

INSIGHTS! INSIGHTS! INSIGHTS!

The Predictive Edge:

Unpublished Useful Insights Defining the AI-Age Consumer



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ABOUT VASE.AI

Make smarter marketing, advertising and product decisions

Using our **on-demand consumer research platform**

3.6M

Identity-verified
consumers across
Southeast Asia

24 hours

From question to
insight, at its fastest

Reliable

Data-quality checks: AI
models, rules and
human review

Expertise

Companies that trust
Vase.ai for consumer
research

How we can help you: Ideate new strategies, Validate concepts,
Justify your 2027 plans, Measure campaigns, Track customers and
more...



Deloitte.



KHIND
Delivering Happiness

SPRITZER



and more...

How Malaysians Discover & Research Brands

THE
CONTEXT

The AI disruptor

THE
FUNDAMENTALS

01

THE DIGITAL
SHELF

02

OFFLINE, AT
THE MALL

03

THE BRAND
SWITCHERS

04

NEEDS,
VALUE,
PRIDE

05

EAST
MALAYSIA

SETTING THE CONTEXT

The AI disruptor - how many of you Research about a product through AI?

SETTING THE CONTEXT

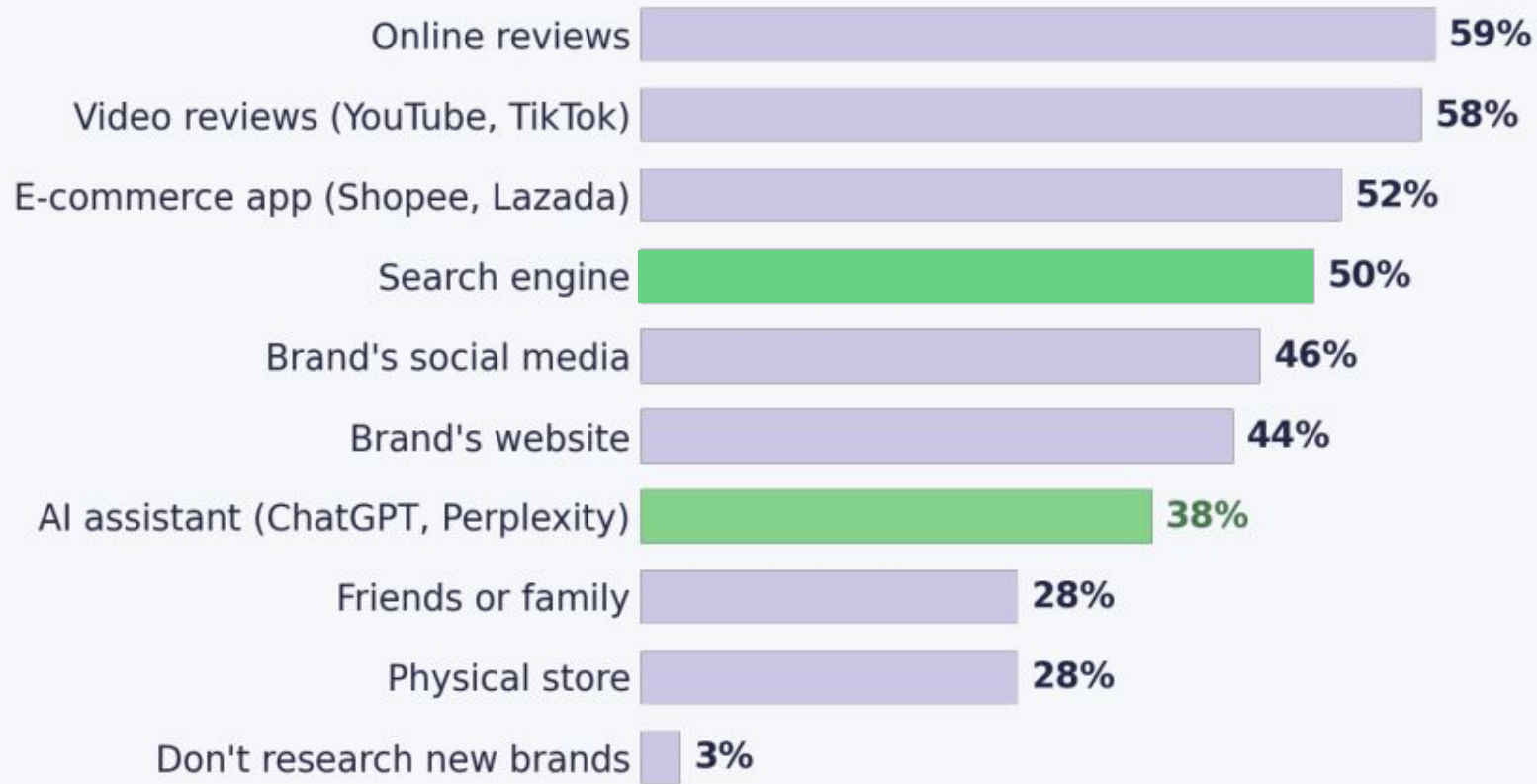
The AI disruptor

38%

RESEARCH new brands with AI, evenly across Gen Z, Millennials and Gen X

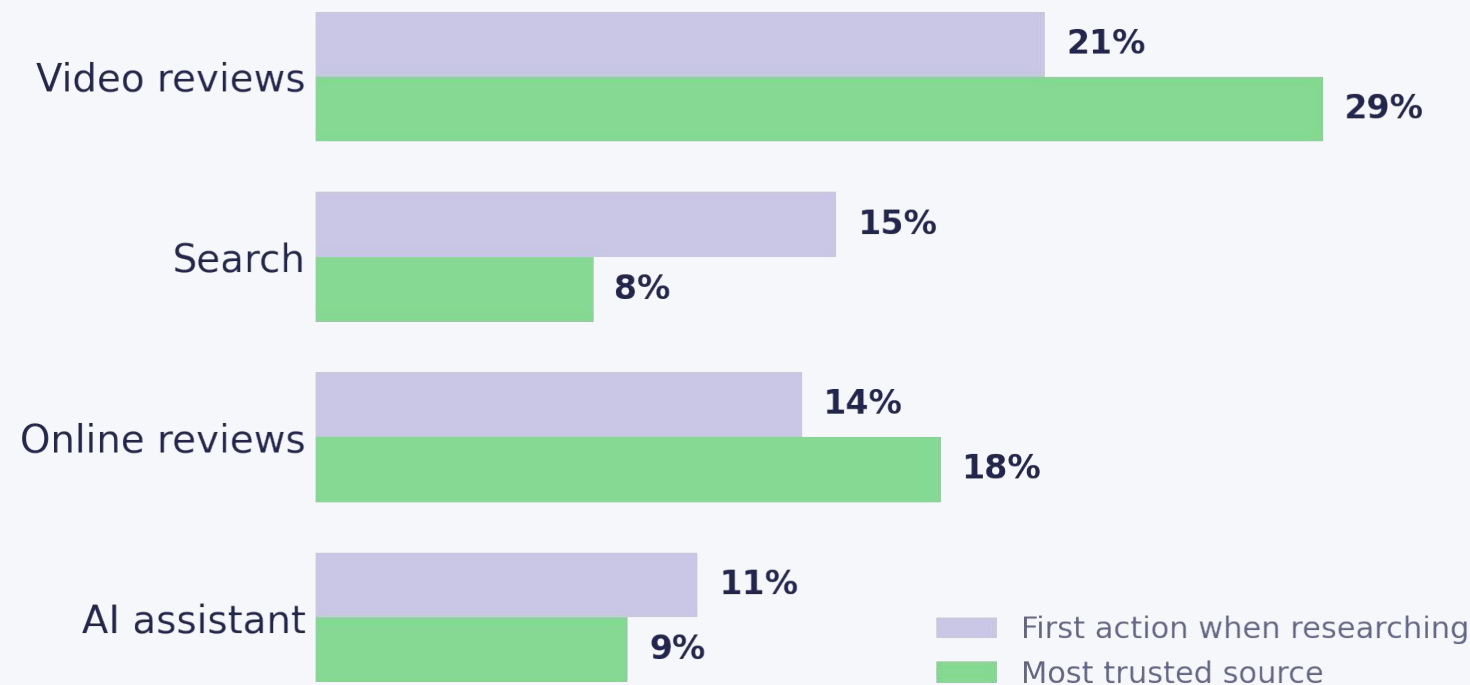
Quick Reality Check : Where AI sits in brand research

When Malaysians research a new brand, video and search still lead. AI is on the list, not at the top, yet.



First stop vs most trusted source

Which channel people turn to first, and which they trust most, when checking out a new brand.

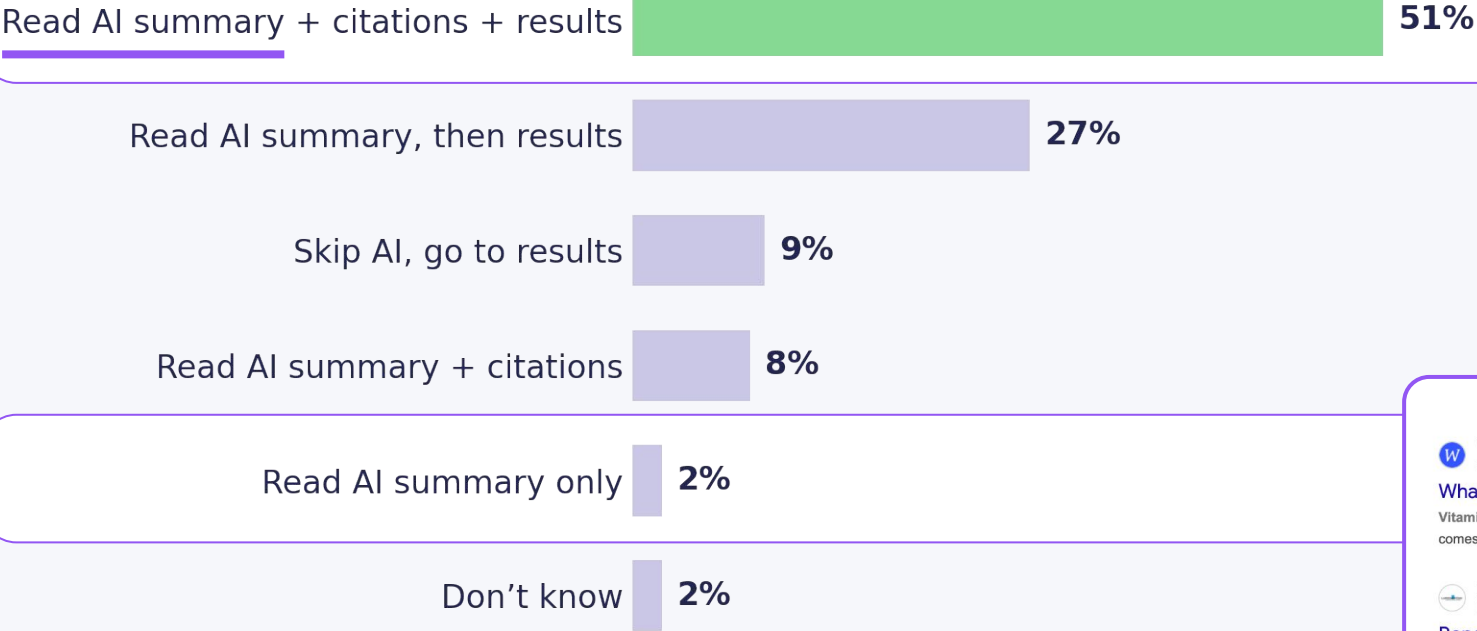


Source: Vase.ai FMCG consumer study, Malaysia 2026. AI brand-discovery module.

93% engage with the AI summary when they search

51% read the summary, click its citations and check the results, most of the time

WHAT THEY DO MOST OF THE TIME WHEN USING SEARCH



AI Overview

Vitamin C serums won't directly cure active acne, but they are highly effective for fading post-breakout dark spots and preventing acne scars. If you have severe active acne, strong formulas might cause irritation, so consider stable derivatives like Sodium Ascorbyl Phosphate (SAP) [Proactiv +3](#)

How Vitamin C Helps Acne-Prone Skin

- Fades Acne Scars:** It inhibits melanin production to brighten hyperpigmentation and promotes collagen synthesis to heal pitted scars.
- Reduces Inflammation:** Its antioxidant properties soothe redness and swelling associated with breakouts.
- Prevents Sebum Oxidation:** By neutralizing free radicals, it stops oils from oxidizing on the skin, which can help prevent pores from clogging. [WebMD +2](#)

Best Practices for Using Vitamin C on Acne

WebMD
<https://www.webmd.com/Healthy Beauty/Reference>

What to Know About Vitamin C Serum for Acne

Vitamin C contains anti-inflammatory properties and helps reduce the redness and swelling that comes with acne.

La Roche-Posay Australia
<https://www.laroche-posay.com.au/blog/the-benefits...>

Benefits of Vitamin C for Acne-Prone Skin

Vitamin C is considered helpful in the management of acne-prone skin because it helps reduce redness and improves skin texture. [Read more](#)

Discussions and forums

[Confused about vitamin C layering \(acne-prone skin\)](#)

...ic acid) is too harsh, use
...r Tetrahexyldecyl

SETTING THE CONTEXT

AI doesn't replace the fundamentals. It audits them, at machine speed.

Are you on the digital shelf and the physical shelf? Are you exposed to switching? Do you actually offer value?

THE
FUNDAMENT
ALS

01

THE DIGITAL
SHELF

02

OFFLINE, AT
THE MALL

03

THE BRAND
SWITCHERS

04

NEEDS,
VALUE,
PRIDE

05

EAST
MALAYSIA

So here is the state of those fundamentals in Malaysia.

The Malaysian consumer in 2026

Switching, scrolling, and still showing up at the mall. All at once.

01

What the data
shows

02

The human
truth beneath it

03

The bridge to
2027

Do this on Monday,
decide it for 2027

04

The open
questions in
your 2027 plan

Decide them with
research

SECTION A

01

THE DIGITAL SHELF

Where Malaysians shop, discover, and buy online.

01 Digital

02 Offline

03 Switchers

04 Value

05 East

SECTION A

Are you showing up where your customers are? (Digital)

THE DIGITAL SHELF

Malaysians are omnichannel and social-prompted.
The question is not whether to be online. It is where.

HOW THEY SHOP

Shop online + offline 40%



Entirely / mostly online 39%

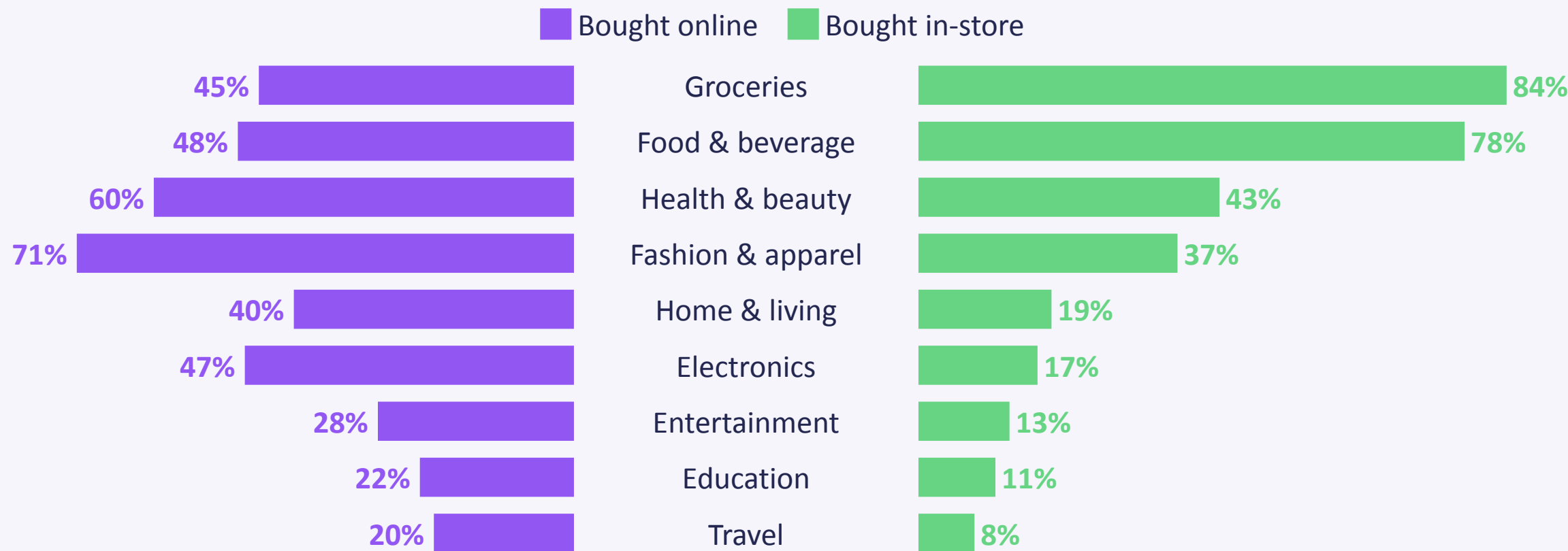


35%

shop online after seeing something
interesting on social media

What they buy online vs in-store

The channel flips by category. Fashion and beauty pull online; groceries and food stay physical.



Match channel to the category, not the average. 71% buy fashion online; 84% buy groceries in-store. A blended 'omnichannel' average hides which shelf each category sells from.

Source: Vase.ai FMCG consumer study, Malaysia 2026. Consumer Shopping Habits module.

Every platform plays a different role

Where Malaysians spend time, discover brands, and settle in, one platform at a time.

 Use regularly

 Discover brands

 Use most often

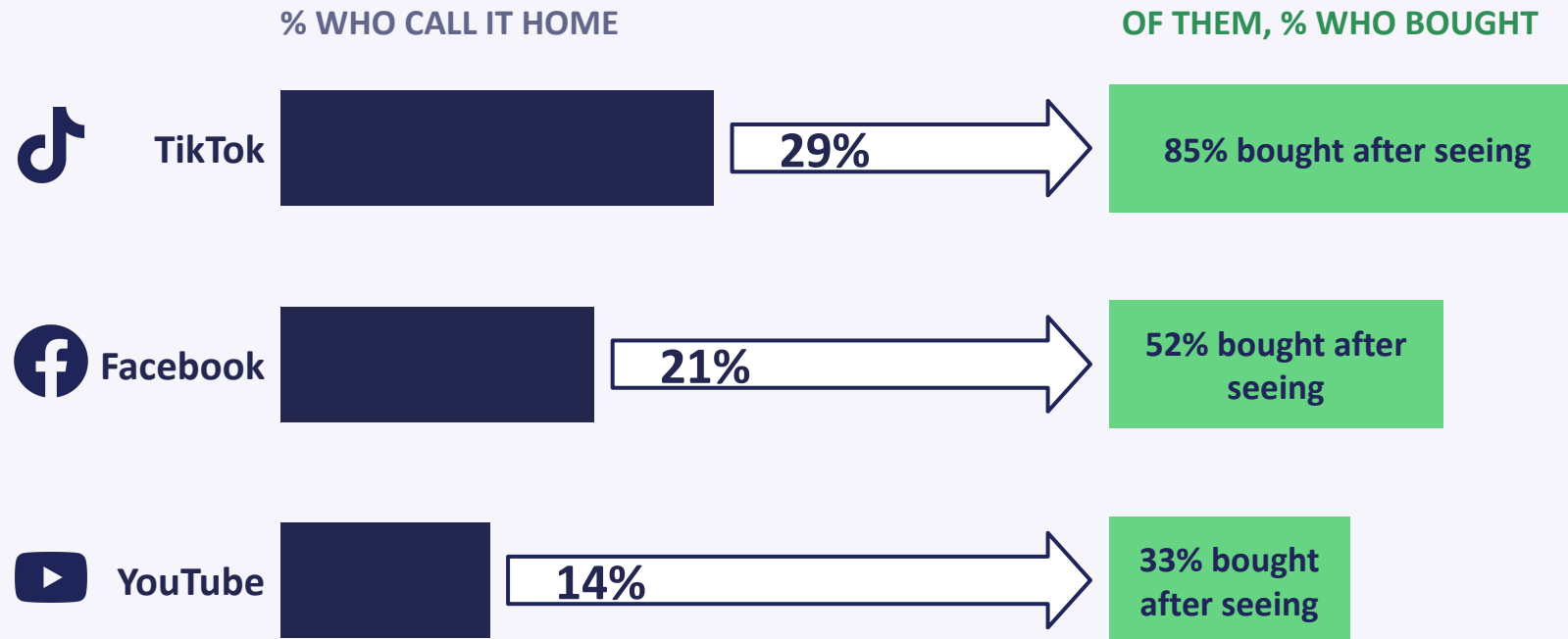


Reach *alone* is a vanity metric. YouTube reaches the most Malaysians, but TikTok owns discovery and daily use, and converts hardest (next slide).

Source: Vase.ai FMCG consumer study, Malaysia 2026. Media Consumption module.

Whose home base actually buys?

Same devotion, wildly different value. TikTok's core shops there. YouTube's mostly does not.



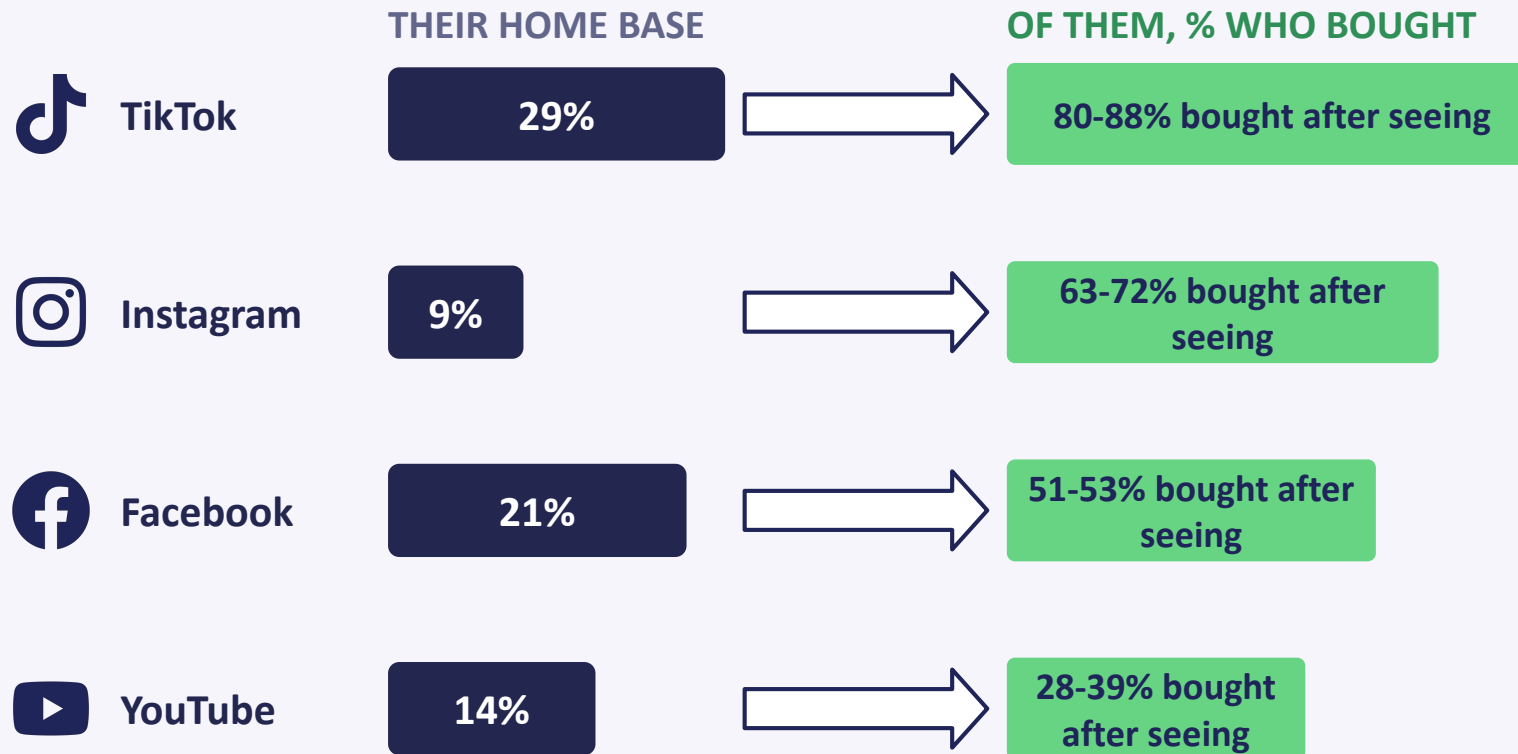
THE KEY POINT

An audience is worth wildly different amounts by platform

A TikTok loyalist shops there. A YouTube loyalist mostly doesn't, at equal devotion.

Age changes the address. Not the buying.

Where people live online flips hard by generation. How readily that home base buys barely moves.



Conversion range across Gen X, Millennials, and Gen Z.



DON'T WRITE THEM OFF

**1 in 5 over-45s now
call TikTok home**

And the committed user
converts hard at every age. A
high-intent group most brands
still treat as awareness-only.

Turn the digital read into two moves



Target committed TikTok users, at every age

Don't write off older audiences who already live on TikTok. Serve the committed user, not broad older reach. One in five over-45s now calls it home.

- Run the older committed-user test now. The result decides whether over-45 TikTok gets its own line in your 2027 media plan.



Pressure-test "sell off the feed" first

If your category isn't fashion, beauty or electronics, prove the playbook before you fund it. Platform purchasing concentrates in those three.

- Test it this half, so social commerce earns, or loses, a 2027 budget line on evidence within your own category.



The open questions in your 2027 plan

- What does cold reach or the casual user actually convert at; the number your 2027 media plan is built on
- Where the buyers you don't have yet first meet a brand

SECTION B

02

OFFLINE, AT THE MALL

Why the mall still wins, and what people do there.

01 Digital

02 Offline

03 Switchers

04 Value

05 East

SECTION B

Are you showing up where your customers are? (Offline)

OFFLINE, AT THE MALL

E-commerce is booming by double digits. Yet Malaysians are still, overwhelmingly, at the mall.

91%

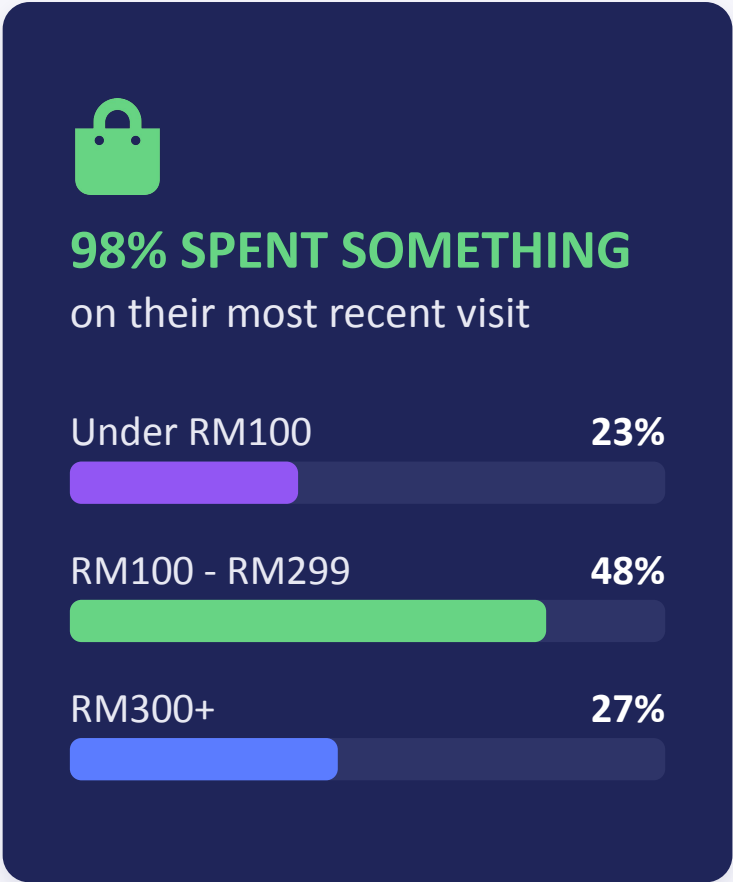
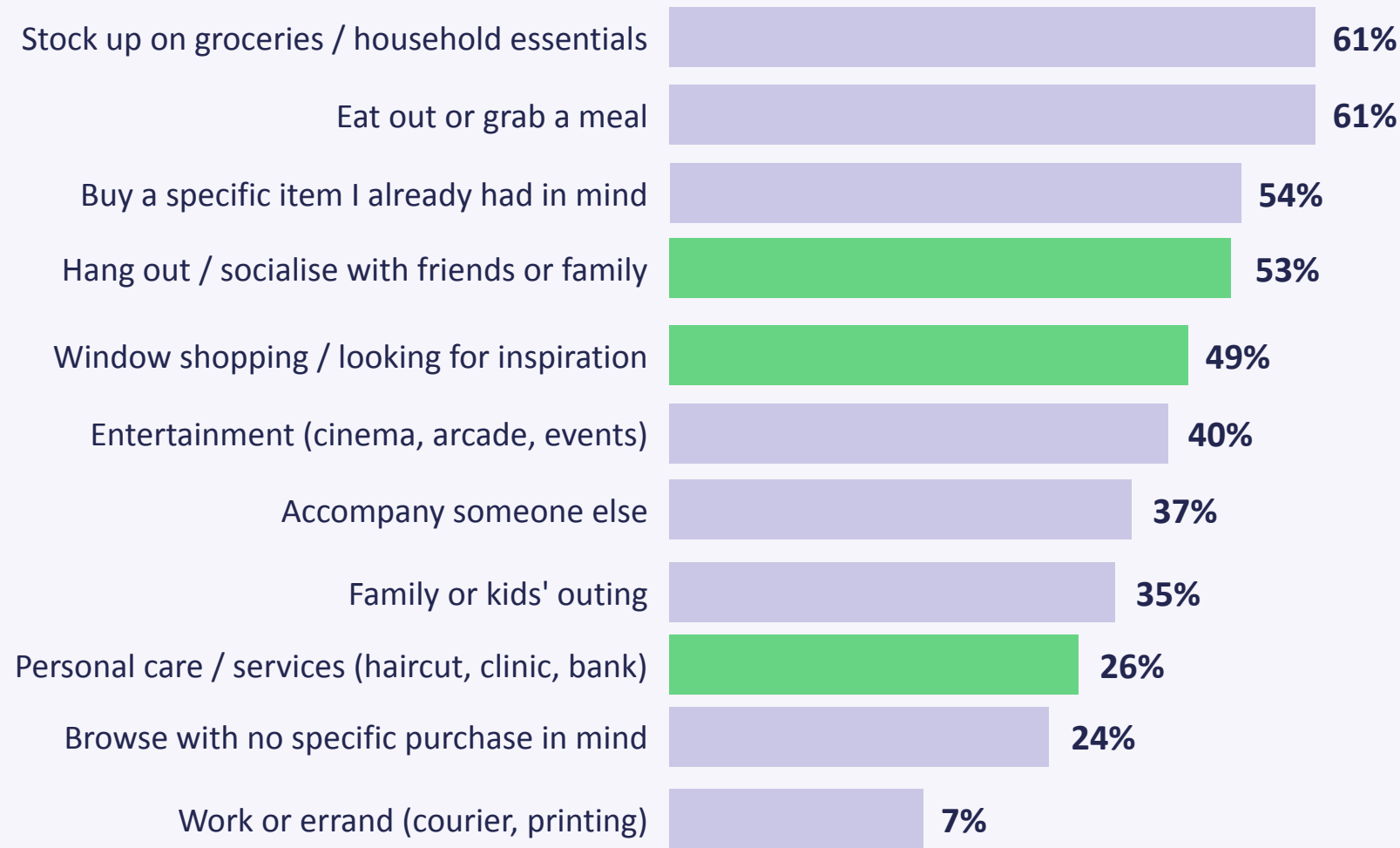
have been to a mall at least once in the past month

44%

visited four or more times in the past month

They come to LEPAK at the mall

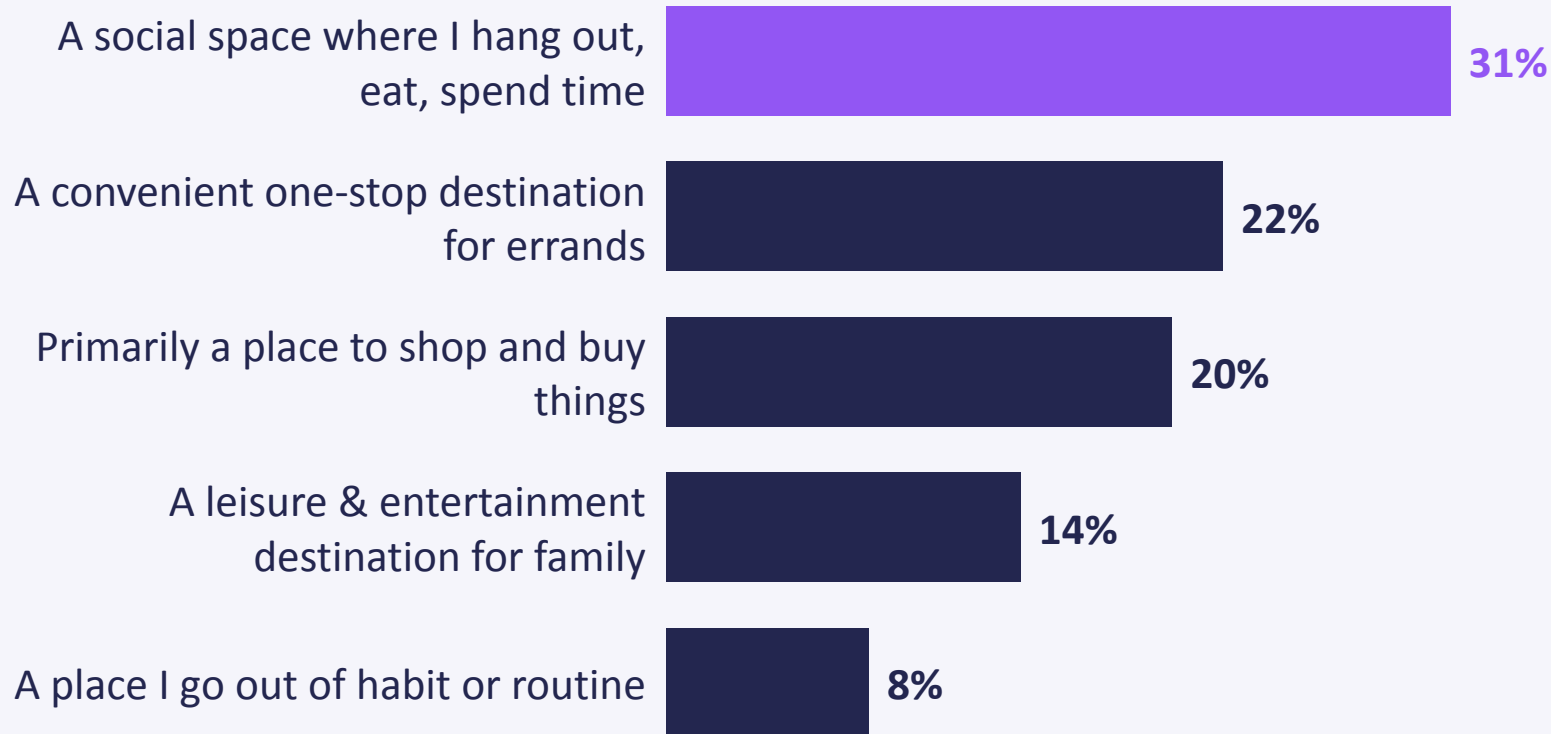
On their most recent visit, 60% come to shop or eat, while the rest are just spending time at the mall.



Source: Vase.ai nationally representative study, Malaysia 2026. Lepak Nation module.

The mall isn't mainly for shopping

Asked what a mall means to them, only 1 in 5 said it's primarily a place to shop.



THE HUMAN TRUTH

Still the lepak generation

How Malaysians lepak shifts with age, but the instinct to eat, relax and linger is age-agnostic. It's not a generation, it's a national habit.

Treat your mall space as experiential, not just transactional



Design experiential activities in your mall space, make it fun

It could be taste testing, it could be wear and snap photos, it could be mix and match your colors. The idea is build it around experiences, not just individual but for groups.



Value the visit that bought nothing, engagement first

The browse-and-linger crowd who came to eat and hang out are still worth something. Educate your servicing staff to be happily serving the non-buyer and planting the sales seed.



The open questions in your 2027 plan. Compare the sales conversion rate among those who have “experience” or “test” your product / brand vs those who just seen it display.

SECTION C

03

THE BRAND SWITCHERS

Who switches, how wide it runs, and whether it sticks.

01 Digital

02 Offline

03 Switchers

04 Value

05 East

1 The average switcher | 2 The calmer East Coast | 3 The generation gap

SECTION C

Once they buy you, do they stick?

THE BRAND SWITCHERS

83% switched a brand this year. But most still buy the original occasionally or fully. It's a shuffle, not an exodus.



THE ONE EXCEPTION

In personal care and coffee, about 1 in 5 switchers say they may be gone for good.

83%

switched at least one brand
this year

The four Malaysians doing the switching

Same shelves, four different reasons to reach for them



Stays put

17% n=79

The anchored loyalist

Switched nothing. Oldest and East-Malaysia-heavy, halal- and price-anchored. Moved by social, not promos.



Switches to cope

17% n=78

The squeezed hunter

Switched ~9 categories under pressure. Promo-driven, and the proudest of spending smart.



Switches for fun

24% n=113

The choice surfer

Switched ~9 by choice, not need. Youngest, side-hustling and most halal-first. Lives on TikTok.



Rotates quietly

43% n=200

The careful rotator

The quiet majority. Rotates across 1 to 5 categories, rarely defects. Why your averages look calm.

Across all four: 22% started a side income since Jan 2026 (28% of Gen Z), funding premium appetite through hustle, not salary.

Switchers rotate. They rarely leave.

By category, most who switched still buy the original, fully or in rotation. Almost none are gone for good.

Category	Went back fully	Rotating (buys both)	Drifted, unsure	Gone for good
Bread (n=68)	38%	56%	4%	1%
Eggs (n=68)	35%	50%	12%	3%
Frozen (n=111)	17%	68%	14%	0%
Coffee (n=117)	17%	63%	15%	5%
Personal care (n=179)	23%	54%	19%	4%

Most switchers stay in rotation or come back fully. 'Gone for good' stays in the low single digits.

Wide across categories, not deep in any one brand

Most people switched a little across many categories, rather than abandoning any single brand.

The average switcher
switched in

6

of 19 categories

Only touched a single category 8%



Rethought five or more at once 58%



Whole sample: changed 6+ categories 41%



THE KEY POINT

Shopping around is the default posture, not a protest

A defection is rarely a verdict on your brand. It's a shopper now open everywhere. When a category looks stable, that may be an average lying to you.

Switching runs calmer on the East Coast



WHERE IT'S CALMER

The East Coast churns less

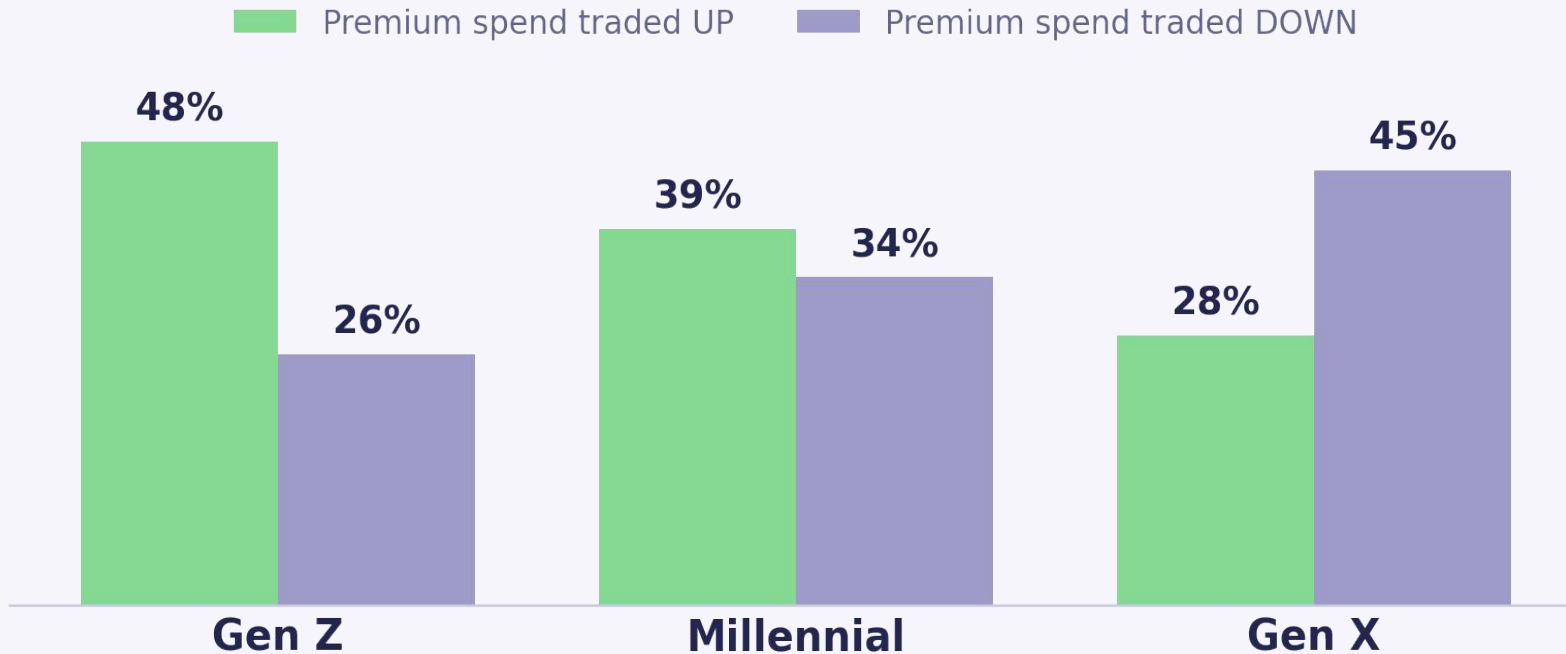
Fewer switch at all (77% vs 83%) and they roam narrower. Central, Northern and Southern all sit at or above national churn.

82% / 84%

Men vs women switch rate, and they roam the same width (6.3 vs 6.1 categories). Gender is a non-story.

Youth loyalty is rented, not owned

Premium momentum fades by the decade. Loyalty is fluid at every age.



87% · 85% · 78%

Gen Z, Millennials and over-45s who switched a brand.

38% · 44% · 38%

Gen Z, Millennials and Gen X who changed 6+ categories.



THE KEY POINT

Switching motive changes by generation

Gen Z churns fastest and pays premium while cutting elsewhere. Millennials rethink the widest basket, 44% changed six or more categories. Gen X keeps the brand count low but trades down hardest. One loyalty play may not hold all three.

Defend the buyers you have, re-earn the restless



Close the open doors you already control

Pull your distribution and out-of-stock gaps and your promo calendar. To a shopper open everywhere, every gap on shelf and dark promo week is a switch you handed over. Close them first, so you learn how much of your churn was self-inflicted before you buy loyalty spend in 2027.



Read a young-skewing base as flight risk

- Open the free age split in Meta, TikTok, Shopee, Lazada. A young audience (under 45) isn't your loyal future, it's your highest flight risk.
- Then defend by motive, which is where your 2027 retention budget should follow:
 - Gen Z: Put reasons-to-stay behind premium lines.
 - Millennial: Defend the whole basket, not the hero SKU.
 - Gen X: Fight the trade-down with value framing instead of price cuts.



The open questions in your 2027 plan. Your sales data shows the net result, not who is leaving versus arriving under a flat line.



The open questions in your 2027 plan. Your age mix can't tell you which generation to bet your 2027 budget on, or how to hold the switchers in your specific category by addressing their category-specific needs.

04

NEEDS, VALUE & PRIDE

When consumer switch a brand, they want something. What do they want?

01 Digital

02 Offline

03 Switchers

04 Value

05 East

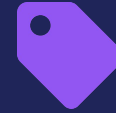
1 What Malaysians Want

SECTION D

What do consumers actually want?

NEEDS, VALUE & PRIDE

Underneath the price talk, the wants are steady: value, quality and trust. And spending well now reads as pride, not just necessity.



FRUGALITY FEELS GOOD

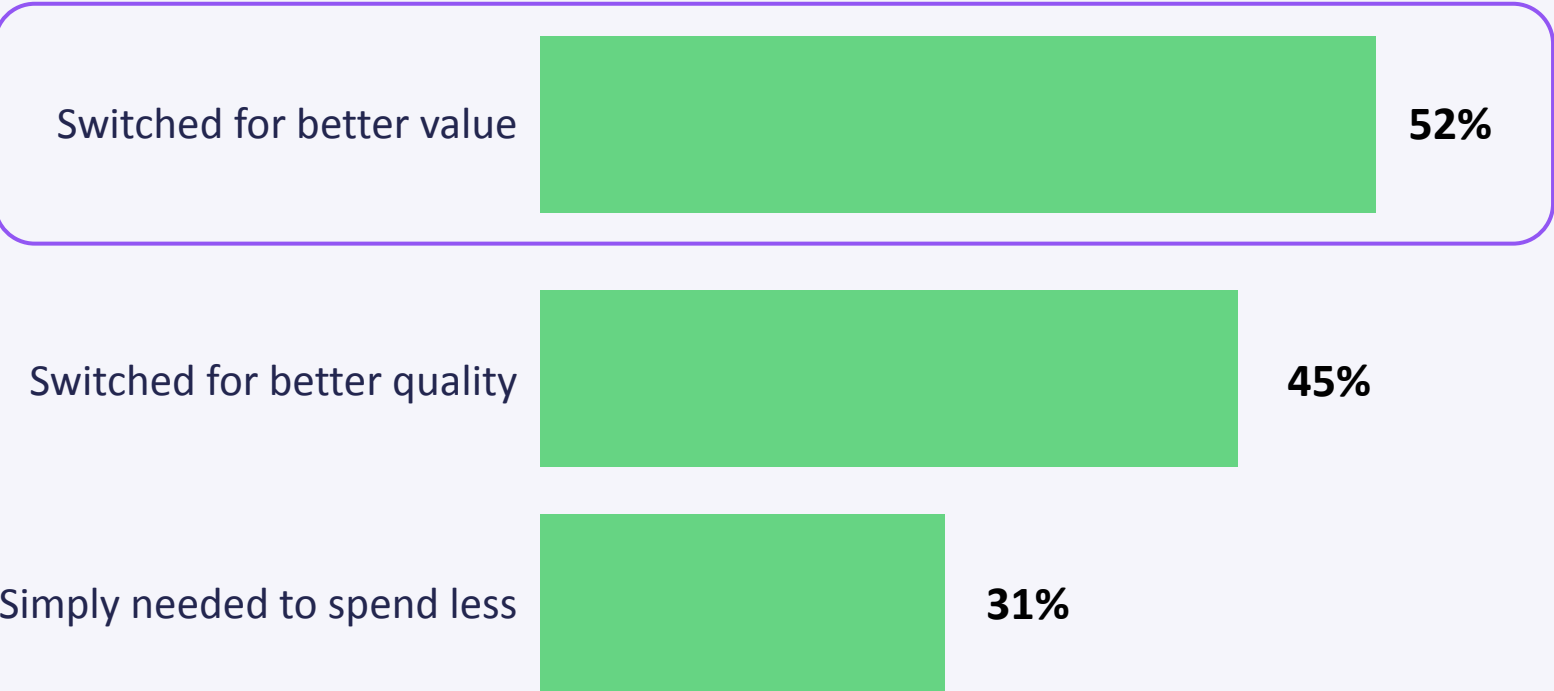
"Smart spending" is now a top source of joy for Malaysians in 2026.

15%

rank it a top source of joy, right behind family (22%) and financial stability (16%).

Switchers chase value, not just cheapness

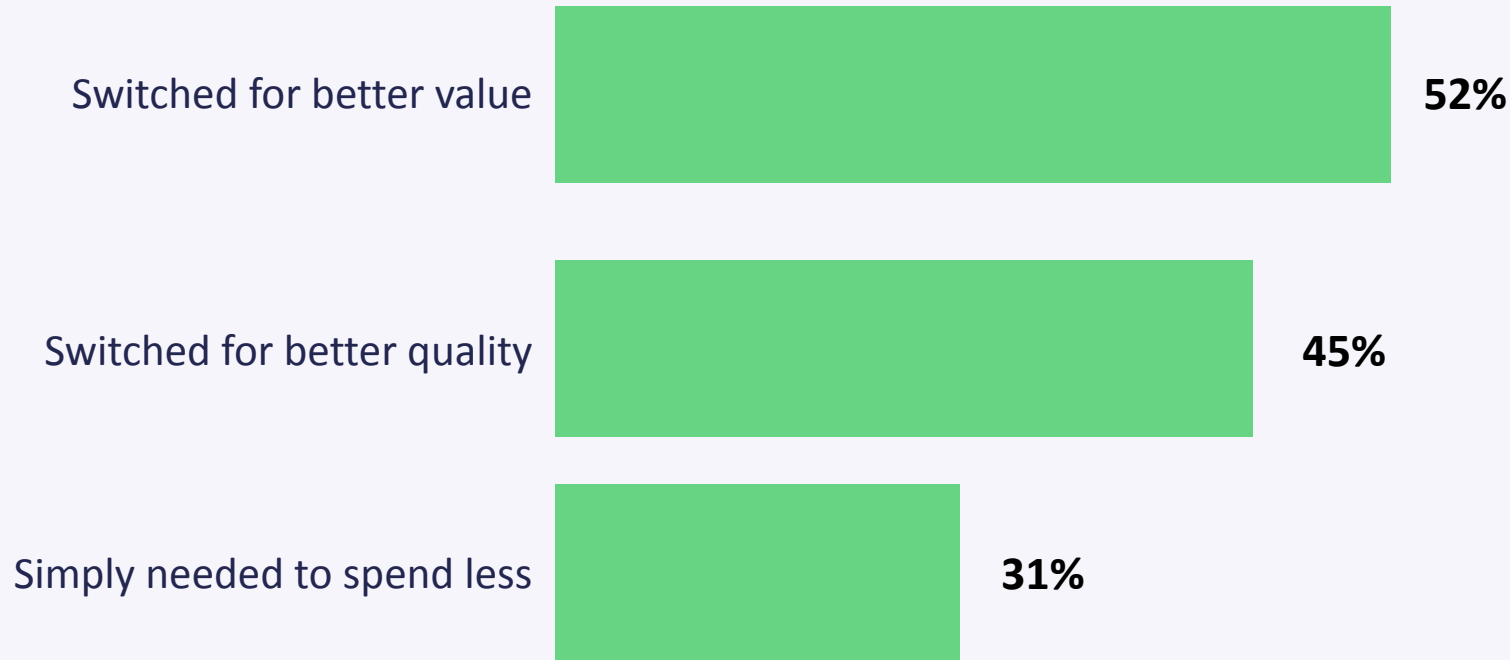
When people switched brands, more did it for value and quality than to simply spend less.



Income	Value-seeking
<RM3k	46%
RM3k to 8k	51%
RM8k+	59%

Switchers chase value, not just cheapness

When people switched brands, more did it for value and quality than to simply spend less.



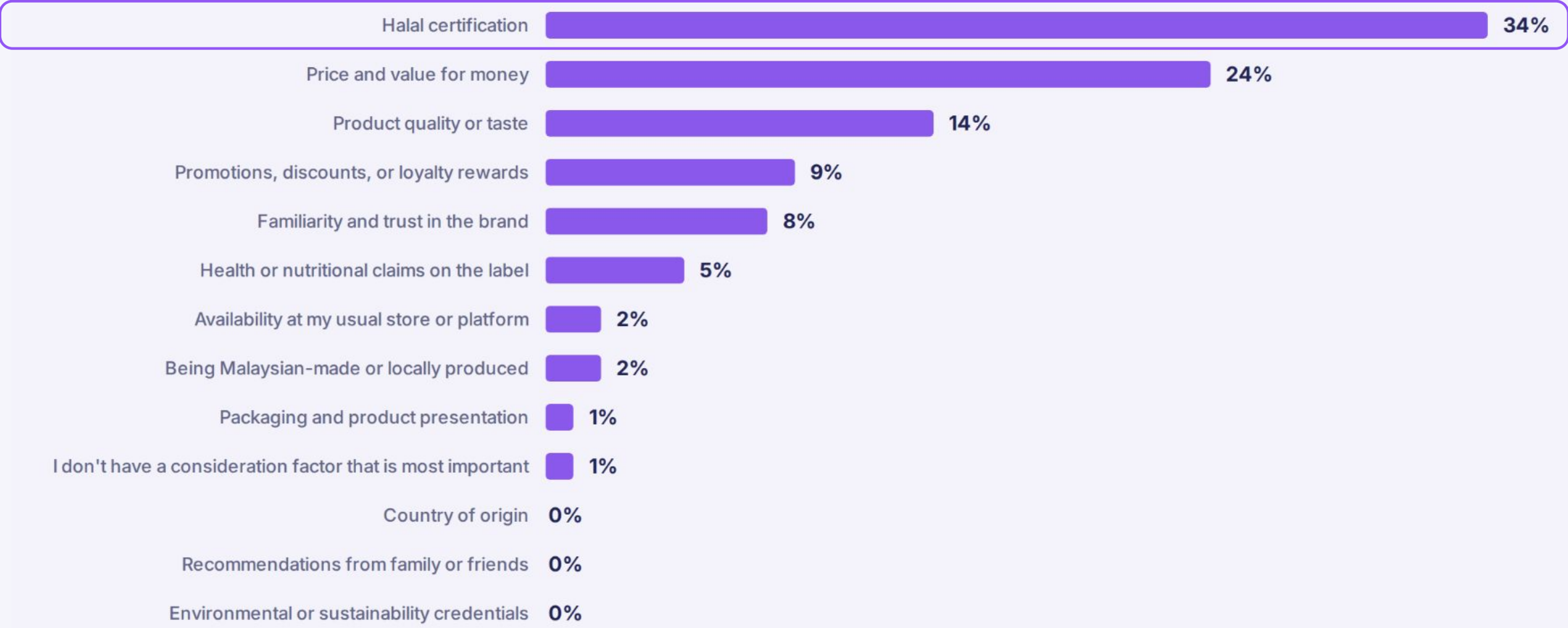
THE HUMAN TRUTH

Don't sell cheap, sell SMART

They're not victims hunting for the cheapest thing. They're hunters who feel CLEVER when they win. Reframe value, don't just cut price.

What actually drives brand choice

Halal leads with value and quality. Country of origin and sustainability is not on the list as the single most important drivers.



Reframe value before you bet



Sell the smart choice, not the cheap one

Rewrite one listing from “cheapest” to “smartest”, on cost-per-use, per-serving or durability. See if your conversion improves.



Test value-based promotions, not just price-based

Examples are premium bundling, exclusive VIP access or early bird access, extended warranties, faster or more convenience services.



The open questions in your 2027 plan. Compare the sales conversion rate between value-based promotions vs price-based promotions.

SECTION E

05

EAST MALAYSIA

Same shopper, different road. The one bucket you can't port a Peninsular playbook onto.

01 Digital

02 Offline

03 Switchers

04 Value

05 East

East Malaysia: same destination, different road

At the shelf the decision logic is basically identical. The conditions around it are not.

THE SAME WANTS

	East	Pen.
Price & value	76%	77%
Quality	65%	66%
Familiarity & trust	57%	58%
Malaysian-made	30%	30%

SAME DESTINATION

The wants don't change

At the shelf, East and Peninsular Malaysia want the same things. What changes is the road to get there, the conditions around the sale.

Read as direction, not fact. These East signals sit on a small base (n=76).

East Malaysia: the early signals

Direction, not settled fact. These sit on a small base (n=76), read as where East may differ.

East Malaysia Peninsular Malaysia



More physical-first

Online is lower for household and grocery shopping (**37%** vs **50% Peninsular**).

Weekly in-store grocery purchase is higher (**38%** vs **29%**)

40% hit a mall 5+ times a month vs **31%**.

64% of East Malaysian visitors spent RM150 or more on their last mall visit vs **49%**



A thinner wallet

51% earn RM3,000 or less a month, vs **26%** Peninsular. Price increases are their #1 anxiety (**32%** vs **20%**).



Local pride runs harder

“Support a Malaysian brand” is the most convincing reason to try something new for **17%**, vs just **8%** in Peninsular.



Stable on top, restless underneath

Fewer switch at all (**75%** vs **85%**), but the ones who move roam wider: ~7.3 categories vs 6.0.

Test East before you bet



Treat East as a hypothesis to test

- Split your own sales and distribution by region before assuming East behaves like the national average.
- Lead East messaging with local-brand cues and value framing, then pressure-test. The result decides whether East Malaysia earns a dedicated line in your 2027 plan.



Lead with local and value cues

Lead East messaging with local-brand cues and value framing, then pressure-test against your own data.



The open questions in your 2027 plan. Your regional split shows East behaves differently, not whether it is worth a dedicated line in 2027.

THE TAKEAWAY

How Malaysians Discover & Research Brands

THE
CONTEXT

The AI disruptor - Rising, but not the top yet

THE
FUNDAMENTALS

01

THE DIGITAL
SHELF

Don't lose focus

02

OFFLINE, AT
THE MALL

Make it
experiential

03

THE BRAND
SWITCHERS

Earn switched
customers back

04

NEEDS,
VALUE,
PRIDE

Value first

05

EAST
MALAYSIA

Physically first,
locally proud

GET IN TOUCH

Thank You!

Questions? Ask away now, or come find us after the session to turn these truths into your plan.



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