

Southeast Asia Advertising Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Advertising is a commercialized communication method that is employed by companies to market goods, services, or concepts to target audiences. It aims to educate, persuade, and influence consumer behavior by utilizing creative messages across various media platforms. Finally, advertising can lead to brand recognition, encourage interaction, and increase sales.

The Southeast Asian Advertising market is expected to exhibit a growth rate of 12.15% during the forecast period (2025-2033F). The primary drivers of market growth are the surge in internet penetration, mobile growth, and e-commerce expansion. The young digital population and rising social media usage in the region, combined with the availability of low-cost smartphones, make it an attractive market for digital advertising. The digital transformation of governments and the emergence of SMEs and content creators are also contributors to ad spend. The increased use of analytics, real-time bidding, and interactive ad formats such as AR and DOOH is also increasing effectiveness and Return on Investment (ROI).

On July 18, 2025, Appier, an AI-native SaaS company specializing in advanced AdTech and MarTech solutions, officially launched the AdCreative.ai solution in Thailand. The platform is powered by Generative AI and reduces creative production, improves campaign performance, and scales personalized marketing processes of Thai brands. The opening is a significant move to promote Thai brands as they go through the dynamic marketing environment. Hundreds of marketers and advertisers of leading brands and agencies were present at the event to see how AI is transforming creative workflows and actually delivering business outcomes.

Based on type, the market is segmented into traditional advertising (television,

print, radio, cinema, out-of-home (OOH)), digital advertising (display ads, video, social media, search, digital out-of-home (DOOH), audio, platform, others). Among these, the digital advertising market held the largest share in 2024. This is mainly because it has enabled brands to reach a highly engaged, mobile-first audience. As internet and social media penetration increase, more advertisers are moving their budgets to digital media, where they can measure performance and target in real time. Moreover, the capacity to undertake localized, data-driven campaigns in markets enhances brand presence and Return on investment (ROI), as digital channels drive advertising growth. For example, on October 23, 2025, AdShare Global, an international advertising and digital technology company, officially launched AdWork, a next-generation digital advertising collaboration platform designed to enhance transparency, engagement, and shared value in the global marketing ecosystem. This milestone also marks AdShare Global's expansion into Southeast Asia, with Vietnam chosen as its regional operations hub, a strategic move driven by the country's fast-growing digital economy and highly skilled young workforce.

Based on platform, the Southeast Asian Advertising market is segmented into desktop web, mobile web, mobile in-app, OTT & streaming platforms, retail media, and others. Among these, the mobile in-app segment held the dominant share of the Southeast Asia Advertising market in 2024. This is mainly due to the high mobile usage in the region. The majority of consumers spend most of their online time on apps, generating valuable ad space for brands. The accuracy of in-app targeting, interactive video advertisements, and native placements enables advertisers to increase engagement and conversions, and this platform is vital for achieving digital growth and audience retention.

Based on transaction type, the market is segmented into programmatic and non-programmatic. Among these, the programmatic segment is expected to grow at a significant CAGR during the forecast period (2025-2033) through automation and data intelligence. It gives advertisers the opportunity to purchase and optimize media in real time, enhancing efficiency and enabling access to fragmented Southeast Asian markets. Adding to this, the increasing need for transparency, audience accuracy, and measurable results is driving brands to embrace programmatic solutions that simplify ad delivery and optimize ROI across various digital touchpoints. On January 15, 2025, Magnite, the largest independent sell-side advertising company, announced it has strengthened its partnership with Samsung Ads to power programmatic advertising on Samsung TV Plus inventory in Singapore, the Philippines, and Thailand for the first time.

Advertisers now have programmatic access to premium video inventory on Samsung's free ad-supported streaming TV (FAST) service, Samsung TV Plus, which went live across the Southeast Asia region late last year.

Based on industry vertical, the market is segmented into BFSI, retail & e-commerce, automotive, healthcare & pharmaceuticals, technology and telecom, FMCG, travel & hospitality, entertainment & media, and others. Among these, the retail & e-commerce segment is expected to grow at a significant CAGR during the forecast period (2025-2033). Online marketplaces and direct-to-consumer brands are spending heavily on digital and performance-based advertising to capture a larger share of the growing online spend. The needs of advertising are also fostered by seasonal sales, social commerce, and customized ad recommendations, which make e-commerce a decisive driver of regional digitalization and ad revenue. For example, on October 22, 2025, Shopee partnered with Meta to launch new tools that make it easier for users to discover and buy products on Facebook through Shopee. The collaboration introduces a simplified affiliate marketing system and enhances Facebook Live with Collaborative Ads, allowing seamless product promotion and checkout.

For a better understanding of the market adoption of the Southeast Asian Advertising market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, Singapore, and the Rest of Southeast Asia. Vietnam is expected to grow at a significant CAGR during the forecast period (2025-2033), driven by economic growth and a young, technologically advanced population. The increasing number of online shopping, mobile games, and social interaction sites is getting a huge advertising outlay. It has a growing digital infrastructure, and the government is also promoting digitalization, making Vietnam an ideal destination for advertisers looking to scale and achieve high returns from their digital operations. For instance, on July 10, 2025, Appier, an AI-native SaaS company specializing in advanced AdTech and MarTech solutions, officially launched the AdCreative.ai solution in Vietnam. The platform is powered by Generative AI and reduces creative production, improves campaign performance, and scales personalized marketing processes of Thai brands. The opening is a significant move to promote Thai brands as they go through the dynamic marketing environment. Hundreds of marketers and advertisers of leading brands and agencies were present at the event to see how AI is transforming creative workflows and actually delivering business outcomes.

Some major players running in the market include Dentsu International, Ogilvy, Omnicom Media Group, Publicis Commerce, Havas Media Network (Havas), Mediabrands Worldwide, Inc., JCDecaux Group, Clear Channel Outdoor, Moving Walls, and GIGIL Manila.

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