

Exploring the Market Potential and Consumer Preferences of Generation Z for Fashion Apparel Featuring Sarawak Heritage Beads

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Abstract

Heritage crafts such as beadwork are vital in preserving cultural identity and enriching contemporary fashion. This research explores the market potential and consumer preferences of Generation Z for fashion apparel integrated with Sarawak heritage beads. Faced with declining sales and diminishing interest among younger consumers, local artisans seek to blend cultural heritage with contemporary fashion to sustain this unique craft. Employing a mixed-methods approach, this study combines qualitative data from field interviews, observations, and SWOT analysis with quantitative data from a survey of Generation Z consumers (n=344). Descriptive statistics are used to analyze data. Results show high awareness (71.1%) and appreciation for heritage beads, with product quality (mean = 4.38), promotion (4.33), and aesthetics (4.27) being the most influential purchasing factors. Most respondents favor minimalist, comfortable, and uniquely designed apparel, with a strong inclination towards flora and fauna motifs. The SWOT analysis revealed key strengths in cultural value, but also noted barriers like high production costs. Opportunities lie in leveraging digital marketing though threats include changing consumer tastes. Findings indicate Generation Z is open to fashion that integrates heritage elements, especially when paired with modern design and effective promotion. Sustaining traditional crafts requires innovation, strategic marketing, and cultural relevance to resonate with today's youth.

Keywords: *Consumer Preferences, Generation Z, Fashion Apparel, Sarawak Heritage Beads*

Introduction

Heritage beads, locally known as *manik*, represent a significant cultural craft among the indigenous communities of Sarawak, Malaysia (Noor, 2015). These beads are valued not only for their unique aesthetic qualities but also for their cultural symbolism, reflecting the traditions and identities of ethnic groups such as the Kelabit, Iban, Kayan, and Kenyah (Sharifah, 2015). Traditionally, *manik* have been used to signify wealth, beauty, and social status, crafted from materials including glass, agate, and gemstones, each with distinct cultural meanings (Ratna, 2024). Despite their rich heritage and intricate craftsmanship, the popularity of heritage beads has declined among younger consumers, particularly Generation Z, who tend to favor Western fashion trends (Gezita, 2024).

Local artisans and businesses, such as Saban Handicraft in Kuching, have experienced decreasing sales of bead-related products, especially among Generation Z customers. Challenges include limited promotional activities, low cultural awareness, and competition from cheaper imported bead products (Siti, 2013). Furthermore, the lack of digital marketing strategies and collaborations with influencers has hindered the reach of traditional bead products to younger audiences (Info Kraf, 2017). This challenge is particularly significant given that Generation Z consumers, as digital natives who have been immersed in a world of the internet, social media, and ever-evolving mobile devices from their early years (Camphouse, 2025), require distinctly different marketing approaches compared to previous generations.

Generation Z, born between the mid-1990s and early 2010s, constitutes a significant and unique consumer segment. As digital natives, their fashion choices are heavily influenced by social media, where they discover and cultivate personal styles (Siregar et al., 2023). Recent research indicates that 45% of young people report buying products based on influencer recommendations, though this represents a 7 percentage-point drop since May 2024, suggesting evolving consumer behavior patterns within this demographic (Opeepl, 2025). This shift in

influence patterns presents both challenges and opportunities for heritage craft businesses seeking to engage younger consumers.

While previous studies have explored the importance of preserving traditional crafts, there is a noticeable gap in understanding how these products can be adapted to suit the tastes and values of Gen Z consumers in a modern fashion context. Therefore, this study aims to explore the market potential and consumer preferences of Generation Z for fashion apparel integrated with Sarawak heritage bead elements. Specifically, it aims to identify key factors influencing purchase decisions and preferred product attributes, providing insights to help revitalize traditional crafts through contemporary fashion.

2. Materials and Methods

This research used a mixed-methods approach that aims to explore the market potential and consumer preferences of Generation Z for fashion apparel integrated with Sarawak heritage bead elements. A mixed-methods approach, integrating qualitative and quantitative findings, enhances the validity and reliability of the research by providing a more holistic view of the phenomenon under investigation (Capucan, 2024). This methodological choice is particularly relevant for consumer behavior research in the fashion industry, where understanding both measurable trends and subjective preferences is crucial for comprehensive analysis (Zhang et al., 2025). Qualitative data was gathered through field interviews with the target population to understand their perspectives and preferences. Concurrently, a quantitative survey using structured questionnaires was administered to collect numerical data on consumer attitudes and purchasing behavior. A SWOT analysis was also conducted to evaluate the market, examining the internal strengths and weaknesses, as well as external opportunities and threats. A SWOT analysis is also conducted to evaluate the market, examining internal strengths and weaknesses, as well as external opportunities and threats. SWOT analysis is a valuable tool for assessing the market landscape and identifying strategic factors that influence the success of heritage-based fashion products (Fodor et al., 2017).

In this research, quantitative data obtained from the surveys was analyzed using SPSS software (version 30.0.0). Descriptive analysis was used to summarize and identify the key purchasing factors influencing Generation Z's interest in fashion products integrated with heritage beads. The combination of these analyses allowed for a comprehensive understanding of the market landscape and consumer behaviors relevant to this study.

3. Result and discussions

This chapter presents and discusses the findings from the survey of 344 Generation Z students at Politeknik Kuching Sarawak, examining their perceptions, preferences, and purchasing behaviors related to fashion apparel integrated with Sarawak heritage beads. The analysis is structured around the research objectives: (1) to explore the market potential of fashion apparel integrated with heritage bead elements among Generation Z, (2) to identify the factors influencing purchase decision (3) to identify characteristics of fashion product ideas for Generation Z that are integrated with heritage bead elements..

3.1 Findings

a. Demographic Profile

Table 3.1 shows that the respondents were predominantly female, making up 66.2% of the total sample, while males accounted for 33.8%. Most of respondents were young adults aged 18-19 years, representing 67.6% of respondents, followed by smaller proportions in the 21-23 and 24-25 age groups (Table 3.2). In terms of racial composition in Table 3.3, Malays constituted the largest group at 50.9%, with significant representation from indigenous

communities such as the Iban (15.5%) and Bidayuh (13.5%), alongside smaller percentages of Chinese, Indian, Melanau, and other ethnicities. This demographic profile reveals a young, culturally varied sample that is heavily represented by women, which is crucial for comprehending how people view and interact with heritage beads in fashion.

Table 3.1: Frequency distribution and percentage of respondents by gender

Gender	Frequency	Percentage (%)
Male	116	33.8
Female	228	66.2

Table 3.2 Frequency distribution and percentage of respondents by age

Age	Frequency	Percentage (%)
Below 18	28	8.2
18-19	233	67.6
21-23	50	14.6
24 and 25	33	9.6

Table 3.3 Frequency distribution and percentage of respondents by race

Race	Frequency	Percentage (%)
Malay	175	50.9
Chinese	25	7.2
Indian	25	7.2
Iban	53	15.5
Bidayuh	46	13.5
Melanau	10	2.9
Others	10	2.9

b. Objective 1: Market Potential Analysis

The market potential was explored by analyzing respondents' awareness, knowledge, and perceptions of heritage beads in fashion. Results shows that 71.1% of respondents were aware of heritage beads, while 36.7% considered themselves knowledgeable about them. Additionally, 35% viewed heritage beads as essential aesthetic elements in fashion. Furthermore, 57.7% believed that integrating heritage beads into modern fashion helps preserve tradition, and 46.9% felt it enriches fashion designs. 46.1% of respondents thought this integration could make heritage beads an appealing trend.

Table 3.4 shows the results of the SWOT analysis based on interviews and observations from industry players.

Table 3.4: SWOT Analysis

SWOT Analysis	Summary
Strength	• Unique cultural value • Skilled artisans
Weaknesses	• High production costs • Limited market reach
Opportunities	• Growing cultural awareness • Digital marketing channels
Threats	• Competition from imports • Changing consumer tastes

The SWOT results reinforce the importance of balancing traditional aesthetics with modern design preferences. Leveraging digital platforms and addressing cost and quality concerns are essential to realizing market potential.

c. Objective 2: Factors Influencing Purchase Decisions

To identify the factors influencing purchase decisions, respondents rated various factors related to heritage bead fashion apparel. Table 3.5 summarizes the mean scores for these factors.

Table 3.5: Factors Influencing Purchase Decisions

Factor	Mean Score
Quality	4.38
Promotion	4.33
Aesthetics	4.27
Price	4.13

With the highest mean score of 4.38, Table 3.5 shows that respondents' decisions to buy heritage beaded fashion clothing are primarily influenced by quality. It shows that consumers favor well-made, long-lasting products, indicating that upholding high standards is crucial for commercial success.

Promotion factor came in second with a score of 4.33, suggesting that marketing initiatives and promotional activities have a big influence on customer decisions. This emphasizes how crucial efficient communication and marketing techniques are to increasing awareness and drawing in customers.

With a mean score of 4.27, aesthetics also significantly influences consumers' decisions to buy, suggesting that they appreciate the heritage bead fashion's visual appeal and design. This lends credence to the notion that heritage beads are important fashion accessories. Despite having the lowest mean score (4.13), price is still a significant consideration, indicating that affordability is somewhat less important than quality, promotion, and aesthetics.

According to these results, brands should prioritize product quality, spend money on focused advertising campaigns, and concentrate on eye-catching designs in order to successfully increase sales while keeping prices competitive..

d. Objective 3: Characteristics of fashion product ideas

Based on the findings, most of respondents chose casual shirts (42.6%) and T-shirts (38.8%) as their preferred types of clothing to be combined with heritage beads, followed by jackets (26.2%).

In terms of product idea acceptance, 32% of respondents considered the idea of clothing made with Sarawak beadwork to be interesting, while 29.2% found it very interesting, indicating a positive reception towards this innovation. For design preferences, 37.9% of respondents liked both modern and traditional beadwork designs, while 37.6% preferred traditional designs and only 16.3% favored modern designs alone. Most of respondents (74.9%) preferred simple bead arrangements compared to elaborate ones (25.1%).

Regarding the most attractive beads features, 60.9% of respondents liked beads with unique designs, 46.4% preferred combinations of no more than three colors, and 44.9% liked colorful beads. In terms of beadwork style, there was a tendency towards minimalist and elegant designs (39.7%), followed by luxurious and glamorous (34.7%), and casual and simple (25.7%). The main concern among respondents was the strength and durability of the beads (44.5%), followed by designs that do not match modern fashion (17.8%) and difficulty in cleaning and maintaining the clothing (17.4%).

In terms of price, most respondents agreed that a suitable price range is between RM50 and RM100 (44.2%), followed by RM101 to RM150 (29.7%).

Most of respondents (78.2%) would consider buying clothing integrated with heritage beads, with physical stores being the main preferred place to purchase (64.6%). Flora and fauna motifs were the most favored (39.8%), followed by songket motifs (17.1%) and Pua Kumbu and hornbill motifs (14.1%).

Finally, comfort is also highly prioritized, with 40.5% of respondents considering it important and 36.4% considering it very important when purchasing clothing with bead integration.

3.2 Discussions

The results of this study offer valuable insights into the preferences and behaviors of Generation Z regarding fashion apparel integrated with Sarawak heritage beads. The high level of awareness and prior usage among respondents indicates a strong market interest and acceptance of heritage bead products within this demographic. This aligns with previous research suggesting that Generation Z is open to cultural elements in fashion, provided they are presented in a modern and appealing way (Siregar et al., 2023).

Product quality emerged as the most influential factor in purchase decisions, highlighting Generation Z's demand for durability, craftsmanship, and sustainability in fashion products. This finding is consistent with global trends showing that younger consumers are increasingly conscious of product longevity and ethical consumption (Capucio et al., 2024). For designers and producers, this underscores the importance of maintaining high standards in material selection and workmanship to meet consumer expectations.

Promotion emerged as the second most significant purchase driver (mean = 4.33), directly validating the digital nativity characteristics of Generation Z identified by Camphouse (2025), who noted that this generation has been immersed in internet, social media, and mobile devices from early years. This finding provides empirical support for Info Kraf (2017)'s assertion that the lack of digital marketing strategies has been a primary barrier hindering traditional bead products from reaching younger audiences. The high promotional influence score demonstrates that Generation Z's fashion discovery and cultivation processes, as documented by Siregar et al. (2023), are indeed heavily dependent on social media engagement. Furthermore, this result aligns with Opeepl (2025)'s contemporary research showing that 45% of young consumers make purchases based on influencer recommendations, though their declining influence patterns suggest that digital marketing strategies must evolve beyond simple endorsements. The preference for engaging marketing through platforms like Instagram, TikTok, and Facebook indicates that effective heritage craft promotion requires digital storytelling and influencer collaborations that blend traditional cultural narratives with modern digital outreach as a strategic approach that previous studies recommended but lacked empirical validation for the heritage bead market specifically.

While aesthetics and unique design features are highly valued, the findings reveal a preference for minimalist and elegant beadwork, as well as motifs inspired by flora and fauna. This indicates that Generation Z appreciates subtle cultural references that can be seamlessly integrated into everyday fashion. At the same time, concerns about bead durability and ease of care point to the need for practical and user-friendly product designs.

Interestingly, despite Generation Z's strong online presence, the majority still prefer to purchase heritage bead apparel from physical craft stores and fairs. This suggests that tactile experiences and the ability to assess product authenticity remain important. Retailers and artisans should therefore focus on creating immersive in-store experiences and leveraging storytelling to enhance the perceived value of their products.

Price remains a relevant, though less dominant, factor. Most respondents are willing to pay a moderate price, provided the product meets their standards for quality and design. Offering a range of pricing options, including limited edition or customizable pieces, may help capture a broader segment of this market.

In summary, successfully engaging Generation Z in the market for heritage bead fashion apparel requires a holistic approach: prioritizing quality and design, leveraging digital and offline promotional strategies, ensuring practical usability, and maintaining accessible pricing. By addressing these factors, designers and marketers can help revitalize traditional crafts and foster a deeper appreciation of Sarawak's cultural heritage among younger consumers.

4. Conclusions

This study demonstrates that there is strong market potential for fashion apparel featuring Sarawak heritage beads among Generation Z consumers. The findings reveal that Generation Z values product quality, unique and minimalist designs, and cultural significance when considering heritage bead fashion. While price remains an important consideration, it is secondary to quality, promotion, and aesthetics in influencing purchase decisions. The preference for purchasing through physical craft stores and fairs highlights the importance of authentic, tangible experiences, even for a digitally native generation.

To successfully engage Generation Z, designers and marketers should prioritize high-quality craftsmanship, incorporate both traditional and modern design elements, and leverage effective digital and offline promotional strategies. Emphasizing the cultural story behind heritage beads and ensuring products are both attractive and comfortable can further enhance appeal. Addressing concerns about durability, ease of care, and appropriate pricing will be essential for broader market acceptance.

Overall, the integration of Sarawak heritage beads into contemporary fashion not only has commercial promise but also plays a vital role in preserving and promoting local cultural heritage. The insights from this research provide practical guidance for artisans, businesses, and policymakers aiming to revitalize traditional crafts and connect with the next generation of consumers.

5. Acknowledgement

The authors would like to express their sincere gratitude to Politeknik Kuching Sarawak for the support and facilities provided throughout this research. We also thank the industry partners and local community for their valuable cooperation and contributions. Their support was essential in making this study possible.

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