



# The Regional Regulatory Forecast

## How Prepared Is the Digital Marketing Industry?



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# Foreword

A Malay proverb says Sediakan payung sebelum hujan; prepare the umbrella before it rains.

Our region is in the most active period of regulatory development as laws catch up with innovation, transformation and technology. Enforcement is increasing, with penalties ranging from criminal prosecution to fines of up to 10% of annual turnover. All seven markets in this study are introducing increased AI governance this year which will apply alongside privacy, e-commerce, advertising, and cybersecurity policies already in place, and in some cases will even change them.

Over 1,700 marketers across the region shared their perspectives. You can compare where your company stands, see how to improve your ability to respond to regulations as they evolve, and how to support your teams in applying them to their roles.

Our findings highlight that the industry feels significantly more prepared than it may be. Most teams are making decisions every day under regulations they may not fully understand, risking both fines and lost credibility with the clients and partners they rely on. And with compliance now part of most RFPs and pitches, being well prepared is also a competitive advantage.

To help your teams be better prepared for what is in place now and what is in the pipeline, we are proposing the following 3-step action plan:

## 1. Take ownership

and ensure someone is responsible for understanding regulations and educating the business on how they apply in each market.

## 2. Develop specific guidance

for how regulations apply to the different teams and roles within your company.

## 3. Engage with government policy makers

as early as possible to help inform how regulations are developed.

Most companies are planning to increase their investment in being better prepared over the next 12 months. This can be invested in strengthening your own internal expertise and capabilities, in working with industry associations and trade bodies to achieve this collectively, or a blend of both.

Thank you to Google, whose research grant made this possible for the first time in our region and helping make sure there is still time to grab your umbrella.

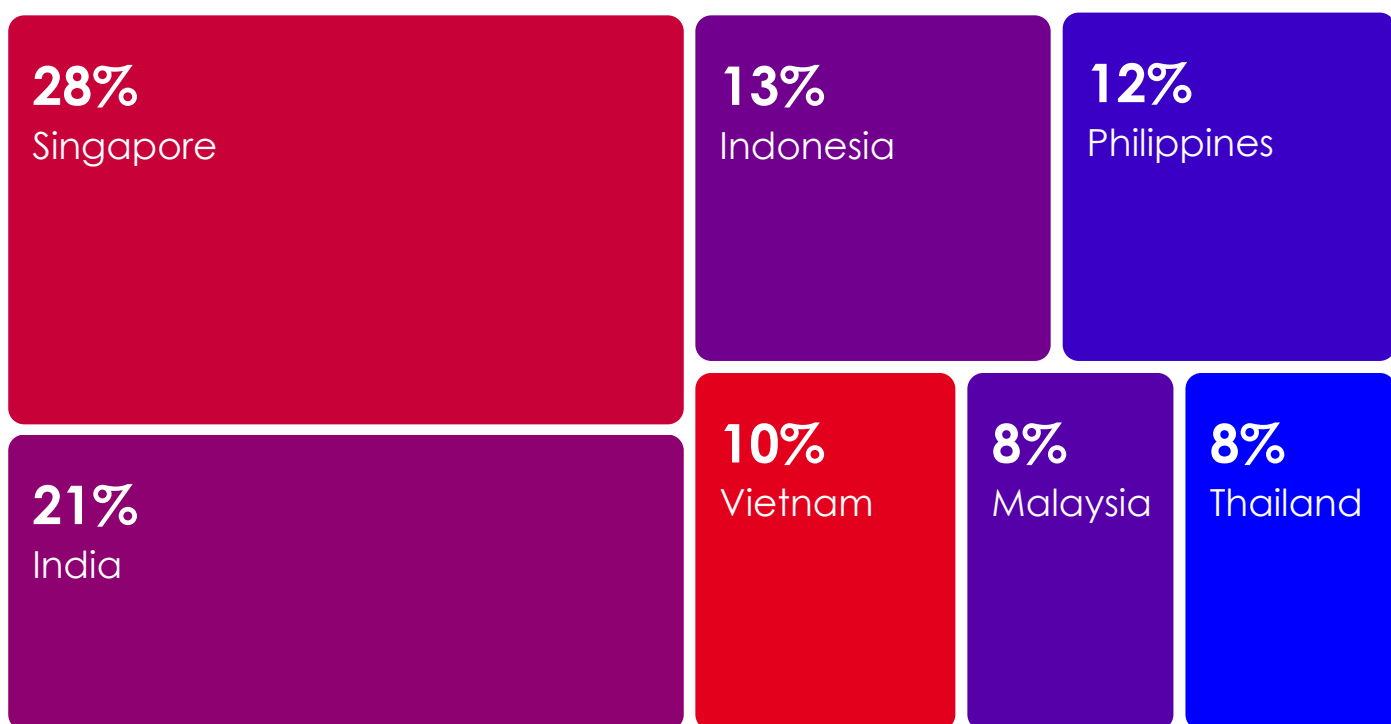


**Miranda Dimopoulos**

Regional CEO



## About This Study



**31% Partners**

**26% Agencies**

**17% Brands**

**14% Publishers**

**12% Ecommerce/Superapps**

See appendix for full methodology, including survey design, branching logic, limitations, and AI tool disclosure.

Where survey respondents are quoted in this study, the views expressed are their own and do not necessarily reflect those of IAB SEA+India or Google.

## The shorthand titles we use

### Types of companies

<b>Partners</b>	Platform/Adtech/Martech
<b>Agencies</b>	Agency/Consultancy
<b>Publishers</b>	Publisher/Media Owner
<b>Brands</b>	Brand/Advertiser
<b>Ecommerce/Superapps</b>	Ecommerce Retailer/Superapp Platforms
<b>Industry Associations</b>	Industry Associations/Trade Bodies

### Types of roles

<b>Legal</b>	Legal/Policy/Privacy
<b>Leadership</b>	Leadership/Management
<b>Marketing</b>	Marketing
<b>Commercial</b>	Product/Data/Commercial/Partnerships
<b>Operations</b>	Finance/Operations
<b>Tech</b>	Engineering/Tech

## The Preparedness Paradox

The volume of regulations developing across the region, the speed at which they are evolving, and the opportunity to inform them while they are being developed is more than most companies are currently set up for.

Most of those who say their company is prepared are assuming someone else in the company has it covered.

**Most people feel  
their company is  
across regulations**

**72%**

believe their company is  
prepared

**But most people  
don't know what  
they mean**

**<50%**

are aware of the regulations  
already affecting their role

**And very few companies  
are informing how  
they're drafted**

**8%**

of companies participate during  
the drafting phase, when policy  
makers invite industry consult

# Executive Summary

## Awareness

**3x**

Those most informed about regulations are three times more likely to have three things in common:

- 1 - Someone in their company responsible for keeping them updated
- 2 - Access to legal and policy expertise based in the region
- 3 - Engagement with industry associations.

“

"I piece info together myself from five or six different sources and I am never sure I have everything."

- Agency, Thailand

## Understanding

**#1**

request is guidance on how regulations apply to specific roles and markets.

In 38% of companies, the responsibility for creating these is spread across different people with no single owner.

27% of people don't know who in their company is responsible for helping them at all.

“

"We have global policies but limited people to interpret them for each market."

- Brand, Regional

## Opportunity

**66%**

of companies plan to increase their investment in being better prepared over the next 12 months.

63% of people want to participate in industry forums to create guidance for different roles and markets, and contribute to collective submissions for regulations in development.

“

"The client asked about our data handling practices in the pitch and it helped us win."

- Agency, Indonesia

# Awareness

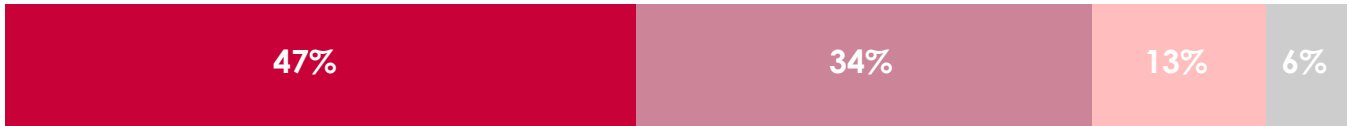
What the industry knows about current regulations and where companies get their information.

# Awareness

## Privacy is the only regulatory domain the industry knows well

### PRIVACY AND DATA PROTECTION

How personal data is collected, stored, shared, and deleted. This is the most established domain.



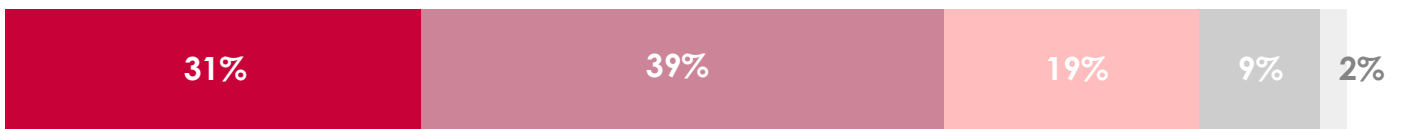
### ADVERTISING AND CONTENT STANDARDS

Governs what brands can advertise, guidance on advertising to children, restricted product categories, and endorsement requirements.



### E-COMMERCE AND CONSUMER PROTECTION

Addresses fair trade, advertising transparency, and consumer rights in online transactions.



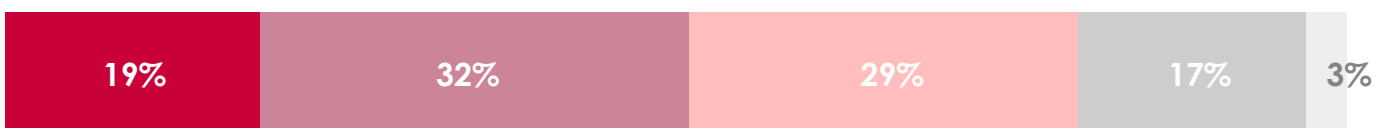
### CYBERSECURITY AND DIGITAL PLATFORM REGULATION

Relates to system security, online content responsibilities, and platform accountability.



### AI AND EMERGING TECHNOLOGY

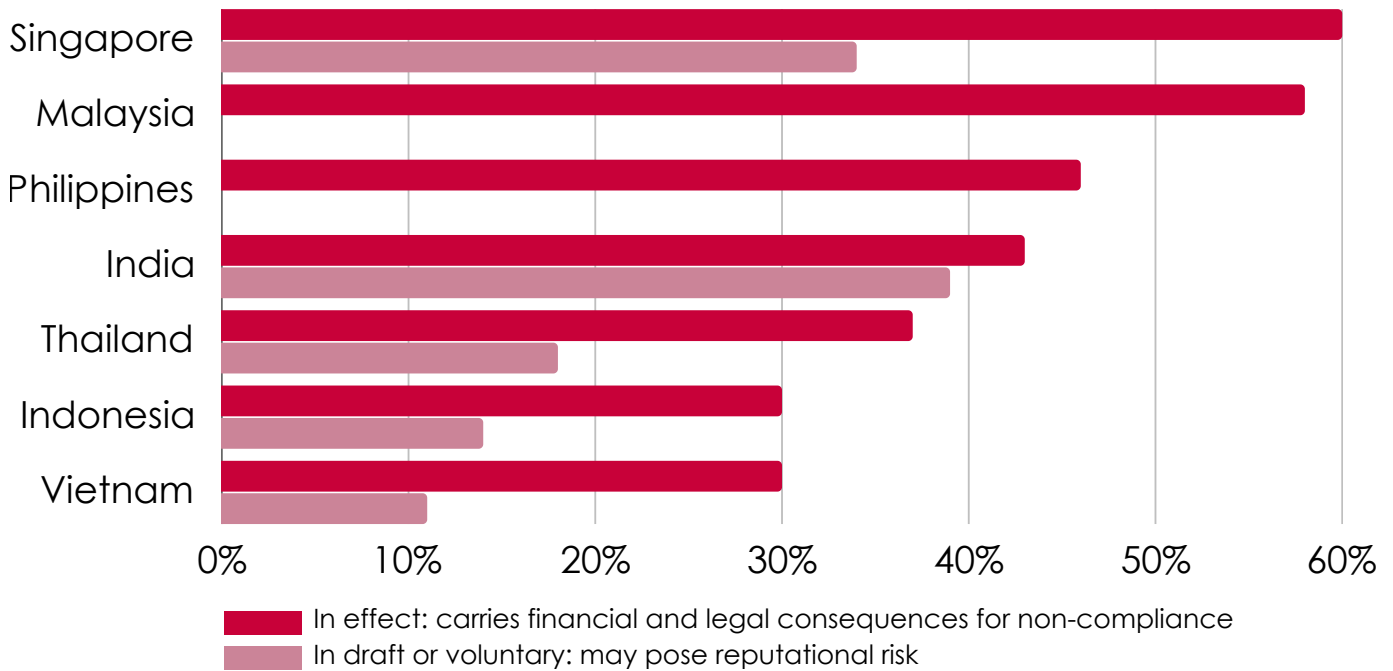
The responsible use of AI and new technologies is the most nascent domain.



- Highly aware: follow updates and understand key provisions
- Somewhat aware: know the domain exists and roughly what it covers
- Limited awareness: know the name only
- Not aware: haven't heard of it
- Unsure

Privacy and data protection is the regulatory domain our industry knows best. In the four other domains we asked about (advertising standards, e-commerce, cybersecurity, and AI and emerging technology), awareness is significantly lower. Existing regulations in all five domains are being updated, new ones are being introduced, and this is happening in seven markets at the same time.

## The industry knows the regulations it is accountable for



Multi-select question on markets operated. Singapore n=1,188, Malaysia n=916, Indonesia n=824, Philippines n=752, Thailand n=746, Vietnam n=744, India n=616. Average awareness across all regulations surveyed per market. Draft or voluntary regulations options were not included for Malaysia and Philippines.

## Awareness is highest when the business risk is highest

Privacy and data protection, with enforceable laws across all seven markets, has the highest awareness at 47%. AI and emerging technology, where most requirements remain voluntary guidelines or are still being developed, is at 19%. Awareness of regulations already in force averages 39%, while draft or voluntary regulations average 16%.

AI governance awareness at 31% among Legal respondents reflects the nascency of the domain, compared with 72% for privacy and data protection. All seven markets are planning to introduce AI governance this year, with enforceable provisions already active in Vietnam and India. The opportunity to be ready before enforcement begins is most time-sensitive here. With several markets actively inviting industry input on draft provisions, there is also an opportunity to inform how these regulations are written.

## Regulatory awareness is higher where business opportunity is accelerating

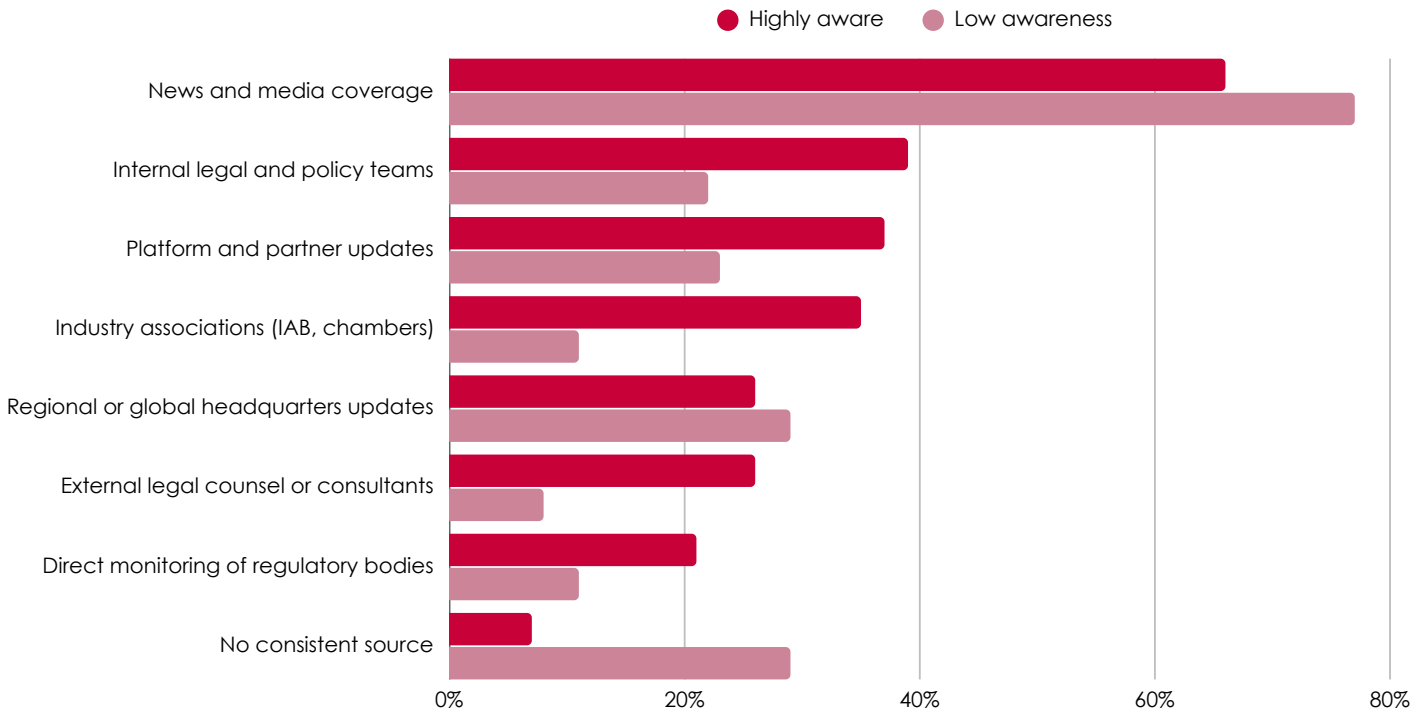
India's DPDPA was notified in November 2025 and is being implemented in phases through to 2027, with core provisions on consent and privacy notices not yet in force. Awareness is already at 44%, reflecting how quickly the industry is responding to a law still being established. E-commerce regulation awareness is even higher at 47%, in a market where online retail accounts for less than 8% of total retail but is growing at 27% year on year. Where business opportunity is accelerating, awareness of the regulations governing it is keeping pace.

“

"Legal gave us a summary of the new data rules but it does not tell me whether the audience segments I am running are still compliant."

- Brand, India

## How teams are informed is the strongest indicator of how well they understand regulations



Base: Average across all five regulatory domains. Highly aware respondents per domain: Privacy n=823, Advertising n=666, E-Commerce n=543, Cybersecurity n=420, AI n=333. Low awareness includes respondents reporting limited awareness, not aware, or unsure per domain: Privacy n=333, Advertising n=368, E-Commerce n=526, Cybersecurity n=701, AI n=858. Multi-select question; totals exceed 100%.

### 19% of respondents have no consistent source of regulatory information.

Among those with low awareness, this rises to 25-35% across every domain. How companies inform their teams is one of the strongest indicators of how well those teams understand what applies to them.

The most referenced sources are passive; news and media coverage (68%) and platform or partner updates (36%). These are effective for knowing what is changing, but less so for interpreting what it means for your company and role. The sources most associated with higher awareness are all active; internal legal and policy teams, direct monitoring of regulatory bodies, and industry associations. Respondents who use these sources have awareness at 2-3x the rate of those who don't.

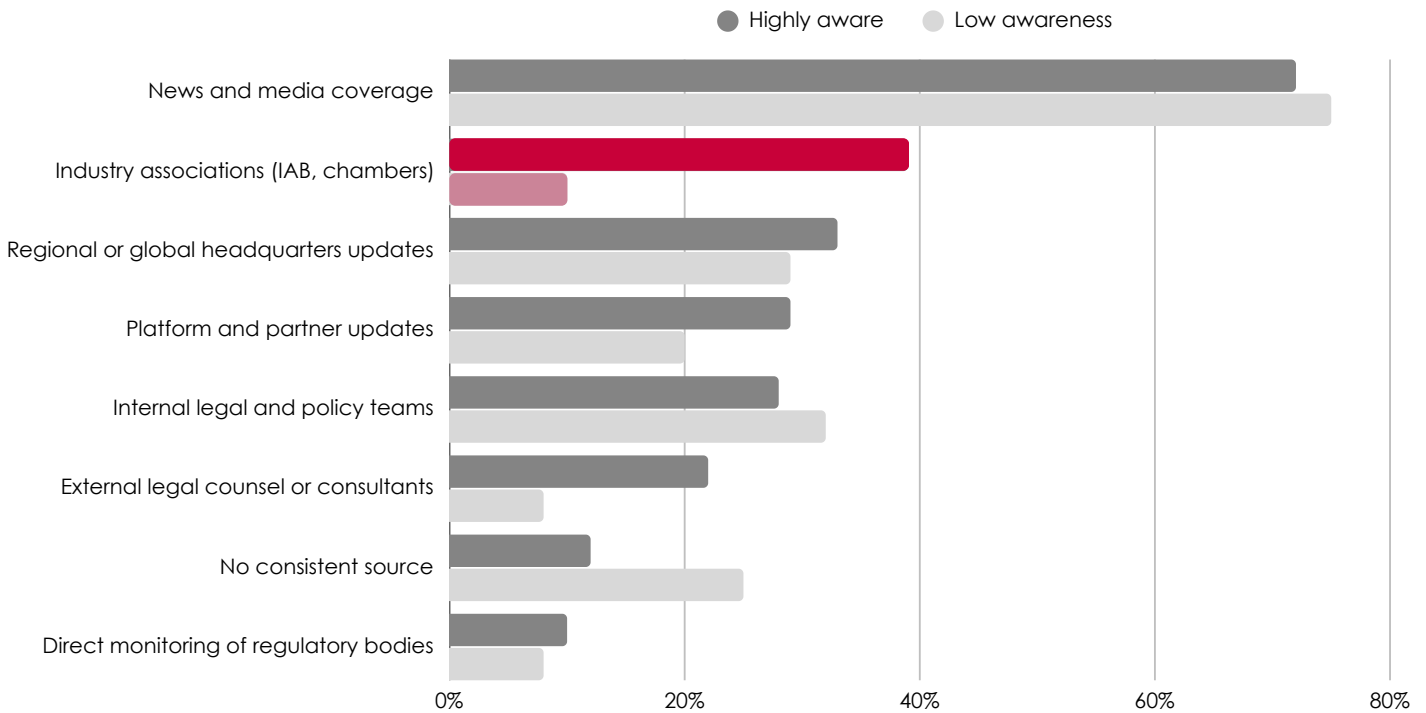
Those who monitor regulatory bodies directly (22%) are also more likely to engage in formal feedback on draft regulations before they take effect. The companies most informed about regulations have people and sources keeping them ahead of them.



"I try to attend webinars run by the law firm we use. They are good for lawyers but not for those running programmatic campaigns."

- Partner, Philippines

## Awareness of regulations coming into effect is higher with industry association engagement



Base: Highly aware respondents n=333. Low awareness respondents n=858. Multi-select question; totals exceed 100%.

For AI and emerging technology specifically, industry associations are the leading information source among the most informed respondents at 39%.

Highly aware marketers use industry associations at 3.4x the rate of those with limited awareness, 61% compared with 18%.

While AI governance is being introduced across the region, government agencies and industry associations have created frameworks and compliance guidance to support the industry as these regulations are being drafted.

**Compliance Actions Across Markets**

The ABCs of Responsible AI Integration and other actions require different actions in each market. This table provides examples of typical compliance activities by the end-market. These examples are illustrative only and do not represent comprehensive compliance requirements. Regulations across the region continue to evolve, so review and update practices regularly.

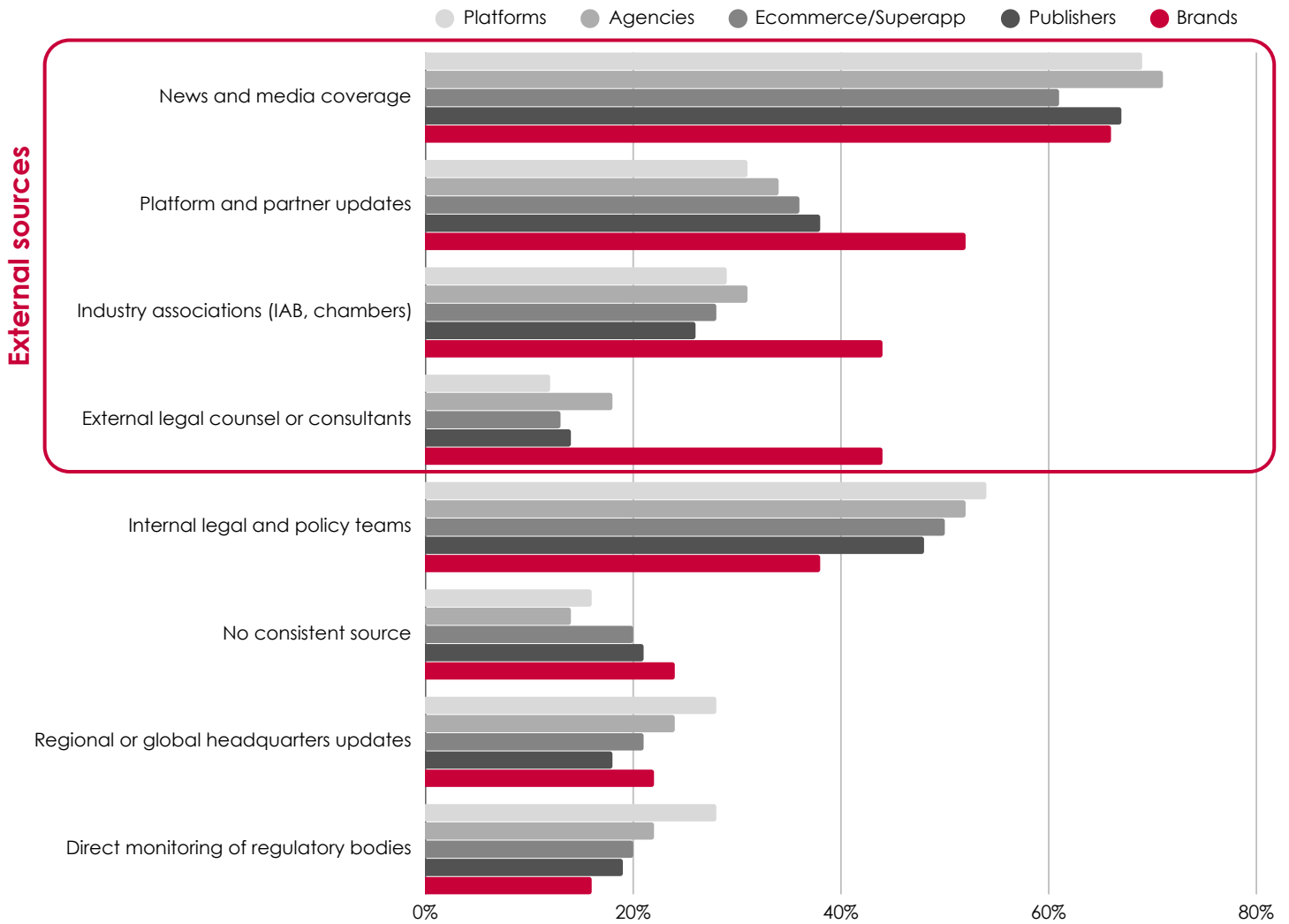
Market	Access	Build	Conduct	Accountability	
Singapore	AI Governance, AI Ethics, AI Transparency, AI Security, AI Privacy, AI Risk Management, AI Incident Response, AI Model Governance, AI Model Performance, AI Model Explainability, AI Model Auditability, AI Model Accountability, AI Model Transparency, AI Model Security, AI Model Privacy, AI Model Risk Management, AI Model Incident Response, AI Model Model Governance, AI Model Model Performance, AI Model Model Explainability, AI Model Model Auditability, AI Model Model Accountability, AI Model Model Transparency, AI Model Model Security, AI Model Model Privacy, AI Model Model Risk Management, AI Model Model Incident Response	AI Governance, AI Ethics, AI Transparency, AI Security, AI Privacy, AI Risk Management, AI Incident Response, AI Model Governance, AI Model Performance, AI Model Explainability, AI Model Auditability, AI Model Accountability, AI Model Transparency, AI Model Security, AI Model Privacy, AI Model Risk Management, AI Model Incident Response	AI Governance, AI Ethics, AI Transparency, AI Security, AI Privacy, AI Risk Management, AI Incident Response, AI Model Governance, AI Model Performance, AI Model Explainability, AI Model Auditability, AI Model Accountability, AI Model Transparency, AI Model Security, AI Model Privacy, AI Model Risk Management, AI Model Incident Response	AI Governance, AI Ethics, AI Transparency, AI Security, AI Privacy, AI Risk Management, AI Incident Response, AI Model Governance, AI Model Performance, AI Model Explainability, AI Model Auditability, AI Model Accountability, AI Model Transparency, AI Model Security, AI Model Privacy, AI Model Risk Management, AI Model Incident Response	AI Governance, AI Ethics, AI Transparency, AI Security, AI Privacy, AI Risk Management, AI Incident Response, AI Model Governance, AI Model Performance, AI Model Explainability, AI Model Auditability, AI Model Accountability, AI Model Transparency, AI Model Security, AI Model Privacy, AI Model Risk Management, AI Model Incident Response
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**Applying the ABCs of Responsible AI Integration in Your Own Company**

The ABCs of Responsible AI Integration work for any company type, whether you're a platform, a service provider, or a product provider. Regional examples, like platform or small business, may vary but they help you apply the principles to your operations.

- Know your role.** Identify where your business sits on a Provider, Buyer, Partner, or Approver. Some companies play multiple roles (e.g., agency is a Buyer when working with platforms, but also comes a Partner when working with clients). A Provider is a Provider when selling products, but becomes a Buyer when purchasing data services. Knowing which role you play in each business relationship defines who owns which responsibilities.
- Align with the ABCs.** Access, Build, and Conduct practices align with Access, Build, and Conduct. You might find that data control or user Access but gaps in human review under Conduct. This helps identify where to strengthen your AI governance.
- Scale to your market.** Check and update your legal requirements. The ABC model guidance table provides a starting point for AI regulations, but regulations vary and are evolving. Companies operating across multiple markets need to adjust for each of these variations.
- Review and evolve.** Recall the ABCs in your AI use cases. When you add new tools, enter new markets, or regulations change, update your workflow, partner requirements, and team training accordingly. As capabilities and regulations are changing quickly and business needs to stay right.

## Brands depend on external sources to stay informed



Footer: Base: n=1,752. Multi-select question; respondents could choose more than one option.

Brand respondents have the lowest rate of using internal legal and policy teams (38%), the lowest rate of monitoring regulatory bodies (16%), and the highest reliance on platform or partner updates as an information source (52%). Brands are the most dependent on external sources to stay informed about the regulations affecting them.

48% of those unaware of regulations have no regular way of staying informed at all. Where companies invest in keeping their teams informed, through internal expertise, industry associations, or both, awareness is higher across every regulatory domain.

“  
 "Legal sends us quarterly updates but they cover APAC not just SEA so you have to figure out which parts apply to your market."  
 - Brand, Vietnam

# Understanding

Who is responsible, where they are based, and whether teams feel they have what they need.

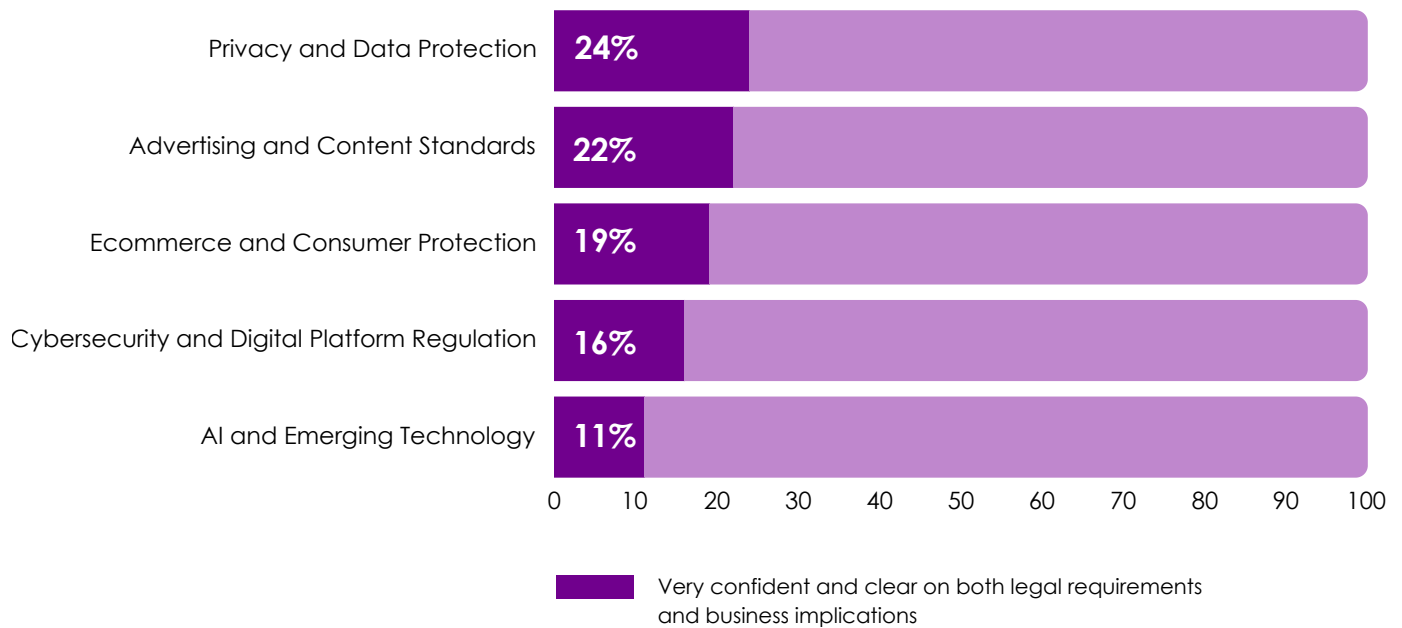
## Understanding

### Knowing a regulation exists and knowing what it means for your role are two different things

Most people involved in regulatory decisions need guidance before they can act on them. Teams want to understand how regulations apply to their role, in their market, but many do not know who in their company can help them. The support teams are looking for is the same, whether they feel confident about their company's readiness or not.

Among the 81% of respondents involved in regulatory decisions, only 24% are very confident they understand both the legal requirements and the business implications. Three quarters need some level of guidance before they can act, from wanting help interpreting how a regulation applies to their role, to being unsure whether it applies to them at all.

### Those responsible for regulatory decisions need more guidance before they can act



Base: n=1,419. Respondents who are final decision-makers, recommenders/approvers, or involved/consulted in regulatory matters.

Confidence is highest in privacy and data protection where laws are more established, and lowest in AI and emerging technology at 11%. As new regulatory domains come into effect alongside those already in place, teams will need guidance specific to each one.

“

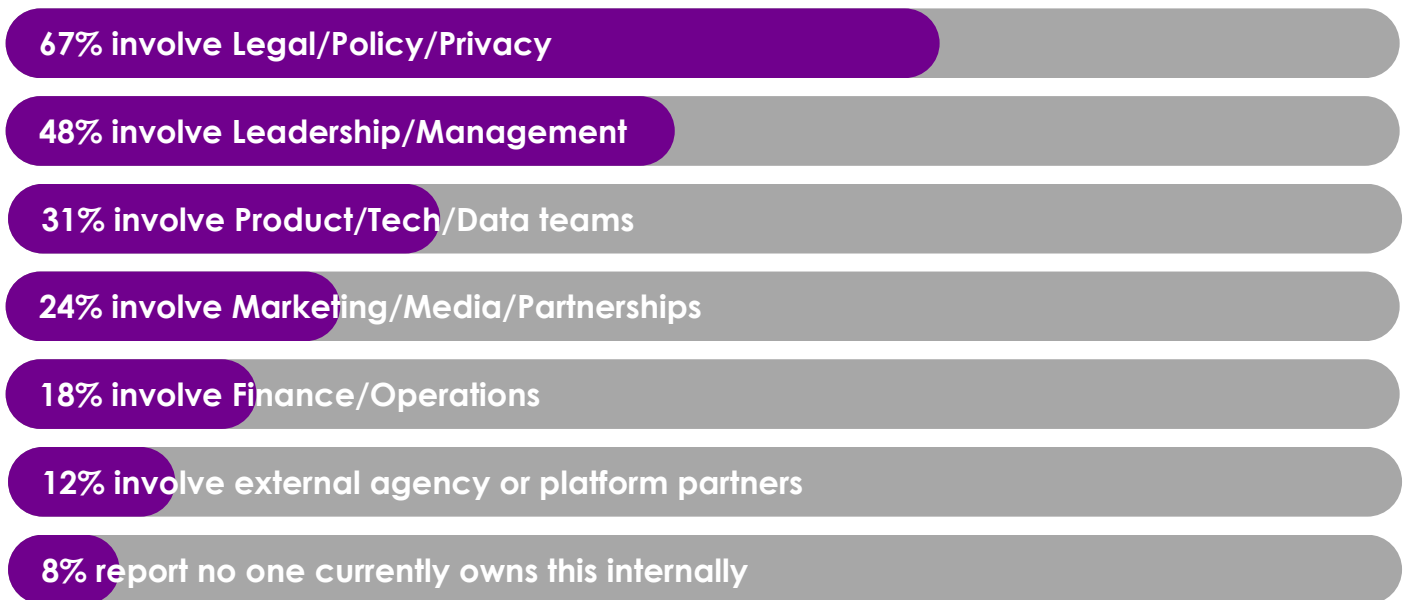
"Our privacy person left and it took four months to replace them. During those four months nobody was tracking what changed."  
- Ecommerce/Superapp, Indonesia

When asked what makes it difficult to understand how regulations affect them, **44% say they cannot find explanations in language they can use.**

39% say internal communication or training is limited. 34% say regulations are written in language too complex for non-legal roles. While teams may have access to regulatory information; what they are asking for is someone to connect it to the decisions they make in their role, in their market.

Respondents in multi-market roles are 50% more likely to report no consistent information source than single-market respondents (15% vs 10%) - the more markets you cover, the less connected you are to what is happening in each one.

**Most companies have someone responsible for regulations, but teams may not know who they are**



Base: n=1,752. Multi-select question.

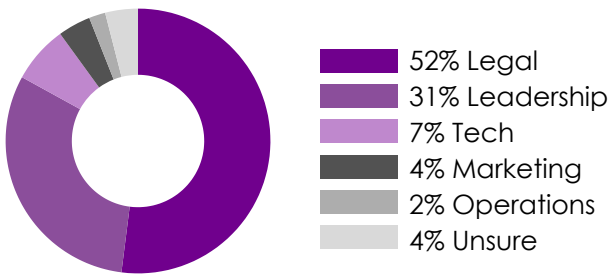
**67% of companies involve Legal in regulatory decisions, and most involve at least one other function.**

But 27% of respondents would not know who in their company is responsible for helping them understand how a regulation applies to their role. Another 8% say no one owns this internally at all. While most companies have people responsible for regulations, the problem is that the teams who need their help don't know how to find them.



**Where multiple functions are involved, Legal holds ultimate accountability at 52% and Leadership at 31%.**

For Agencies, Legal and Leadership split accountability almost evenly, treating compliance as a business conversation as much as a legal one.



Base: n=1,286. Respondents who selected multiple functions as involved in regulatory readiness. When multiple functions are involved, one role was identified as holding ultimate responsibility.

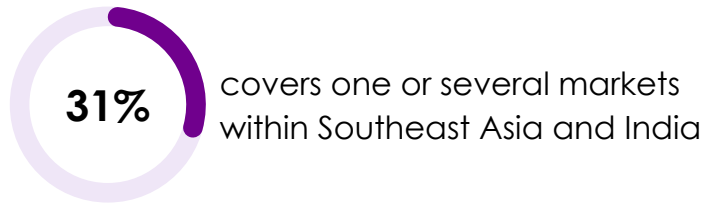
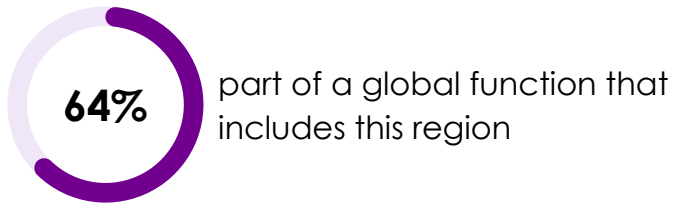


"We run our loyalty programme out of our regional hub for multiple markets. Last year I found out the way we collect consent for sign-ups is not valid in one of them and no one flagged it."  
- Brand, Regional

Even when there is defined ownership, this role is often based outside the region and from the markets where regulations are applied; 56% of those responsible are part of a global function not in Southeast Asia and India. Only 9% are focused on a single domestic market. The further the expertise is from the market where a regulation is enforced, the harder it is for teams in that market to get guidance specific to their role.

Brands (55%) and Ecommerce/Superapps (50%) assign accountability to Legal. Brands are also the company type most likely to rely on external legal counsel (44%), external information sources (52%), and global functions not based in the region for compliance, making them the most dependent on sources outside of their business for updates and information.

## Those accountable for regulatory readiness are often based outside the region



Base: n=1,245. Respondents whose companies have dedicated resources for regulatory readiness.

In 38% of companies, the responsibility is shared across different people with no single owner. 33% have a dedicated legal or compliance function. 9% have no defined owner at all. Publishers and Brands favour shared responsibility models (44% and 43%), while Partners split evenly between shared and dedicated Legal (34% each).

“

"I approved a retargeting campaign last month and then found out the tracking pixels we were using might not be compliant."

- Agency, Thailand

**82% of respondents** who understand the regulations affecting them say their company is prepared.

### What prepared companies do differently

Among those who do not, this is 41%. Understanding is what separates companies that feel ready from those that do not.

### Two practices are common amongst the most prepared companies

**35%**

highly prepared: defined processes, specified roles, regular internal education

**36%**

somewhat prepared: processes exist but communication or training is limited

**16%**

minimally prepared: awareness exists but actions are mostly reactive

**5%**

not prepared

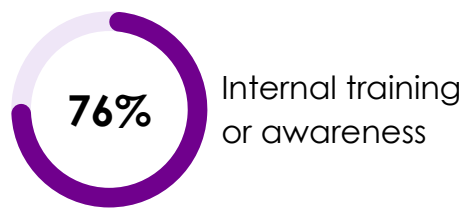
**8%**

unsure

Base: n=1,752.

The most prepared companies invest in empowering their teams at 2x the rate of the least prepared. Two practices stand out: defined roles or points of contact for regulatory response (81% of the most prepared vs 57% of the somewhat prepared) and internal training or awareness sessions (76% vs 52%). People who know who to go to and receive updates and training on what regulations mean for their role report higher preparedness across every domain.

When companies look ahead, confidence is lower. Only 14% are very confident their company can adapt to new regulations. 31% understand the risks but have limited ability to act on them. The difference between feeling ready for what is in place now and feeling ready for what is coming is where most companies are.



Base: n=620. Respondents reporting their company is highly prepared.

## The #1 request is guidance connecting regulations to business decisions

The top request is the same whether companies feel confident or not; access to timely, region-specific guidance connecting regulations to business decisions. 59% of those who feel their company can adapt say this is what gives them confidence. 48% of those who feel their company cannot yet adapt say it is what would most increase it.



“

"Templates showing what different regulations mean for specific campaign types would save us weeks of back and forth with legal."

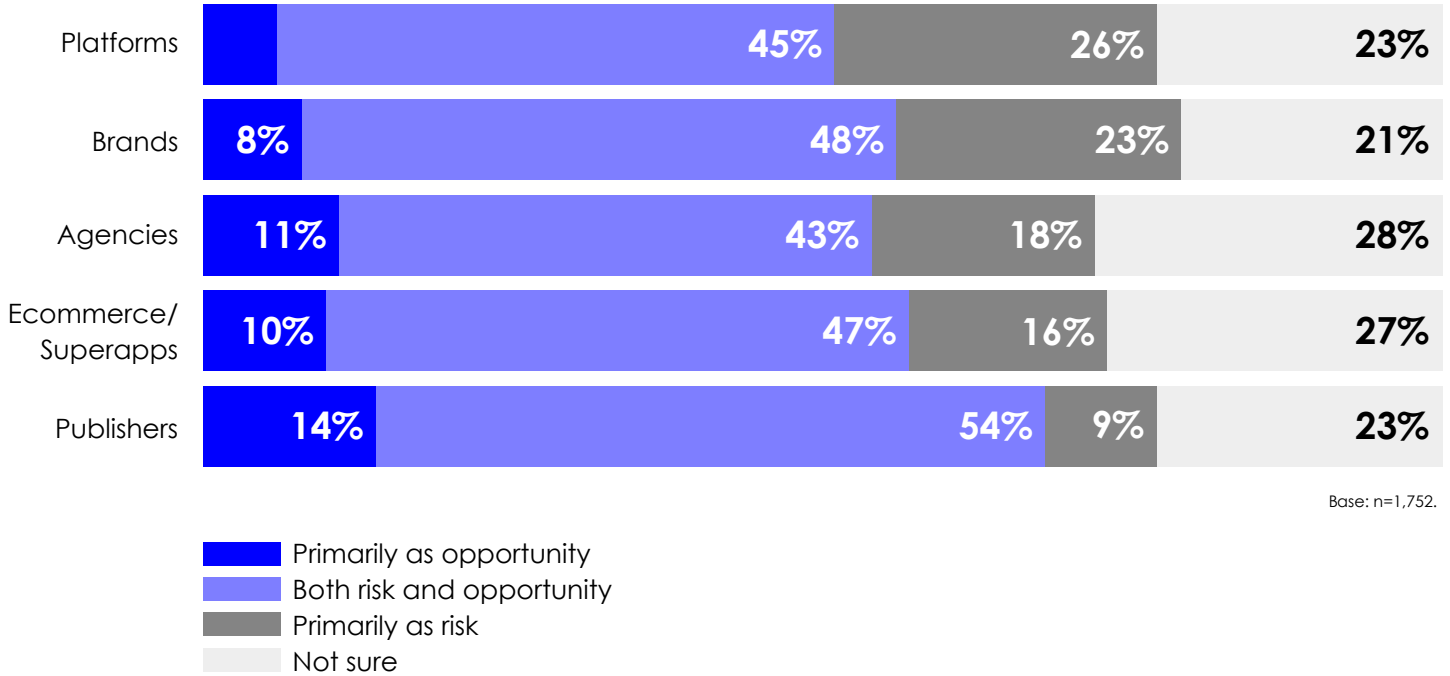
- Brand, Regional

# Opportunity

How companies currently engage with regulations while they're being developed and what they would invest in to improve their capabilities.

# Opportunity

## More than half of the industry sees opportunity in regulation



Most companies view regulation as both a risk and an opportunity, depending on the regulation and the market (47%). 20% see it primarily as a risk. 9% see it primarily as an opportunity, and among this group, 62% say the advantage is trust and credibility with clients, while 25% say it opens market access. Compliance is already part of how these companies win and retain business.

## Those who feel regulation is an opportunity see a competitive advantage



Base: n=157. Respondents who view regulation primarily as an opportunity. Open-text responses coded thematically.

## Most companies engage with regulations after the opportunity to inform them has passed



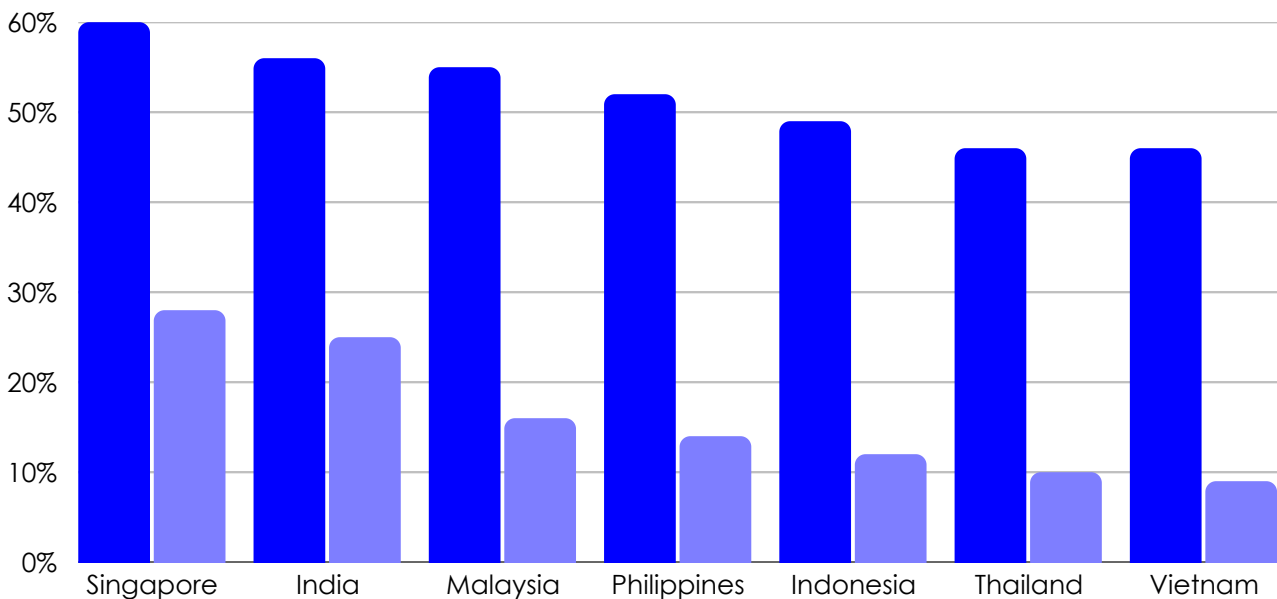
Base: n=1,752.

Compliance is already part of how companies win and retain business. Governments invite industry input while regulations are being developed, but most companies first engage only after they take effect. The appetite to participate earlier is strong, and so is the opportunity.

Governments and policy makers invite industry comment on draft regulations before they take effect. Singapore and India have structured public consultation frameworks; in other markets the process is less formalised or less widely publicised. 59% of companies first engage with a regulation after it has been implemented or enforcement begins. Only 8% engage during the drafting phase, when policy makers are inviting industry input.

## Singapore and India's structured industry consultation processes have higher participation

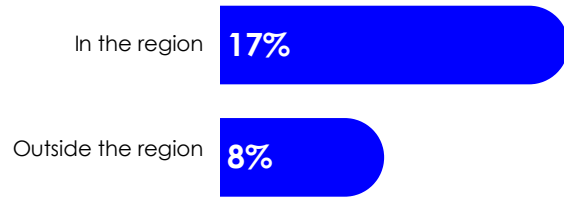
- Aware of formal feedback processes (% of market respondents)
- Company has submitted formal feedback (% of those aware)



Base: n=1,752. Respondents by primary market of operational focus.

## Proximity increases participation

58% of legal respondents participate during the drafting phase, when regulators seek industry input. Product (25%), Leadership (29%), and Finance (29%) engage only after implementation. Companies with in-region legal teams submitted formal feedback at twice the rate (17%) of those where legal is based outside the region (8%).



Base: n=1,245. Respondents whose companies have dedicated resources for regulatory readiness. In-region figure is a weighted average of domestic (19%, 9% of base) and regional (16%, 22% of base) respondents.



"We would participate in formal feedback if someone coordinated it. We do not have the bandwidth or the connections."

- Publisher, Philippines

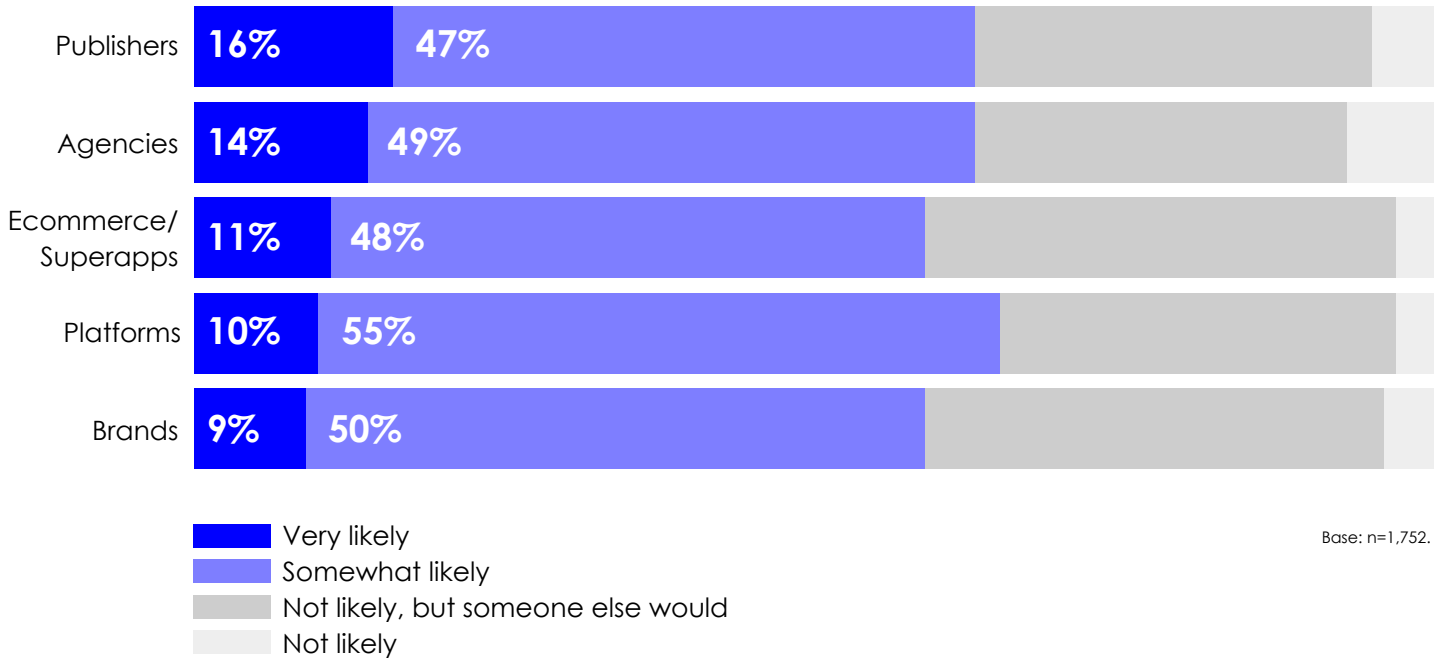
In every market, awareness of formal feedback processes increases participation. More industry voices during the drafting phase means regulations are better informed by the companies they will affect.

## Most companies plan to increase their investment in being better prepared over the next 12 months

66% of companies plan to increase their investment in being better prepared over the next 12 months. 63% of respondents want to participate in industry forums. These forums serve two purposes: creating guidance for how regulations apply to different roles and markets, and contributing collective submissions to formal feedback on regulations in development.

56% say they want more accessible ways to contribute to formal regulatory feedback. Collective submissions give a representative voice to the companies and roles beyond those currently engaging directly with regulators.

## There is appetite to work together on regulatory guidance and collective feedback submissions



“

"Clients are asking about compliance in RFPs now."

- Partner, Malaysia



## Conclusion

Most people believe their company is across regulations even though less than half are aware of the regulations already affecting their role. And most are assuming someone else in the company has it covered. Our industry feels more prepared than it is.

With compliance already part of most RFPs and pitches, and regulations continuing to evolve concurrently across every market, investing more in being prepared for current and coming regulations will strengthen both how your company manages risk and how you are perceived by the clients and partners you work with.

Whether you choose to develop these capabilities further internally and participate in formal feedback independently, or whether you choose to support collective industry engagement to extend your capacity; either way, the industry will have a more representative voice informing how regulations are developed and how companies can prepare for them.

We've created a three-step action plan to help your company take ownership of regulatory readiness, develop guidance for the different roles and markets in your business, and engage early with policy makers while regulations are still being developed. If you'd like to support and be part of doing this collectively, let us know at [hello@iabseindia.com](mailto:hello@iabseindia.com).

Sediakan payung sebelum hujan: prepare the umbrella before it rains.



**Miranda Dimopoulos**  
Regional CEO



# A three-step action plan for the next 12 months

# 1. Assign someone in this region who is responsible for regulation

Companies with regulatory expertise based in the region are 2-3x more likely to participate in formal feedback on draft regulations, and report higher awareness, higher confidence, and higher preparedness across every domain. Once this person is in place, they can then support the next two steps;

**2.**

**Developing the internal guidance your teams need**

**3.**

**Engage with policy makers while regulations are being developed**

## 2. Develop guidance connecting regulations to business decisions

44% of respondents say they cannot find guidance on how regulations apply to their role and market. When asked what single change would make compliance easier, respondents described centralised, plain-language guidance they can act on. This includes:

- Monitoring regulatory developments in the markets where the company operates
- Translating regulations into guidance for different markets and functions, so teams can see how a regulation applies to their specific roles
- Advising leadership on the company's position on regulations, both those in place and those in development, so the company has a view before it is asked for one by a client or partner
- Being the point of contact when teams have questions about how a regulation affects them
- Supporting RFPs and proposals with up-to-date company compliance information

## 3 Engage early with policy makers while regulations are being developed

59% of companies first engage with a regulation after it takes effect. Only 8% participate during the drafting phase, when governments are inviting industry input. This can include:

- Responding to public consultations and formal feedback requests on draft regulations before they take effect
- Participating in roundtables, and stakeholder dialogues convened by governments and regulatory bodies
- Contributing to the development of industry codes of conduct and self-regulatory standards that complement government regulation
- Joining regulatory sandbox programmes to test how new requirements apply before they are finalised

# Appendix

# Methodology

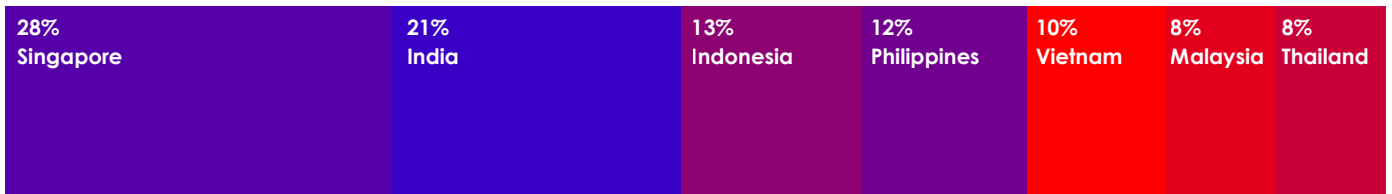
Fieldwork was conducted in December 2025 through an online survey distributed via IAB SEA+India research panels.

## Sample

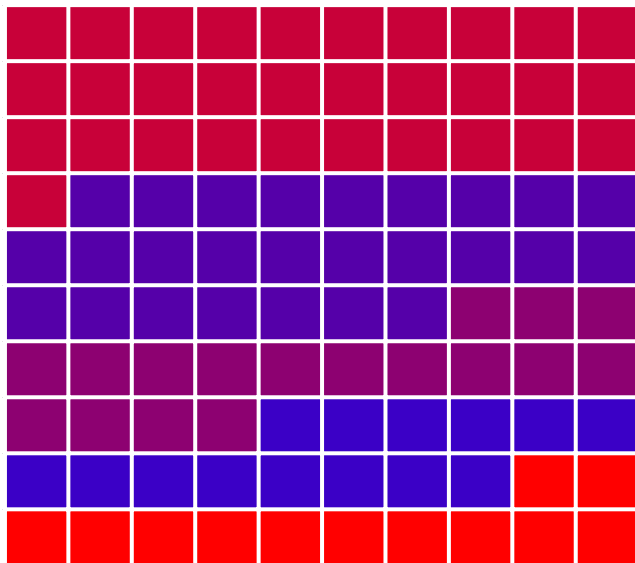
1,752 digital marketing professionals across seven markets.

## Markets

Respondents were assigned to their primary market of operational focus.

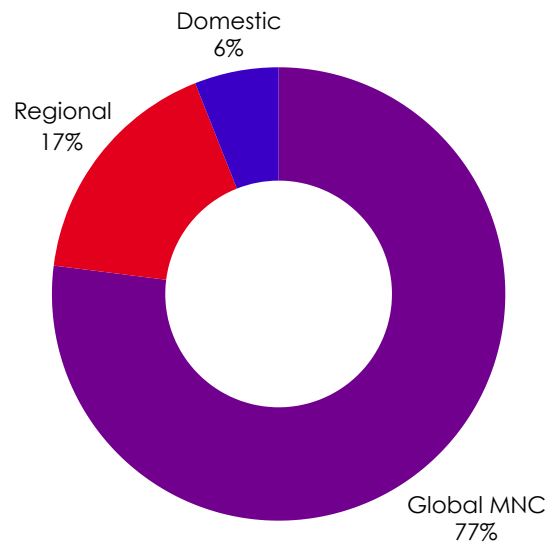


## Company types

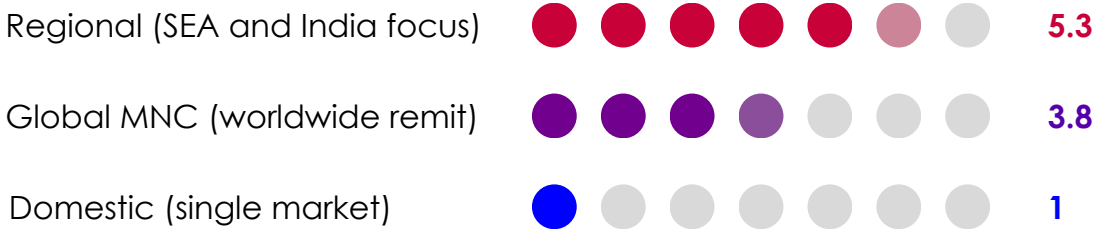


- 31% Platforms
- 26% Agencies
- 17% Brands
- 14% Publishers
- 12% Ecommerce/Superapps

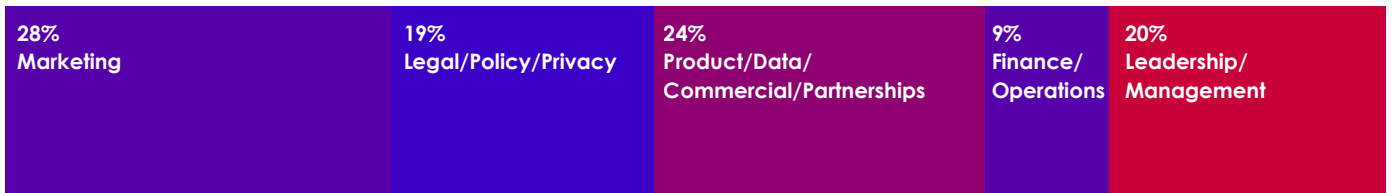
## Company footprint



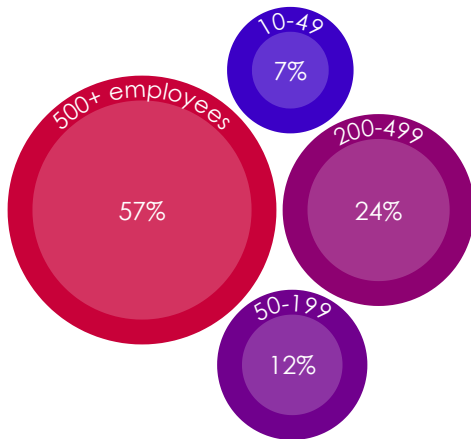
### Market coverage by company footprint (average)



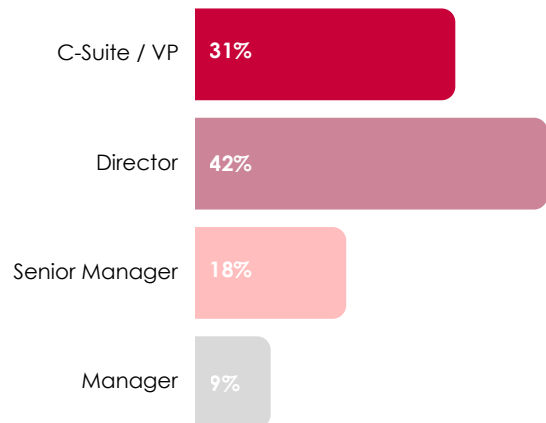
### Role



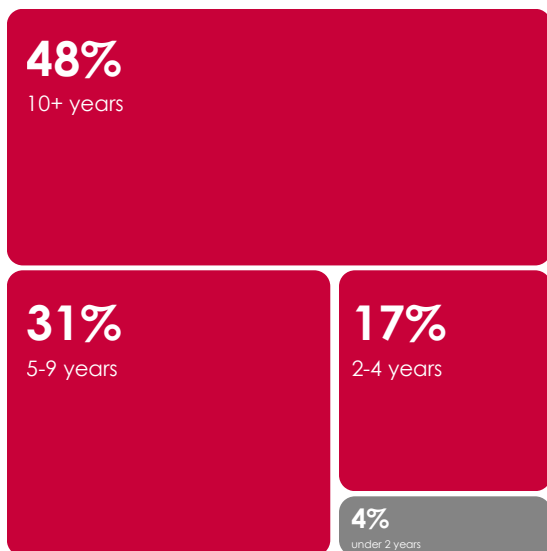
### Company size



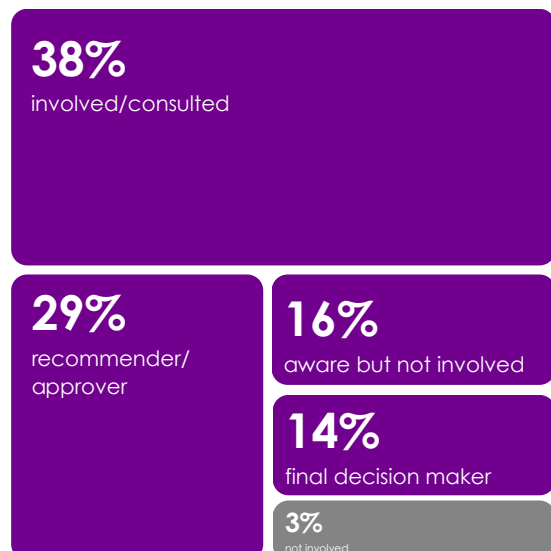
### Seniority



### Experience



### Involvement in regulatory matters



**Survey design**

Survey questions were designed by IAB SEA+India, covering regulatory awareness, information sources, organisational structure, preparedness practices, confidence, improvement priorities, and outlook. Open-text responses were coded thematically.

**Branched questions**

Several survey questions were shown only to specific respondent subsets based on prior responses. Where findings derive from branched questions, the applicable base and sample size are noted.

**Use of quotations**

Verbatim quotes reproduced in this study are drawn from open-text survey responses. Quotes have been lightly edited for spelling, and to remove identifying details, in line with the confidentiality terms of the survey.

**Limitations**

Most respondents are from larger companies (57% with 500+ employees) and Global MNCs (77%). The sample composition skews toward senior (73% Director or above) respondents. Cross-tabulation by seniority and experience was tested but did not show strong variation to core findings.

**Use of AI tools**

AI tools were not used to generate findings, code responses, or calculate results. They were used as a secondary check to compare raw responses against drafted insights for potential omissions and to edit for brevity. No respondent data was used to train any model; the tools were used in a controlled review workflow.



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.

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