



Southeast Asia Digital Landscape 2025

Unveiling Brand to Consumer
Engagement in a Hyperconnected
World



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INTRODUCTION

Southeast Asia's digital economy continues to grow rapidly, but this growth has introduced significant fragmentation across both marketing and e-commerce channels. From social media to marketplaces, direct-to-consumer websites, and live commerce, consumers now engage across a wide range of disjointed touchpoints.

This complexity has reshaped the consumer journey. Purchase decisions often span multiple platforms and formats, influenced by a mix of real-time content, peer recommendations, and targeted advertising. The traditional marketing funnel has evolved into a dynamic and unpredictable network of interactions that demands a more integrated and responsive approach from brands.

To help businesses navigate this landscape, the Southeast Asia Digital Landscape 2025 report combines first-party data from AnyMind's proprietary platforms with findings from consumer surveys across Southeast Asia. Together, these insights reveal how people discover, evaluate, and purchase products in a fragmented digital world.

As businesses seek to drive greater efficiency and engagement across more channels, this report offers a clear view of shifting consumer behavior and a practical foundation for turning complexity into competitive advantage.

This report is part of a series of reports that also include India and MENA specific regional reports, along with local reports of each Southeast Asian market.

01. Methodology

Methodology

Methodology & data sources

The analysis is based on two primary data sources:

First-Party Data Insights: We utilized hashed data from our proprietary suite of marketing and e-commerce platforms, including influencer marketing campaign data from [AnyTag](#), mobile marketing data from [POKKT](#), digital marketing data from [AnyDigital](#), and e-commerce data from [AnyX](#). These products provide real-time engagement metrics, user interaction data, app category preferences, and other behavioral insights.

Consumer Survey: Based on insights gleaned from our proprietary platforms, various hypotheses around digital consumer behaviors were created and posed to a panel of consumers in a consumer survey commissioned through InQognito. The survey was delivered to live and panel audiences across the Southeast Asia, India and MENA regions. These surveys were able to gather qualitative and quantitative data on consumer preferences, purchase behaviors, and digital consumption habits. Surveys are designed to complement hypothesis derived from collected first-party data, providing deeper context and validation and aggregated to ensure user privacy.



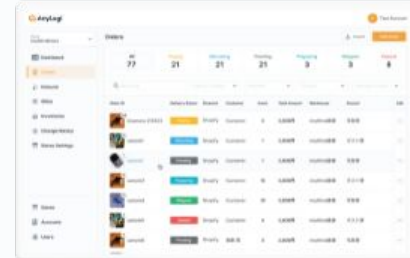
Methodology

Rationale

Our methodology uniquely leverages insights based on data from our proprietary products (AnyTag, POKKT, AnyDigital and AnyX) to develop hypotheses .

First-party data from these products offers a distinct advantage, allowing us to:

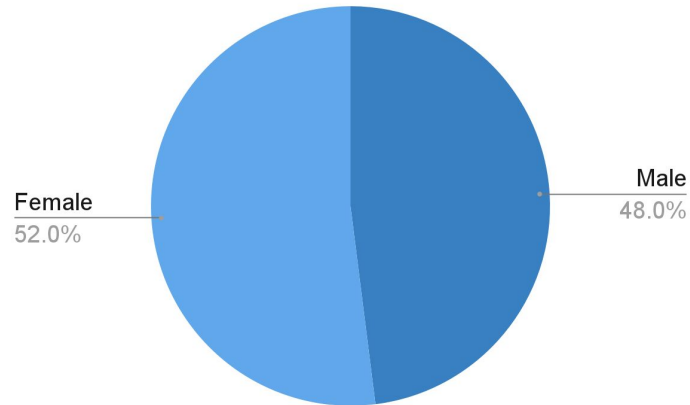
1. Insights into real-time campaign performance.
2. Understand user behavior within specific platforms.
3. Provide tailored recommendations based on actual data.
4. Demonstrate the effectiveness of our solutions.



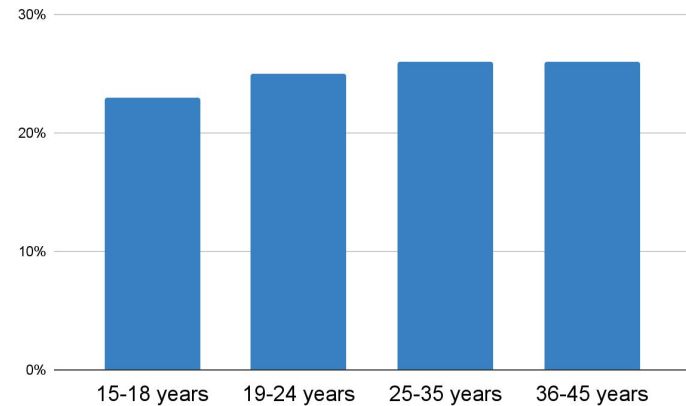
Digital consumer profile

A live panel of 1,355 consumers across six Southeast Asian markets were surveyed, including Singapore, Malaysia, Indonesia, Thailand, Philippines and Vietnam.

Gender



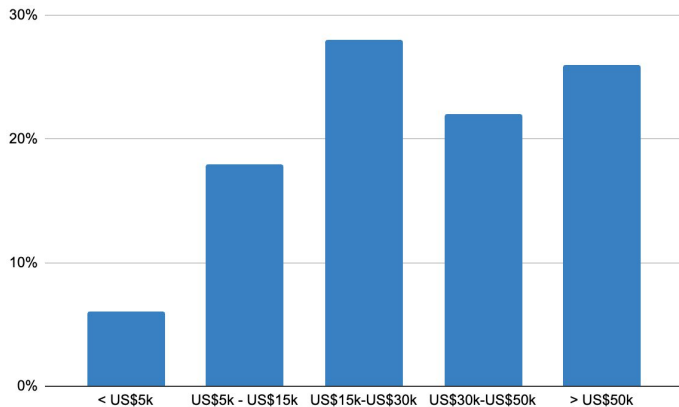
Age group



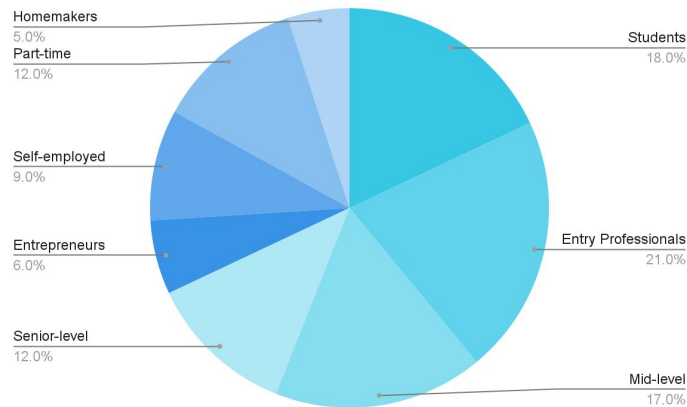
Digital consumer profile

A live panel of 1,355 consumers across six Southeast Asian markets were surveyed, including Singapore, Malaysia, Indonesia, Thailand, Philippines and Vietnam.

Annual household income



Occupation



02. Digital landscape overview

Southeast Asia

Mobile Penetration: As of 2024, the Southeast Asia mobile penetration rate stands at [117.8%](#), indicating that there are more mobile connections than people in Southeast Asia.

Digital Penetration: Internet penetration in Southeast Asia is around [78.2%](#), with significant growth observed in developing regions. Driven by a young and tech-savvy population, Southeast Asia is quickly becoming the world's fastest growing internet market.

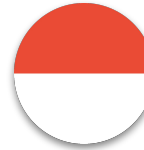
Global Network Readiness Index 2024



#2 Singapore
NRI Score: 76.94



#40 Thailand
NRI Score: 56.07



#48 Indonesia
NRI Score: 53.84



#36 Malaysia
NRI Score: 57.88



#45 Vietnam
NRI Score: 54.96



#63 Philippines
NRI Score: 49.93

Source: <https://networkreadinessindex.org/nri-2024-edition-press-release/>

Southeast Asia

With a population of over 659 million and a collective gross domestic product of \$2.5 trillion, Southeast Asia is on track to become the world's fifth largest economy, and reach nearly \$200 billion by 2025¹.

The **ASEAN-6**, comprising Indonesia, Thailand, Malaysia, Singapore, the Philippines, and Vietnam, is experiencing rapid growth in internet, digital, social media, and mobile activities with over 400 million internet users and double-digit growth in most segments.

55%-65%

of internet users spend on
digital products

Future growth will be powered by deeper engagement through increased frequency, spending, and adoption of new services

US\$263b

estimated SEA digital
economy size (GMV)

In key sectors such as e-commerce, new entrants and new forms of engagement are unlocking further growth

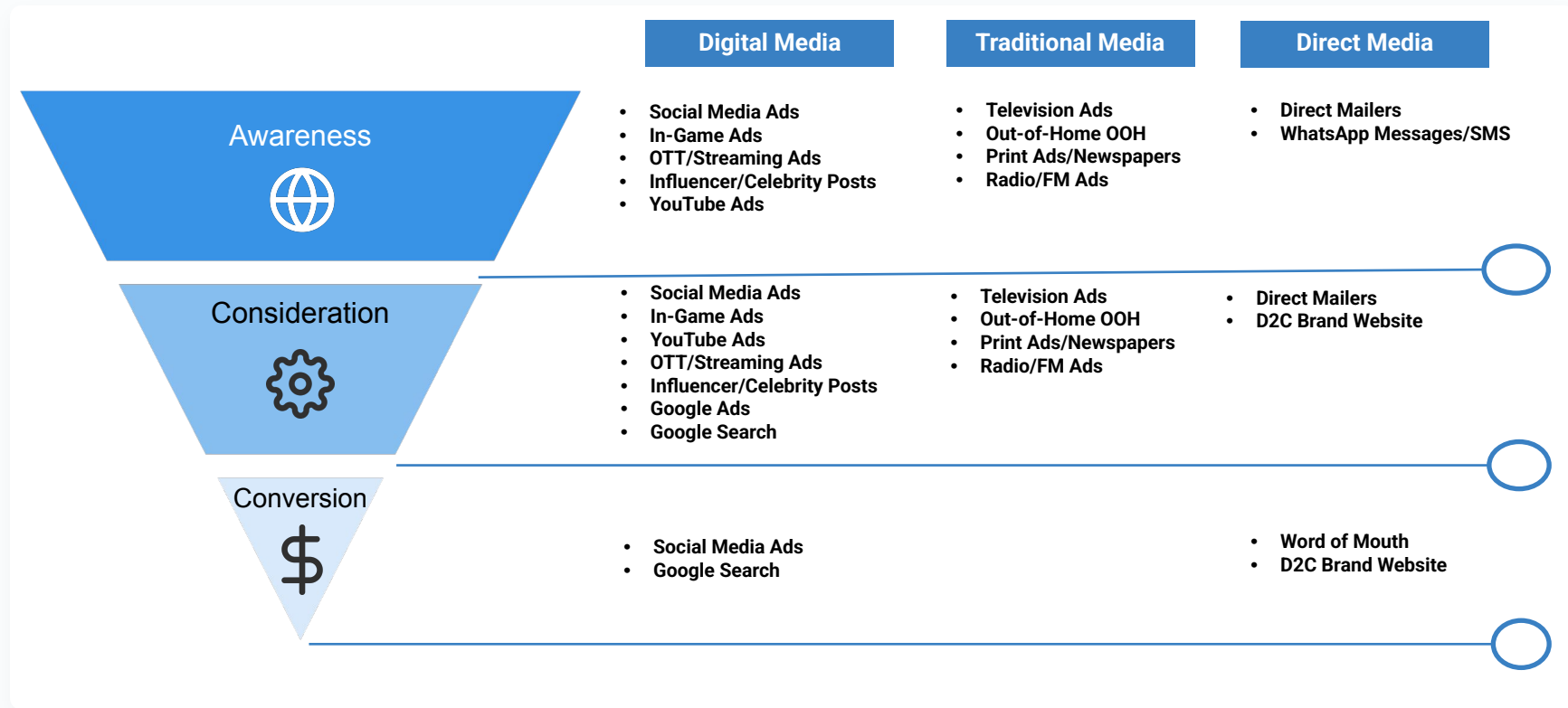
US\$122b

estimated SEA digital
economy revenue

Businesses will continue to ramp up digital monetization within their core offerings, whilst expanding revenue streams to drive future growth

03. A Journey through the marketing funnel

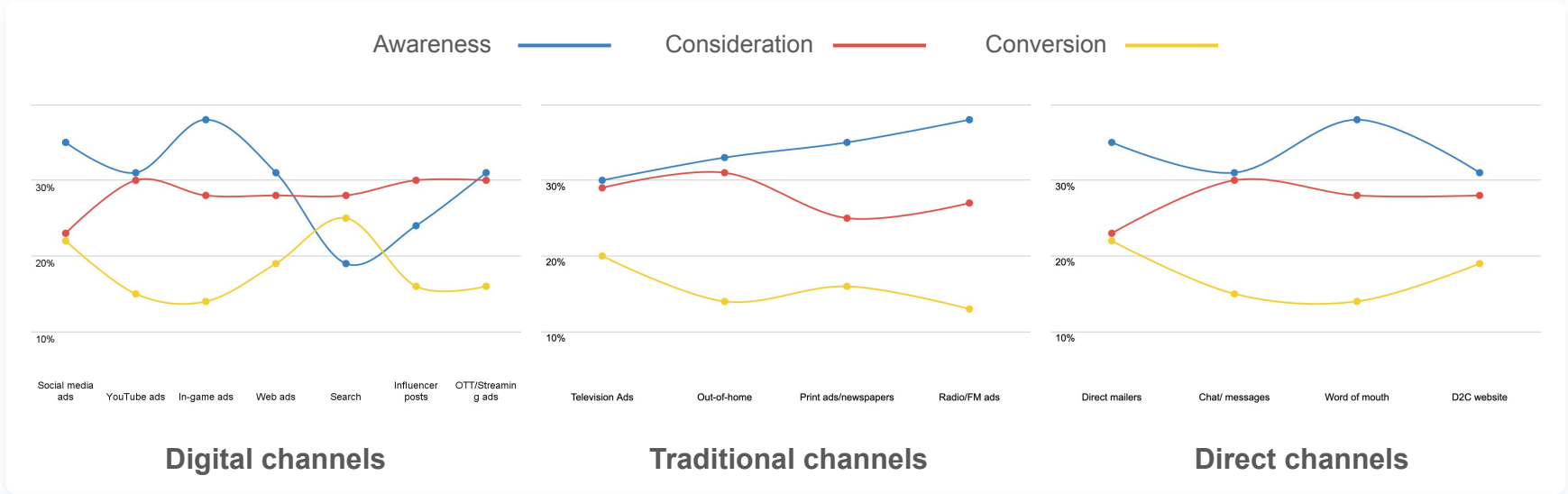
SALIENT MEDIA TOUCHPOINTS - SOUTHEAST ASIA



Role of Specific Channels - Southeast Asia

In-game advertising is emerging as a top-of-funnel powerhouse in Southeast Asia, ideal for brands seeking early recall. Social media and YouTube offer consistent performance across the entire funnel—valuable for holistic campaigns.

Search and Word of Mouth remain critical for conversion, indicating the importance of intent-based and trust-based influence. Traditional media supports mid-funnel engagement but should be supplemented by digital or direct channels for full-funnel impact.



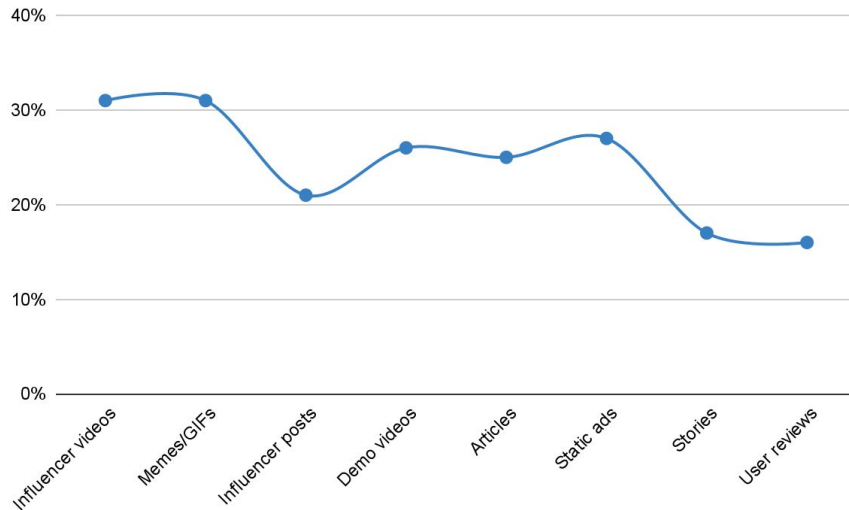
3.1 —

Awareness

Best content formats | Ad exposure: awareness to
conversion window | Media mix optimization

Awareness Stage - best content formats

Best content formats that drive awareness



Influencer videos and short video ads dominate awareness across SEA, with Singapore and the Philippines leaning in hardest.

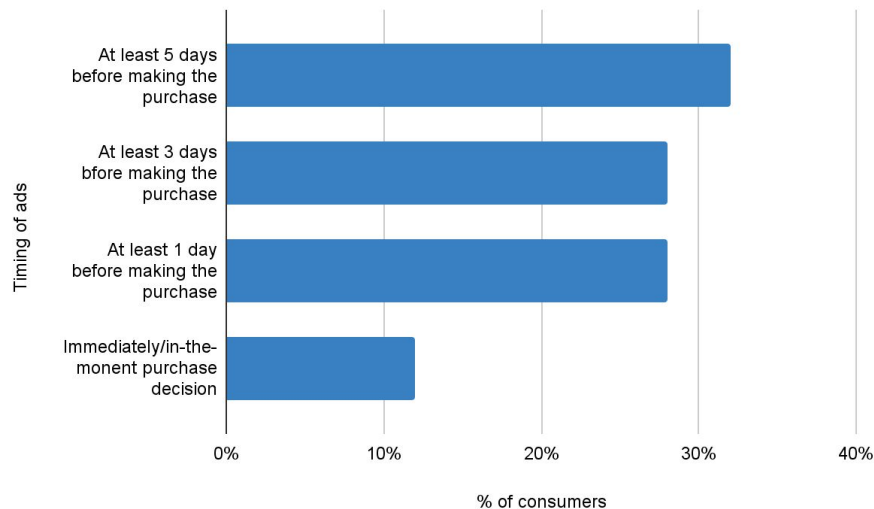
Influencer-led content drives the strongest pull in Singapore, while Indonesia and Vietnam favor more hands-on formats like demo videos and tutorials. Static ads hold steady, but user reviews trail in grabbing early attention

Awareness Stage - timing of ads

The awareness stage is the initial phase of the customer journey, where potential customers first become aware of a brand, product, or service. At this stage, the focus is on capturing attention, building recognition, and generating interest.

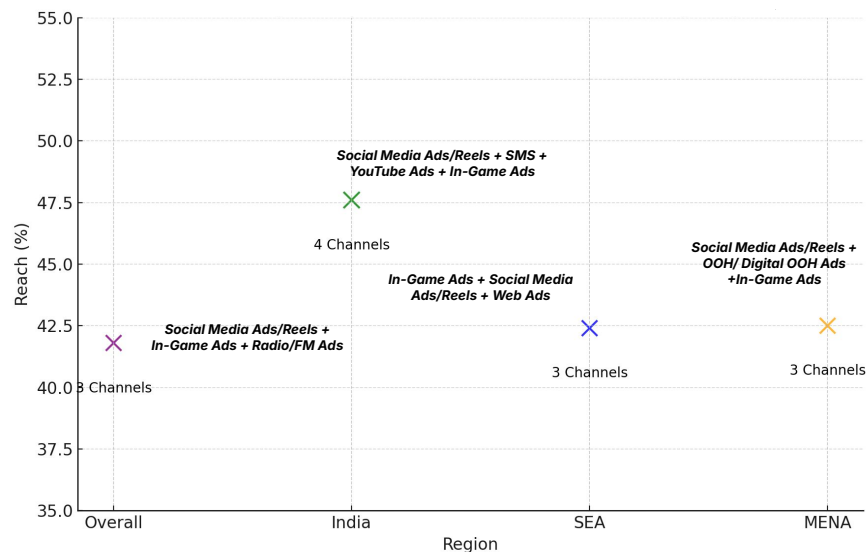
Across markets in Southeast Asia, most consumers prefer to see an ad 3-5 days before moving into the consideration stage, whilst only a fraction of consumers make considerations immediately after seeing an ad for the first time (outliers are Indonesia and Vietnam, which have higher ratios of consumers surveyed making in-the-moment purchase decisions).

Awareness to consideration window



Awareness Stage - media mix optimization

TURF analysis: optimal channel combination by region



At the Awareness stage, 3–4 smartly chosen media combination can unlock over 40% reach across regions.

India leads with highest efficiency using 4 formats, while SEA and MENA hit optimal reach with 3 channel combination.

In-Game Ads and Social Media are common success drivers, showing strong digital affinity.

Blended strategies work best—pairing digital-first with regional nuances.

3.2 —

Consideration

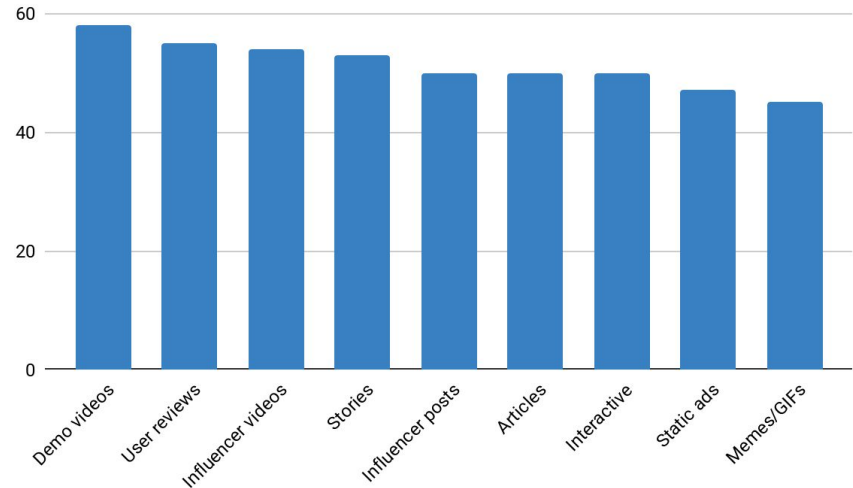
Best content formats | Best ad formats | Best ad timing
by medium | Media mix optimization

Consideration Stage - best content formats

The consideration stage is pivotal in guiding potential customers from awareness to intent. It's where users actively explore options, and dynamic, engaging content plays a critical role in shaping their decisions.

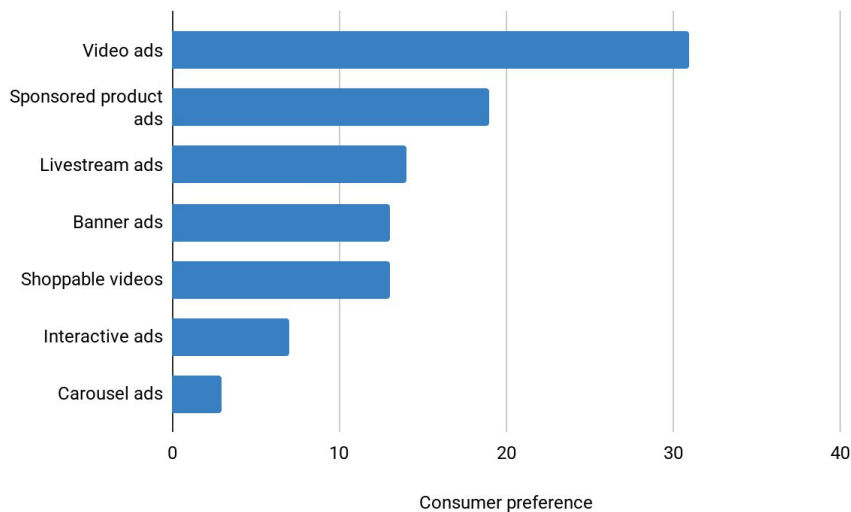
Video dominates the consideration game—from short influencer-led clips to product demos, SEA consumers lean heavily into dynamic formats.

Consumer preference of content formats when making considerations



Consideration Stage - ad type preference

Preferred ad type when making considerations



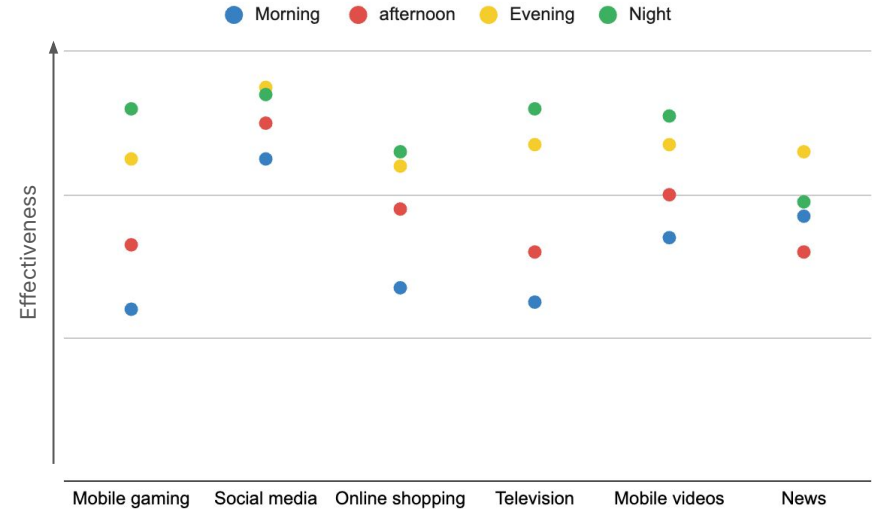
The top three ad types in Southeast Asia are video ads, sponsored product ads and livestream ads. Banner ads and interactive ads capture moderate attention, with carousel ads being the least preferred.

Consideration Stage - timing and mediums

Video ads dominate engagement across SEA, consistently outperforming other formats.

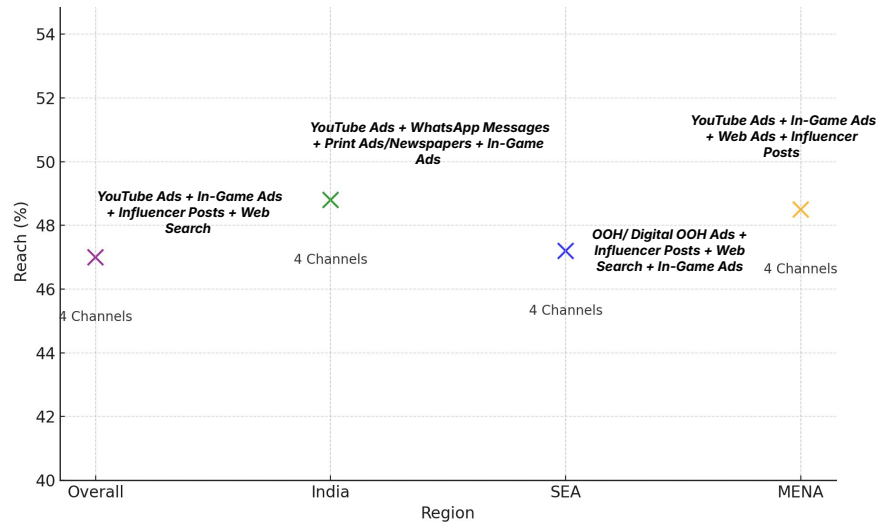
Livestream and sponsored product ads also show strong traction - prime picks for driving consideration.

Best ad timing by medium



Consideration Stage - media mix optimization

TURF analysis: optimal channel combination by region



At the Consideration stage, Optimal 4-channel mix boosts consideration reach across regions and unlocks ~48% reach across regions.

YouTube, In-Game Ads, and Influencers dominate top-performing combos, signaling strong digital trust drivers.

SEA stands out with OOH driving impact—proving offline still influences deeper decisions.

3.3 —

Conversion

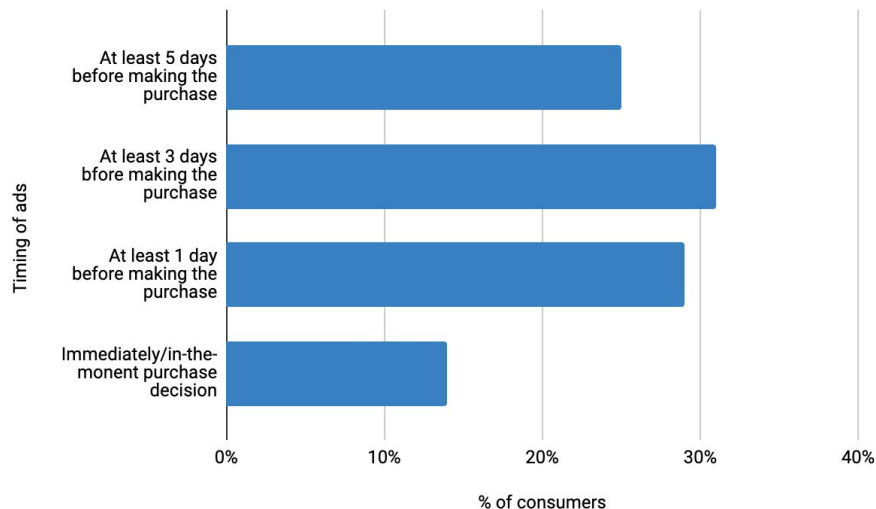
Ad exposure: first interaction to conversion window |
Best ad formats | Best e-commerce page for ads to be
shown | Media mix optimization

Conversion Stage - timing of ads

The conversion stage represents the critical final step in the marketing funnel, where potential customers make a purchase. This stage demands a combination of strategic timing, persuasive content, and precise platform utilization to transform interest into action.

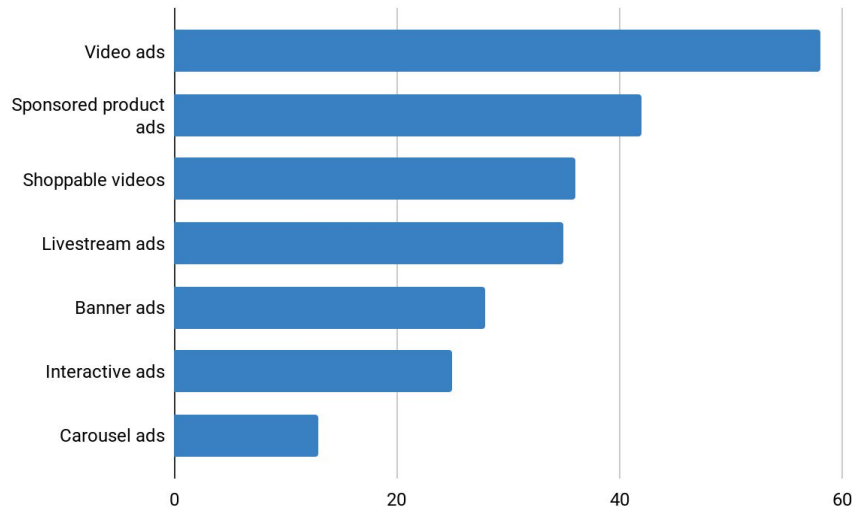
In SEA, most consumers respond to ads best at least 1–3 days before purchase, highlighting the importance of early influence. However, markets like Indonesia and Vietnam show higher in-the-moment conversions—ideal for tactical, time-sensitive ad formats.

Ad to purchase window



Conversion Stage - ad formats

Highest performing ad formats when making purchases



Video ads remain the most preferred format across SEA for driving product discovery at the conversion stage. Malaysia closely followed by Philippines leads in click-through interest, while consistent performance across other markets underscores video's power to convert attention into action.

Shoppable videos are a high-performing format at the conversion stage, especially in the Philippines, Malaysia, and Indonesia.

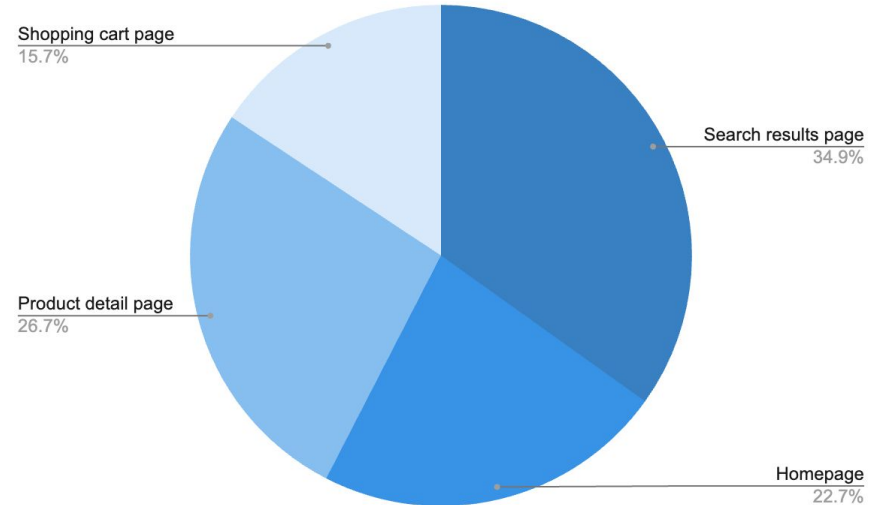
Their seamless path from discovery to purchase makes them a powerful tool for driving immediate consumer action across SEA.

Conversion Stage - E-Commerce

Sponsored product ads perform strongest on search results pages—where purchase intent peaks—especially in Malaysia, Indonesia, and the Philippines.

To win in e-commerce, brands must prioritize high-visibility ad placements in moments closest to conversion.

Best pages for sponsored ads to be shown



Consideration Stage - media mix optimization

TURF analysis: optimal channel combination by region



At the Conversion stage, a 4-channel strategy consistently delivers ~47% reach.

Word of Mouth + D2C + Search emerge as universal conversion triggers across markets.

SEA and MENA tap into direct engagement through Social and Owned platforms.

Final push needs trust, relevance, and a frictionless path to purchase.

04. Channel-Specific Deep Dives

4.1 —

Mobile Marketing

Best performing ad formats by impressions | Highest performing ad formats by CTR | Video ad completion rates | Best time of day for CTR

Data gathered from:



Best performing mobile advertising formats by impressions

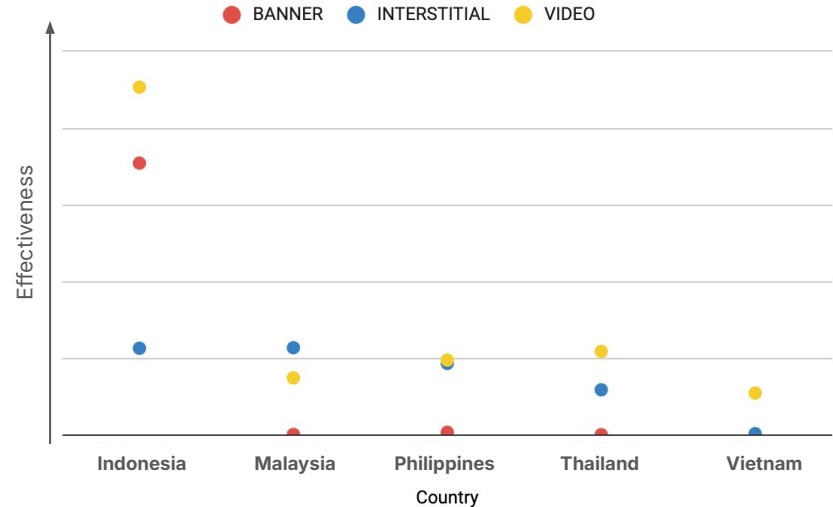
Our data highlights a clear regional preference for **video advertising formats**, which consistently record the highest impressions across markets.

Among all mobile ad types: **video**, **interstitial**, and **banner**, **video formats dominate in overall impressions**, signaling their strong performance and effectiveness in capturing user attention. This aligns with broader mobile consumption trends, where users engage more deeply with dynamic and full-screen content.

Interstitial ads come in second across most markets, reflecting continued demand for high-impact, full-screen placements that can drive engagement without the complexity of video production.

Overall, the data suggests that Southeast Asian advertisers prioritize **visually immersive formats** to achieve better performance outcomes, with video emerging as the top choice to drive visibility and engagement across mobile platforms.

Most common advertising formats by impressions



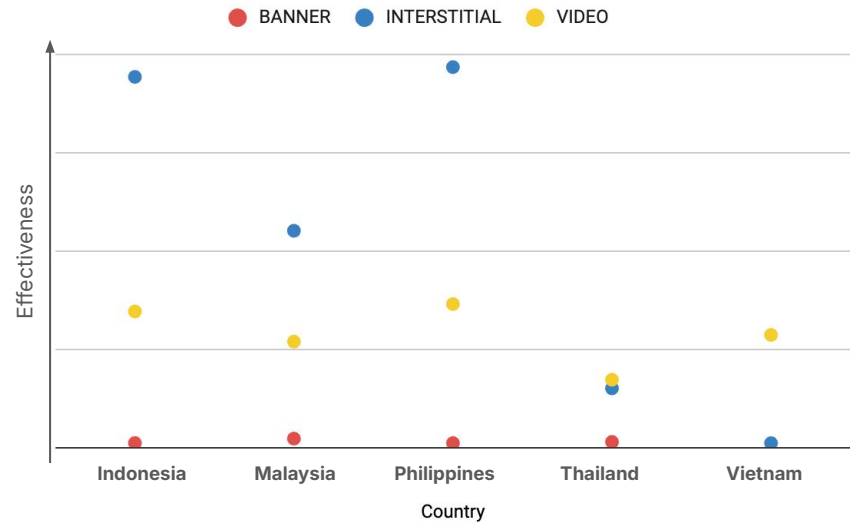
Highest performing mobile ad formats by clickthrough rate

Across a majority of Southeast Asian markets, **interstitial ads**: full-screen, skippable or non-skippable formats that appear between content, outperform other ad formats in terms of **clickthrough rate (CTR)**. This underscores their effectiveness in driving immediate user engagement when executed with compelling creative and strong call-to-actions.

Video ads generally show mid-range CTRs, suggesting strong visual engagement but slightly lower direct response compared to interstitials. However, their branding value and immersive nature likely contribute to performance in upper and mid-funnel objectives. Meanwhile, **banner ads** record the **lowest CTRs** across the board, reflecting user fatigue toward static placements and limited engagement at scale.

Overall, **interstitials remain the most effective performance format** on mobile, particularly for campaigns aimed at driving direct user action. Advertisers in the region are advised to prioritize high-impact, interruptive formats backed by creative optimization to maximize CTR performance.

Ad format performance by clickthrough rates



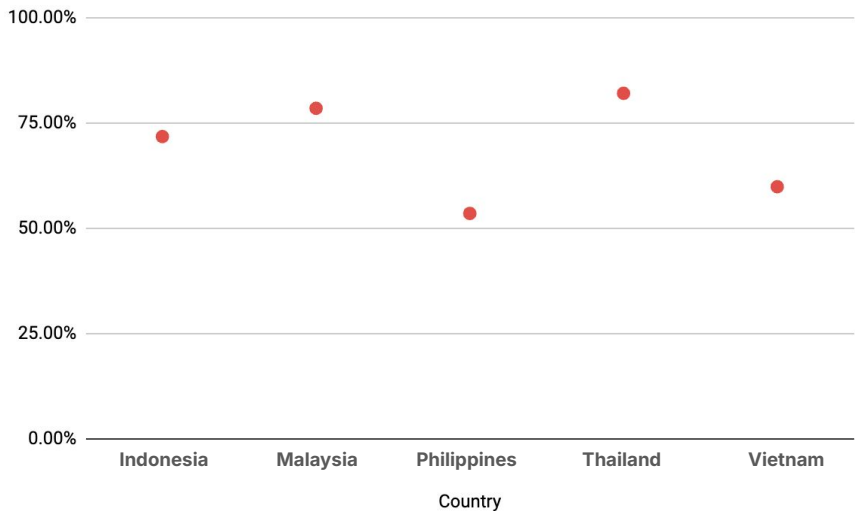
Mobile video ads - completion rates across Southeast Asia

Video ad completion rates remain relatively strong across Southeast Asia, with most markets achieving close to or over 75% completion, highlighting the effectiveness of mobile video in maintaining viewer attention.

Thailand and Malaysia lead the region with the highest video completion rates, both approaching or exceeding 75%, indicating highly engaging content or more receptive mobile audiences in these markets. These results suggest that well-executed video campaigns can hold user attention effectively in high-performance environments.

Overall, Southeast Asia demonstrates **a strong baseline for video engagement**, reaffirming mobile video's value as a powerful storytelling and performance tool—especially when localized and optimized for platform and audience behavior.

Completion rate - video ads



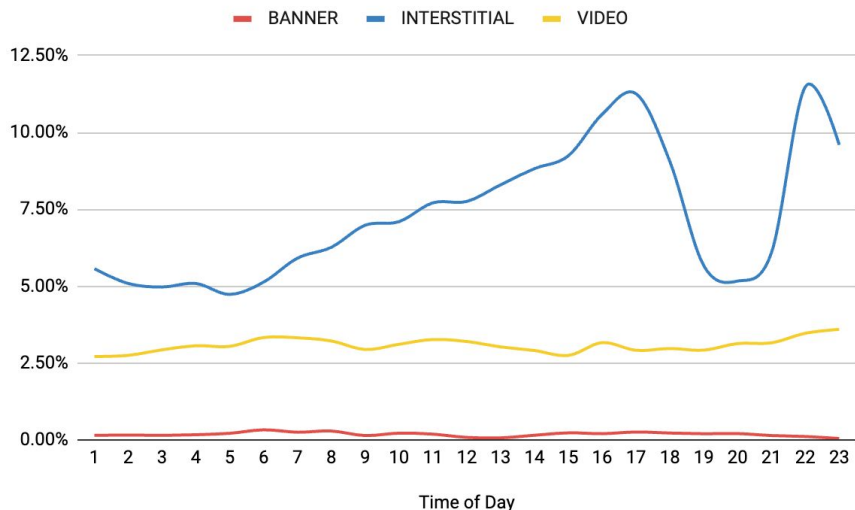
Time of day with best clickthrough rates on mobile ads

Interstitial ads exhibit the strongest time-based variation, with CTRs gradually increasing throughout the day, **peaking at around 4–5 PM and again at 9–10 PM**. These peaks align with periods of increased mobile usage: post-work and pre-sleep hours, suggesting optimal moments for high-impact, full-screen creatives that capture attention during wind-down time.

Video ads maintain relatively steady CTRs across the day, with a **slight lift in engagement in the late evening hours**. This reflects the lean-back consumption behavior typical of video formats, where users passively engage during breaks or downtime.

Overall, advertisers aiming for **performance-driven outcomes** should **prioritize interstitial placements during late afternoon and evening windows**, while **video formats remain a dependable option** throughout the day for awareness or hybrid objectives.

Clickthrough rate based on time of day by format



4.2 —

Influencer Marketing

Engagement rates by influencer type

Data gathered from:  **AnyTag**[™]

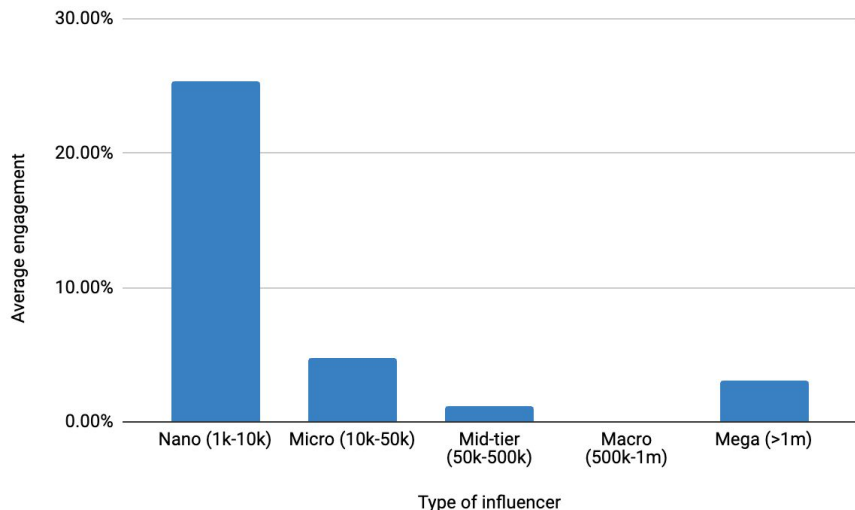
Engagement rates by influencer type

Across Southeast Asia, nano-influencers have the best engagement rates, whilst macro-influencers have the lowest average engagement rate at 0.08%. However, engagement rates should not be used as a sole benchmark when deciding which type of influencer to work with, and other factors that should be considered (depending on the funnel stage) include:

- Absolute potential reach
- Context and content niche
- Ability to drive sales
- And more

A separate report on the state of influencer marketing in Asia will be published later in 2025.

Average engagement rates by type of influencer



4.3 —

Digital Marketing

CTR by ad format | Average view rates by ad format |
Average completion rates by ad format

Data gathered from:  **AnyDigital™**

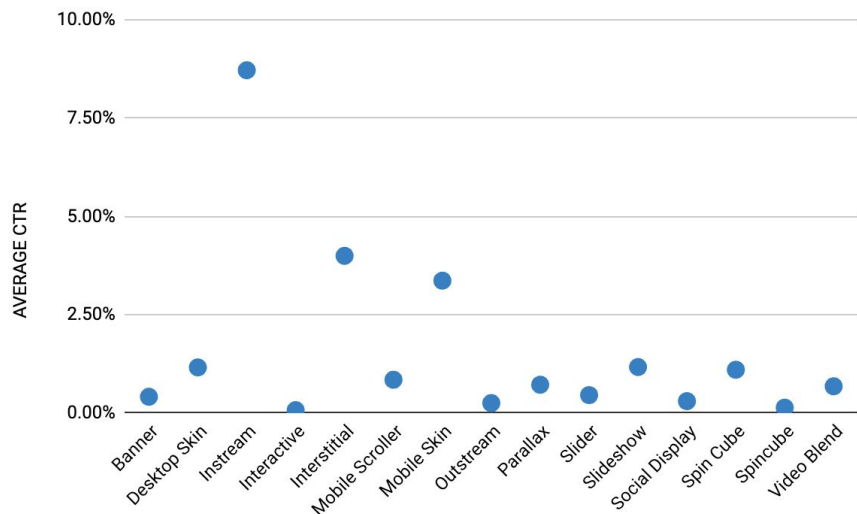
Web advertising - clickthrough rate by ad format

Immersive and high-visibility formats clearly outperform others in average clickthrough rate (CTR).

- **Instream lead all formats** by a wide margin, with an average CTR nearing **9%**. This underscores their effectiveness in commanding user attention through full-screen, interruptive placements that are often hard to ignore.
- Following instream, **interstitial** and **mobile skins** also show strong CTRs (~3–4%), reflecting the power of **visually-integrated, context-aware creatives** in driving engagement—especially on mobile environments. More traditional formats such as **banners, social display, outstream, and native ads** cluster at the lower end of the chart, mostly under 1% CTR, pointing to potential limitations in visibility, placement fatigue, or user habituation.

This performance distribution makes it clear: advertisers should **prioritize high-impact, interruptive, or creatively embedded ad formats** for web environments when CTR is the key KPI. Meanwhile, low-performing formats may require creative rethinking or repositioning to remain relevant.

CTR by ad format



Web advertising- average view rates by ad format

Formats like Video Blend, Slider, and Mobile Scroller deliver the **highest average view rates (~65%+)**, making them ideal for awareness and upper-funnel campaigns. These formats are less intrusive yet visually engaging, leading to sustained attention.

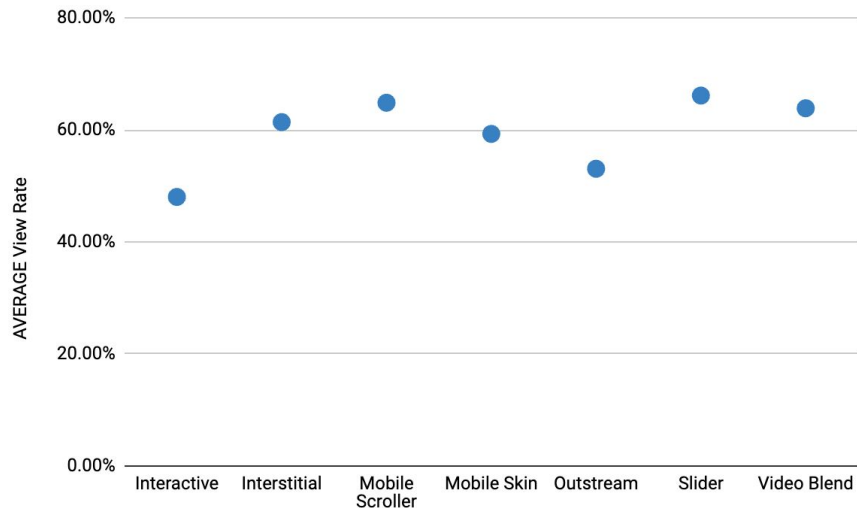
While **interstitials** led in clickthrough rates (previous slide), their **view rate is moderate (~60%)**, suggesting users often skip quickly despite the high engagement. **Mobile Skin** and **Outstream** also perform solidly in terms of viewability.

Interactive formats show the **lowest view rates (~50%)**, likely due to higher user effort or less optimized placement.

Overall, advertisers should match formats to objectives:

- **For awareness campaigns**, advertisers should consider **slider, video blend, and mobile scroller formats** for maximizing viewability.
- **For performance-driven goals**, interstitials remain top performers, but with a trade-off on view duration.

Average view rate



Web advertising - average completion rates by ad format

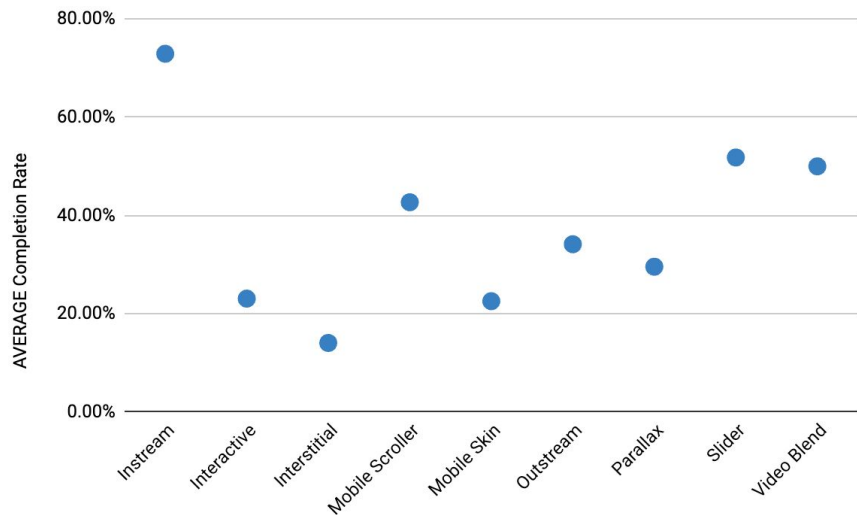
Instream ads have the highest average completion rates among all web formats, at **around 75%**, making them the most effective for delivering full-message storytelling and brand video content.

Slider and **Video Blend** formats also perform strongly, with completion rates in the **50–55% range**, benefiting from smoother integration within user content flow.

At the lower end, **Interactive**, **Interstitial**, and **Mobile Skin** formats record **completion rates below 25%**, suggesting higher skip rates or user drop-off despite their strengths in CTR or visibility.

In summary, **Instream**, **Slider**, and **Video Blend** formats are best suited for campaigns where **message completion and viewer retention** are critical to performance.

Average completion rates



4.4 —

E-Commerce

Clickthrough rates by e-commerce platform | ROAS by
e-commerce platform | Conversion rates by
e-commerce platform

Data gathered from:  **AnyX**TM

Ad clickthrough rates by e-commerce platform

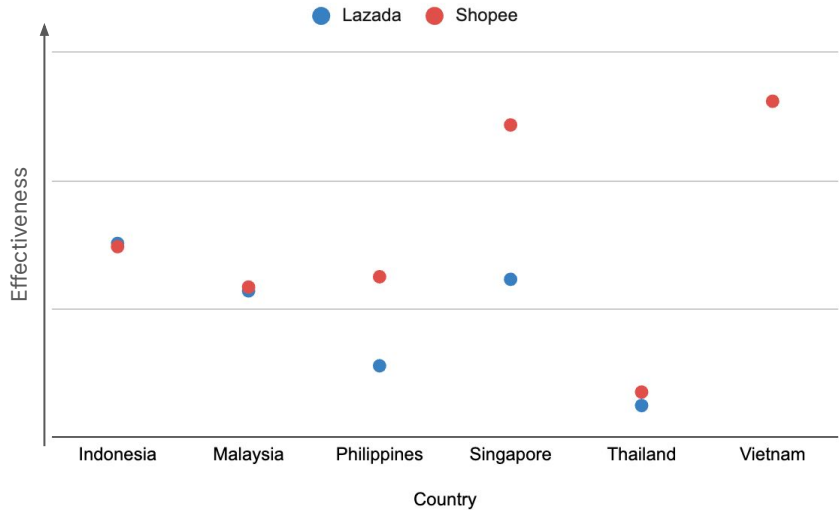
Across Southeast Asia, data reveals that **Shopee ads consistently achieve higher clickthrough rates (CTR)** than Lazada across most markets, pointing to stronger user responsiveness and engagement with Shopee-linked campaigns.

This trend is particularly clear in **Vietnam, Singapore, and the Philippines**, where Shopee CTR significantly outpaces Lazada, suggesting Shopee's ad ecosystem is more effective at driving clicks, likely due to better placement relevance, stronger promotional hooks, or deeper user trust.

Lazada, while still competitive in Malaysia and Indonesia, shows **generally lower CTRs overall**, which may indicate less aggressive ad engagement tactics or a different audience behavior profile.

From a regional standpoint, the data implies that **Shopee currently provides better performance opportunities for advertisers focused on conversion metrics**, especially in markets where mobile shopping behavior is highly app-driven.

Higher ad clickthrough rates



Return on Ad Spend by e-commerce platform

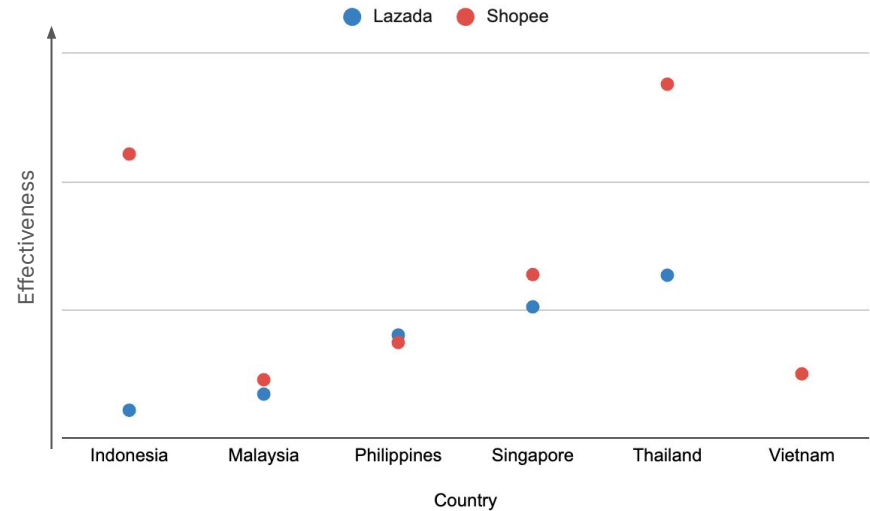
Across Southeast Asia, **Shopee delivers stronger Return on Ad Spend (ROAS)** in multiple markets—most notably in **Indonesia and Thailand**, where it significantly outperforms Lazada. This suggests Shopee's ad platform is not only effective at driving engagement (as seen in the CTR slide) but also better at converting ad spend into sales in key markets.

Lazada, however, shows competitive or slightly better ROAS in **Singapore and the Philippines**, indicating that while its overall CTR may be lower, its users may exhibit higher purchase intent or basket sizes when they do engage.

Overall, the data indicates that **Shopee is generally more effective for revenue-generating ad campaigns**, particularly in fast-growing markets like **Indonesia and Thailand**. **Lazada**, on the other hand, may be more suitable for high-value, urban-centered markets where efficiency per transaction is key.

Advertisers should consider **allocating budget dynamically** by platform based on regional performance trends—leveraging **Shopee for volume-driven ROAS** and **Lazada for market-specific conversion efficiency**.

ROAS by platform



Conversion rates by e-commerce platform

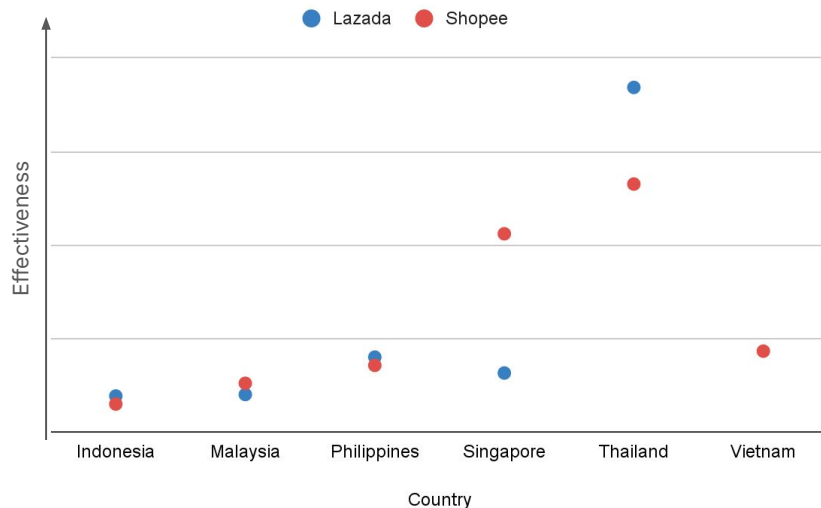
Regionally, **Lazada delivers stronger conversion rates** than Shopee in key markets like **Thailand and Singapore**, despite Shopee consistently driving higher CTR and ROAS. This suggests Lazada has a **more efficient checkout funnel or higher purchase intent** among users.

In **Vietnam**, Shopee performs well across all three metrics—CTR, ROAS, and conversion—indicating a **well-optimized full-funnel experience**.

Meanwhile, **Malaysia and the Philippines** show low conversion rates for both platforms, pointing to **opportunities for funnel optimization**.

- **Shopee** is ideal for driving **high traffic and ROAS**—best for upper- and mid-funnel campaigns.
- **Lazada** converts better where it counts—ideal for **bottom-funnel, ROI-focused efforts**.
- **Hidden opportunity**: Combine Shopee for acquisition and Lazada for conversion in markets like **Singapore and Thailand**.

Conversion rates by platform



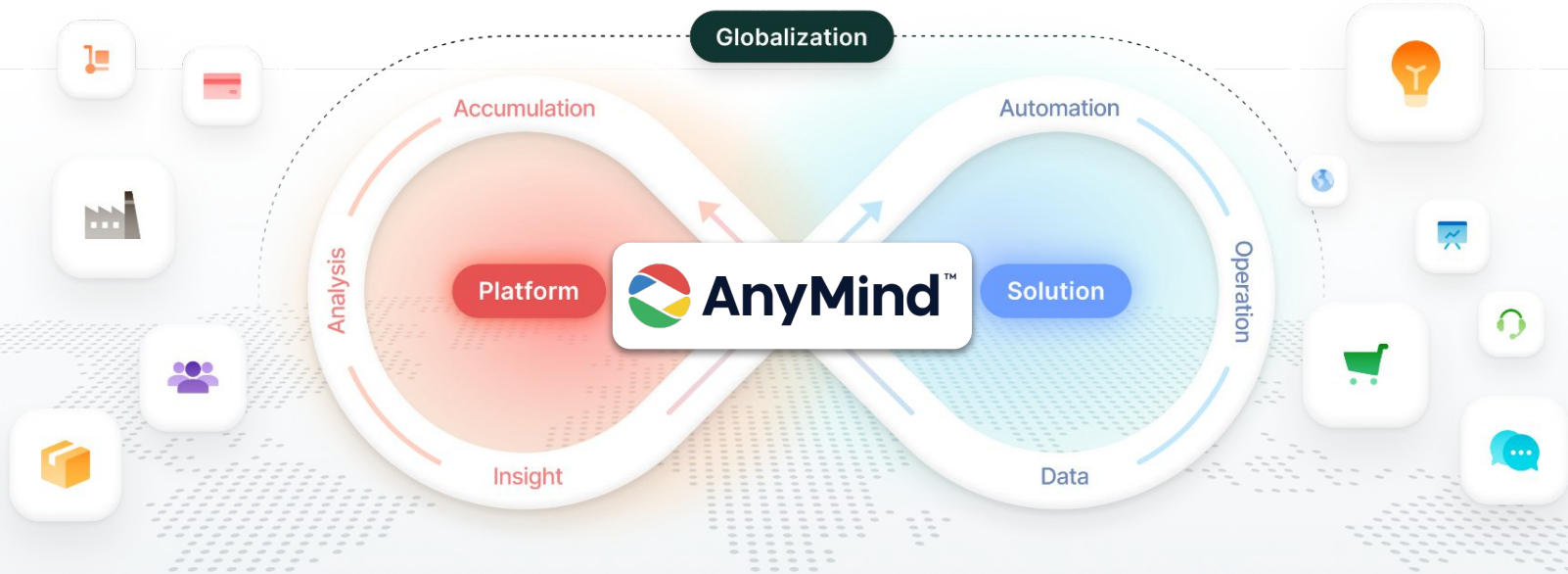


COMPANY

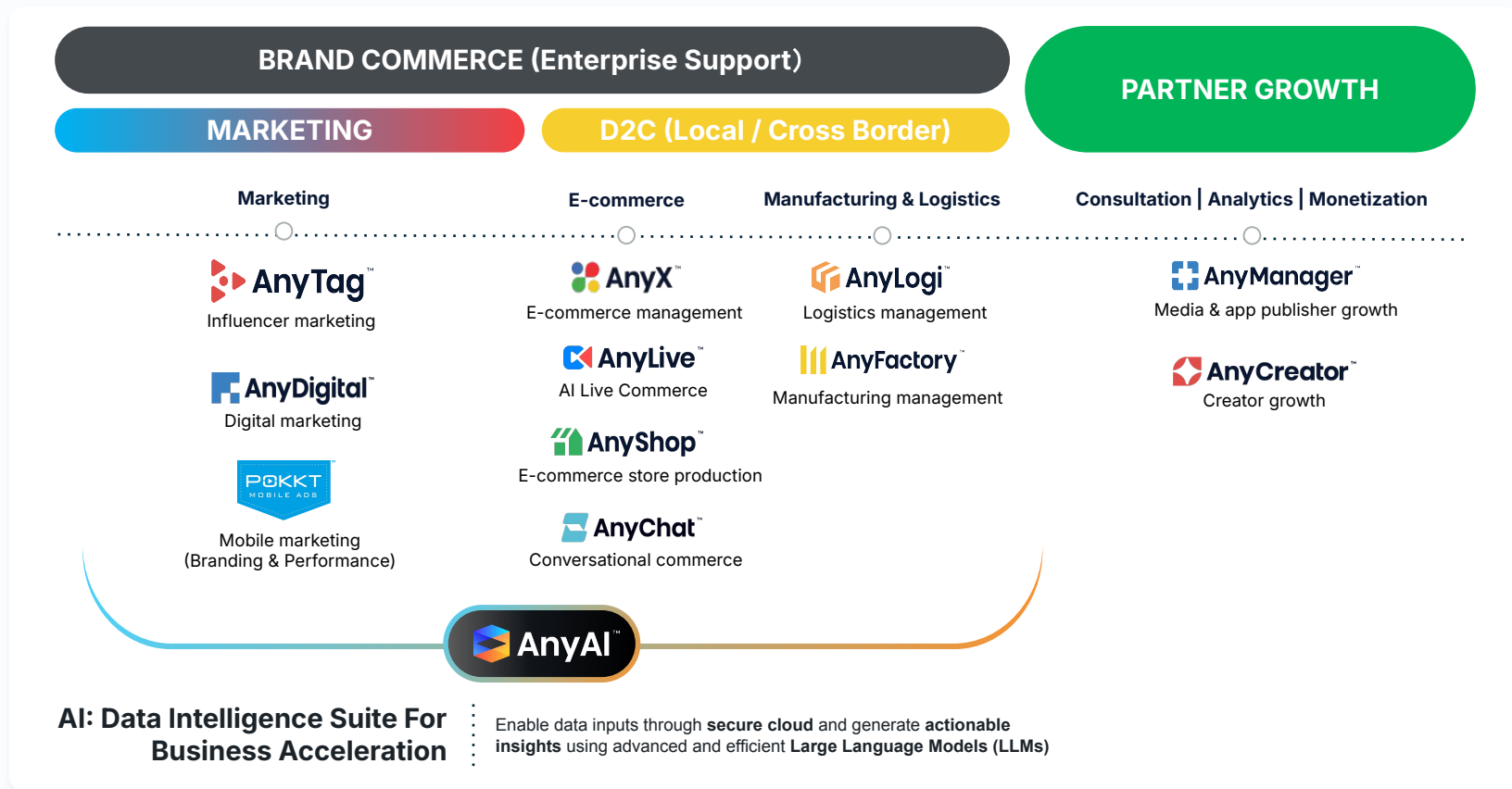
About AnyMind Group

Supporting enterprise growth through BPaaS

BPaaS provides an additional layer of value on top of SaaS (software-centric) and BPO (operations-centric), by providing greater flexibility, scalability and automation to the entire business process lifecycle.



Platform ecosystem that drives enterprise growth





Mobile advertising platform

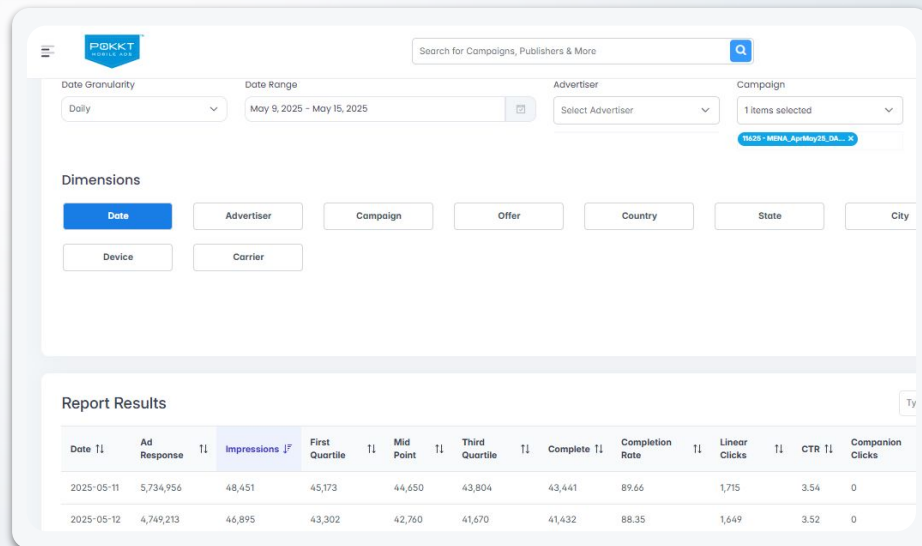
Focusing on in-app advertising, POKKT provides advertisers with full-funnel programmatic capabilities with formats including rewarded video ads, rich media and in-game placements. [Learn more.](#)

Branding-based KPIs

Performance-based KPIs

Global in-app inventory

Diverse app categories





Maximize influencer marketing effectiveness through data

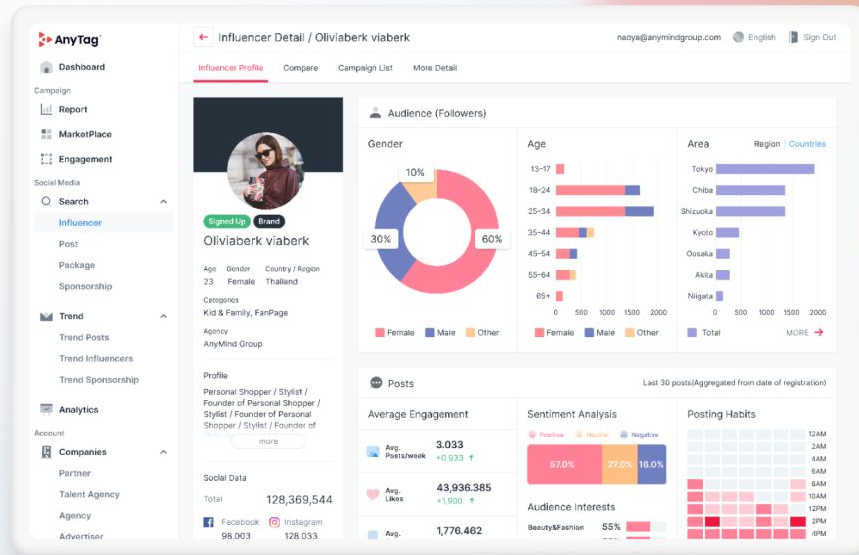
A single platform for full-funnel influencer marketing management and social media analytics, that taps on AnyMind's own pool of creators and influencers. [Learn more.](#)

Deep influencer insights

Campaign management, tracking and reporting

Social media analytics

UGC management and utilization





Integrated management of web advertising

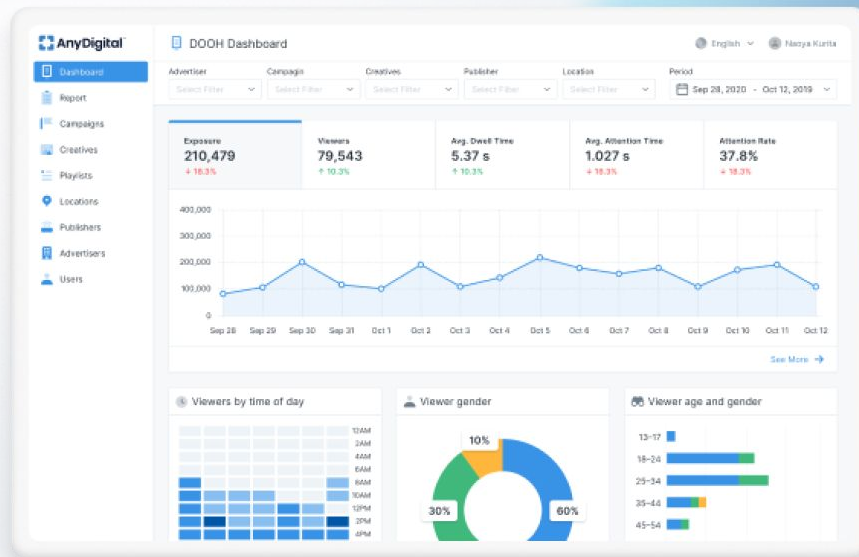
A digital marketing platform that enables centralized management from ad serving to management and analysis of online media globally. [Learn more.](#)

Premium media across APAC

Viewable & high-impact ad formats

Full-funnel advertising

Display, video and rich media ad formats





Centralized e-commerce channel management

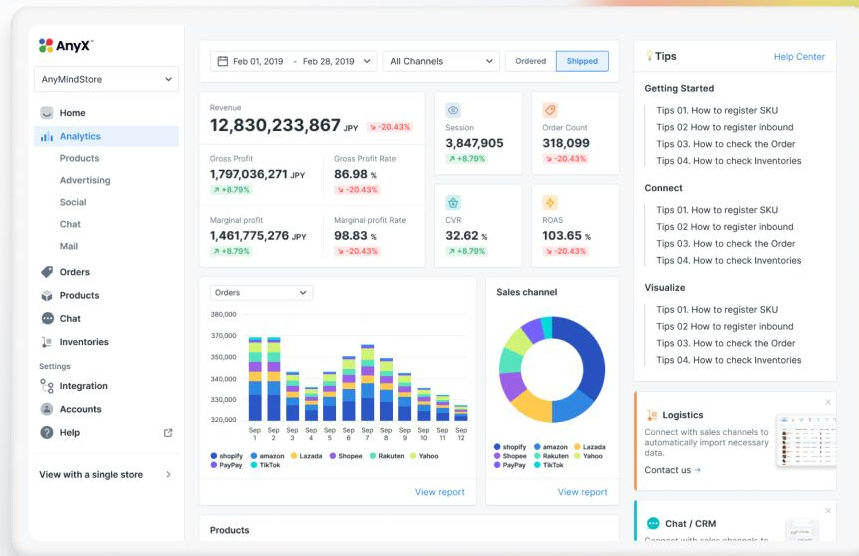
Drive operational efficiency and data utilization through AnyX, and tap on in-market expertise and operations to enhance e-commerce growth. [Learn more.](#)

Unified dashboard for e-commerce

E-commerce marketplace management

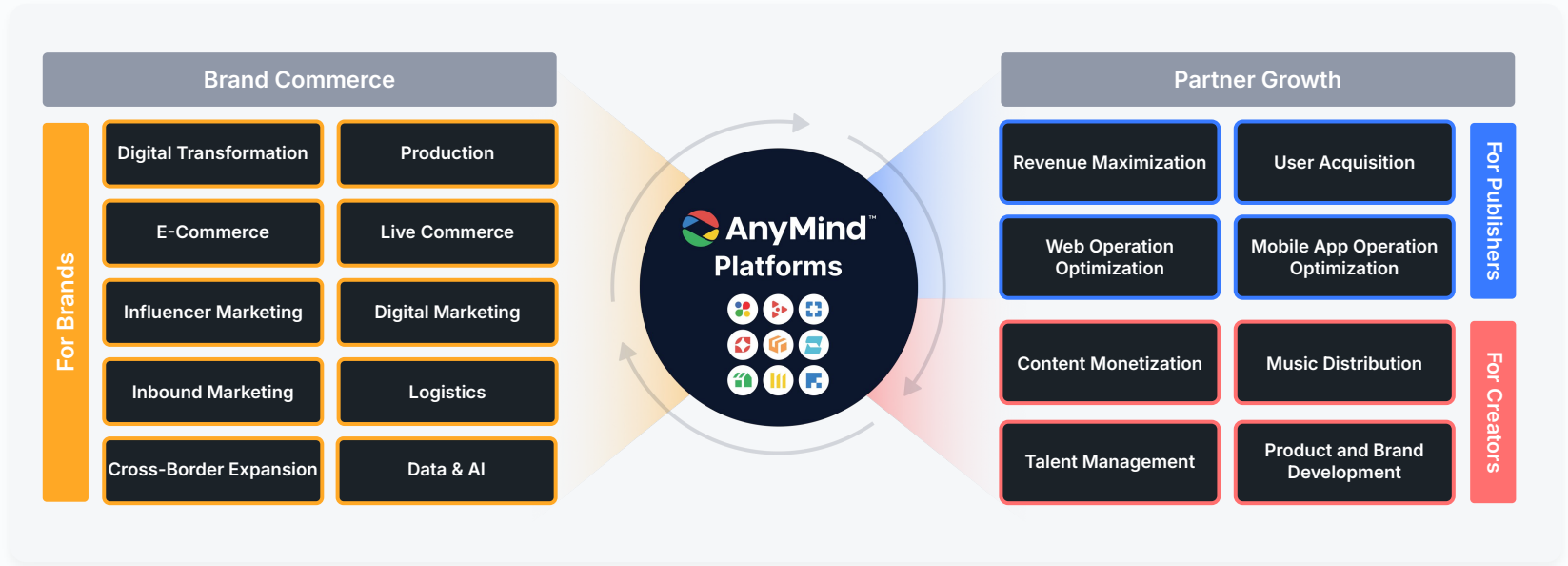
Cross-border e-commerce localization

Brand.com site management



Solutions powered by proprietary technology

Enterprises, publishers and creators can leverage an ecosystem of networks and data to drive greater brand growth through a combination of proprietary platforms and in-market expertise/operations.





Contact Us

Learn more about the entirety of our offerings, or specific platforms that suit your needs through the QR code on your right. Reach out today to our team to receive a consultation catered for your business.



<https://anymindgroup.com/>

*Our team will get back to you as soon as possible.

This document is recommended for those who want to know more about AnyMind, including our platforms, case studies and more.

Please feel free to contact us to understand more about our various offerings.

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