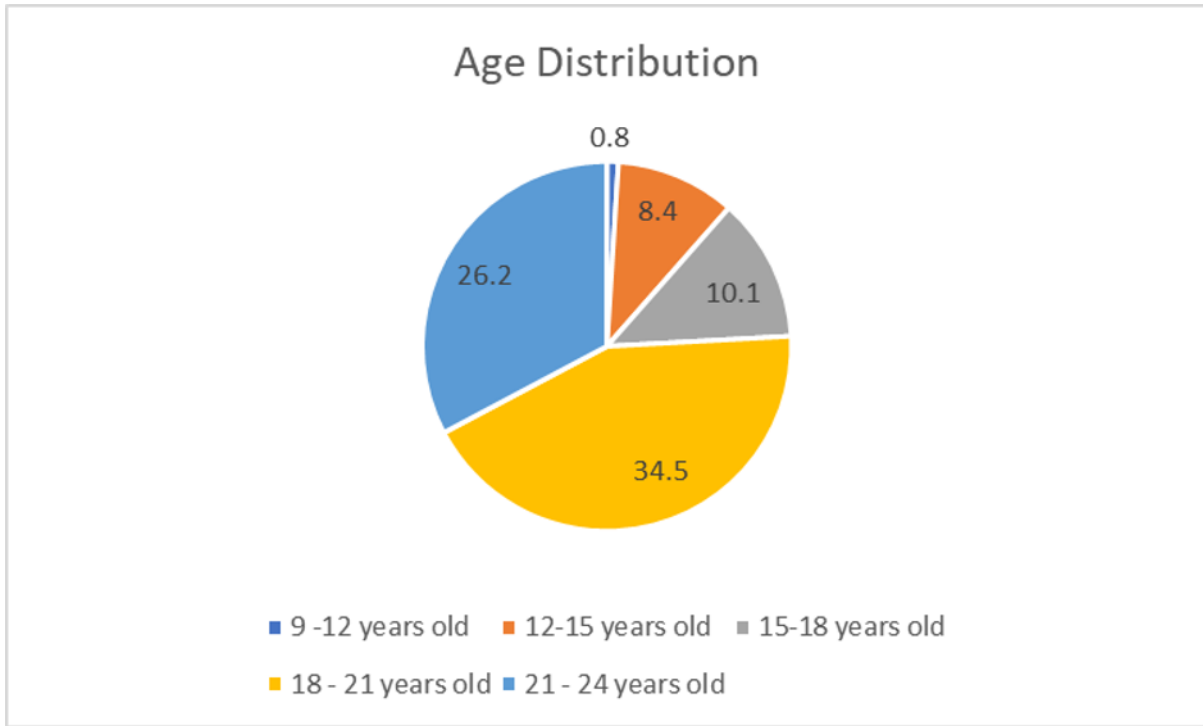
5 Data Analysis

The research undertaken sought to examine the fashion consumption behaviors and sustainability perceptions of South Korean Generation Z. Based on data gathered from 119 participants, several intricate patterns emerged that provide a multifaceted understanding of this demographic.

Starting with the age distribution, the bulk of the respondents, precisely 80.7%, are clustered within the 18-24 age bracket. This portion of the demographic, often regarded as young adults, possesses significant buying power [18]. They are frequently students in higher education or have just commenced their careers. These life stages are significant for molding consumption habits. The relatively minor representation of those aged 15-18, and particularly 9-15 (a combined 19.3%), suggests the primary insights drawn from this study gravitate towards the older segment of Gen Z.

The gender breakdown reveals a slightly higher male participation at 57.1%, against the 42.9% female participation. This skew could potentially lead to a bias, especially when considering that fashion consumption trends might be somewhat different between genders.

In terms of educational background, a significant number (58.8%) of respondents have only completed high school. It's intriguing to note that middle school attendees (17.6%) outnumber

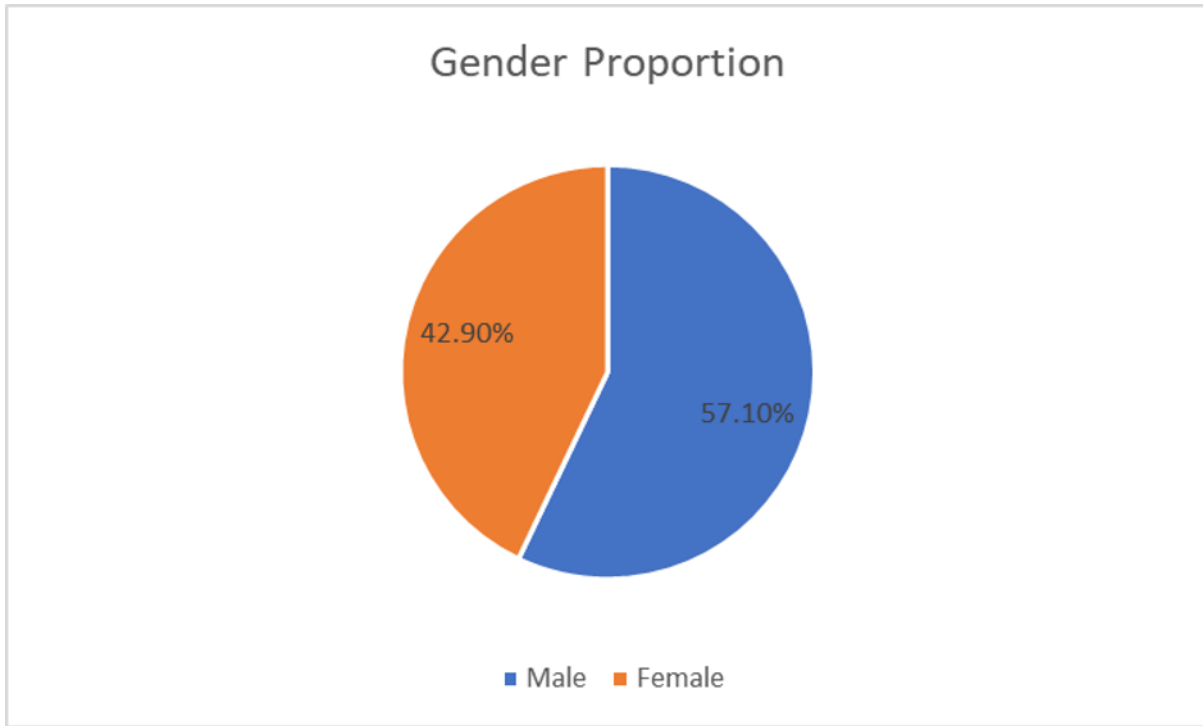


those with an undergraduate degree (16.8%). Such a pattern signals that a majority of respondents might be relatively early in their educational or career journey. Postgraduates form only 5.1%, suggesting that perspectives from highly academic backgrounds are underrepresented.

Digging deeper into purchasing patterns, it's noteworthy that 74% buy new clothing at least once every 2-3 months, showcasing a high frequency of consumption. Fast fashion, chosen by 49.6% of respondents, corroborates this trend. These brands typically offer trendy items at affordable prices, making them popular among younger consumers. That being said, sustainable brands have a foothold, with 19.3% of respondents inclined towards them, indicating an emergent conscious consumer segment.

Upon analyzing the driving forces behind purchasing decisions, style/aesthetics reigns supreme at 84.1%, emphasizing Gen Z's keenness for fashion-forward choices. Yet, it's vital to recognize that quality (72.3%) and price (64.8%) are also predominant factors, underscoring the need for affordability without compromising on the product's longevity.

Sustainability in fashion is becoming a buzzword globally, and within this sample, 56.4% acknowledged its recognition. A diverse array of sustainable brands was cited, with Patagonia leading substantially. Yet, the importance attributed to sustainability in fashion paints a nuanced image:



a sizable 37% placed it mid-way on the importance scale, signaling a potential ambivalence or lack of deeper understanding.

Moreover, when evaluating the sway of corporate sustainability initiatives, an evident ambivalence emerged. While 26.9% affirmed its impact, an equal proportion negated it. A substantial 46.2% remained unsure, elucidating a pivotal area where brands can work - to demystify and transparently communicate their sustainability efforts.

Patagonia’s reputation as a sustainability champion was clear, with an overwhelming 73.9% being familiar with the brand. Among them, 69.9% rated their sustainability efforts highly, suggesting that transparent and genuine sustainability practices can indeed resonate positively with



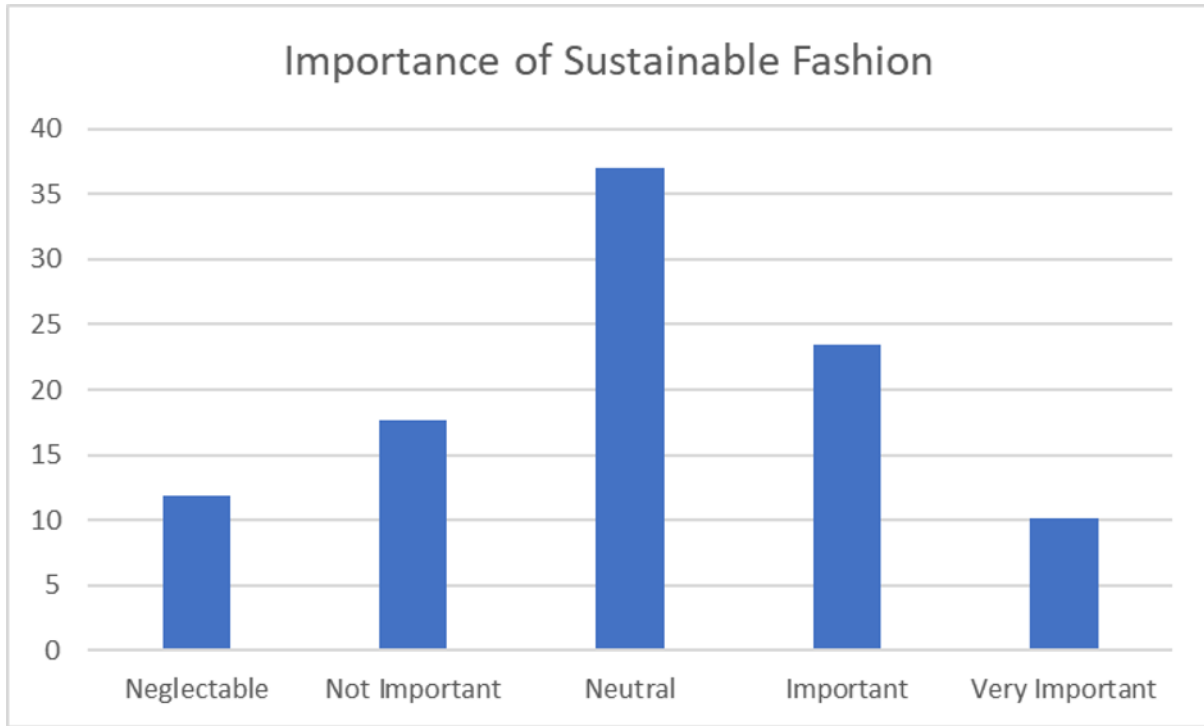
consumers.

Interestingly, despite varied responses on the influence of sustainability, 58% conveyed intent to increase their sustainable fashion consumption. Price, style, and clothing quality, being major influencing factors, accentuate the critical role these play in purchasing decisions.

In essence, while fast fashion remains dominant, there's a budding consciousness towards sustainable fashion among South Korean Gen Z. Their consumption behaviors underscore a blend of trendiness, affordability, and quality. Brands aiming for a competitive edge could consider melding these with genuine sustainable practices. Such an amalgamation might just be the recipe for success in capturing the allegiance of this crucial consumer segment.

6 Research Limitations

This study provides important insights into the perspectives of South Korean Generation Z regarding fashion consumption and sustainability. However, there are some limitations to consider. Firstly, with a sample size of 119 participants, capturing the intricate diversity of the entire Gen Z



cohort in South Korea might be challenging. Moreover, the age distribution leans heavily towards those aged 18-24, accounting for 80.7% of the total respondents. This results in a limited representation of the younger sections within the Gen Z demographic. In terms of gender distribution, there's a notable tilt with 57.1% male participants, which could potentially not fully capture the nuances of female consumer behavior. Educationally, a significant portion of respondents are high school graduates, implying potential biases in the data as those with postgraduate degrees or only middle school education are underrepresented. When evaluating familiarity with sustainable fashion brands, recall biases might be present, given the nature of the question. Additionally, while many respondents indicated familiarity with the term 'sustainable fashion', the depth of their understanding and commitment to its values wasn't explored. Lastly, relying on self-reported data can introduce multiple biases, such as participants possibly aligning their responses with what they perceive as socially acceptable rather than reflecting their genuine opinions or behaviors.

7 Conclusion and Recommendations to Fashion Businesses

South Korea's fashion domain is in an instrumental transition phase. The facets outlined by the PESTEL analysis—a confluence of political, economic, social, technological, environmental, and legal elements—are carving a distinct trajectory for the industry. Now, an eco-centric regulatory climate, recalibrated economic strategies due to international perturbations, societal inclinations towards sustainable mores, and innovative technological strides are defining the contours of the fashion sector.

Probing the sentiments of South Korea's Generation Z offers valuable insights. While attributes like aesthetic appeal, cost-effectiveness, and longevity hold their ground, there is an incipient inclination towards sustainability in fashion. The growing prominence of entities like Patagonia noted for their sustainable ethos, is a testament to the advantages of integrating environmental consciousness into the brand's core philosophy.

Yet, the current landscape is not without its intricacies. The ascendancy of sustainable consumption awareness among Generation Z is discernible. However, this awareness, for now, skates on the surface. The crux lies in transitioning from a mere nod to sustainable fashion to its holistic assimilation in consumer choices. This delineation offers businesses a golden opportunity. As consumer understanding is in its infancy, brands can don the dual hats of guide and trailblazer. By shepherding consumers from initial recognition to enlightened, sustainable choices, enterprises can cement lasting allegiances and seize a pivotal stake in this transformative phase of the industry's evolution.

In summation, as the fashion realm is in flux, astute brands have the prospect to navigate, educate, and firmly position themselves at the forefront of an impending sustainability-centric epoch.

Given this backdrop, it's imperative for South Korean fashion enterprises to not just superficially project sustainability but to wholeheartedly weave it into their fabric. A meaningful start would be the sourcing of eco-conscious materials, fostering ethically sound labor conditions, and championing energy thriftiness. To affirm this commitment, brands might seek endorsements from globally acknowledged environmental organizations. However, in a milieu where green claims are viewed with a degree of skepticism, proactive transparency becomes paramount. Regularly sharing

exhaustive sustainability evaluations, welcoming unbiased scrutiny, and initiating open conversations about green pursuits can elevate brand trustworthiness. Furthermore, brands have a golden chance to don the educator's hat, demystifying the sustainable fashion cosmos. Orchestrating educational sessions, fostering influencer tie-ups, or spearheading awareness drives can intensify the sustainable fashion discourse. Melding elements such as design, cost-effectiveness, and longevity with sustainability in promotional campaigns can resonate well, especially considering their significance to the Gen Z cohort. Harnessing the technological zeitgeist of South Korea can also yield dividends. Innovations like virtual outfit trials, digital storytelling of a product's journey, or immersive platforms elucidating a brand's eco-mission can captivate the tech-savvy. To further underscore environmental commitment, brands might mull over alliances with tech innovators or eco-conscious urban design entities. Finally, keeping the communication channels with consumers perennially open ensures that brand strategies remain attuned to their evolving predilections and apprehensions.

8 Future Research

The current study's comprehensive dive into the South Korean fashion sector's alignment with sustainability, particularly through the lens of Generation Z's preferences, has unveiled several facets that necessitate further scholarly exploration. While the insights regarding Generation Z's inclinations are invaluable, it would be enriching to delve into the perspectives of other demographic cohorts, such as Millennials or Generation Alpha, to discern if and how their sustainable fashion perceptions differ. Their unique life experiences and value systems might reveal contrasting or complementary insights. Furthermore, the multifaceted nature of sustainability beckons a more nuanced understanding. It might be beneficial to delineate and dissect the different dimensions of sustainability—environmental, social, and economic—to grasp which facet resonates most with consumers. The role of technology, especially in a technologically advanced nation like South Korea, also presents a promising avenue. Future studies could investigate how technological interventions, from Augmented Reality in fashion trials to blockchain in supply chain transparency, can amplify or alter sustainable fashion consumption. Moreover, the present research highlighted a gap between surface-level awareness and profound commitment to sustainability. A future study might

wish to explore the root causes of this disparity, perhaps delving into educational frameworks, media influence, or cultural nuances that shape perceptions. Lastly, a comparative analysis between South Korea and other nations, whether they are neighbors in the Asia-Pacific region or countries from different continents, could shed light on cultural, economic, or political determinants driving sustainable fashion trends globally.

9 Appendix: Survey Questionnaire

1. Age Distribution of Respondents:

9-12 years: 0.8%

12-15 years: 8.4%

15-18 years: 10.1%

18-21 years: 34.5%

21-24 years: 46.2%

2. Gender Distribution:

Male: 57.1%

Female: 42.9%

3. Highest Level of Education:

Middle School: 17.6%

High School: 58.8%

Undergraduate Degree: 16.8%

Postgraduate: 5.1%

4. Frequency of Clothing Purchases:

Once a month: 38.7%

Every 2-3 months: 35.3%

Every 4-6 months: 19.3%

Once a year: 5.1%

5. Type of Clothing Preference:

Fast Fashion: 49.6%

High-end/Designer: 25.2%

Second-hand: 5.9%

Sustainable Brands: 19.3%

6. Influential Factors in Clothing Purchase Decisions:

Price: 64.8%

Brand Reputation: 33.6%

Quality of Clothing: 72.3%

Sustainability Impact: 14.2%

Style/Aesthetics: 84.1%

Comfort: 69.8%

Material: 37.8%

Country of Origin: 1.7%

7. Awareness of the Term “Sustainable Fashion”:

Yes: 56.4%

No: 43.6%

8. Brands Identified as Promoting Sustainable Fashion:

Patagonia: 24 respondents

Allbirds: 3 respondents

Freitag: 9 respondents

H&M: 5 respondents

Levis: 4 respondents

Nike: 5 respondents

Adidas: 4 respondents

Everlane: 3 respondents

Zara: 6 respondents

Stella McCartney: 4 respondents

Plato's Closet: 1 respondent

Vivienne Westwood: 1 respondent

9. Importance of Sustainability in Fashion (Scale of 1-5):

1: 11.8%

2: 17.6%

3: 37%

4: 23.5%

5: 10.1%

10. Influence of Corporate Sustainability Initiatives on Purchasing Decisions:

Yes: 26.9%

No: 26.9%

Unsure: 46.2%

11. Familiarity with the Brand Patagonia:

Yes: 73.9%

No: 26.1%

12. Rating of Patagonia's Efforts Towards Sustainability (Scale of 1-5):

1: 1.1%

2: 4.4%

3: 20%

4: 41%

5: 28.9%

13. Plans to Purchase More Sustainable Fashion:

Yes: 58.0%

No: 10.1%

Unsure: 31.9%

14. Factors Influencing the Decision to Buy Sustainable Fashion:

Price: 59.1%

Style: 68.1%

Brand Reputation: 37.8%

Sustainability Impact: 42.8%

Quality of Clothing: 64.7%

Other: 4.2%

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