



THE NEW ECONOMICS OF STREAMING: A CTV/OTT INVESTMENT GUIDE FOR SOUTHEAST ASIA AND INDIA

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FOREWORD

Dear Reader,

The **2025 CTV/OTT Council** brought together specialists who see CTV/OTT advertising from every angle - platforms, agencies, measurement partners and publishers - with one goal: helping marketers, planners, and media partners connect investment to the unique outcomes CTV/OTT can deliver.

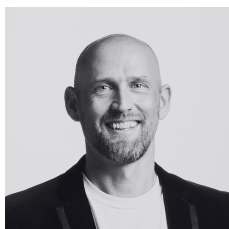
For marketers, these outcomes include recognition, preference, sustained visibility, and action. **Attention × Consumption = Effectiveness** is the formula for how CTV/OTT delivers each. We developed this into a Matrix to connect campaign objectives with the context and format selections that support them.

Three workstreams developed the Matrix, each focusing on one element of the formula. First, the Consumption workstream analysed where audiences are across seven markets and why they're choosing ad-supported streaming. Then the Attention workstream examined how timing, device, co-viewing, and genre affect receptivity. And finally the Effectiveness workstream connected these variables to what different brands need at different stages of maturity. After each presentation, the wider council discussed (and sometimes debated) what had been shared, adding their own perspectives.

This playbook is for everyone in the investment conversation: marketers connecting spend to business objectives, planners aligning on effectiveness outcomes before selecting inventory, and media partners articulating how they can help support specific campaign goals. It's also a resource for anyone seeking regional case studies or looking to align on terminology through our glossary.

Every Council meeting left us with something we didn't expect to learn, the kind of growth that comes from hearing how different parts of the ecosystem see the same challenges and opportunities. What made this experience even more special was the camaraderie that comes from rallying around a shared mission. We are grateful for every council member who brought their expertise, their candor, and their time.

We set out to help marketers, planners, and media partners connect investment to the unique outcomes CTV/OTT can deliver. This Matrix is your cheat code for assessing whether CTV/OTT will achieve your objectives. Your next brief is the perfect time to use it.



Jonathan Mackenzie

Head of Data Solutions APAC



Co-Lead, IAB SEA+India CTV/OTT Council
& Industry Leadership Board Member



Siddharth Puri

CEO & Founder



Co-Lead, IAB SEA+India CTV/OTT Council
& Industry Leadership Board Member

INTRODUCTION: ATTENTION × CONSUMPTION = EFFECTIVENESS

Ad-supported streaming reaches 72-94% of audiences across Southeast Asia and India, yet advertiser allocation to CTV/OTT sits at 3-6% of digital spend. This imbalance between where audiences watch and where investment flows is one of the biggest opportunities in regional media planning.

The imbalance persists because streaming is still planned using metrics designed for other channels. Reach and frequency favour formats with lower CPMs and higher volume, which means streaming's attention quality is consistently undervalued.

Streaming builds awareness rapidly or sustains preference over time, with the right approach determined by brand maturity and campaign objectives.

This playbook introduces a formula for matching campaign objectives to the right combination of attention and consumption, then aligning investment accordingly:

Attention × Consumption = Effectiveness

Two variables determine advertising effectiveness in streaming environments:

1. Attention

How a format captures and holds viewer focus. Some formats grab attention through active viewer decisions in the opening seconds, generating recall and inspiring immediate action. Others retain attention through sustained viewing, giving stories time to build preference, consideration, and purchase intent.

2. Consumption

How broadly a format reaches audiences. Some formats target specific segments, contexts, or moments. Others reach broad audiences across multiple touchpoints.

When these two variables combine, they create four effectiveness outcomes:



Attention x Consumption = Effectiveness Matrix

	TARGETED CONSUMPTION	BROAD CONSUMPTION
ATTENTION RETAINING	EFFECTIVENESS FOR BRAND MOMENTS	EFFECTIVENESS FOR BRAND BUILDING
ATTENTION GRABBING	EFFECTIVENESS FOR TARGETED REACH	EFFECTIVENESS FOR AWARENESS & ACTION

This matrix helps marketers and media partners begin with the effectiveness a campaign needs, then identify which combination of attention and consumption will achieve it.

THE CTV/OTT VALUE PROPOSITION

Streaming is naturally suited to holding attention and reaching broad audiences. Large screens command focus with sound-on as the default. Lean-back viewing means audiences are relaxed and paying attention, and long-form content gives stories time to build emotional connection. Co-viewing means brand messages can become household conversations, discussed and remembered long after the session ends.

This playbook walks through each layer of the Matrix in relation to this region's streaming opportunity.

Chapter 1: Consumption

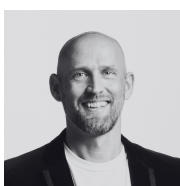
The audience available across targeted and broad consumption, and why audiences actively choose ad-supported streaming.

Chapter 2: Attention

The context variables that determine whether a campaign grabs or retains attention, and how to align context with objectives.

Chapter 3: Effectiveness

Bringing both dimensions together for investment decisions, matching brand maturity to the right approach.



Jonathan Mackenzie
Head of Data Solutions
APAC



"Across Southeast Asia and India, ad-supported streaming reaches the vast majority of audiences. What this Council has produced goes far beyond a playbook. The Attention × Consumption = Effectiveness Matrix shows how streaming context determines campaign outcomes, whether recall, action, preference, or purchase intent. It gives every brief a starting point and every planning conversation a common reference. I'm already using this Matrix with my teams and clients. I couldn't be prouder of what this Council has achieved."

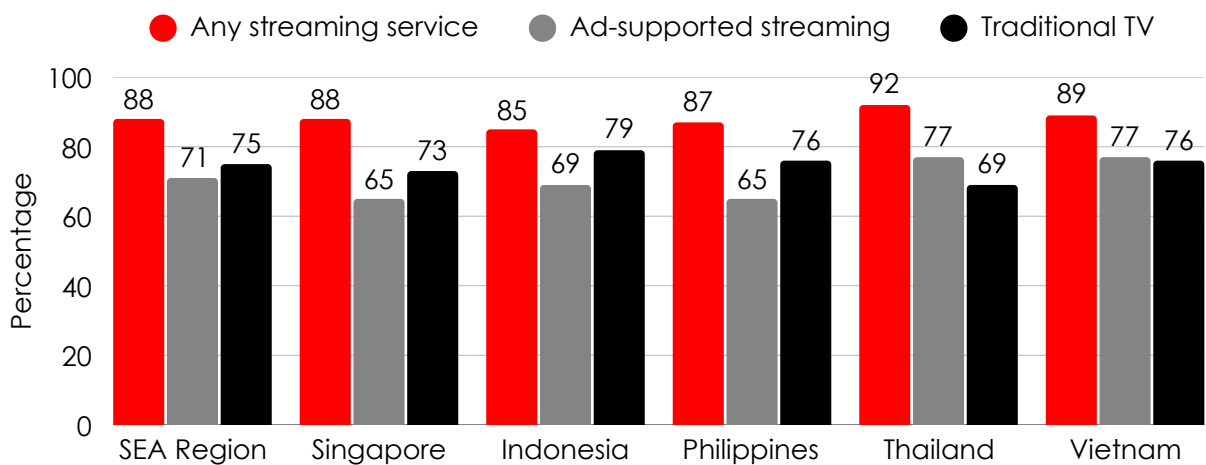


CHAPTER 1: CONSUMPTION - THE UNTAPPED VALUE

THE CONSUMPTION OPPORTUNITY ACROSS SOUTHEAST ASIA AND INDIA

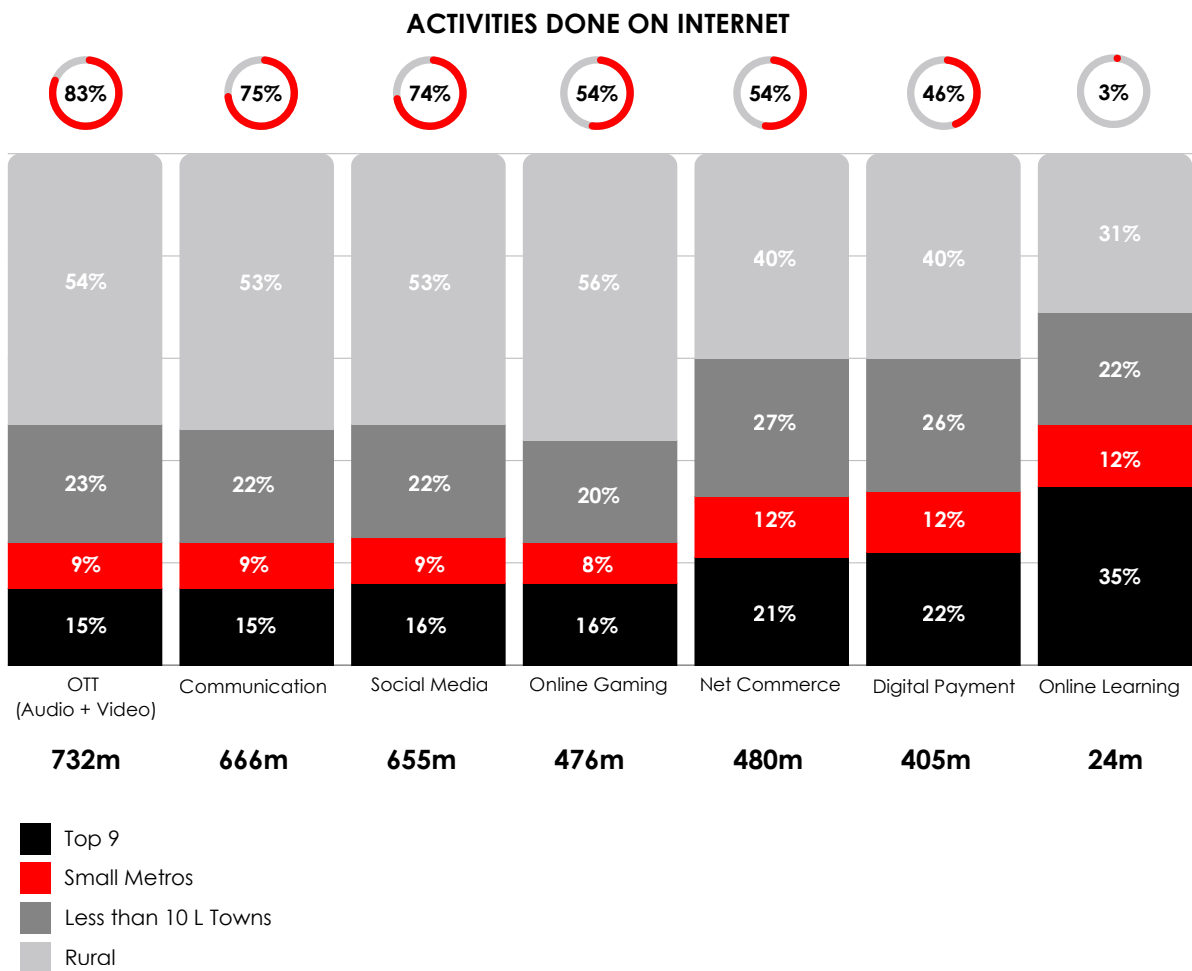
Consumption is about audience availability, and across this region, audiences are choosing ad-supported streaming at rates well above the global average of 42%: 94% in the Philippines, 77% in Vietnam and Thailand, 73% in Indonesia, and 72% in India. These viewers are actively choosing advertising in return for content access, cost savings, or platform flexibility.

AD-SUPPORTED STREAMING SERVICES ARE CATCHING UP TO TRADITIONAL TV VIEWERSHIP



Source: Magnite, Streaming TV's New Era, SEA, 2023/24

India illustrates the scale of this opportunity. With 547 million streaming viewers, the country holds one of the world's largest video audiences, and 83% of internet users identify streaming as their primary online activity. Hayden Ong, The Trade Desk, noted: "Rural viewers actually contribute to more than half of OTT consumption in India, however urban viewers still have more spending power." This rural-urban split means campaigns can achieve both reach and influence within a single flight, balancing volume with spending power depending on objectives.



Source: Kantar x IAMA Report 2024

Mobile devices handle 82% of viewing across Southeast Asia and 54% in rural India. This mobile-first behaviour cuts across demographics but is especially important for reaching rural audiences, where phones may be the only connected device. For marketers, this changes when and where audiences can be reached throughout the day.

These patterns are accelerating as markets mature. "Markets are moving to a more mature phase now, with viewers showing clear nuances in viewing habits and content preferences," observes Anupama Tatwawadi, Google. Take local language content: 87% of viewers in Vietnam prefer local content, alongside 79% in Thailand and 75% in Indonesia, while Singapore and Malaysia lean towards English. For marketers, this reinforces the need for campaigns designed around local relevance to connect with the majority of audiences in each market.

Alongside this breadth of access, younger audiences are changing what streaming means for brands. For marketers, this makes streaming both where young audiences spend time and where they discover and connect with brands.



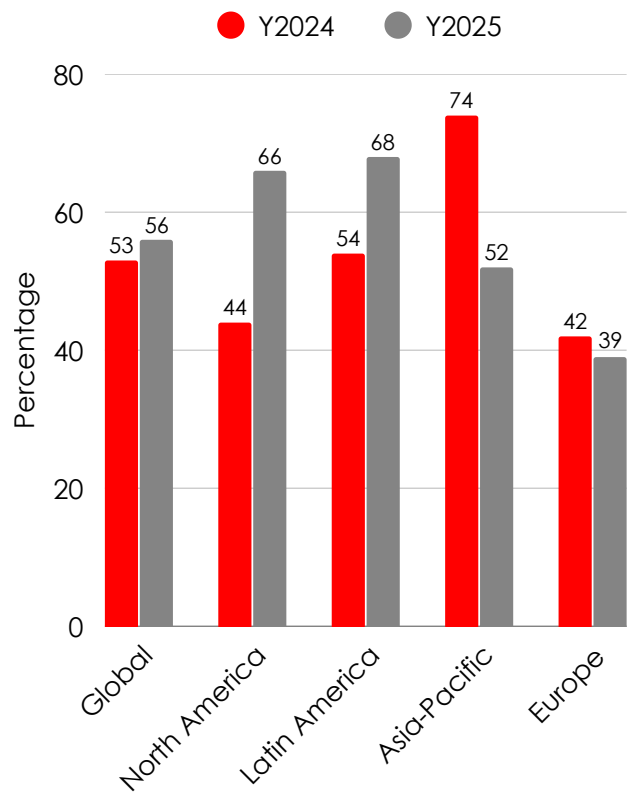
Priya Pradhan
Director, Business Development SEA
nexxø

"One in three people in India, mainly young adults, prefer CTV/OTT for exclusive content." Gen Z sees streaming as a destination for content they cannot get elsewhere.

Audiences also act on what they see; in Singapore, 36% of viewers research a product and 33% visit a brand's website after watching OTT ads. Rural communities driving scale, Gen Z driving discovery, direct response driving action. Streaming's value comes from how these diverse behaviours combine across the region.

This combination of scale, viewing choice, and local preferences is why 74% of APAC marketers plan to increase their OTT/CTV investment.

SHARE OF MARKETERS PLANNING TO INCREASE THEIR OTT/CTV SPEND IN THE NEXT 12 MONTHS



Source: Nielsen, 2025 Global Annual Marketing Survey; Nielsen, 2024 Global Annual Marketing Survey.

The **Attention × Consumption = Effectiveness Matrix** provides a tool to evaluate these opportunities across three areas:

- 1.** The value exchange between viewers and content.
- 2.** The reach available across diverse audiences.
- 3.** The conditions for relevance in a fragmented region.

THE VALUE EXCHANGE: AUDIENCES CHOOSING ADVERTISING

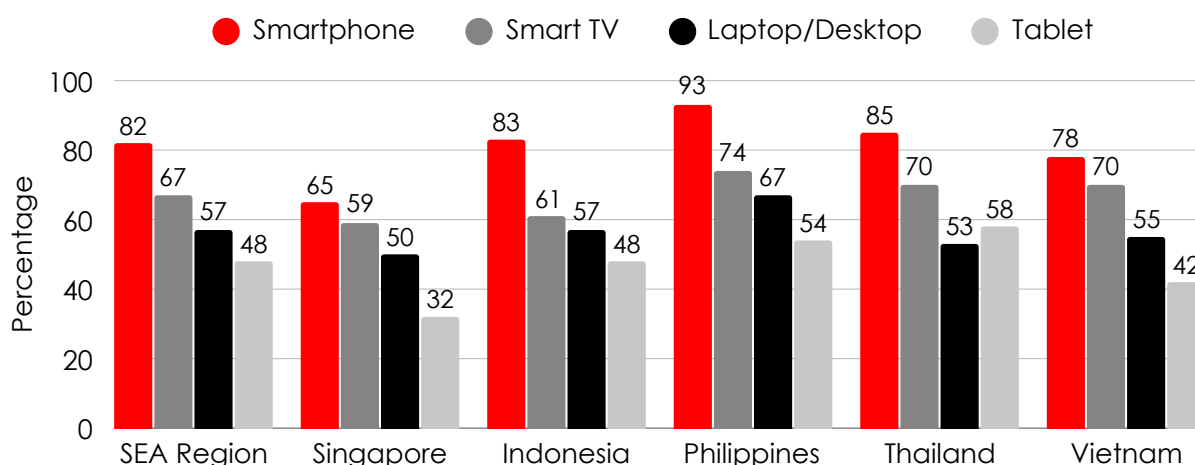
Broad consumption establishes the opportunity, and the value exchange explains why audiences actively choose ad-supported environments across this region.

Platform strategies reflect these preferences. YouTube is one of the region's most widely used platforms for both short and long-form viewing. Disney+ Hotstar offers flexibility between tiers, Netflix has adapted to include advertising options, and local platforms serve regional content preferences. FAST channels are also adding momentum in India. As Jemeema Ramnath, DoubleVerify, shares, "FAST is already spiking interest and some players are giving viewers free channels without even needing to log in."

The result is multiple touchpoints across the viewing journey. Some markets balance subscription and advertising, others are firmly ad-led, and platforms are adapting with blended and free models to fit local preferences. For campaigns, this means broad reach across audiences who have actively chosen to be there.



AD-SUPPORTED STREAMERS ARE WATCHING CONTENT ACROSS SCREENS



Source: Magnite, Streaming TV's New Era, SEA, 2023/24

THE ALLOCATION EQUATION: WHERE INVESTMENT MEETS CONSUMPTION

Local content preferences determine where audiences concentrate, which is why platforms are expanding local content libraries and commissioning originals for each market. For campaigns, linguistic and cultural context affects whether audiences engage or scroll past.

Broad consumption across the region presents a significant opportunity, but current investment tells a different story.

MARKET	AD-SUPPORTED REACH	CTV/OTT SHARE OF DIGITAL SPEND
Philippines	94%	4%
Vietnam	77%	6%
Thailand	77%	3%
India	72%	3%
Indonesia	73%	5%
Singapore	Mixed model	4%
Malaysia	Mixed model	4%

Source: Magnite Streaming Research 2024 (Philippines, Vietnam, Thailand); Magnite Streaming Research India 2024; Magnite Streams & Screens Indonesia 2025 (reach); IAB SEA+India CTV/OTT Council member estimates (spend share).

The imbalance between 72-94% reach and 3-6% allocation reflects how streaming is currently planned. Reach and frequency remain the dominant planning metrics, favouring channels with lower CPMs and higher volume. Direct buying accounts for 35-55% of CTV/OTT transactions across most markets, which limits what programmatic can offer in audience targeting and measurement. These conditions keep CTV/OTT priced below its attention value.

Television budgets are evolving with agency planning teams reallocating 5-20% of linear television spend toward CTV/OTT. Vietnam, India, and the Philippines show the strongest movement. This reallocation is gradual relative to consumption changes, suggesting this region has not yet aligned investment with what streaming delivers.

MARKET	TV BUDGET SHIFT TO CTV/OTT	DIRECT IO SHARE	PROGRAMMATIC SHARE
Vietnam	10-20%	35-50%	25-40%
India	10-15%	35-50%	40-70%
Philippines	5-20%	35-40%	40-55%
Singapore	8-15%	50-55%	35-45%
Indonesia	8-10%	40-50%	35-50%
Thailand	5-12%	50%	35-45%
Malaysia	5-10%	45-55%	35-45%

Source: IAB SEA+India CTV/OTT Council member estimates based on aggregated agency holding company data.

Buying models vary by market. India and the Philippines show higher programmatic adoption (40-70% and 40-55% respectively), while Singapore, Thailand, and Malaysia lean toward direct buying. Across all markets, CTV/OTT is recording double-digit year-on-year growth, with advertiser interest growing faster than allocation.

Consumption across this region offers both broad reach and targeted opportunities. The next variable is attention: what determines whether audiences pay attention, and for how long.

CHAPTER 2: ATTENTION - THE VALUE MULTIPLIERS

HOW TIMING, DEVICE, CONTEXT, AND EMOTION COMBINE

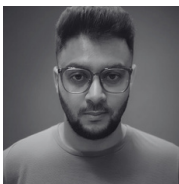
Attention is the second variable in the Matrix, and context determines how much value each ad generates.

The same creative produces different results depending on when and how audiences encounter it. Primetime streaming produces 60% higher engagement than daytime viewing because multiple variables align simultaneously; audiences are relaxed, focused, and more likely to recall brand messages. Four variables strengthen this effect. Timing, device type, viewing context, and emotional state.

TIMING	When audiences watch throughout the day
DEVICE	Mobile, desktop, or connected TV screens
CONTEXT	Solo viewing versus co-viewing environments
EMOTION	Relaxed, inspired, or distracted mindsets

Understanding how these variables layer allows campaigns to adapt creative and placement to match attention quality as audiences move through their day:

- Timing and device type
- Emotional states and genre alignment
- Co-viewing and its effect on viewing context
- Measurement approaches for each variable



Anannya Paliwal
Regional Director, Digital Solutions

OMNICOM MEDIA

"Advertisers cannot treat day parts as they've always treated TV or traditional screens. They have to design creative for context. It has to be snackable and mobile optimised on the go for users watching during commute or lunch hours, but more cinematic and emotionally rich on a big screen at night in prime time."

THE DAILY VALUE CYCLE: DEVICE TRANSITIONS AND PEAK ATTENTION

Across this region, viewers start the day on mobile, transition to desktop during midday, and close their evenings on connected TVs. This fluid movement creates different advertising environments, each with its own attention profile. Mobile viewing during commutes offers short-form, high-frequency exposure suited to awareness. Desktop consumption during midday provides focused attention during lunch breaks. Evening connected TV viewing becomes the peak window for emotional and social.

Morning Routine & Commute		Work		Lunch		Work		Commute & Dinner		Evening Prime Time		Late Night Streaming							
6am		9am		12pm		2pm		5pm		8pm		11pm							
Mobile usage spikes on morning commute		Desktop usage dominates during work hours		Desktop and mobile used during lunch		Mobile usage spikes on evening commute		CTV/OTT average prime-time usage is 60% higher than daytime usage		CTV/OTT late-night viewing still going strong, only dropping about 25% from prime-time									

Source: Magnite Platform, Proprietary Data



Karnika Maroo
Account Director

Magnite

"We are a connected consumer, fluidly moving across devices throughout the day; starting with mobile in the morning as we catch up on messages and quick video clips, shifting to desktops during work hours, then to short-form content platforms during lunch breaks or commutes for entertainment, news, or sports, and finally to co-viewing experiences at home with family, which creates a peak window for immersive brand storytelling."

Teads' omnichannel insights reinforce these patterns, showing how viewing behaviour in India follows two peaks. Early evenings (6–8 p.m.) lean toward news, travel, and food content across web and CTV, while late evenings (8–10 p.m.) move toward entertainment, drama, and finance. The crossover between web and connected TV during these hours reflects households browsing and deciding what to watch together, an early signal of co-viewing attention.

Jonathan Mackenzie from Publicis Groupe adds: "There's a clear window of opportunity around CTV, from 6pm to midnight, where you've got long form viewing and welcome ad opportunities that consumers enjoy. It's a different stage for advertisers to think more strategically about."

CASE STUDY: INCREMENTAL REACH THROUGH ATTENTION QUALITY

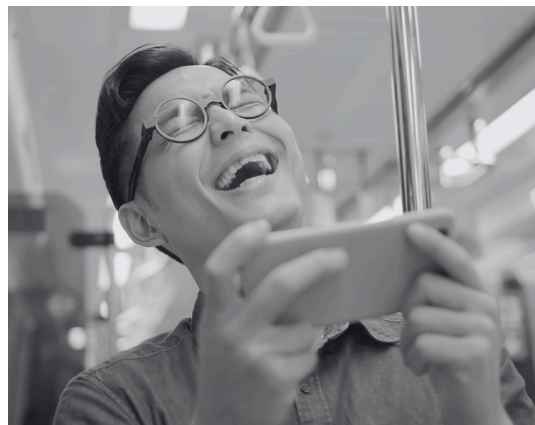
An Omnicom Media campaign with a large FMCG skincare brand in India showed how connected TV can add efficient incremental reach. In traditional TV campaigns, the first 70-80% of reach is relatively straightforward through high-rating programmes. The final 10-20% is harder: light TV viewers who watch infrequently and have migrated to digital-only screens. Reaching these audiences on linear TV requires buying more spots at higher cost.

To reach this final 10% more effectively, Omnicom Media India redirected budget from linear TV to CTV, running sequential storytelling across multiple evening sessions to build brand recall. The campaign achieved 1.5x website traffic growth in 30 days, 15% incremental reach, and 2.5% absolute lift. Anannya Paliwal, Omnicom Media explains, "We reallocated these TV budgets to find the cord cutter/light TV viewers on CTV to drive incremental reach efficiently. Having the right measurement in place to identify the impact through website visits and brand lift was the cherry on top."

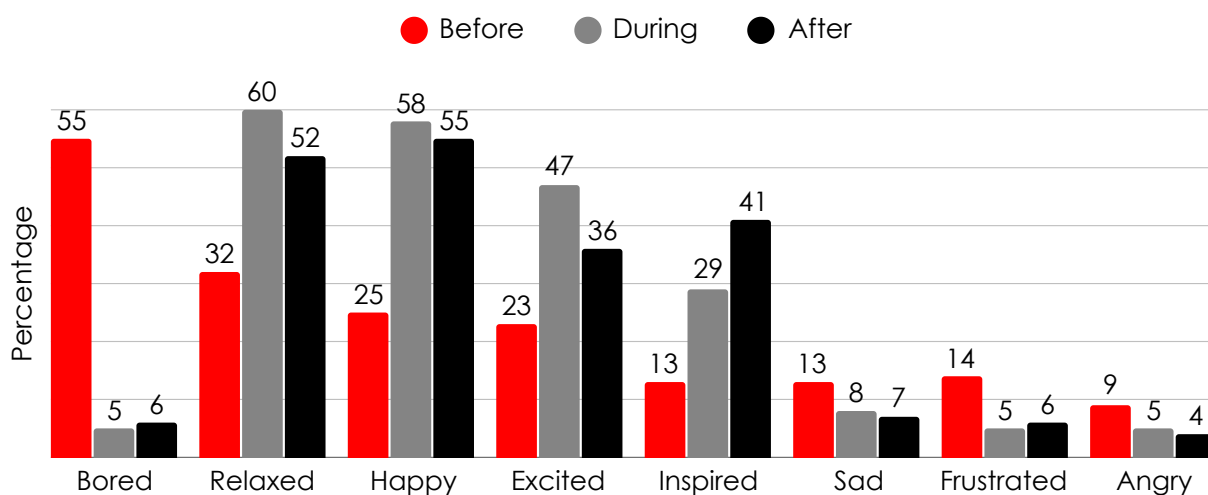
THE EMOTIONAL PREMIUM: POSITIVE STATES AND GENRE ALIGNMENT

Timing and device determine when and where audiences encounter advertising, emotional state determines how receptive they are when it arrives.

Streaming consistently generates positive emotional states. Happiness rises from 25% before viewing to 58% during, and relaxation grows from 32% to 60%. Even viewers who start frustrated or distracted often become relaxed, happy, or inspired during streaming sessions. These emotional shifts mean brand messages reach receptive mindsets, reducing ad skipping and improving recall.



HOW DO YOU FEEL BEFORE / DURING / AFTER WATCHING VIDEO CONTENT?



Source: [Omnicom Media, Connecting Connected TV 2025](#)

DoubleVerify shared regional data from their 2025 Global Insights research exclusively for this playbook. 78% of respondents say genre influences how they perceive advertised brands. Among these viewers, lifestyle content scores highest for positive brand associations at 65%, followed by educational programming at 63% and music at 57%.

CASE STUDY: GENRE ALIGNMENT FOR AUDIENCE RE-ENGAGEMENT

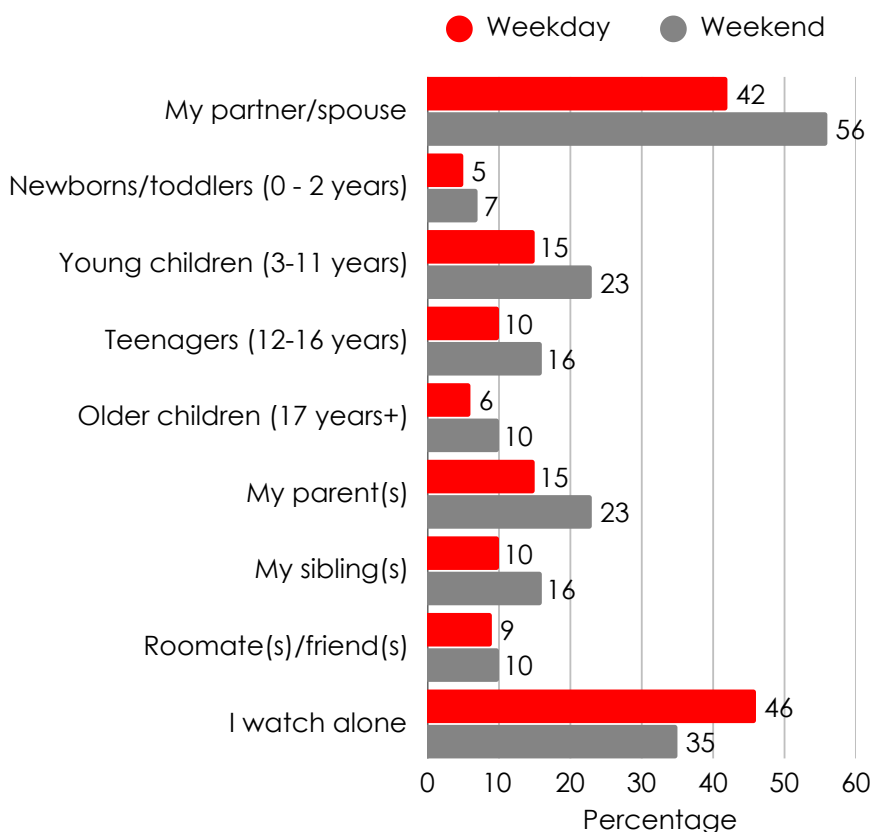
Magnite's client Nescafé Philippines applied genre alignment during the festive season to re-engage health-conscious Filipinos who had reduced coffee consumption. The campaign used genre-tailored programmatic pause ads, health-conscious audience curation, and contextual playlist promotion. By reaching audiences in moments aligned with their lifestyles and values, the campaign connected with viewers already in a positive frame of mind.

THE CO-VIEWING DIVIDEND: HOUSEHOLD REACH AND SHARED EXPERIENCE

Timing, device, and emotional state affect attention quality for individual viewers, and co-viewing multiplies this effect across households.



WHO DO YOU NORMALLY WATCH WITH?



Source: [Omnicom Media, Connecting Connected TV 2025](#)

Streaming is a shared experience, with more than half of all weekend viewing happening with partners or family members. Households watching together are more receptive to advertising, and families are more likely to consider purchases. When audiences are relaxed, happy, or inspired, shared viewing amplifies this openness. Brand messages become part of the household conversation.

Co-viewing changes how brand messages are received, turning them into conversation prompts recalled and reinforced through social exchange. "CTV ads go beyond the standard digital metrics of impression and clicks," Anannya notes. "It's about delivering a shared brand experience in an immersive and clutter-free environment."

Decision-making dynamics differ by viewing group; watching with parents or siblings becomes a "give and take" scenario where compromise influences content selection, while friend groups make more collective decisions. These dynamics affect what audiences watch and how open they are to brand messages. Measurement strategies should consider household reach to capture co-viewing's multiplier effect, as ads may influence multiple participants, each contributing to the final purchase decision.

CASE STUDY: MULTI-DEVICE COORDINATION DURING CO-VIEWING

A campaign by Teads for a global sports brand shows how connected-TV home-screen placements can reach shared household audiences during peak co-viewing hours. By combining CTV activation in evening primetime with complementary in-read video across mobile, the campaign extended attention across devices while maintaining consistent creative visibility. Their results show view-through times 25% above benchmark and click-through rates 18% higher than regional averages, illustrating how multi-device coordination during shared viewing periods can heighten engagement within connected environments.

The homescreen placement strategy in this campaign illustrates how co-viewing contexts increase format effectiveness differently across the funnel. Targeted and actionable formats maintain consistent performance from discovery through consideration, while pause and tile formats excel at awareness but decline at conversion.



In shared viewing environments, homescreen placements reach households during the decision-making moment of what to watch together, while actionable formats convert those household discussions into immediate responses. Pause and tile formats maintain brand presence during co-viewed content without disrupting the shared experience. Allocating budget by both format capability and viewing context gives campaigns additional precision in achieving specific objectives.

PURCHASE FUNNEL	TARGETED ADS	ACTIONABLE ADS	PAUSE ADS	TILE ADS
DISCOVERY Search / discussed product	66%	62%	60%	61%
CONSIDERATION Saved product / clicked link	56%	56%	48%	47%
ACTION Added to cart / purchased	50%	52%	38%	42%

Indonesia, Philippines & Thailand average numbers
Source: Magnite Streams and Screens 2025 Report

CASE STUDY: STORYTELLING DEPTH IN CO-VIEWING CONTEXTS

A Teads campaign for a jewellery brand in India demonstrates what attention retaining formats achieve when combined with broad consumption. The campaign targeted women 25+ with household income criteria, combining connected TV with complementary web placements.

The results show what happens when audiences have time with a message. Every metric outperformed regional benchmarks, with purchase intent reaching 3× benchmark being the strongest. Benjamin Rehberg, Teads, shares "Across the board it's very strong and outperforms the regional benchmarks, especially when it comes to ad recall. So that speaks to the longer sustained attention of people. When it comes to CTV, it's that situation where you are simply spending way more time with it."



Benjamin Rehberg
Head of Data APAC



"Across the board it's very strong and outperforms the regional benchmarks, especially when it comes to ad recall. So that speaks to the longer sustained attention of people. When it comes to CTV, it's that situation where you are simply spending way more time with it."

The 3× purchase intent lift shows what storytelling depth achieves with sustained viewing time. Shoppable formats and QR codes then convert that attention into action, particularly during 11.11 and 12.12 mega sales where social commerce enables purchase within the viewing experience.

LIVE PROGRAMMING: CONCENTRATED ATTENTION MOMENTS

Live programming holds attention differently. Sports, esports, awards shows, and live commerce generate collective focus where audiences are actively engaged and advertising becomes part of the shared experience.

As Hayden observes, "These are people actually tuned in because it's live and their attention is undivided." Some forecasts estimate US\$14.9 million in live sports streaming revenue for Southeast Asia by 2029, but many in the industry question whether this captures the full scale. Siddharth Puri, Tyroo, puts it directly. "That number feels far too low. In India alone, sports already account for at least half a billion dollars of allocation."

Live programming lets campaigns join cultural moments where attention is already concentrated. Real-time content, emotional stakes, and co-viewing combine to reach audiences when they are most engaged.



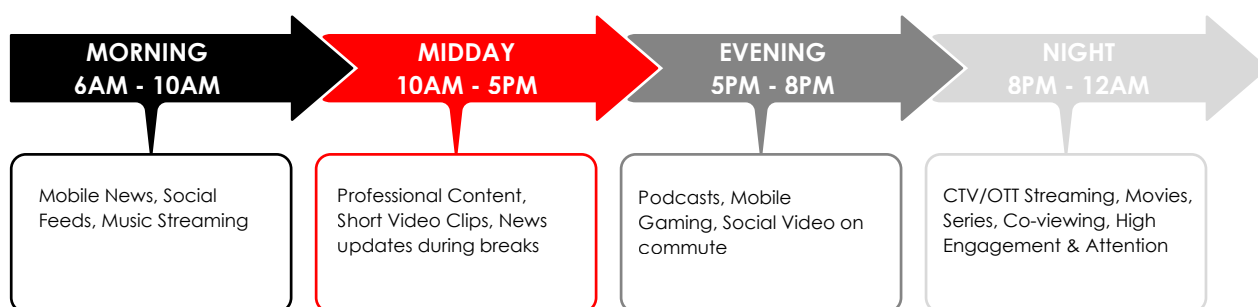


THE DAYPART DIFFERENTIAL: TIMING AND RETURNS

Tyroo data from 21 brand lift studies across the region shows how attention variables combine into measurable differences. Sushil Chhillar, Tyroo, breaks down the viewing behaviour behind these numbers. Morning and evening sessions average one to one-and-a-half hours of continuous viewing, with morning skewing toward news and evening toward drama. Midday viewing drops to just 32 minutes on average, the lowest attention window. Primetime co-viewing sessions extend beyond three hours, and recall peaks at 17%. As Sushil describes it, "when the entire family is viewing."

The 5.7x difference in brand recall between primetime and midday matters for budget allocation. The same placement produces dramatically different results depending on when it runs.

"The evening time is the highest consumption but also the highest attention, partly because of co-viewing," observes Alex Phillips, Google. "But even without co-viewing taking place, it's the time when users are in the most lean-back and attention-paying frame of mind."



Source: Tyroo, brand recall stats

THE FORMAT YIELD: GRABBING VERSUS RETENTION

Timing, device, emotional state, and co-viewing determine how much attention is available. Format determines how that attention is captured.

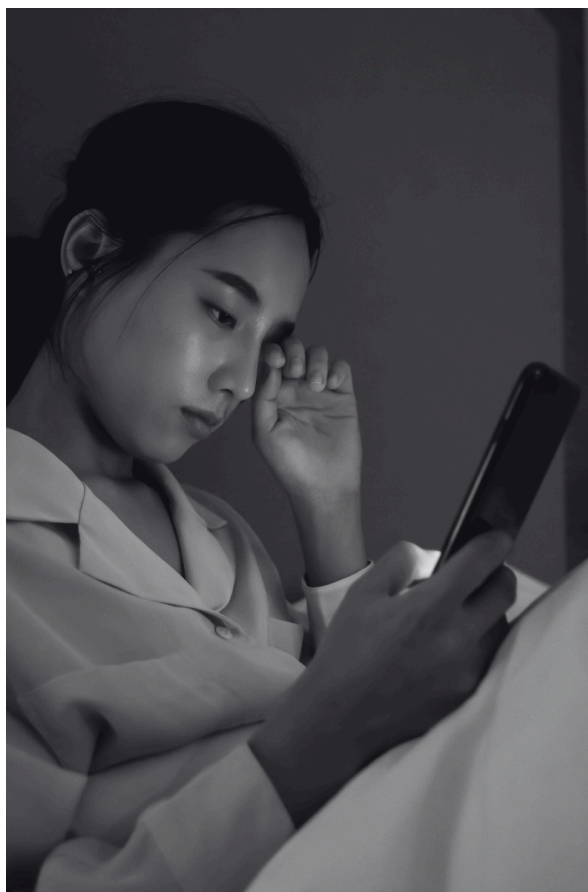
Attention retaining formats hold engagement through sustained viewing. The viewer stays with the full narrative, and the storytelling has time to build emotional connection. Cinema, long-form video in primetime co-viewing contexts, and streaming with sound-on by default give complete storytelling room to land, building preference, consideration, and purchase intent over time.

	TARGETED CONSUMPTION Specific audiences, contexts, moments; defined segments, contextual alignment	BROAD CONSUMPTION Mass populations, multiple touchpoints; wide reach, cross-demographic
ATTENTION RETAINING TIMING: Primetime DEVICE: CTV/large screen CONTEXT: Co-viewing EMOTION: Relaxed/positive	EFFECTIVENESS FOR BRAND MOMENTS Format Characteristics: Captive audience environments, large format/immersive, premium contexts, limited inventory, high-impact placements.	EFFECTIVENESS FOR BRAND BUILDING Format Characteristics: Long-form video, lean-back viewing environments, sound-on by default, non-skippable or completed view formats, extended session times, co-viewing contexts.
ATTENTION GRABBING TIMING: Commute/midday DEVICE: Mobile/desktop CONTEXT: Solo viewing EMOTION: Neutral/task orientated	EFFECTIVENESS FOR TARGETED REACH Format Characteristics: Contextual placements, native formats, niche environments, precision targeting.	EFFECTIVENESS FOR AWARENESS & ACTION Format Characteristics: Short-form video, in-feed placements, scroll-based consumption, skippable formats, high frequency potential.

Attention grabbing formats work through active decision. The viewer decides whether to engage, scroll, or act. Short-form video, in-feed placements, and scroll-based social commerce grab immediate attention, generating recall and inspiring action.

Benjamin frames the contrast through viewing context. "Cinema is an extreme case of a conscious choice to remove all the other distractions and focus on something. You are literally in a dark room with nothing else to do but pay attention to the screen, versus social media, which is distraction by default. You choose to engage with your smartphone because you have nothing else to do right now."

Brand recall forms at the 3-second mark, which means campaigns optimising for recall need frequency and reach to accumulate those moments. Preference, consideration, and purchase intent require longer storytelling, and campaigns optimising for these metrics need sustained attention to let the narrative build.



Teads Southeast Asia creative benchmarks illustrate this difference. Social formats hit 71% view rates with 2.12 seconds dwell time, while video formats hit 66% view rates with 2.65 seconds dwell time. Social gets more initial views, but video holds attention longer. The 25% longer dwell time accumulates across a campaign, giving storytelling more opportunity to build brand affinity.

FORMAT	VIEW RATE	EYES-ON DWELL TIME (SEC)
VIDEO	66%	2.65
DISPLAY	61%	2.55
flow	64%	3.23
scroller	71%	2.74
carousel	61%	2.9
SOCIAL	71%	2.12
social video	70%	2.15
social image	75%	1.95
stories display	71%	2.2
stories video	81%	1.99

Source: Teads, SEA Creative Attention Benchmarks 2025

FORMAT PERFORMANCE COMPARISON

Sushil's brand lift analysis also found skippable ads achieve 22.9% brand recall compared to 16.4% for non-skippable ads. The skip decision itself creates a moment of heightened attention. "In a 30-second ad, most of the time the ad is running, people might not be paying attention. But when it comes to skippable ads, people still have the remote in hand."

AD TYPE	BRAND RECALL
Skippable	22.90%
Non-Skippable	16.40%

Source: Tyroo, brand recall stats



Sushil Chhillar
Business Head - CTV



"In a 30-second ad, most of the time the ad is running, people might not be paying attention. But when it comes to skippable ads, people still have the remote in hand."

The recall advantage does not extend to preference; "The attention grabbing has happened, but attention retention is not happening because you're not watching the full ad," Sushil continues. "The entire storytelling is not happening. So it might not result in a higher percentage of your shoppability or your favourability because you haven't seen the entire story." Campaigns can use skippable formats to accumulate brand recognition through frequency, or non-skippable formats to deliver complete narratives that create preference. Both produce results, and the planning question is which outcome the campaign needs.

EVOLVED FORMATS: ATTENTION TO ACTION



Anupama Tatwadi
Video & Media Sales Lead SG



Streaming formats extend beyond traditional video into interactive and shoppable experiences. Anupama identifies three emerging format types. "One is home screen units, two are interactive ads, and the third being shoppability. All of these go far beyond what linear TV can do."

Home screen placements reach viewers at the moment they decide what to watch. Pause ads capitalise on natural breaks when viewers are already engaged. QR codes connect the screen with the device already in hand. Shoppable formats let viewers purchase directly within the viewing experience. These formats shorten the path from advertising to transaction, taking streaming beyond awareness into direct response within the same session.

CONTEXT ALIGNMENT: SELECTING FOR EFFECTIVENESS OUTCOME

The four variables (timing, device, context, emotion) determine the effectiveness outcome. The Matrix shows which variable combinations move advertising toward attention grabbing or attention retaining.

	TARGETED CONSUMPTION Specific audiences, contexts, moments; defined segments, contextual alignment	BROAD CONSUMPTION Mass populations, multiple touchpoints; wide reach, cross-demographic
ATTENTION RETAINING TIMING: Primetime DEVICE: CTV/large screen CONTEXT: Co-viewing EMOTION: Relaxed/positive	EFFECTIVENESS FOR BRAND MOMENTS Affinity and association through captive, immersive experiences	EFFECTIVENESS FOR BRAND BUILDING Preference and consideration through storytelling depth at scale
ATTENTION GRABBING TIMING: Commute/midday DEVICE: Mobile/desktop CONTEXT: Solo viewing EMOTION: Neutral/task orientated	EFFECTIVENESS FOR TARGETED REACH Relevance and engagement through contextual precision	EFFECTIVENESS FOR AWARENESS & ACTION Recognition and response through reach and frequency

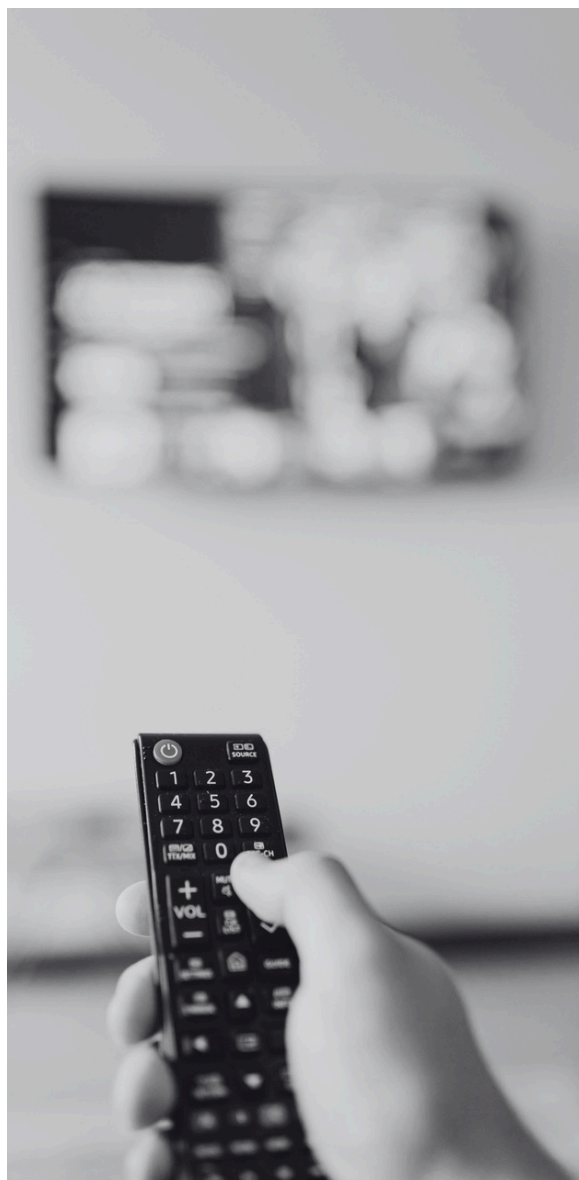
Attention retaining and attention grabbing serve different objectives:

ATTENTION RETAINING	Builds preference, consideration, and purchase intent through complete storytelling and emotional connection.
ATTENTION GRABBING	Generates recall, discovery, and immediate action through frequency and active viewer decision.

Evening primetime on CTV means relaxed viewers, extended viewing sessions, and households watching together. These conditions give narratives time to build emotional connection. Brand messages become talking points that stay with households. The 5.7x recall difference between primetime and midday reflects this layering. Longer sessions, larger screens, shared attention, positive emotional states, all working together.

Commute and midday contexts produce different outcomes. Shorter sessions, smaller screens, solo viewing, task-oriented mindsets. These conditions favour formats that capture attention in the first seconds with strong calls to action. The active viewer decision to continue watching (or skip) creates heightened engagement with messages that earn continued attention.

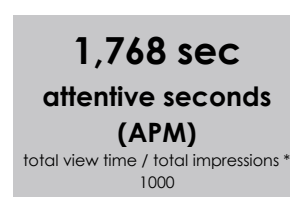
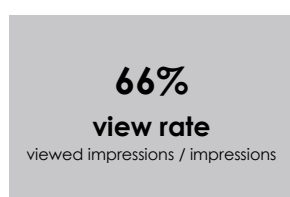
This means two campaigns can buy identical inventory and achieve very different outcomes. A campaign concentrated in primetime co-viewing builds preference through storytelling depth. The same inventory purchased across midday builds frequency and recall through repeated exposure. The Attention x Consumption = Effectiveness Matrix helps align campaign objectives to the right context combinations: timing, device, viewing context, and emotion.



CASE STUDY: B2B TARGETING THROUGH NEWS CONTEXT

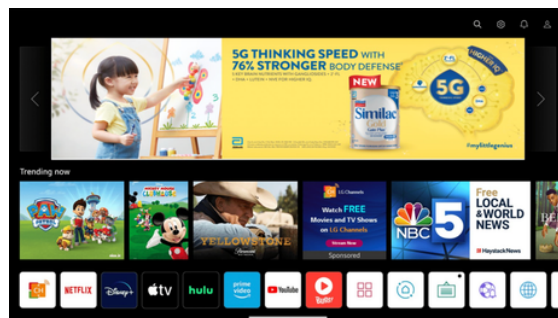
A Teads campaign for a consumer electronics brand in India used news content to reach a B2B audience, with custom creative optimisation across all formats.

The alignment with news content produced the highest attention scores, showing how contextual placement strengthens format performance for specific audiences.



CASE STUDY: FAMILY CONTEXT ALIGNMENT FOR KIDS NUTRITION

A Tyroo campaign for a kids nutrition brand ran across six markets, showing targeted consumption at regional scale. The campaign used 30-second non-skippable homescreen waterfall and carousel video ads targeting families with school-age children.



The 93% video completion rate far exceeded the client's expectation of 25% based on performance from other channels. Sushil calls the combination of big-screen format, non-skippable delivery, and sound-on the "best attention cocktail" for branding objectives.

Consumption offers both broad reach and targeted opportunities. Attention determines whether that consumption grabs or retains, depending on context. Chapter 3 brings both variables together, connecting brand maturity to effectiveness outcomes and showing how to validate results.



CHAPTER 3: EFFECTIVENESS - HOW INVESTMENT RETURNS

EFFECTIVENESS OUTCOMES: THE BRAND MATURITY VARIABLE

Brand maturity determines which effectiveness outcome a campaign needs. The Matrix gives marketers and media partners a common framework for planning conversations.

	TARGETED CONSUMPTION Specific audiences, contexts, moments; defined segments, contextual alignment	BROAD CONSUMPTION Mass populations, multiple touchpoints; wide reach, cross-demographic
ATTENTION RETAINING TIMING: Primetime DEVICE: CTV/large screen CONTEXT: Co-viewing EMOTION: Relaxed/positive	EFFECTIVENESS FOR BRAND MOMENTS Affinity and association through captive, immersive experiences	EFFECTIVENESS FOR BRAND BUILDING Preference and consideration through storytelling depth at scale
	Format Characteristics: Captive audience environments, large format/immersive, premium contexts, limited inventory, high-impact placements.	Format Characteristics: Long-form video, lean-back viewing environments, sound-on by default, non-skippable or completed view formats, extended session times, co-viewing contexts.
	Campaign Objectives by Brand Maturity: EMERGING: High-impact launches; memorable first impressions GROWING: Premium moments and major cultural events build affinity through experience ESTABLISHED: Reinforce brand stature and cultural positioning; maintain premium perception	Campaign Objectives by Brand Maturity: EMERGING: Build awareness with storytelling depth; establish brand story with new audiences GROWING: Deepen consideration and preference; convert attention into action through shoppable formats and QR codes ESTABLISHED: Maintain visibility and protect market position; full-funnel campaigns reinforcing brand equity
ATTENTION GRABBING TIMING: Commute/midday DEVICE: Mobile/desktop CONTEXT: Solo viewing EMOTION: Neutral/task orientated	EFFECTIVENESS FOR TARGETED REACH Relevance and engagement through contextual precision	EFFECTIVENESS FOR AWARENESS & ACTION Recognition and response through reach and frequency
	Format Characteristics: Contextual placements, native formats, niche environments, precision targeting.	Format Characteristics: Short-form video, in-feed placements, scroll-based consumption, skippable formats, high frequency potential.
	Campaign Objectives by Brand Maturity: EMERGING: Efficient reach to defined target audiences; test and learn efficiently GROWING: Precision retargeting; contextual alignment reinforcing brand messaging ESTABLISHED: Reach niche segments efficiently; maintain presence in specific markets or audiences	Campaign Objectives by Brand Maturity: EMERGING: Build awareness rapidly through reach and frequency; test messaging and audiences efficiently GROWING: Drive discovery and social commerce; retarget audiences across the journey ESTABLISHED: Maintain frequency and share of voice; drive promotional response and immediate purchase

Emerging brands need recognition before anything else can happen. Evelyn Tay, OpenX, frames the initial goal as building "recognition and initial brand equity" through campaigns that build mental availability. At this stage, repeated exposure builds recall, or precision targeting tests messaging with specific audiences before committing further investment. Evelyn recommends targeting "between 5 to 8pm and 8pm to 12am":



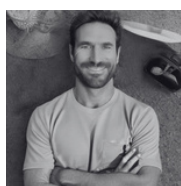
Evelyn Tay
Senior Director, Business Development



"Between 5 to 8pm we see mobile usage actually spike when consumers are commuting back to home, making mobile the right device for that window, with CTV reserved for primetime."

Growing brands convert recognition into preference and loyalty. "For mid-level awareness brands, they want to turn into preference and loyalty, creating more brand relevancy," Evelyn continues. "Using the data they collected in the early stage, they can retarget users to earn trust and drive product trials." Streaming's extended viewing sessions and co-viewing contexts give creative time to build the emotional connection that preference requires. Shoppable formats and QR codes then convert attention into action, particularly during 11.11 and 12.12 mega sales where social commerce enables purchase within the viewing experience.

Established brands pursue different effectiveness outcomes. Anupama observes, "A high awareness FMCG or CPG brand needs very high visibility to keep their consumption and penetration going. Attention plays a high role in those scenarios." Share of voice protects share of market, which means attention metrics carry as much weight as conversion metrics even with dominant positions. CTV/OTT serves multiple purposes at this stage: sustained visibility through storytelling depth, promotional response through frequency and reach, niche segment defence through precision, and cultural positioning through live experiences.



Alex Phillips
Head of APAC, Exchange Platforms



"CTV has its place in the funnel and depends on the brand maturity to establish when it makes sense to include it. Primarily it's around brand awareness and reach, but it even has a place in the lower funnel for more mature brands."

MEASURING ATTENTION: APPROACHES AND TRADE-OFFS

The **Attention × Consumption = Effectiveness Matrix** supports planning and investment conversations, measurement helps assess whether campaigns achieved intended outcomes.

The measurement challenge in this region is economic as much as technical. Dedicated attention measurement adds cost, creating a trade-off between insight depth and campaign efficiency.

Karnika Maroo, Magnite, captures the regional reality, "We are operating in a fragmented ecosystem where OTT CTV lacks standardisation in terms of measurement. We need to stretch each and every dollar across this fragmented landscape and do it in an effective, measurable and respectful way to users' choices and data."

A tiered approach matches measurement investment to campaign value. "Price is still very sensitive, especially in our region," notes Priya Pradhan, Nexxen. "If it's a premium campaign and they're willing to pay, then they could engage a vendor. But we need a tiering level so you can choose which proxies resonate most with attention versus consumption."



CASE STUDY: MEASUREMENT TRANSPARENCY AND BUDGET REALLOCATION

A DoubleVerify client in technology and services found more than 60% of advertising placed in non-transparent CTV apps went unmeasured, while verified inventory achieved 96% viewability and prompted budget reallocation toward transparent supply.



Jemeema Ramnath
Manager, Customer Success APAC



"The visibility gap is narrowing year on year. However, 65% of advertisers in this region express concern about ensuring their ads are aligned with appropriate CTV contexts."

TECHNIQUE	PROS	CONS
Data Signals	<ul style="list-style-type: none"> • Widespread availability of signals • Works across devices • Low cost 	<ul style="list-style-type: none"> • Lack of standardised "attention" metrics
Visual Tracking	<ul style="list-style-type: none"> • Insights into user reaction to ads • Closer to understanding true attention • Independent/unbiased verification 	<ul style="list-style-type: none"> • High cost • Requires specialist equipment/vendors • Not available across devices • Privacy challenges
Physio/Neuro observations	<ul style="list-style-type: none"> • Insights into user feelings towards ads • Closest proxy to actual attention • Independent/unbiased verification 	<ul style="list-style-type: none"> • High cost • Request specialist equipment • Not available across devices • Privacy challenges
Panels/Surveys	<ul style="list-style-type: none"> • Insights into ad recall/memorability • Independent/unbiased verification 	<ul style="list-style-type: none"> • High cost • Achievable on a propo
Predictive Modelling	<ul style="list-style-type: none"> • Identify insights/trends from all data sources • Broadly available 	<ul style="list-style-type: none"> • Only as useful as the data inputs

More advanced techniques, including visual tracking and biometric measurement, offer the deepest insight into attention quality, but cost restricts them to validation research. "Super high cost, mostly restricted to dedicated research," Alex notes. "So it can't be used on a kind of live campaign basis really."

Alex suggests using vendor measurement on a sample to establish benchmarks, then applying those benchmarks across campaigns using proxy signals. "If you can use vendor attention measurement on at least a small sample and then use that to compare what are the other metrics and how are they affected, when you see high attention in other areas then that can give you a benchmark for how you could, without using vendor attention measurement across all campaigns, see the other variables impacting attention."

The recently released IAB US and MRC attention measurement standard provides a starting framework. "Even if it isn't applicable across the world, it's still a very good start," Alex notes. "We hope to see more global collaboration on how attention can be measured and vendors aligning on how that's done."



CONCLUSION: THE MATRIX FOR PLANNING AND INVESTMENT DECISIONS

The **Attention × Consumption = Effectiveness** formula frames the CTV/OTT opportunity in this region through three elements. Where streaming audiences are, what determines whether they pay attention, and how brand maturity informs which effectiveness outcome a campaign needs.

Consumption across this region is both broad and receptive, with 72-94% of audiences reachable through ad-supported streaming and the majority actively choosing advertising over higher subscription costs.

Attention varies by context, and context can be selected to match campaign objectives. Primetime co-viewing gives storytelling room to build preference. Commute and midday placements build recognition through repeated exposure. Genre alignment means audiences are already in the right frame of mind when the brand message appears.

Effectiveness outcomes depend on brand maturity. Emerging brands need recognition, growing brands need preference, established brands need sustained visibility. Each requires different combinations of consumption breadth and attention depth.

The Matrix organises these elements into a planning framework. Four effectiveness outcomes connect campaign objectives to the conditions that produce them, giving marketers and media partners a common reference point for what a campaign needs and how to get there.

What makes streaming across this region distinctive is that audiences are not just reachable but receptive. Timing, device, and context can all be selected to match campaign objectives. The Matrix connects hundreds of millions of viewers to four effectiveness outcomes, and the next brief is the place to start.



Miranda Dimopoulos
Regional CEO



“Whether you're already investing in streaming across this region, considering it, or not sure where to start, the Attention × Consumption = Effectiveness Matrix is here to help. Southeast Asia and India is unique: streaming reaches the vast majority of audiences, they're actively choosing ad-supported content, and the diversity of markets, languages, and viewing contexts means campaigns can be planned for each. We developed this matrix to help marketers connect streaming investment to audience opportunity.”



**attention x consumption =
effectiveness matrix**

ATTENTION X CONSUMPTION = EFFECTIVENESS MATRIX

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How to use this Matrix:

1. Identify campaign objective and brand stage to select the appropriate quadrant
2. Use the context conditions on each axis to guide placement and timing decisions
3. The same inventory can serve different quadrants depending on context selection

THE IAB SEA+INDIA CTV/OTT COUNCIL

The IAB SEA+India CTV/OTT Council unites streaming specialists from platforms, agencies, publishers, and measurement partners with expertise in programmatic buying, content strategy, audience measurement, and campaign performance. This playbook was created through collaboration and consensus, to provide trusted industry guidance on how to plan, buy, and measure streaming advertising for responsible growth.

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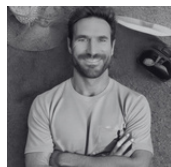
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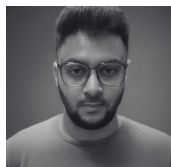
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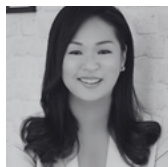
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The IAB SEA+India is the not for profit industry association that unites the digital marketing industry across 7 countries in Southeast Asia and India for collective progress and responsible growth.

The membership, comprising platforms, agencies, publishers, retailers, and brands, has a highly engaged global audience who see IAB SEA+India as a neutral source of truth on what's now and next for digital marketing in the region.

With a dual Regional Board structure and active specialist Councils, practitioners collectively design solutions such as playbooks, framebooks and whitepapers specifically for the region.

Visit iabseaindia.com for more information about becoming a member.

Click [here](#) to connect with us directly.





ctv/ott glossary

CTV, OTT, and streaming are redefining how audiences watch and how brands reach them across Southeast Asia and India. This glossary helps the industry speak the same language when planning, buying, and measuring streaming advertising.

Term	Definition
Ad	A paid placement by an advertiser within or alongside streaming content.
Ad Pod	A group of ads played back-to-back in one commercial break. An ad pod can be placed before, during, or after streaming content.
Ad-based Video On Demand (AVOD)	A streaming service funded by advertising, offered free to the viewer.
Addressable TV	Serving different ads to different audience segments based on demographics, viewing behaviour, interests, or location.
Automated Content Recognition (ACR)	Technology built into smart TVs and connected devices that identifies what content is being watched in real time. ACR data is used for audience measurement, ad targeting, and content recommendations.
Brand Lift	The measured increase in awareness, favourability, or purchase intent resulting from an advertising campaign.
Broadcaster Video On Demand (BVOD)	A streaming service run by a broadcaster, funded by advertising and free to the viewer.
Co-Viewing	When two or more people watch streaming content together on the same screen.
Connected Device	Any device that connects a television to the internet for streaming, such as a streaming stick, gaming console, or set-top box. A smart TV with built-in internet access is also a connected device.
Connected TV (CTV)	A television connected to the internet, either directly as a smart TV, through a streaming device or gaming console.
Daypart	A specific time period within the day, such as morning or prime time, used for advertising planning.
Dwell Time	The length of time a viewer spends engaged with content or an ad.
Free Ad-Supported Streaming Television (FAST)	A streaming service that mirrors the channel-based experience of traditional TV, funded entirely by advertising.
Home Screen Ads	An ad placed on the first screen a viewer sees when they turn on their connected TV or streaming device.
Hybrid Video On Demand (HVOD)	A streaming service combining subscription and advertising models, giving users the choice between a lower-cost ad-supported plan or a premium ad-free tier.
Incremental Reach	The additional audience gained by adding a new channel or platform to an existing campaign.
Lean-Back Viewing	When a viewer is settled in to watch content on a large screen for an extended session.

Term	Definition
Linear/Traditional TV	Scheduled programming broadcast at a set time on a dedicated channel.
Live Shopping	A live video session where brands or creators showcase and sell products in real time.
Live Sports	Sporting events broadcast in real time.
Livestreaming	Video content broadcast in real time by a platform, brand, or creator.
Long-Form Video	Video content of extended length, such as movies, series, and full-length programmes.
Over-The-Top (OTT)	Video content delivered to viewers over the internet. OTT services include AVOD, BVOD, SVOD, and FAST, and can be accessed across multiple devices and screens.
Pause Ads	An ad displayed when a viewer pauses their streaming content.
Pre-Roll/Mid-Roll/Post-Roll	Ad placements running before (pre-roll), during (mid-roll), or after (post-roll) streaming content.
Primetime	The peak viewing period for CTV and streaming, when audiences are largest.
Set-Top Box	A device provided by a broadcaster or telco that connects a television to content services.
Shoppable Ads	An ad format that lets viewers buy products through clickable icons, QR codes, or action buttons within the ad.
Short-Form Video	Video content of shorter length, such as clips, reels, and social video.
Skippable/Non-Skippable Ads	Skippable ads give viewers the option to skip after a few seconds. Non-skippable ads play in full before content continues.
Streaming/Streaming Services	Video content watched over the internet. Streaming services can be ad-supported, subscription-based, or both.
Subscription Video On Demand (SVOD)	An on-demand video service where viewers pay a recurring fee to watch content.
Transactional Video On Demand (TVOD)	A service where viewers pay to rent or buy a single movie or episode.
User Generated Content (UGC)	Content created by consumers and creators including videos, livestreaming and social posts.
Video Completion Rate (VCR)/View-Through Rate (VTR)	The percentage of viewers who watch a video from start to finish. VCR and VTR are used interchangeably.
Viewability	A measure of how long an ad was displayed on screen and visible to the viewer.