[Original Article]

Indonesian Muslim women's fashion design preference

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Abstract

Indonesian women have emerged as global consumers, and various studies are needed to expand the global fashion market targeting their needs. In this study, a survey was conducted to determine the fashion design preferences of Indonesian Muslim women according to demographic characteristics and religious variables. In this study, Indonesian women aged from their teens to their 40s were surveyed by questionnaire during June 2020. This yielded 301 survey responses, which were analyzed using χ^2-test, t-test, ANOVA, and Duncan's multiple range test using SPSS23. The results of the study are as follows: Analysis of the demographic characteristics of Indonesian Muslim women and the degree of acceptance of fashion trends according to religious variables showed significant differences according to age, monthly income, and the extent to which they wore a hijab. Analysis of the demographic characteristics of the women and the degree of acceptance of the fitted garment according to religious variables showed significant differences depending on their age, whether they were married, their monthly income, religious faithfulness, the extent to which they wore a hijab, and the degree of acceptance of Islamic discipline. After examining the difference in Muslim women's preferred fashion images (according to demographic characteristics and religious variables), significant differences were identified according to their age, income, extent to which they wore a hijab, and the degree of Islamic discipline with regard to clothing.

Keywords: fashion design, Indonesian Muslim women, design preference

Ⅰ. Introduction

The Fashion Market Trend 2021 by Korean Federation of Textile Industries reports that only 13 out of 41 domestic sales companies worth more than 200 billion won saw a recent sales increase in 2020, while the remaining 28 companies witnessed a sales decline (Kim, 2021).

The impact of COVID-19 from 2020 caused the domestic fashion industry to further stagnate, with additional difficulties arising due to China's protectionist policy. In this regard, the Korean fashion industry requires new strategies, seeking to pioneer and expand overseas markets in the new-normal era. The Korean government held a Korea-Indonesia Business Forum in 2017 regarding the diversification

of trading target countries and announced the New Southern Policy as a key strategy for Korea's national development. Subsequently, the South Korea-Indonesia Comprehensive Economic Partnership Agreement (CEPA), a bilateral negotiation with Association of Southeast Asian Nations (ASEAN) countries under the New Southern Policy, came into fruition in November 2019 (Ministry of Trade and Industry, 2020). Such government efforts aim to expand Korea's economic base to numerous countries by shifting the focus away from U.S., Japan, and China through cooperation with ASEAN countries.

According to the 2020 census (Sensus Penduduk Indonesia) by Statistics Indonesia, locally known as Badan Pusat Statistik (BPS), Indonesia is the fourth most populated country in the world, with 272.2 million people, following China, India, and the U.S. (Hur, 2019). Consequently, interests and research on Indonesian Muslim consumers are needed. Indonesia is evaluated as a country with very high potential as a fashion-consumption market due to the large population of young people in their 20s and 30s and increasing level of education (KOTRA, 2019). In this regard, global fashion brands are also constantly attracting interest through their strategies targeting Muslim consumers (An, 2017). However, research on Muslim fashion remains insufficient in the domestic fashion studies field despite the continuous expansion of the fashion market for Muslim women. Thus, research on Indonesian Muslims is needed, as they are the fashion consumers currently emerging in the new consumer market.

Foreign fashion studies research on modern Southeast Asian Muslim women includes studies on the fashion trends of Indonesian Muslim women and hijabers (Agustina, 2015; Hassan & Harun, 2016), as well as a study on Indonesian female Muslims' trend sensitivity when purchasing fashion products (Riptiono, 2019). Studies conducted in Korea include research on Muslim fashion styles in modern fashion and a study on modest fashion (Choi & Kim, 2019; Kim,

2018). In addition, Na and Lee (2016) conducted a study related to the clothing behaviors of Indonesian consumers in their 20-30s and their attitudes toward Korean fashion brands. Recently, Park and Park (2021) researched the relationship between religious variables and fashion product purchases by investigating Indonesian Muslim women's fashion product purchase behavior. To date, however, no studies have surveyed Indonesian Muslim women on their preferences for fashion design. In fact, it is pointed out that the hijab is on the rise as a daily part of Indonesian women's wear, which is an increase in religiousness (Turmudi, 2016) and that even young women with strong spending power are demanding a new fashion while wearing hijab follows the Sharia (Agustina, 2015) and the popularization of Islamic religion, the hijab and fashion became a very important symbol for Indonesian women (Beta, 2014).

Therefore, the purpose of this study is to conduct a survey on fashion design preferences according to demographic characteristics and religious-related variables such as religious fidelity, the degree of wearing a hijab, and the application of Islamic rules to Indonesian Muslim women. To this end, we intend to conduct a survey on Muslim women living in large cities in Indonesia (i.e., Jakarta, Bandung). According to the results of the survey, information on Indonesian consumers who are emerging as global consumers by identifying differences in preferred fashion images and preferred patterns according to demographic characteristics and religious fidelity, the degree of wearing the hijab, and the application of Islamic rules of clothing to the industry. It will be provided to and academia and will be used in the strategy of the Indonesian market.

Ⅱ. Theoretical Background

1. Indonesia's economic growth and fashion industry development as a population powerhouse

The Korea Trade-Investment Promotion Agency's

overseas market report (KOTRA, 2019) shows that Indonesia has seen an increase in the middle-class population due to its rapid economic growth since the 2000s, with more than 100 million Indonesians of the total population belonging to the middle class. Furthermore, the high proportion of young people in their 20s and 30s has led to high interest in the consumption of beauty and fashion clothing. Following the increase in the middle-class and young adult population, the growth of domestic consumption acts as a positive opportunity for Korean companies to enter Indonesian regions. The popularity of the Korean wave such as K-pop and K-dramas has led to a rise in favorable views of South Korea among the young Indonesian generation, which can serve as a great advantage to Korean companies (KOTRA, 2019). However, the need for fierce competition with other competitors such as Japan-traditionally recognized as high-end in the Indonesian market-should not be overlooked. Subsequently, it is timely to consider a different market approach that focuses on the Indonesian younger generation.

In this regard, an increase in women's education levels leads to more active women's social activities, which is consequently related to the expansion of the fashion market. According to Kelmachter (2016), Muslims spent $266 billion on clothing in 2013, exceeding fashion sales in Japan and Italy. The U.S. economic magazine *Fortune* also indicated that although business for Muslims has so far been concentrated on finance and halal food, fashion has an endless potential in the Muslim market (Petrilla, 2015). The Indonesian government and Indonesia's leading fashion media group, Femina Group, play important roles in Indonesia's fashion industry. Jakarta Fashion Week is Southeast Asia's largest international fashion show; hosted by the Femina Group, it has been held annually in Indonesia since 2008. In addition, the Indonesia Islamic Fashion Consortium is a coalition of government agencies established for Indonesia's fashion industry, which supports the Indonesian

government to develop as an Islamic fashion mecca. Accordingly, Indonesia is currently considered the world's largest Muslim fashion market after the United Arab Emirates.

Indonesia continues to strengthen its economic policy under the second government of Joko Widodo after his re-election success. In particular, the Indonesian government is implementing radical deregulation policies by taking the initiative to create jobs and develop the economy amid global economic uncertainty.

2. Indonesian Muslim women's design preference for fashion products

Muslims value the practice of Islam in their daily life and want to follow the law even when wearing clothes. In general, there are Abaya, Chador, Niquab, and Burqa as the Islamic religious attire centered on the Arabian peninsula, but Muslims in Southeast Asia centered on Indonesia mainly wear the hijab. This particular type of Muslim attire was seen as particularly unfamiliar to non-Muslims, and in the past, it was more called Muslim fashion because it was only worn by believers in Islam. But now, modest fashion, represented by hijab fashion, is being accepted as one of the global fashion trends. Therefore, the current Islamic fashion of Indonesian Muslims can be understood as one of the unique modern fashions in which the hijab fashion is expressed together with the religious modesty and sophisticated personality of Islam.

In a study on Islamic fashion segmentation in Indonesia, Kartajaya, Iqbal, Alfisyahr, Devita, and Ismail (2019) noted that Indonesian Muslim fashion is changing from conservative traditional clothing to modern fashion. The younger generation is at the center of this trend, accounting for 40% of the fashion-consumption market. The study also noted that Muslim women are consuming their image and social identity through fashion as fashion is a form of social communication. Indonesian Muslim women consider both modern fashion styles and religious

sincerity for their fashion due to their pursuit of individuality, orientation toward a Sharia (religious law forming part of the Islamic tradition) clothing style, and strong religious faith. In particular, Indonesian Muslim women are well aware that their strong pursuit for individuality and their hijab clothing reveals their image and self-identity in their surrounding society.

Lee and Park (2020) conducted a study on hijab fashion and stated that wearing a hijab is considered a Muslim duty, right, or personal choice by Muslim women in Southeast Asia, and that they freely select between traditional, modern, and Western fashion for their styling as an expression of religious identity and pride. On another note, Park and Park (2021) found that Muslim women actively purchase fashion products from multiple platforms such as department stores and the internet, from which they most frequently purchased from shopping malls and department stores. The study interpreted such a trend to reflect their *malling* lifestyle, where Muslim women enjoy browsing in shopping malls due to the hot weather, and suggested marketing strategies for appropriately creating visual presentation and visual merchandising display in shopping malls and department stores. The study also noted that it would be most effective to design such shopping venues with a focus on practicality when targeting groups with married Muslim women, those in their 30s and 40s, and those who value religious sincerity.

Studies mention the importance of the results of hijab fashionistas' religious sincerity and their pursuit of fashion, brand, and individuality, since they affect general consumers—especially the younger generation (Kartajaya et al., 2019). Park and Jang (2020) found that Instagram hijabistas' fashion mostly had a sporty image, and while many had an elegant or modern image, few had an ethnic, avant-garde, or classical image. In addition, the study indicates that the high proportion of sporty and elegant images results from the fact that SNS spaces reveal influencers' sporty fashion attire on luxurious vacations or trips, and that

these images depict working women.

Park and Jang (2020) also found that all hijabistas wore a hijab as an expression of religious sincerity and that they most frequently wore long, unfitted pants and t-shirts. Monochrome colors were most common for both veils and garments, and material patterns were less diverse and infrequently applied. The study interpreted such a lack of pattern use as a fashion characteristic that focuses on other aspects of design such as color or shape. In addition, Na and Lee (2016) noted that new, young, modern, active, casual, and interesting clothing images were favored by Indonesian consumers in their 20s and 30s. These consumers had a high interest in appearance and commonly wear western clothing styles such as jeans and suits along with Muslim, traditional, and western clothing (Fig. 1).

A review of previous literature on Indonesian Muslim women's fashion reveals that based on religious sincerity, Muslim women prefer modern and sporty fashion designs with an urban image and are significantly interested in fashion trends. In addition, middle-class female consumers from young cities considered modern fashion styles as well as religious sincerity. In particular, Indonesian Muslim women were well aware that their high pursuit of individuality and hijab clothing revealed their image and identity in their surrounding society. Overall, Muslim women followed a wide variety of fashion trends while conforming to Islamic norms. Following (Table

<Fig. 1> Young Muslim women in hijab in Indonesian metropolis
Photographed by the author. (January 13, 2021).

1) below summarizes the previous studies above.

Ⅲ. Research Questions and Methodology

1. Research questions and research model

The following research questions were established to examine the differences in fashion design preferences among Indonesian Muslim women according to demographic characteristics and religious variables.
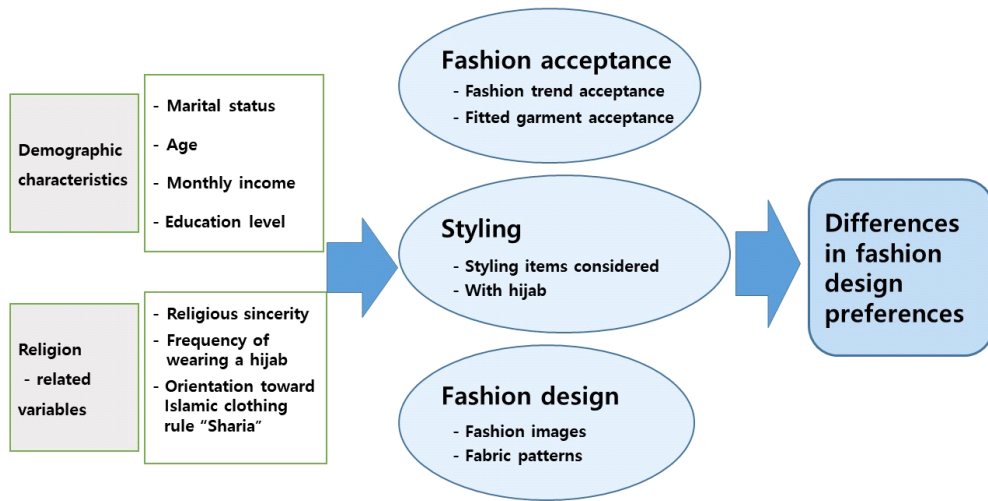
First, what are the differences in Muslim women's degree of acceptance of fashion trends and fitted clothing according to demographic characteristics and religious variables? Second, what are the differences in the style factors considered by Muslim women when wearing a hijab according to demographic characteristics and religious variables? Third, what are the differences in Muslim women's fashion images according to demographic characteristics and religious variables? Fourth, what are the differences in Muslim women's preferences for patterns according to demographic characteristics and religious variables?

Focusing on the above research questions, the research proceeds according to the following research model (Fig. 2). After analyzing the demographic characteristics and religion-related variables of Indonesian Muslim women, these variables were designated as independent variables. According to these independent variables, by examining the fashion trends of Indonesian Muslim women, the difference in the accep-

<Table 1> The previous studies of Indonesian Muslim fashion

Researcher (year)	Topic	Contents and result
Agustina (2015)	Hijabers: Fashion trend for moslem women in Indonesia	• Changes in the value of the hijab. • Young Muslims prefer a modern, new style of hijab, following the trend and still following the Sharīah.
Kartajaya et al. (2019)	Segmenting Islamic fashion lifestyle on Indonesian woman	• 11 factors and 6 segments for clusting the respondents of Islamic fashion lifestyle. • The cluster analysis demonstrated that mean of personality pursuit, Sharia dressing style orientation and religiousity is greater than 4.00 on all clusters.It proves that the consumers of Islamic fashion among six clusters have high level or religiousity and Sharia dressing style.
Park & Jang (2020)	Characteristics of hijabista fashion in Southeast Asia according to social media - Focused on Indonesia and Malaysia -	• Hijabista's fashion image is overall sporty, yet shows the characteristics of elegance or romantic femininity. • The masculine image is not large. • Preferred fashion image: The fashion image preference is high in the order of sportive image, elegance image, and modern image.
Turmudi (2016)	The passion of jilbab: Socio-cultural transformation of Indonesian Muslim women	• The veil has become a daily wear for Muslim women in Indonesia, and is related to religious order, so the increase in users is seen as an increase in religiousness. • Wearing jilbap (Indonesian expression of hijab) is a cultural change and means following a modern style.
Wagner, Sen, Permanadeli, & Howarth, (2012)	The veil and Muslim women's identity: Cultural pressures and resistance to stereotyping	• Indonesian young people think the veil is cool and claim that the veil follows contemporary fashion and localized dress codes of the community and fashion industry. • Trendy veil is seen as a fashion product that is connected to the lifestyle of the upper class and satisfies cultural and religious conditions and the desire for aesthetic expression.

<Fig. 2> The research model according to research proceeds

tance of fitted clothes, the difference in style items to be considered when wearing the hijab, and the difference in fashion image and pattern through fashion design, the difference in the fashion design preference of Muslim women was investigated.

2. Data collection and research subjects

Data for this study was collected from Indonesian Muslim women to analyze differences in design preferences for fashion products according to demographic characteristics and religious variables (i.e., religious sincerity, frequency of wearing a hijab, and the degree of conformity to Islamic clothing rules).

Specifically, data was collected via survey questionnaire from Muslim women in their teens to 40s living in large Indonesian cities (Jakarta, Bandung). The survey was conducted online for five days between June 3 and 7, 2020. Consequently, 301 surveys were included in this study after excluding responses that were determined to be insincere or unreliable. The demographic characteristics of the research subjects are as shown in 〈Table 2〉.

3. Measurement tools and analysis methods

In this study, a survey questionnaire was used for

<Table 2> Demographic characteristics of samples

Demographic characteristics		Frequency(%)
Marital status	Single	241(80.1)
	Married	60(19.9)
Age	10s	41(13.6)
	20s	213(70.8)
	30s	24(8.0)
	40s	23(7.6)
Monthly incomes (IDR)	Less than 2,000,000	118(38.5)
	2,000,001−4,000,000	74(24.6)
	4,000,001−6,000,000	52(17.3)
	More than 6,000,000	59(19.6)
Education level	High school or less	193(64.1)
	Bachelor's degree or higher	108(35.9)
Total		301(100.0)

the measurement tool. The survey largely consisted of questions on the degree of acceptance of clothing fashion trends and fitted clothing (one question for each category using a 5-point Likert scale), styling items considered when wearing a hijab (one multiple choice question). Indonesian Muslim women tended

to pursue a wide range of global fashion trends while following Islamic norms, while on the other hand, their attire reveals their image and identity in the surrounding society by wearing a hijab along with their pursuit of high individuality. Indonesian Muslim women tended to pursue a wide range of global fashion trends while following Islamic norms, while on the other hand, their attire reveals their image and identity in the surrounding society by wearing a hijab along with their pursuit of high individuality. Through these questions, we try to understand the latest fashion trends of Muslim women. Through these questions, we try to understand the latest fashion trends of Muslim women fashion design preferences (one multiple choice question each on preferred fashion images and preferred patterns), and other demographic characteristics.

The survey questions were constructed based on the review of three fashion experts and three graduate students majoring in fashion, which were then revised and supplemented after trialing the survey on 15 prospective subjects. In particular, fashion images that were suitable for the purpose of this study were derived from previous studies (Jang & Park, 2021; Lee & Kim, 1998; Park & Jang, 2020), which were then revised and supplemented into six types. Subsequently, after coordinating and taking photos of the fashion suitable for each image type, the photos were reviewed by three fashion experts and three graduate students majoring in fashion to determine the suitability of the images for the study and increase their reliability as fashion-image tools. SPSS 23 software was used to analyze the results using multiple statistical analyses including a χ^2-test, factor analysis, t-test, ANOVA, and Duncan multiple range test.

Ⅳ. Results and Discussion

1. Differences in the degree of acceptance of fashion trends and fitted clothing

The differences in the degree of acceptance of fashion trends according to demographic characteristics (i.e., marital status, age, highest education level, monthly income) and religious variables (i.e., religious sincerity, frequency of wearing a hijab, and orientation toward Islamic clothing rules) are shown in ⟨Table 3⟩ and ⟨Table 4⟩. Specifically, there were significant differences according to age, monthly income, and frequency of wearing a hijab, but no significant differences according to marital status, highest education level, religious sincerity, and orientation toward Islamic clothing rules. Examining the variables that showed significant differences more closely, those under the age of 30 accepted fashion trends more positively than those in their 40s. Participants who most positively accepted fashion trends included those with a monthly income of 2,000,000 IDR or more and 4,000,000 IDR or less, and those who do not wear a hijab.

The differences in the degree of orientation toward fitted clothing according to demographic characteristics (marital status, age, highest education level, monthly income and religious variables religious sincerity, frequency of wearing a hijab, and orientation toward Islamic clothing rules are shown in ⟨Table 3⟩ and ⟨Table 4⟩. Specifically, there were significant differences according to marital status, age, monthly income, religious sincerity, frequency of wearing a hijab, and orientation toward Islamic clothing rules, and no significant differences according to highest education level. Focusing on the variables that showed significant differences, unmarried participants more positively accepted fitted clothing than married participants. Groups that most positively accepted fitted clothing included those in their 20s, those with a monthly income of 2,000,000 IDR or more and 4,000,000 IDR or less, those who did not value religious sincerity, those who do not wear a hijab, and those who were not oriented toward Islamic clothing rules.

Such results show that women under 30, women who do not wear a hijab, unmarried women, and women who do not value religious sincerity were more

<Table 3> Differences in the degree of acceptance of fashion trends and fitted clothing according to demographic characteristic

Demographic characteristic / Acceptance level	Marital status			Age				
	Single (n=241)	Married (n=60)	t	10s (n=41)	20s (n=213)	30s (n=24)	40s (n=23)	F
Acceptance of fashion trends	3.655	3.500	1.066	3.585b	3.681b	3.667b	3.043a	2.685*
Acceptance of fitted clothing	3.062	2.300	3.851***	3.098a	3.075b	1.792a	2.217a	8.818***
Demographic characteristic / Acceptance level	Level of education			Income (IDR)				
	High school or less (n=193)	Bachelor's degree or higher (n=108)	t	Less than 2,000,000 (n=116)	2,000,000– 4,000,000 (n=74)	4,000,001– 6,000,000 (n=52)	Over 6,000,000 (n=59)	F
Acceptance of fashion trends	3.642	3.574	.551	3.509a	3.878b	3.712ab	3.424a	2.865*
Acceptance of fitted clothing	2.984	2.778	1.227	2.922ab	3.216b	2.904ab	2.508a	2.840*

* $p<.05$, *** $p<.001$, Duncan multiple range test: a<b

<Table 4> Differences in the degree of acceptance of fashion trends and fitted clothing according to religious variables

Religious variables / Acceptance level	Religious sincerity			Frequency of wearing a hijab			
	Not important (n=23)	Important (n=278)	t	Do not wear at all (n=71)	Wear sometimes (n=52)	Wear everyday (n=178)	F
Acceptance of fashion trends	3.261	3.647	−1.723	4.000b	3.533a	3.500a	4.801**
Acceptance of fitted clothing	3.609	2.853	2.722*	3.859c	3.250b	2.433a	4.313***

Religious variables / Acceptance level	Orientation toward Islamic clothing rules			
	Reject (n=39)	Slightly oriented (n=71)	Very oriented (n=191)	F
Acceptance of fashion trends	3.308	3.662	3.665	2.016
Acceptance of fitted clothing	4.154c	3.254b	2.529a	29.092***

* $p<.05$, ** $p<.01$, *** $p<.001$, Duncan multiple range test: a<b<c

positive toward fashion trends and fitted clothing. The results indicate that the acceptance of fashion trends or fitted clothing is affected by age or Islamic religious factors. In addition, these outcomes align with

previous study (Jang & Park, 2021) that found that Malaysian Muslim women valued religious sincerity and had a higher negative perception toward fitted clothing.

2. Styling items considered when wearing a Hijab

The differences in styling items considered by Indonesian Muslim women when wearing a hijab are shown in ⟨Table 5⟩, ⟨Table 6⟩, ⟨Table 7⟩, and ⟨Table 8⟩, which include multiple responses. There were significant differences according to religious variables (frequency of wearing a hijab and orientation toward Islamic clothing rules) but no significant differences for other variables. Overall, handbags and shoes were most frequently considered by Indonesian Muslim women as styling items when wearing a hijab, followed by color harmony with clothes, which were considered the most by those who wear hijab every

⟨Table 5⟩ Differences in styling factors considered when wearing a hijab according to marital status and age

n(%)

Marital status & age / Styling items	Marital status			Age				
	Single (n=422)	Married (n=100)	Total	10s (n=65)	20s (n=379)	30s (n=43)	40s (n=35)	Total
Color harmony with clothes	155 (36.7)	39 (39.0)	194 (37.2)	26 (40.0)	141 (37.2)	13 (30.2)	14 (40.0)	194 (37.2)
Harmony with handbags, shoes, etc.	235 (55.7)	47 (47.0)	282 (54.0)	34 (52.3)	210 (55.4)	21 (48.8)	17 (48.6)	282 (54.0)
No consideration given	32 (7.6)	14 (14.0)	46 (8.8)	5 (7.7)	28 (7.4)	9 (20.9)	4 (11.4)	46 (8.9)
Total	422 (100.0)	100 (100.0)	522 (100.0)	65 (100.0)	379 (100.0)	43 (100.0)	35 (100.0)	522 (100.0)
	χ^2=5.091　　df=2			χ^2=9.752　　df=6				

⟨Table 6⟩ Differences in styling factors considered when wearing a hijab according to highest education level and monthly income

n(%)

Level of education & income / Styling items	Level of education			Income (IDR)				
	High school or lower (n=331)	Bachelor's degree or higher (n=191)	Total	Less than 2,000,000 (n=205)	2,000,000 −4,000,000 (n=128)	4,000,001 −6,000,000 (n=86)	Over 6,000,000 (n=103)	Total
Color harmony with clothes	123 (37.2)	71 (37.2)	194 (37.2)	76 (37.1)	49 (38.3)	33 (38.4)	36 (35.0)	194 (37.2)
Harmony with handbags, shoes, etc.	181 (54.7)	101 (52.9)	282 (54.0)	117 (57.1)	69 (53.9)	44 (51.2)	52 (50.5)	282 (54.0)
No consideration given	27 (8.2)	19 (9.9)	46 (8.8)	12 (5.9)	10 (7.8)	9 (10.5)	15 (14.6)	46 (8.8)
Total	331 (100.0)	191 (100.0)	522 (100.0)	205 (100.0)	128 (100.0)	86 (100.0)	103 (100.0)	522 (100.0)
	χ^2=.514　　df=2			χ^2=7.249　　df=6				

<Table 7> Differences in styling factors considered when wearing a hijab according to religious sincerity and frequency of wearing a hijab　　　　　　　　　　　　　　　　　　　　　　　　　　　n(%)

Religious variables / Styling items	Religious sincerity			Frequency of wearing a hijab			
	Not important (n=38)	Important (n=484)	Total	Do not wear at all (n=105)	Wear sometimes (n=95)	Wear everyday (n=322)	Total
Color harmony with clothes	11 (28.9)	183 (37.8)	194 (37.2)	29 (27.6)	34 (35.8)	131 (40.7)	194 (37.2)
Harmony with handbags, shoes, etc.	22 (57.9)	260 (53.7)	282 (54.0)	55 (52.4)	56 (58.9)	171 (53.1)	282 (54.0)
No consideration given	5 (13.2)	41 (8.5)	46 (8.8)	21 (20.0)	5 (5.3)	20 (6.2)	46 (8.8)
Total	23 (100.0)	484 (100.0)	522 (100.0)	105 (100.0)	95 (100.0)	322 (100.0)	522 (100.0)
	χ^2=1.737　　df=2			χ^2=22.968** 　df=4			

** $p<.01$

<Table 8> Differences in styling factors considered when wearing a hijab according to orientation toward Islamic clothing rules　　　　　　　　　　　　　　　　　　　　　　　　　　　　　　n(%)

Orientation toward Islamic clothing rules / Styling items	Reject (n=57)	Slightly oriented (n=133)	Very oriented (n=322)	Total
Color harmony with clothes	17(29.8)	50(37.6)	127(38.3)	194(37.2)
Harmony with handbags, shoes, etc.	28(49.1)	78(58.6)	176(53.0)	282(54.0)
No consideration given	12(21.1)	5(3.8)	29(8.7)	46(8.8)
Total	57(100.0)	133(100.0)	322(100.0)	522(100.0)
	χ^2=15.328** 　　df=4			

** $p<.01$

day and those who were oriented toward Islamic clothing rules. The higher percentage of women who did not consider styling items included those who do not wear a hijab and those who were not oriented toward Islamic clothing rules.

The above results show that Indonesian Muslim women mainly consider the coordination with handbags, shoes, and color of clothing when styling with their hijab. The focus on harmony appears to relate to *akhlak* (one's morality appears in one's clothes and

attitudes), which refers to the Islamic theology that the core of external Islamic beauty includes not only the harmony of clothing combinations but also the overall harmony with makeup, accessories, shoes, and bags. In addition, the fact that harmony with handbags and shoes is prioritized over other factors shows that Muslim women's conventional mindset about fashion is changing. However, their conversative tendency toward color and physical distinction somewhat reflects an ascetic religious influence.

3. Differences in fashion design preferences

1) Differences in preferred fashion images according to demographic characteristics and religious variables

Examining differences in fashion-image preferences among Muslim women according to demographic characteristics and religious variables, significant differences were found according to marital status, age, monthly income, frequency of wearing a hijab, and orientation toward Islamic clothing rules. On the other hand, there were no significant differences according to highest education level and religious sincerity (see Table 9–12). As shown in ⟨Table 9⟩, unmarried women mostly preferred sporty images, while the highest proportion of married women preferred elegant images. By age, Muslim women in their teens and 20s mostly preferred sporty images, while the highest proportion of women in their 30s preferred elegant and modern images. Women in their 40s equally preferred elegant and modern images over others. In addition, those who had a monthly income of less than 4,000,000 IDR preferred sporty images the most, followed by those who prefer modern and sophisticated images, as shown in ⟨Table 10⟩. On the other hand, the highest

proportion of women with a monthly income of 4,000,000 IDR or higher preferred modern images. In particular, those who had an income of 4,000,000–6,000,000 IDR equally preferred sporty and sophisticated images, and those with an income of 6,000,000–8,000,000 IDR preferred elegant images.

According to religious sincerity, those who do not wear or sometimes wear a hijab preferred sporty images the most, followed by modern and sophisticated images, as shown in ⟨Table 11⟩. On the other hand, the highest proportion of women who wear a hijab everyday equally preferred modern and sporty images the most, followed by elegant and sophisticated images. Regardless of the orientation toward Islamic clothing rules, the highest proportion of participants preferred sporty images the most, followed by a preference for modern and sophisticated images among those who reject or are slightly oriented toward Islamic clothing rules, and a preference for modern and elegant images among those who are very oriented toward Islamic clothing rules.

Overall, Indonesian Muslim women preferred sporty images the most, with their subsequent preference differing according to demographic characteristics (marital status, age, and monthly income) and religious

⟨Table 9⟩ Differences in preferred fashion images according to marital status and age n(%)

Marital status & age / Desired image	Marital status			Age				
	Single (n=241)	Married (n=60)	Total	10s (n=41)	20s (n=213)	30s (n=24)	40s (n=23)	Total
Elegant	16(6.6)	17(28.3)	33(11.0)	1(2.4)	19(8.9)	7(29.2)	6(26.1)	33(11.0)
Romantic	21(8.7)	5(8.3)	26(8.6)	4(9.8)	18(8.5)	2(8.3)	2(8.7)	26(8.6)
Modern	64(26.6)	13(21.7)	77(25.6)	10(24.4)	55(25.8)	6(25.0)	6(26.1)	77(25.6)
Sporty	96(39.8)	12(20.0)	108(35.9)	19(46.3)	82(38.5)	5(20.8)	2(8.7)	108(35.9)
Sophisticated	39(16.2)	9(15.0)	48(15.9)	7(17.1)	34(16.0)	2(8.3)	5(21.7)	48(15.9)
Ethnic	5(2.1)	4(6.7)	9(3.0)	0(0.0)	5(2.3)	2(8.3)	2(8.7)	9(3.0)
Total	241(100.0)	60(100.0)	301(100.0)	41(100.0)	213(100.0)	24(100.0)	23(100.0)	301(100.0)
	χ^2=29.777[***] df=5			χ^2=31.298[**] df=15				

[**] p<.01, [***] p<.001

<Table 10> Differences in preferred fashion images according to highest education level and monthly income

n(%)

Level of education & income / Preferred image	Level of education			Income (IDR)				
	High school or lower (*n*=193)	Bachelors or higher (*n*=108)	Total	Less than 2.000.000 (*n*=116)	2.000.000– 4.000.000 (*n*=74)	4,000,001– 6.000.000 (*n*=52)	Over 6.000.000 (*n*=59)	Total
Elegant image	22(11.4)	11(10.2)	33(11.0)	5(4.3)	8(10.8)	7(13.5)	13(22.0)	33(11.0)
Romantic image	15(7.8)	11(10.2)	26(8.6)	9(7.8)	7(9.5)	3(5.8)	7(11.9)	26(8.6)
Modern image	49(25.4)	28(25.9)	77(25.6)	33(28.4)	15(20.3)	16(30.8)	13(22.0)	77(25.6)
Sporty image	75(38.9)	33(30.6)	108(35.9)	51(44.0)	34(45.9)	12(23.1)	11(18.6)	108(35.9)
Sophisticated image	28(14.5)	20(41.7)	48(15.9)	7(14.7)	8(10.8)	12(23.1)	11(18.6)	48(15.9)
Ethnic image	4(2.1)	5(4.6)	9(3.0)	1(0.9)	2(2.7)	2(3.8)	4(6.8)	9(3.0)
Total	193(100.0)	108(100.0)	301(100.0)	116(100.0)	74(100.0)	52(100.0)	59(100.0)	301(100.0)
	χ^2=4.112　 *df*=5			χ^2=34.445** 　*df*=15				

** *p*<.01

<Table 11> Differences in preferred fashion images according to religious sincerity and frequency of wearing a hijab

n(%)

Religious variables / Preferred image	Religious sincerity			Frequency of wearing a hijab			
	Not important (*n*=23)	Important (*n*=278)	Total	Do not wear at all (*n*=71)	Wear sometimes (*n*=52)	Wear everyday (*n*=178)	Total
Elegant	0(0.0)	33(11.9)	33(11.0)	2(2.8)	0(0.0)	31(17.4)	33(11.0)
Romantic	3(13.0)	23(8.3)	26(6.7)	7(9.9)	7(13.5)	12(6.7)	26(8.6)
Modern	3(13.9)	74(26.6)	77(25.7)	16(22.5)	9(17.3)	2(29.2)	77(25.6)
Sporty	10(43.5)	98(35.3)	108(35.7)	30(42.3)	26(50.0)	52(29.2)	108(35.9)
Sophisticated	6(26.1)	42(15.1)	48(16.0)	12(16.9)	9(17.3)	7(15.2)	48(15.9)
Ethnic	1(4.3)	8(2.9)	9(3.0)	4(5.6)	1(1.9)	4(2.2)	9(3.0)
Total	23(100.0)	278(100.0)	301(100.0)	71(100.0)	52(100.0)	178(100.0)	301(100.0)
	χ^2=6.980　 *df*=5			χ^2=29.842** 　*df*=10			

** *p*<.01

variables (frequency of wearing a hijab and orientation toward Islamic clothing rules). These results align with the finding of a previous study (Jang & Park, 2021) that sporty and elegant images were most preferred by Indonesian and Malaysian hijabistas. In addition, the results indicate that fashion images favored by Indonesian women are affected by demographic and religious characteristics. Such findings can

<Table 12> Differences in preferred fashion images according to orientation toward Islamic clothing rules

n(%)

Preferred image \ Orientation toward Islamic clothing rules	Reject (*n*=39)	Slightly oriented (*n*=71)	Very oriented (*n*=191)	Total
Elegant	0(0.0)	2(2.8)	31(16.2)	33(11.0)
Romantic	5(12.8)	7(9.9)	14(7.3)	26(8.6)
Modern	10(25.6)	18(25.4)	49(25.7)	77(25.6)
Sporty	15(38.5)	30(42.3)	63(33.0)	108(35.9)
Sophisticated	7(17.9)	14(19.7)	27(14.1)	48(15.9)
Ethnic	2(5.1)	0(0.0)	7(3.7)	9(3.0)
Total	39(100.0)	71(100.0)	191(100.0)	301(100.0)
χ^2=20.156* *df*=10				

* *p*<.05

be useful for fashion design planning, displaying fashion products in stores, and advertising that targets Muslim women.

2) Differences in preferred patterns according to demographic characteristics and religious variables

Examining the differences in patterns preferred by Muslim women according to demographic characteristics and religious variables shows that there were significant differences according to religious sincerity, but no significant differences for other variables (see

Table 13, 14, 15 and 16). According to religious sincerity, participants mostly preferred plain patterns overall, followed by plant patterns. For subsequent preferences, those who responded that religious sincerity is not important favored animal patterns, followed by other and plant patterns. On the other hand, those who responded that religious sincerity is important indicated a preference in the order of other, plant, and animal patterns. In particular, a higher preference for animal patterns was found in groups who did not value religious sincerity than those who

<Table 13> Differences in preferred patterns according to marital status and age   *n*(%)

Patterns \ Marital status & age	Marital status			Age				
	Single (*n*=241)	Married (*n*=60)	Total	10s (*n*=41)	20s (*n*=213)	30s (*n*=24)	40s (*n*=23)	Total
Plain	102(42.3)	29(48.3)	131(43.5)	17(41.5)	93(43.7)	12(50.0)	9(39.1)	131(43.5)
Geometric patterns	69(28.6)	14(23.3)	83(27.6)	12(29.3)	58(27.2)	5(20.8)	8(34.8)	83(27.6)
Plant patterns	26(10.8)	8(13.3)	34(11.3)	5(12.2)	23(10.8)	5(20.8)	1(4.3)	34(11.3)
Animal patterns	7(2.9)	0(0.0)	7(2.3)	1(2.4)	6(2.8)	0(0.0)	0(0.0)	7(2.3)
Other	37(15.4)	9(15.0)	46(15.3)	6(14.6)	33(15.5)	2(8.3)	5(21.7)	46(15.3)
Total	241(100.0)	60(100.0)	301(100.0)	41(100.0)	213(100.0)	24(100.0)	23(100.0)	301(100.0)
	χ^2=2.910 *df*=4			χ^2=6.966 *df*=12				

<Table 14> Differences in preferred patterns according to highest education level and monthly income   n(%)

Level of education & income \ Patterns	Level of education			Income (IDR)				
	High school or lower (n=193)	Bachelors or higher (n=108)	Total	Less than 2.000.000 (n=116)	2.000.000- 4.000.000 (n=74)	4.000.001- 6.000.000 (n=52)	Over 6.000.000 (n=59)	Total
Plain	81(42.0)	50(46.3)	131(43.5)	48(41.4)	34(45.9)	18(34.6)	31(52.5)	131(43.5)
Geometric patterns	61(31.6)	22(20.4)	83(27.6)	34(29.3)	21(28.4)	15(28.8)	13(22.0)	83(27.6)
Plant patterns	19(9.8)	15(13.9)	34(11.3)	11(9.5)	6(8.1)	11(21.2)	6(10.2)	34(11.3)
Animal patterns	5(2.6)	2(1.9)	7(2.3)	2(1.7)	3(4.1)	1(1.9)	1(1.7)	7(2.3)
Other	27(14.0)	19(17.6)	46(15.3)	21(1.7)	10(13.5)	7(13.5)	8(13.6)	46(15.3)
Total	193(100.0)	19(17.6)	301(100.0)	116(100.0)	74(100.0)	52(100.0)	59(100.0)	301(100.0)
	χ^2=5.222 df=4			χ^2=10.899 df=12				

<Table 15> Differences in preferred patterns according to religious sincerity and frequency of wearing a hjab
n(%)

Religious variables \ Patterns	Religious sincerity			Frequency of wearing a Hijab			
	Not important (n=23)	Important (n=278)	Total	Do not wear at all (n=71)	Wear sometimes (n=52)	Wear everyday (n=178)	Total
Plain	11(47.8)	120(43.2)	131(43.7)	33(46.5)	27(51.9)	71(39.9)	131(43.5)
Geometric patterns	4(17.4)	79(28.4)	83(27.7)	17(23.9)	15(28.8)	51(28.7)	83(27.6)
Plant patterns	2(8.7)	32(11.5)	34(11.3)	8(11.3)	2(3.8)	24(13.5)	34(11.3)
Animal patterns	3(13.0)	4(1.4)	7(2.3)	4(5.6)	1(1.9)	2(1.1)	7(2.3)
Other	3(13.0)	43(15.5)	46(15.0)	9(12.7)	7(13.5)	30(16.9)	46(15.3)
Total	23(100.0)	278(100.0)	301(100.0)	71(100.0)	52(100.0)	178(100.0)	301(100.0)
	χ^2=13.574[*] df=4			χ^2=10.479 df=8			

[*] p<.05

did. Although there were no significant differences according to the frequency of wearing a hijab, the highest preference for animal patterns was seen in those who do not wear a hijab. Thus, it appears that pattern preferences are related to religious characteristics.

Muslim women most preferred plain patterns in general, followed by geometric and other patterns. The high preference for plain patterns also aligns with previous study (Jang & Park, 2021) that found that the highest proportion of hijabistas wore plain patterned clothes. The least preferred pattern by Indonesian Muslim women was animal patterns, which appears to be a result of Muslims' reluctance to portray people or animals since their religion strictly prohibits idolatry; thus, they do not favor patterns of sentient creatures (Park, 2010). These findings suggest that pattern preferences are also affected by religious and demo-

<Table 16> Differences in preferred patterns according to orientation toward Islamic clothing rules   *n*(%)

Patterns \ Orientation toward Islamic clothing rules	Reject (*n*=39)	Slightly oriented (*n*=71)	Very oriented (*n*=191)	Total
Plain	20(51.3)	35(49.3)	76(39.8)	131(43.5)
Geometric patterns	9(23.1)	15(21.1)	59(30.9)	83(27.6)
Plant patterns	3(7.7)	6(8.5)	25(13.1)	34(11.3)
Animal patterns	3(7.7)	2(2.8)	2(1.0)	7(2.3)
Other	4(10.3)	13(18.3)	29(15.2)	46(15.3)
Total	29(100.0)	71(100.0)	191(100)	301(100.0)
χ^2=12.631 *df*=8				

graphic characteristics.

Ⅴ. Conclusion

Muslim countries in Southeast Asia have become target markets for global fashion companies due to their population growth and economic development. With the spread of Pop Islam culture, which flexibly adapts to modern lifestyle, these countries are actively accepting global culture with a focus on middle-class cities. In particular, consumption culture is expanding as women with higher levels of education are actively entering the society. Consequently, it is expected that fashion markets for Muslim women will significantly emerge. Thus, the purpose of this study is to present fundamental data for fashion design planning and development that targets Muslim women by examining differences in fashion product design preferences according to demographic characteristics and religious variables. The following conclusions have been obtained from the results of this study.

First, there was a significant difference in the degree of acceptance of fashion trends among Indonesian Muslim women according to age, monthly income, and frequency of wearing a hijab. The groups that were most positive in accepting clothing fashion trends were those under the age of 30, those with a monthly income of 2,000,000−4,000,000 IDR, and those who do not wear a hijab.

Second, there was a significant difference in the degree of acceptance of fitted clothing among Indonesian Muslim women according to marital status, age, monthly income, religious sincerity, frequency of wearing a hijab, and level of orientation toward Islamic clothing rules. The groups that were the most positive in accepting fitted clothing were unmarried women, those in their 20s, those with a monthly income of 2,000,000−4,000,000 IDR, those who did not value religious sincerity, those who do not wear a hijab, and those who are not oriented toward Islamic clothing rules. Through these results, it was possible to understand that the demographic characteristics and religion-related variables of Muslim women influence fashion trends and the acceptance of fitted clothing.

Third, there was a significant difference in styling items considered by Indonesian Muslim women according to the frequency of wearing a hijab and level of orientation toward Islamic clothing rules. Overall, the styling items that were considered the most when wearing a hijab were matching handbags and shoes. As these results, it can be understood that Indonesian Muslim women are pursuing a variety of global fashion trends while following Islamic norms

as well as pursuing individuality.

Fourth, there were significant differences in fashion images preferred by Muslim women according to marital status, age, monthly income, frequency of wearing a hijab, and level of orientation toward Islamic clothing rules. Overall, Indonesian Muslim women preferred sporty images. The groups that most preferred modern images include unmarried women, those with a monthly income of more than 4,000,000 IDR, and those who wear a hijab every day. In addition, the groups that most preferred sporty images were those in their teens and 20s, those with a monthly income of less than 4,000,000 IDR, and those who do not or sometimes wear a hijab. Elegant images were most favored by women in their 30s and 40s. Fashion image preference was found to be influenced by age and monthly income among demographic characteristics, and by religious characteristics, it was found that the degree of wearing a hijab had an effect. It can be seen that the hijab is a religious feature, and the image pursued is different depending on the religious feature.

Lastly, significant differences in preferred patterns among Muslim women were only found according to religious sincerity. Overall, Indonesian Muslim women most preferred plain patterns and least preferred animal patterns. The results infer Muslims' reluctance to portray people or animals due to Islamic doctrines that strictly prohibit idolatry, thus being hesitant toward patterns with sentient creatures.

Overall, the results of this study show that Muslim women's acceptance of fashion preferences for fashion design are affected by demographic characteristics—especially age and monthly income—and religious variables. Thus, the findings of this study can serve as fundamental data for designing fashion products for Indonesian Muslim women. Indonesian Muslim fashion is currently changing from conservative traditional clothing to modern fashion, but the acceptance of fashion trends and fitted clothing is still greatly influenced by religious variables. That the highest

preference is for plain patterns and the lowest preference is for animal patterns indicates that fashion design preferences are still influenced by Islamic characteristics.

Consequently, such religious characteristics should be reflected as important variables when planning fashion products for Muslim women. An interesting finding of this study was that Indonesian Muslim women considered the harmony between handbags and shoes to be of most important when wearing a hijab. Such results reflect *akhlak* in that the core of external Islamic beauty includes not only the harmony of clothing combinations but also the overall harmony with makeup, accessories, shoes, and bags.

Indonesia has the largest Muslim population in Southeast Asia and has recently developed as a country with the greatest potential as a fashion market. Accordingly, the domestic fashion industry should also devise systematic fashion product marketing plans to successfully enter the Muslim fashion market. Thus, we aim to examine the impact of domestic fashion (i.e., K-pop) on K-fashion and brand preferences in follow-up studies. This study had limitations in securing a sufficient number of surveys from Indonesian Muslim women by region and demographic variables; thus, it is difficult to generalize the interpretations of this study.

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