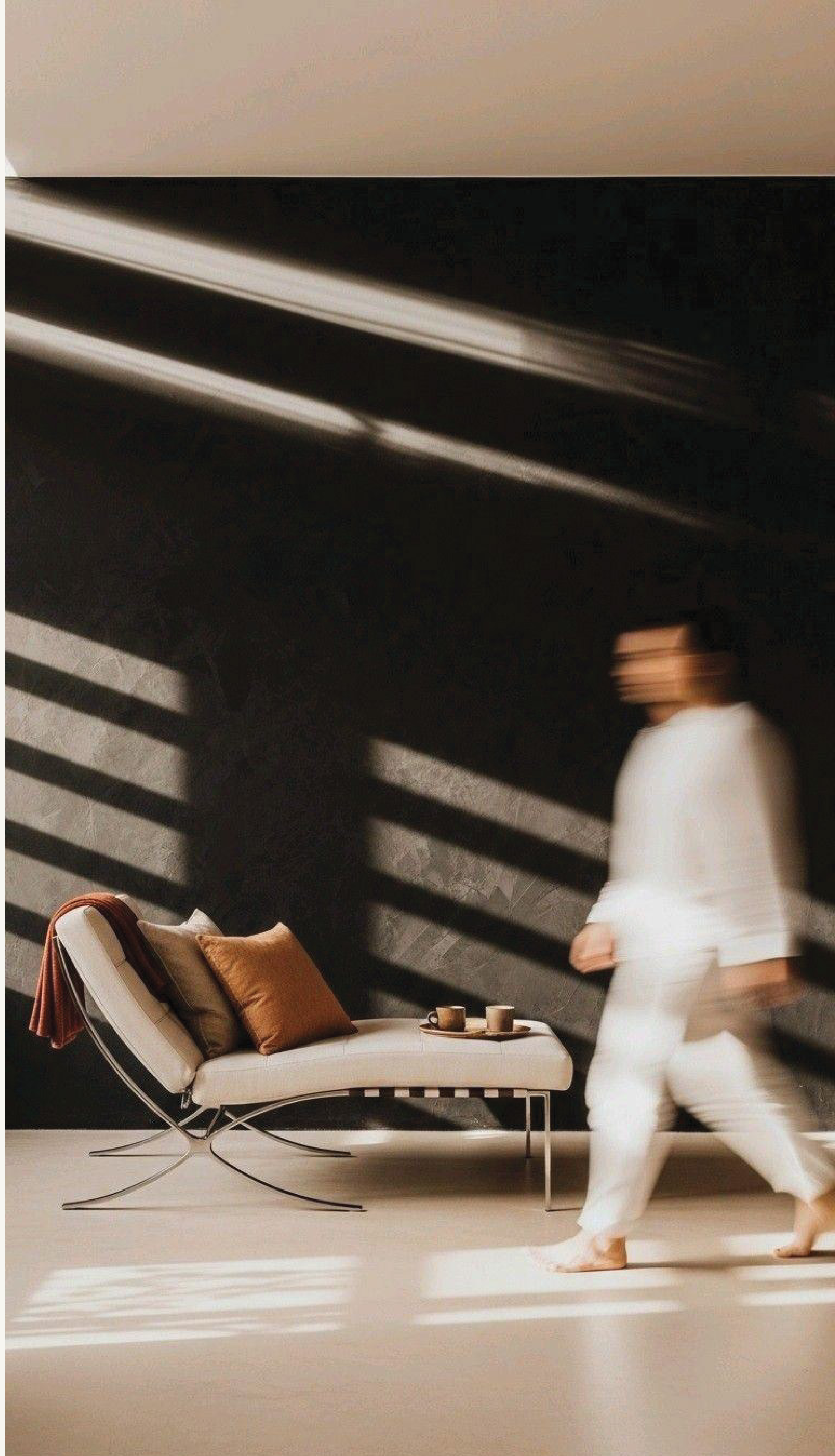
BRAZEN APAC

UNDERSTANDING CONSUMER TRUST

Emerging trends in the beauty, luxury, wellness and hospitality sectors in Singapore and Malaysia

SEPTEMBER 2026



THE KEY TRENDS IN MALAYSIA & SINGAPORE

Six key insights

01 Consumers are deeply invested

02 Trust is won with proof

03 Social drives discovery

04 The celebrity era is shifting

05 Authenticity over aspiration

06 MY vs SG: different gears, significant opportunities

TRUST IS SOMETHING PEOPLE GO AND CHECK

We ran this study because no global report can tell a brand what the distance between Malaysia and Singapore costs. So, we asked people in both markets, and the findings revealed was insightful which led us to share.

There's a conversation I keep having in rooms in Kuala Lumpur and Singapore, and it usually turns to how a brand should sound. Warmer, more human, more relatable. It's a good instinct. But the longer I work across these two markets, the more I think we're solving for the wrong thing. Trust here isn't something a brand can say its way into. It's something people go and check.

That isn't cynicism. It's care. Across beauty, luxury, hospitality and health and wellness, people are making choices that touch their health, their holidays and how they feel about themselves. They have become quietly thorough about it.

The part I find most interesting is where the two markets look the same and aren't. Ask people in either country what makes them trust a brand, and Malaysians and Singaporeans reach for the same word. Ask whose word they would take, and they turn in different directions. Singapore looks sideways, to other customers. Malaysia looks up, to the expert with the credentials.

They differ on who has earned the right to offer that honesty. That is why treating this region as one audience tends to work in one country and fall flat in the other.

Aspiration still catches the eye. It just doesn't close the distance. Reach can still get you noticed; it can no longer get you chosen.

Angeline Tan
GENERAL MANAGER, BRAZEN APAC

ABOUT THIS RESEARCH · CONDUCTED BY CARMA · MALAYSIA & SINGAPORE · 2026

WHAT WE ASKED, AND HOW

337
Total respondents across both markets

51%
Singapore · 173 respondents · S$3,500+ income

49%
Malaysia · 164 respondents · RM3,000+ income

20–39
Age range · equal split of 20–29 and 30–39

RESEARCH PARTNER CARMA

Fieldwork 13 to 16 June 2026. Online self-completion panel, conducted and commissioned by CARMA. Unweighted. A screened sample of income-qualified consumers aged 20 to 39, designed to reflect the lifestyle audience in each market rather than the national population. CARMA and Brazen are both part of News Group International.

WHAT WE STUDIED

Category interest & content consumption
How often consumers engage with content across sectors

Opinion formation & brand credibility
What shapes initial impressions and lasting brand trust

Discovery triggers & channel behaviour
Where consumers first encounter and then convert on brands

Influencer trust & content credibility
Which voices and formats carry the most weight at purchase

CATEGORIES COVERED

Beauty
Skincare, cosmetics & grooming

Health & wellness
Fitness, nutrition & wellbeing

Luxury
Premium goods & lifestyle

Hospitality
Travel, dining & hotels

SIGNIFICANT OPPORTUNITIES AND GROWTH

Beauty, luxury, hospitality and health & wellness are among the fastest-growing consumer sectors in Singapore and Malaysia, presenting significant opportunities for brands. This report analyses consumer perceptions across both markets to identify the key trends shaping these sectors and their implications for communicators.

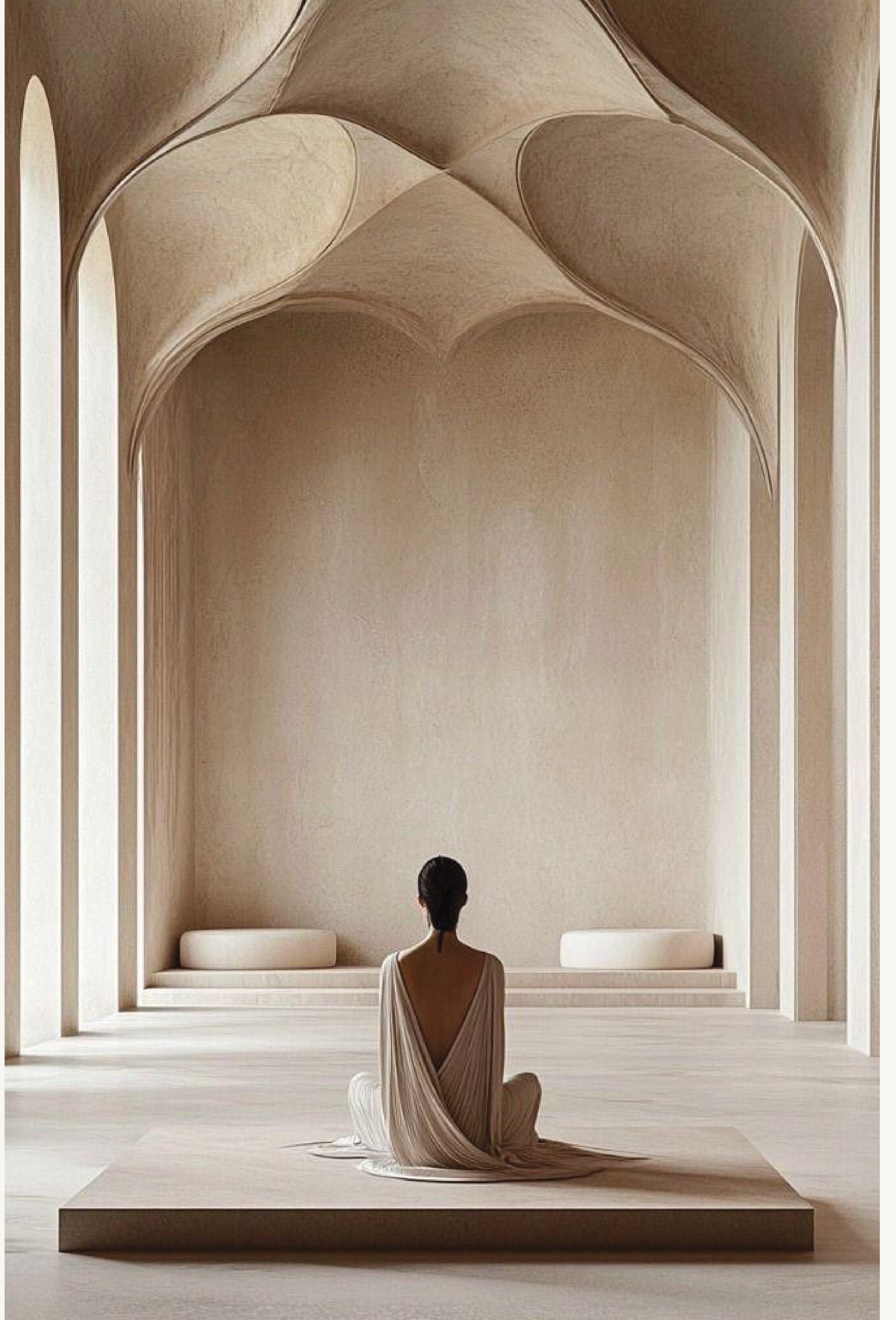
US$42.5B

Singapore health & wellness market by 2034, at a 9.5% CAGR

US$18B

Malaysia health & wellness market forecast, at a 4.68% CAGR

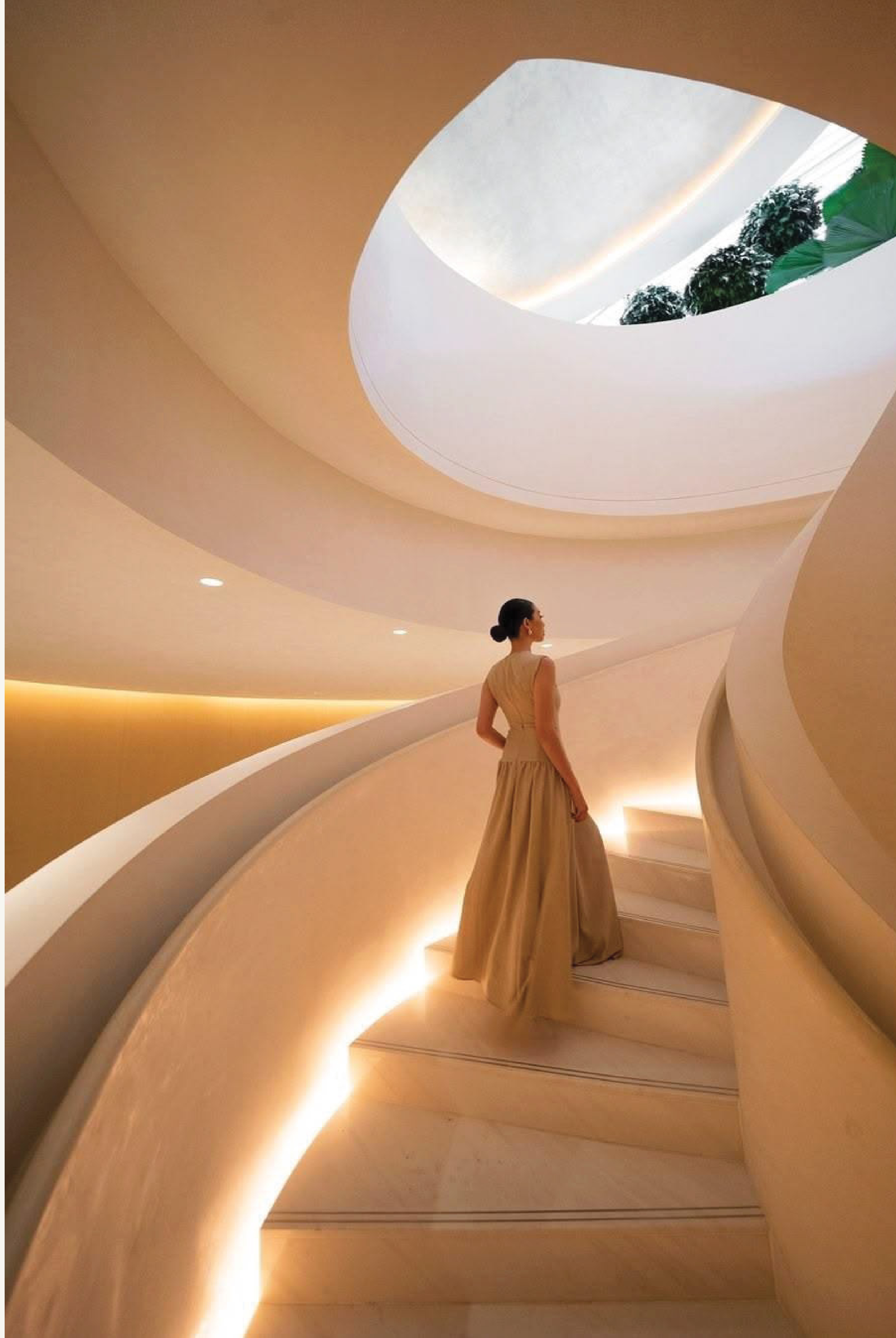
Health & wellness is the strongest growth category, driven by rising health awareness, increased participation in fitness, digital health adoption, and higher disposable incomes. Across both markets, it also generates the highest levels of consumer interest and engagement.



CONVERGENCE WILL DRIVE THE NEXT WAVE

The rapid expansion of wellness is accelerating convergence across industries. While beauty, luxury and hospitality each have distinct audiences and opportunities, the greatest growth potential lies at the intersection of these sectors with health & wellness.

One of the clearest examples is the convergence of hospitality and wellness, as hotels increasingly reposition themselves as wellness destinations, competing on health outcomes as well as guest experiences. At the same time, luxury is shifting from products to experiences, with Singapore leading the region through strong demand from high-value travellers.



SHIFTS IN INFLUENCE, DISCOVERY AND TRUST

Rapid shifts in the media landscape and consumer behaviour are reshaping how people discover, evaluate and trust brands, creating new challenges for communicators.

70%

of consumers use AI to research brands, products and services

AI-assisted discovery is now a critical part of the customer journey. As generative search becomes more influential, earned media is becoming increasingly valuable, with large language models continuing to prioritise and cite credible editorial sources.

Trust is also evolving across Singapore and Malaysia. Consumers increasingly value evidence over promotion and transparency over aspirational messaging. Authenticity is becoming a stronger driver of influence, with everyday consumers and customer-generated content perceived as more credible than celebrity endorsements, macro-influencers or brand-led communications.

CARMA Perception of AI study, G20 markets, n=6,000.

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INSIGHT 01

CONSUMERS ARE DEEPLY INVESTED IN LIFESTYLE & LUXURY

Interest is high across all four categories in both markets, and Malaysia runs significantly hotter across every one of them. An enthusiasm-led mindset, not a passive one.

HEALTH AND WELLNESS LEADS EVERY CATEGORY

There is strong interest across all lifestyle categories in Singapore and Malaysia, and Malaysia shows significantly higher interest across all four, suggesting a more enthusiasm-led consumer mindset. Beauty stands out strongly among females, while hospitality shows stronger appeal among males and high-income respondents.

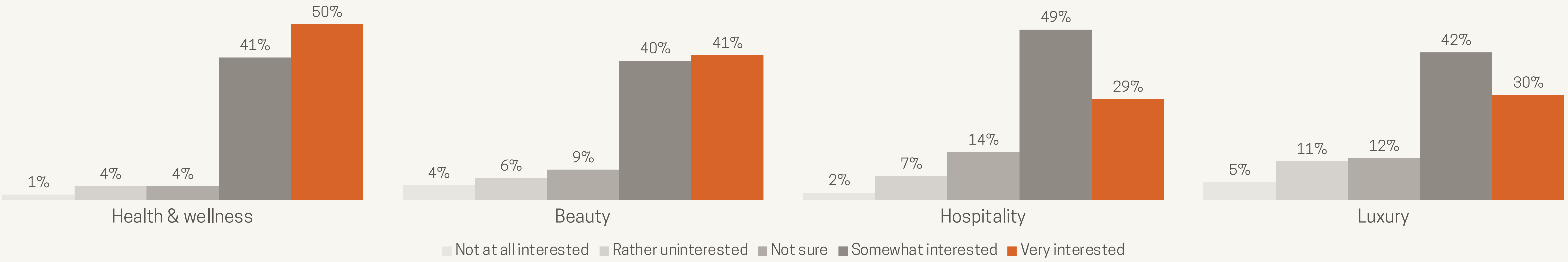
VERY + SOMEWHAT INTERESTED =

91%
Health & wellness

81%
Beauty

77%
Hospitality

72%
Luxury



Q. How interested are you in the following? Sample size: all respondents (337).

CONTENT IS FIRMLY EMBEDDED IN CONSUMER HABITS

Lifestyle content is highly embedded in respondents' media habits, with strong consumption across all four categories. While content consumption is high across the board, the most credible content is customer-led.

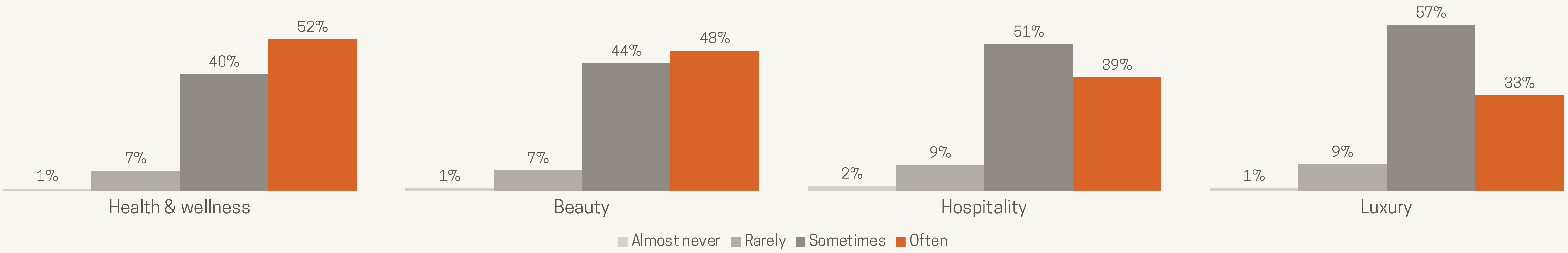
OFTEN + SOMETIMES=

92%
Health & wellness

92%
Beauty

90%
Hospitality

90%
Luxury



Q. And how often do you consume content about these topics? By consuming content, we mean reading, watching or listening to various forms of content from podcasts to magazines, blogposts and videos. Sample sizes: health and wellness (306), beauty (273), hospitality (261), luxury (243).

CONSUMERS ARE MORE DISCERNING

"In light of the current economic environment, the Malaysian consumer today is even more discerning. They look to multiple factors apart from price and promotions prior to a purchase to get the most value, and influence is one of them. Consumers are now questioning previous key influence drivers such as celebrity sponsorship and influencers on their authenticity and credibility. They look to real consumer testimonials as part of influence to try or purchase, along with AI searches and word of mouth. This complexity increases with the usage of AI as it creates further credibility questions from consumers."

Imun Lim
CHIEF MARKETING OFFICER, THE BIG GROUP

WHERE PURCHASE IS MOVING

"Purchase intentions are still driven by KOLs, nano influencers and platforms like XHS and TikTok, which brands have leveraged for many years. Beyond discovery, purchase drivers are starting to take shape to conversational recommendations and solution seeking, where AI is taking place. Consumers are pivoting to AI and brands should monetise this gap, as consumers are seeking purchases at the right price point and channels to purchase."

Amy Pang
FORMER GENERAL MANAGER, MARKETING COMMUNICATIONS, CTOS DIGITAL & PAYNET

INSIGHT 02

TRUST IS WON WITH PROOF, NOT INFLUENCE

Product quality, verified reviews and personal experience are the strongest trust drivers across both markets.

INSIGHT 02 · TRUST IS WON WITH PROOF · TOTAL N=337

WHAT MOVES A PURCHASE, WHAT SHAPES AN OPINION

Product quality, verified reviews and personal experience are the strongest trust drivers across both markets.

BIGGEST INFLUENCE ON PURCHASE DECISION

01 **Product quality & performance**

Consistently ranked first across both Singapore and Malaysia.

02 **Customer reviews & ratings**

Peer-validated proof is the second most powerful converter, underscoring the role of review pipelines in launch strategy.

03 **Personal trial or experience**

Direct exposure, sampling, trials and hands-on interaction build conviction.

WHAT SHAPES BRAND OPINION

01 **Consistent quality over time**

Sustained delivery on the brand promise shapes long-term brand equity and repeat purchase behaviour.

02 **Trustworthy information & transparency**

Consumers reward brands that communicate clearly, honestly and without over-claiming.

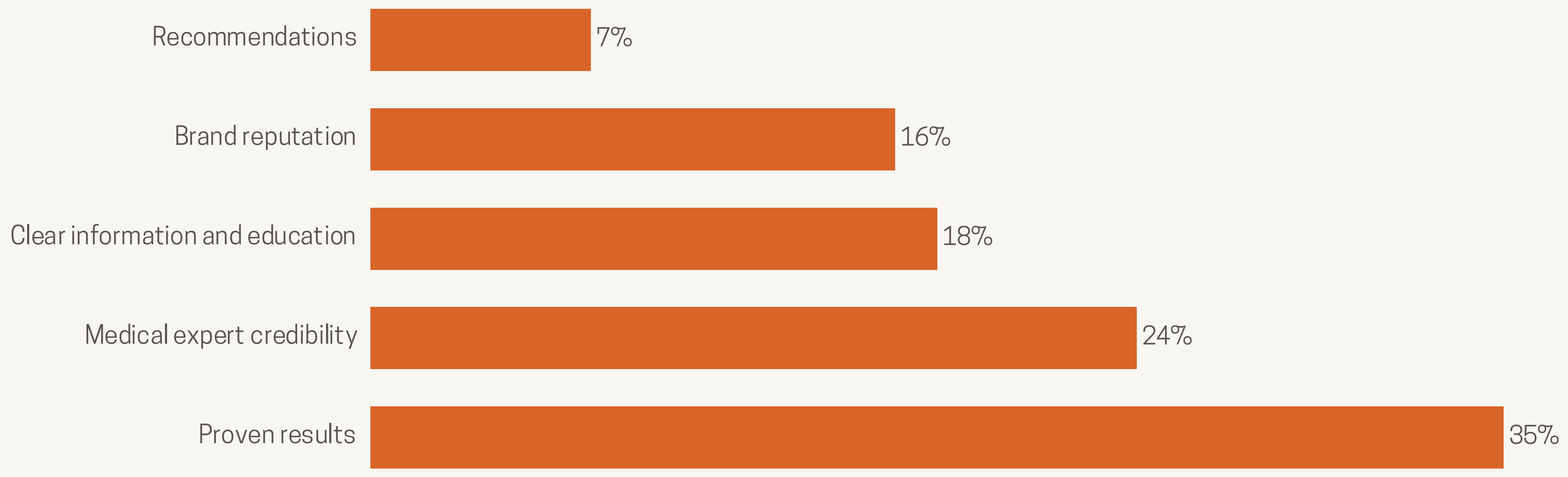
Last **Influencer recommendation**

Ranked notably low as an opinion-shaper. Influence plays a role in discovery, not in the trust-formation stage.

INSIGHT 02 · HEALTH & WELLNESS

WELLNESS TRUST RUNS ON EVIDENCE

Proven results lead as the top driver, followed by medical expert credibility, showing that respondents look for reassurance, reliable information and proof before engaging with brands in this category. This is the one place expertise outranks peers.

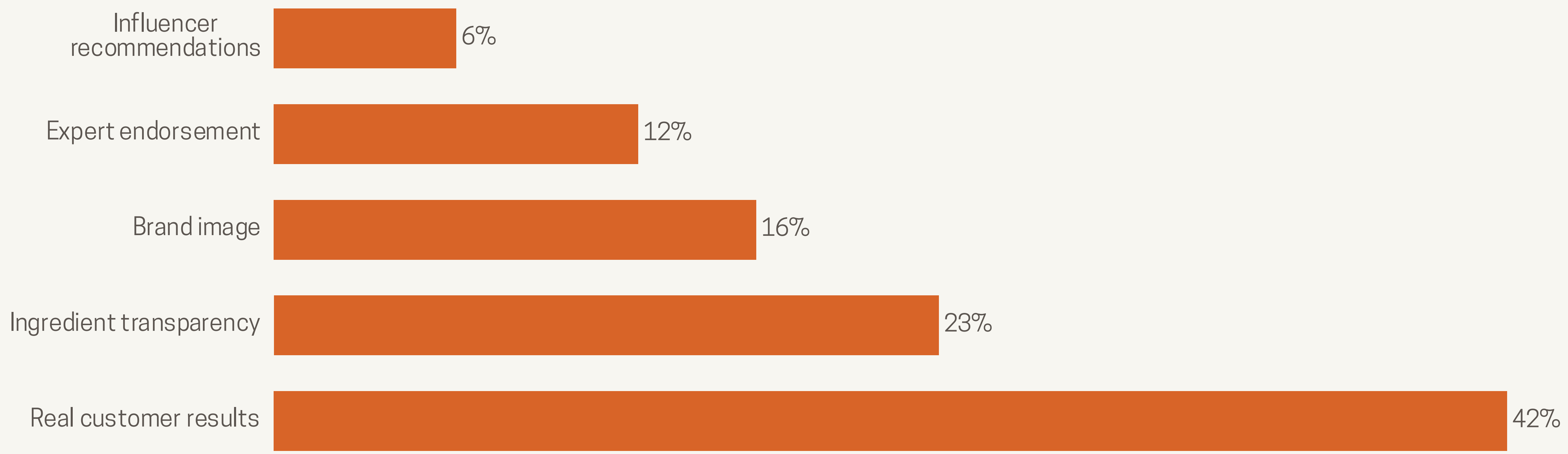


Q. What builds your trust in this category? Respondents interested in health and wellness (306).

INSIGHT 02 · BEAUTY

BEAUTY TRUST IS BUILT ON REAL RESULTS

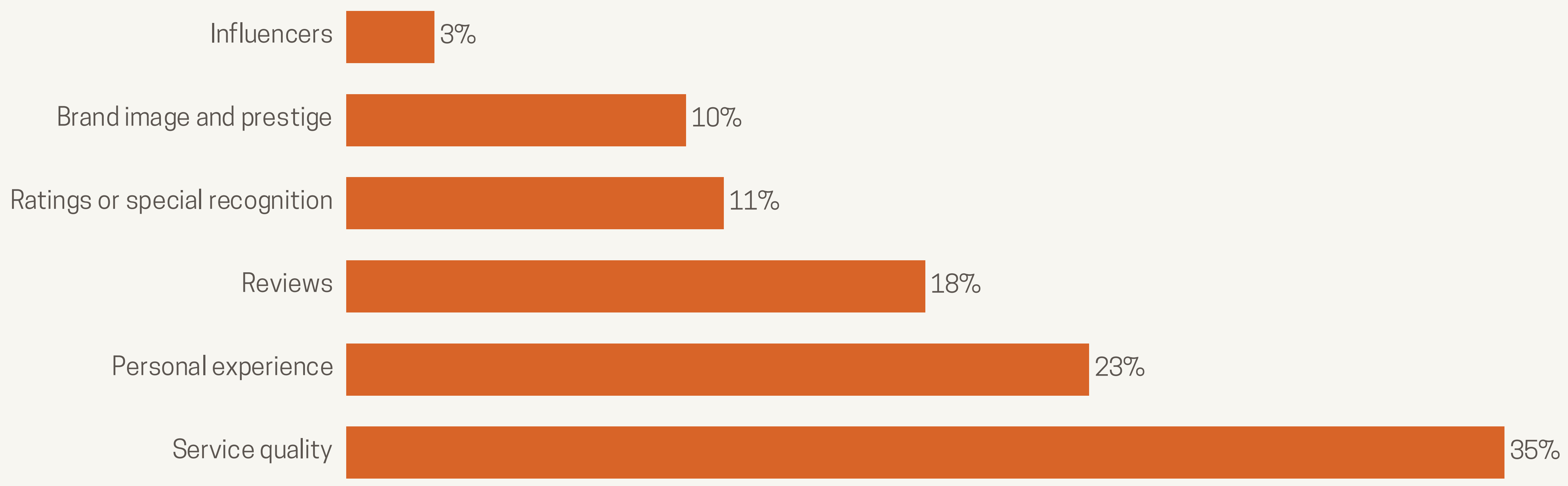
Real customer results are the strongest trust builder, well ahead of brand image, expert endorsement and influencer recommendations, showing that audiences place greater value on visible evidence than traditional influence cues. Real results are cited nearly seven times more often than influencer recommendation.



Q. What builds your trust in this category? Respondents interested in beauty (273).

HOSPITALITY TRUST STARTS WITH THE EXPERIENCE

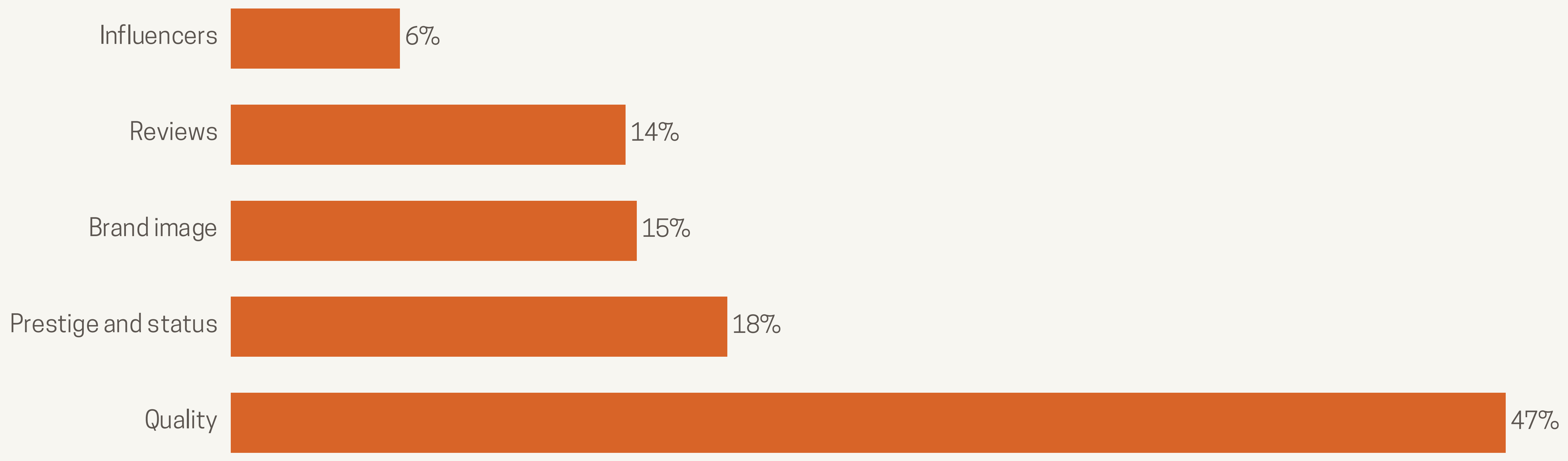
Trust in hospitality is driven first by the experience itself, with service quality leading clearly, followed by personal experience and reviews. Consumers trust what they directly experience or hear from other guests, while brand prestige and influencer impact play a much smaller role.



Q. What builds your trust in this category? Respondents interested in hospitality (261).

LUXURY TRUST IS ANCHORED IN QUALITY

Quality is the clear trust anchor in luxury, outweighing prestige, brand image, reviews and influencer impact. Even in an aspirational category, consumers expect substance, craftsmanship and product excellence to lead the brand story. Prestige is the reward for quality, not a substitute for it.



Q. What builds your trust in this category? Respondents interested in luxury (243).

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INSIGHT 03

REACH GETS YOU NOTICED. IT NO LONGER GETS YOU CHOSEN.

Social media leads discovery, yet consumers convert on reviews, personal experience and expert opinion. The channel that finds the audience is not the channel that wins its confidence.

SOCIAL FINDS THEM, PROOF CONVINCES THEM

Social media is the strongest trigger for learning more or purchasing, followed by friends and family and review platforms. Consumer action is mainly sparked by digital discovery, but consideration is strengthened by personal recommendations and trusted user feedback.

Social is your launch amplifier. Reviews and testimonials are what close the trust gap. Build both.

HOW CONSUMERS DISCOVER

61%	**Social media** Leading discovery channel by a significant margin
32%	**Personal experience / word of mouth** Trusted peer networks and direct trial
30%	**Online reviews & ratings** Platform reviews, Google and aggregator sites
15%	**Expert opinion** Industry professionals, doctors and credentialled voices

WHAT FEELS MOST CREDIBLE

35%	**Customer-led content** UGC, testimonials and real-life reviews
30%	**Expert-led content** Professionals and credentialled authorities
12%	**Influencer content** Paid or organic influencer posts
12%	**Brand-led content** Owned brand communications

Q. How do you discover products and services? All respondents (337).

DISCOVERY IS SHIFTING TOWARDS AI

70%

of consumers use AI to research companies, products and services

Across both Malaysia and Singapore, there is a clear shift in how consumers use AI. Consumers are moving away from traditional keyword searches towards planning, recommendations and hyper-personalisation.

BEAUTY	Users now expect tailored recommendations based on their skin type, climate, budget and preferences rather than a list of search results. McKinsey highlights that personalisation, ingredient transparency and digital beauty discovery are the strongest drivers of consumer engagement.
TRAVEL & HOSPITALITY	Travellers expect recommendations tailored to their budget, interests and experiences. Industry research indicates that personalisation, wellness and authentic local experiences are becoming levers for luxury hospitality across Southeast Asia.

Q. And have you ever used an AI system to research anything about companies or their products and services? CARMA Perception of AI study, G20 markets, n=6,000.

INSIGHT 03 · MALAYSIA & SINGAPORE

EARNED MEDIA PLAYS A SIGNIFICANT ROLE IN LLM ANSWERS

With over 80% of all LLM citations stemming from earned media, earned media is playing a significant role in AI visibility and AI-assisted discovery. For brands in Malaysia and Singapore, this means optimising owned media assets and earning credible coverage, views and mentions on the most-trusted third-party sources. Brands earning visibility are those being talked about by credible publishers, retailers and consumers.

LLMS PRIORITISE THREE MAIN SOURCES IN THESE SECTORS

01

Authoritative sources

Government agencies, hospitals, tourism boards and official brand sites, cited for factual accuracy.

02

Trusted editorial publishers

Titles such as Tatler, Vogue, Condé Nast Traveler, Daily Vanity and CNA Luxury, for curated recommendation and trend reporting.

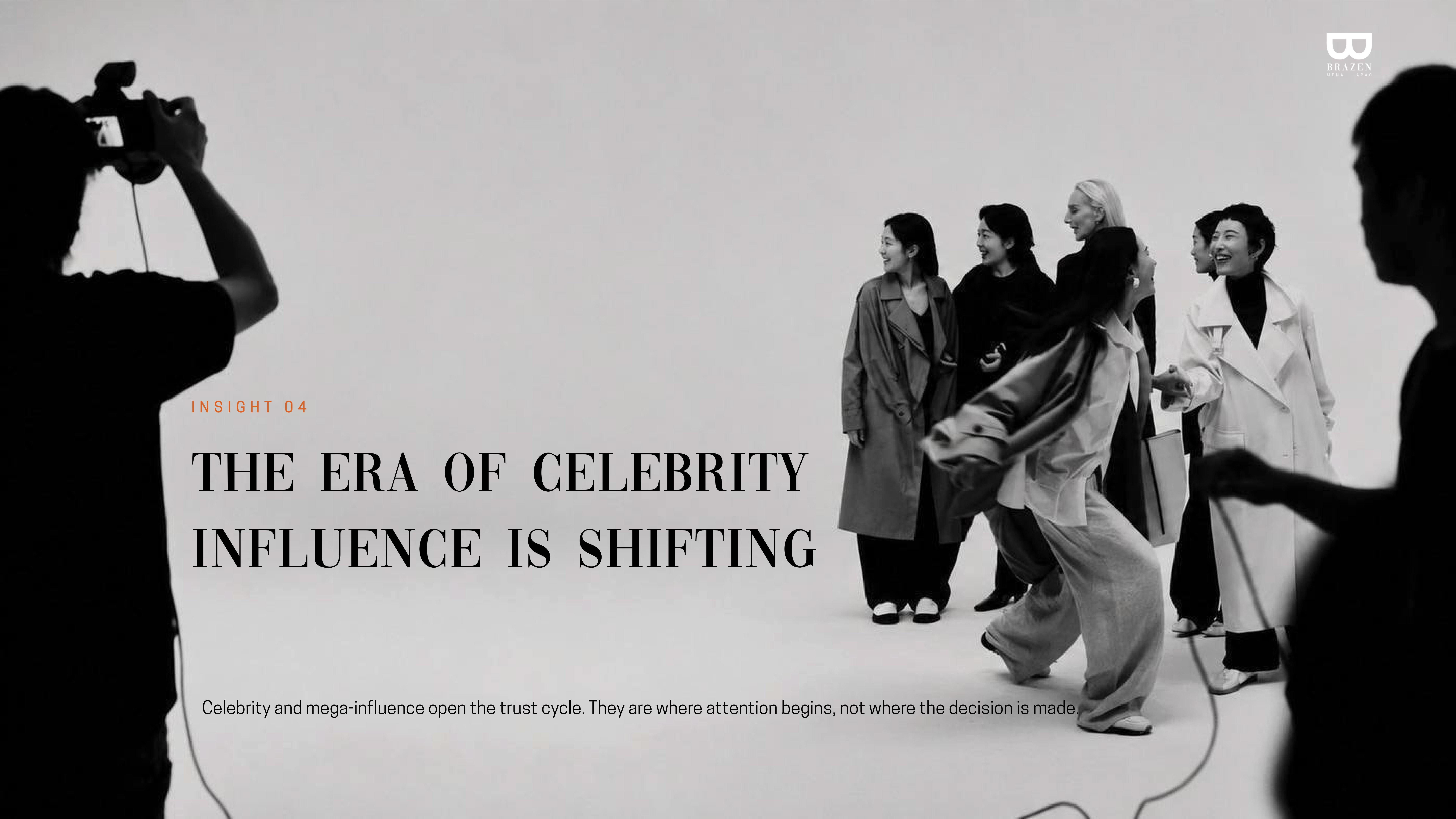
03

Community and review platforms

Reddit, TripAdvisor, YouTube and retailer review sections, for real-world experience and consumer sentiment.

Within the Malaysian and Singaporean markets, each LLM cites a different set of materials, and significant differences exist between the most prominent LLMs and between lifestyle categories.

Publishing deals are likely to influence AI visibility and the nature of citations significantly in future: Condé Nast has secured multiple multi-year licensing agreements for its archive to be trained on, used in real time and cited in AI-generated summaries.



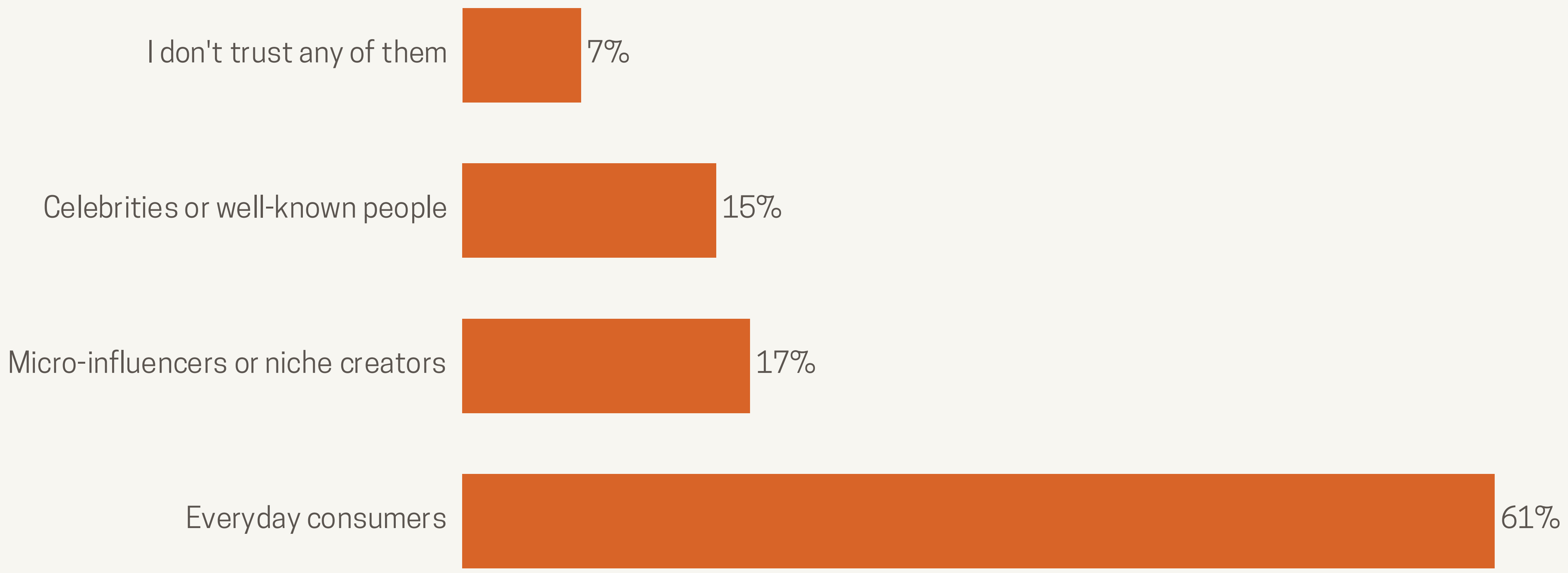
INSIGHT 04

THE ERA OF CELEBRITY INFLUENCE IS SHIFTING

Celebrity and mega-influence open the trust cycle. They are where attention begins, not where the decision is made.

INFLUENCE OPENS THE TRUST CYCLE

Everyday consumers are trusted most by 61% of respondents, with micro-influencers at 17% and celebrities at 15%. Read as a sequence rather than a ranking, this describes where each voice does its work: creators and celebrity open the cycle and earn attention, while peer evidence and credentialled expertise are what close it.



> "SMALLER INFLUENCERS EXCEL AT ENGAGEMENT BY LEVERAGING PERSONAL CONNECTIONS AND THRIVE ON ABSTRACT AND RECOMMENDATION-BASED MESSAGES THAT FEEL MORE AUTHENTIC."
>
> Barari, M., Eisend, M. & Jain, S.P. A meta-analysis of the effectiveness of social media influencers. Journal of the Academy of Marketing Science 54, 28–48 (2026).

Q. Which influencers do you trust the most? Sample size: all respondents (337).

THE ENDURING RESONANCE OF THE KOL

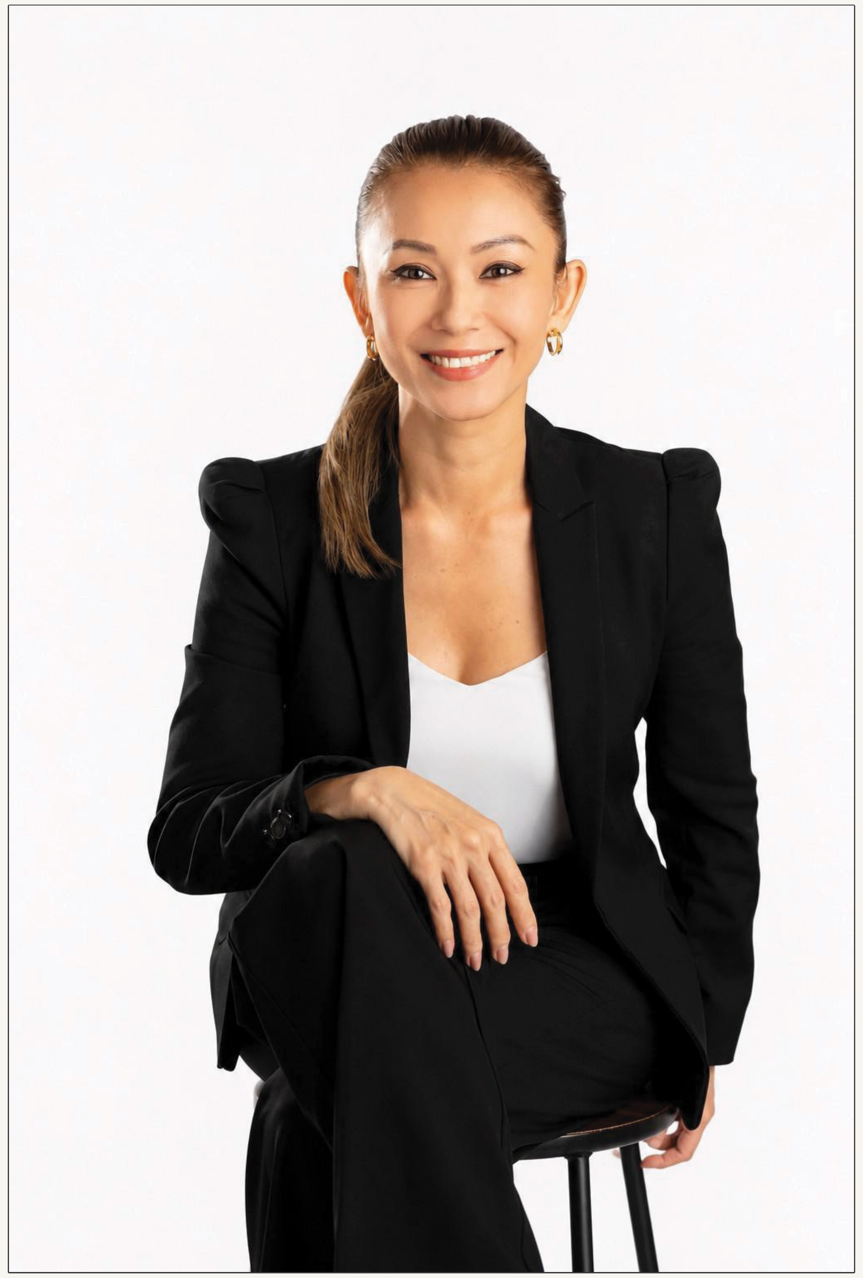
"Key opinion leaders are becoming more integral to the infrastructure of reputation. As consumers move from scrolling to asking, AI systems increasingly draw on credible, authoritative voices to shape their answers.

"Experts no longer influence only at the point of discovery; they help determine how brands are understood, cited and recommended over time."

Louise Jacobson
MANAGING PARTNER, BRAZEN MENA & APAC

INFLUENCE HAS NOT FADED, IT HAS MATURED

"Influence has not faded, it has matured. Consumers still discover through the loudest channels, but they decide through the most credible ones. In this region especially, the voices that endure are those grounded in genuine expertise, because in the end it is trust, not reach, that converts."



Angeline Tan
GENERAL MANAGER, BRAZEN APAC

INSIGHT 05

AUTHENTICITY OUTWEIGHS ASPIRATION

Consumers trust brands that feel genuine and relatable over those projecting purely premium imagery. Both markets align on authenticity as the top driver of trust.

AUTHENTIC AND RELATABLE LEADS ON TRUST

Consumers increasingly trust brands that feel genuine and relatable over those projecting purely premium or aspirational imagery. Singapore and Malaysian audiences align on the importance of authenticity as the top driver of trust. Both markets rank it first, at 49% in Singapore and 43% in Malaysia, a difference too small to be meaningful at these sample sizes.

46% Feel authentic and relatable

The single strongest trust-building signal across both markets. Brands that communicate genuinely and without over-polish earn disproportionate credibility.

24% Are endorsed by experts

Credentialled third-party voices, doctors, specialists and industry authorities, remain a powerful PR tool, particularly in health and beauty.

SG 49% · MY 43%

Both markets rank authenticity first. The gap between them is not statistically meaningful.

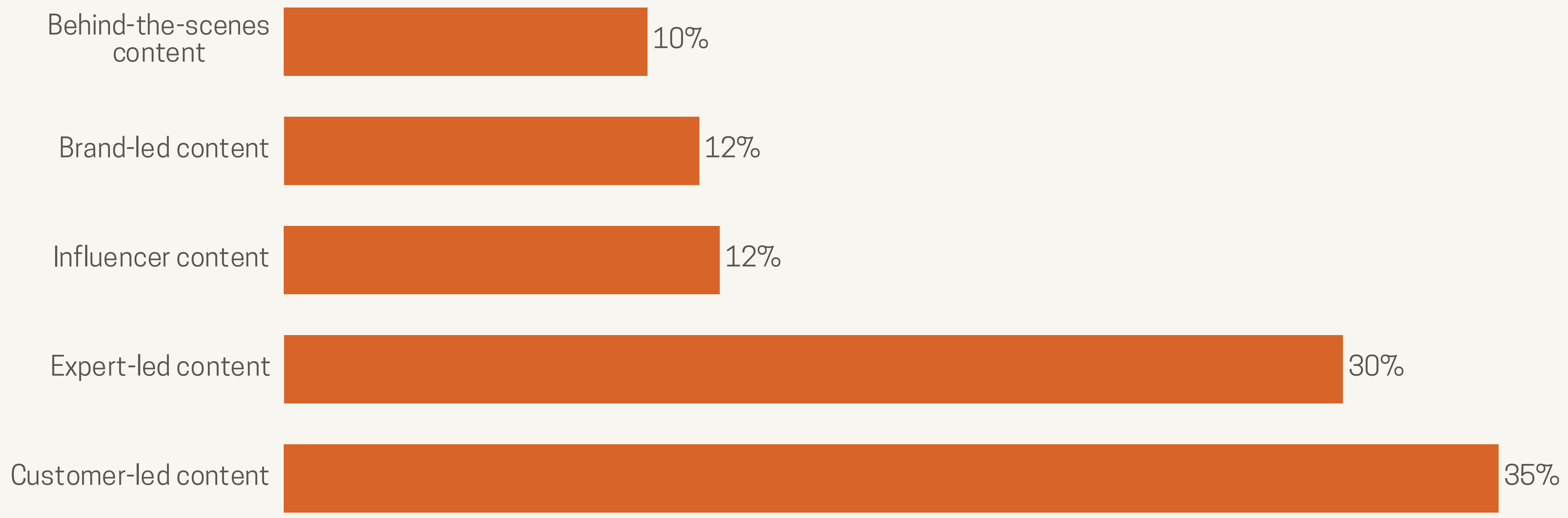
	TOTAL	SG	MY	MALE	FEMALE	20–29	30–39	MID INC.	HIGH INC.
Feel authentic and relatable	46%	49%	43%	42%	50%	43%	49%	43%	49%
Are endorsed by experts	24%	19%	29%	23%	24%	23%	24%	29%	18%
Are widely talked about	16%	16%	17%	19%	14%	20%	13%	17%	16%
Feel aspirational and premium	14%	17%	11%	16%	13%	14%	14%	11%	18%

Q. And finally, which of these statements do you resonate with the most? Sample size: all respondents (337).

INSIGHT 05 · TOTAL N=337

CUSTOMER-LED CONTENT FEELS MOST CREDIBLE

Customer-led content is seen as the most credible format, ahead of expert-led content and well above influencer, brand-led and behind-the-scenes content. Audiences are more likely to believe content that feels grounded in real customer experience rather than overtly promotional or influencer-driven messaging.



Q. And what kind of content feels most credible to you? Sample size: all respondents (337).

CREDIBILITY CUES VARY BY AUDIENCE

Influencer and brand-led content feels less credible amongst Singaporean and Malaysian audiences. The variation between audiences confirms the need for in-depth understanding of audience segments and tailored content strategy.

	SINGAPORE	MALAYSIA	MALE	FEMALE	20–29	30–39	MID INC.	HIGH INC.
Customer-led content	**41%**	28%	31%	**39%**	**35%**	**35%**	30%	**40%**
Expert-led content	20%	**41%**	33%	27%	27%	34%	34%	26%
Influencer content	13%	12%	14%	11%	15%	10%	16%	9%
Brand-led content	12%	12%	11%	13%	13%	11%	10%	14%
Behind-the-scenes content	13%	7%	11%	10%	11%	10%	9%	11%

Customer-led content remains the strongest credibility driver overall, with higher appeal in Singapore, among females and high-income respondents. Malaysia stands out for expert-led content, showing a stronger preference for authority and specialist validation, while influencer content remains lower overall but is slightly more relevant among younger and mid-income audiences.

Q. And what kind of content feels most credible to you? Sample size: all respondents (337).

INSIGHT 06

DIFFERENT GEARS, SHARED OPPORTUNITY

Malaysia is enthusiasm-led; Singapore is more selective. Localised narratives and a focus on real results are the non-negotiables in both.

INSIGHT 06 · DIFFERENT GEARS

MALAYSIA IS ENTHUSIASM-LED, SINGAPORE IS MORE SELECTIVE

Malaysia consistently registers higher 'very interested' scores across lifestyle categories. Singapore respondents present as more discerning, with lower enthusiasm peaks. Localised narratives and a focus on real results are the non-negotiables in both markets.

MALAYSIA

HIGHER 'VERY INTERESTED' PEAKS ACROSS ALL CATEGORIES

Malaysia leads in enthusiasm across beauty, health & wellness, luxury and hospitality, representing a more receptive, high-intent audience ready to engage. Malaysian consumers engage more regularly with beauty, wellness and hospitality content, creating greater surface area for brand communications to land.

SINGAPORE

MORE MEASURED ENTHUSIASM

Singaporean consumers are selective and evidence-driven. They require more proof before developing strong interest in a brand or category.

IMPLICATION FOR MALAYSIA

LEAD WITH MOMENTUM

High openness rewards brands that show up early, often and authentically, seeding broadly across beauty, wellness and hospitality content. Win attention with genuine, locally rooted storytelling, then convert it with visible, real-world results.

IMPLICATION FOR SINGAPORE

LEAD WITH PROOF

Credentialled reviews, expert voices and clear proof points earn interest here, where reach alone does not. Prioritise the quality of the evidence over the quantity of the content.

EXPERT ANALYSIS · ANGELINE TAN, GENERAL MANAGER, BRAZEN APAC

FIVE THINGS I WOULD DO WITH THIS

The data is clear enough. What follows is what I would act on if I were planning for either of these markets in the next twelve months.

01	Plan two markets, not one region	Singapore rewards peer proof. Malaysia rewards credentialled expertise. The same authenticity brief delivered identically in both will underperform in one of them. Localise the messenger before you localise the message.
02	Fund the proof, not only the reach	Product quality, verified reviews and personal experience lead in all four categories. Review pipelines, sampling and trial deserve the same budget seriousness as media does.
03	Brief influence for the job it actually does	Creators and celebrity open the trust cycle and earn attention. Customer evidence and expert validation are what convert it. Both are needed, and they are not interchangeable.
04	Build for how people ask, not how they searched	As discovery moves into conversational AI, earned coverage on credible third-party sources is what gets cited back to the consumer. Owned content alone will not surface.
05	Expect to be checked	Trust here is not granted on tone. It is verified, quickly, against other customers and against experts. Plan for the check rather than hoping to avoid it.

WHAT THIS MEANS FOR PR & COMMS · STRATEGY · INTELLIGENCE · CARE

THE INSIGHTS, ANSWERED BY THREE PRINCIPLES

Three market signals, delivered the way Brazen is built to work: with strategy, intelligence and care, set market by market.

01

STRATEGY

SET FOR EACH MARKET, NOT THE REGION

Malaysia is enthusiasm-led and receptive; Singapore is selective and more sceptical. We build a distinct strategy for each, because these are two mindsets, not one market. Seed broadly and build momentum in Malaysia; earn Singapore's trust methodically, with layered evidence.

02

INTELLIGENCE

PROOF OVER INFLUENCE

The data is emphatic: trust is won with product quality, verified reviews and real experience, not celebrity reach. We lead with evidence and earned credibility, and optimise for how people now discover brands, across social and AI-assisted search.

03

CARE

AUTHENTIC, AND CLOSE TO THE AUDIENCE

Audiences trust what feels genuine, and the voices of everyday people and niche experts over aspiration. We build reputation the same way: authentic storytelling and community advocacy, tailored to each category and each market.

THANK YOU

For the full dataset, a market-specific briefing, or a conversation about what these findings mean for your brand in Malaysia or Singapore, get in touch.

ABOUT BRAZEN

Brazen is a full-service PR, social media and reputation consultancy founded by Louise Jacobson in 2015. An insights-led agency, it shapes reputations and builds influence for global and regional brands across lifestyle, luxury and corporate communications, built on strategy, intelligence, care and genuine partnership. The agency operates from offices in Dubai, Riyadh, Singapore and Kuala Lumpur.

100 Best PR Agencies in the World

PRovoke Media, 2026

10 Best PR Agencies in the Middle East

PRovoke Media, 2025

Large Independent Consultancy of the Year

PRCA MENA, 2025

13 Agency of the Year wins

Across markets

500+ brands represented globally

90% client retention rate

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