2025 Global Insights

DoubleVerify

2025 Global Insights:
APAC Report

Media Authentication Trends in APAC and Across the Globe

When ads appear in unsuitable environments, aren't viewable or are served to bots instead of real people, it leads to media waste — and ultimately, lost revenue. This is why it's essential for advertisers to prioritize brand suitability, viewability, fraud prevention and attention optimization. These core dimensions of media quality directly impact campaign performance and ROI.

As technology evolves and consumer behavior shifts, so do the risks and opportunities for brands. This report explores these dynamics through a global lens, with a close-up view of the Asia-Pacific (APAC) region. To the right, we present global benchmark data adjacent to regional insights, allowing for side-by-side comparisons that offer immediate clarity into both global and APAC performance trends.

This year's report also includes original research from regional marketers and consumers, offering additional context around digital media investment strategies and the real-world impact of media quality on audience behavior.

What Is Media Waste?

Media waste (as defined by DV for the purposes of this report) is the approximate calculated cost associated with total media violations (Brand Suitability, Fraud/SIVT, etc.). This cost figure is derived by multiplying the total violations by an estimated $3 cost-per-mille (CPM), which reflects the cost per 1,000 impressions.

A Quick Snapshot: Global vs. APAC

	Global	APAC
Brand Suitability Violation Rate	5.2% ↓15%	7.7% ↑15%
Fraud/SIVT Rate	1.0% ↓7%	0.8% ↑2%
Authentic Viewable Rate	70% ↑3%	61% ↓2%
Display Viewable Rate	72% ↑2%	62% ↓4%
Video Viewable Rate	80% ↑6%	82% ↑6%
Attention Index	100%	114%

APAC Marketer Insights

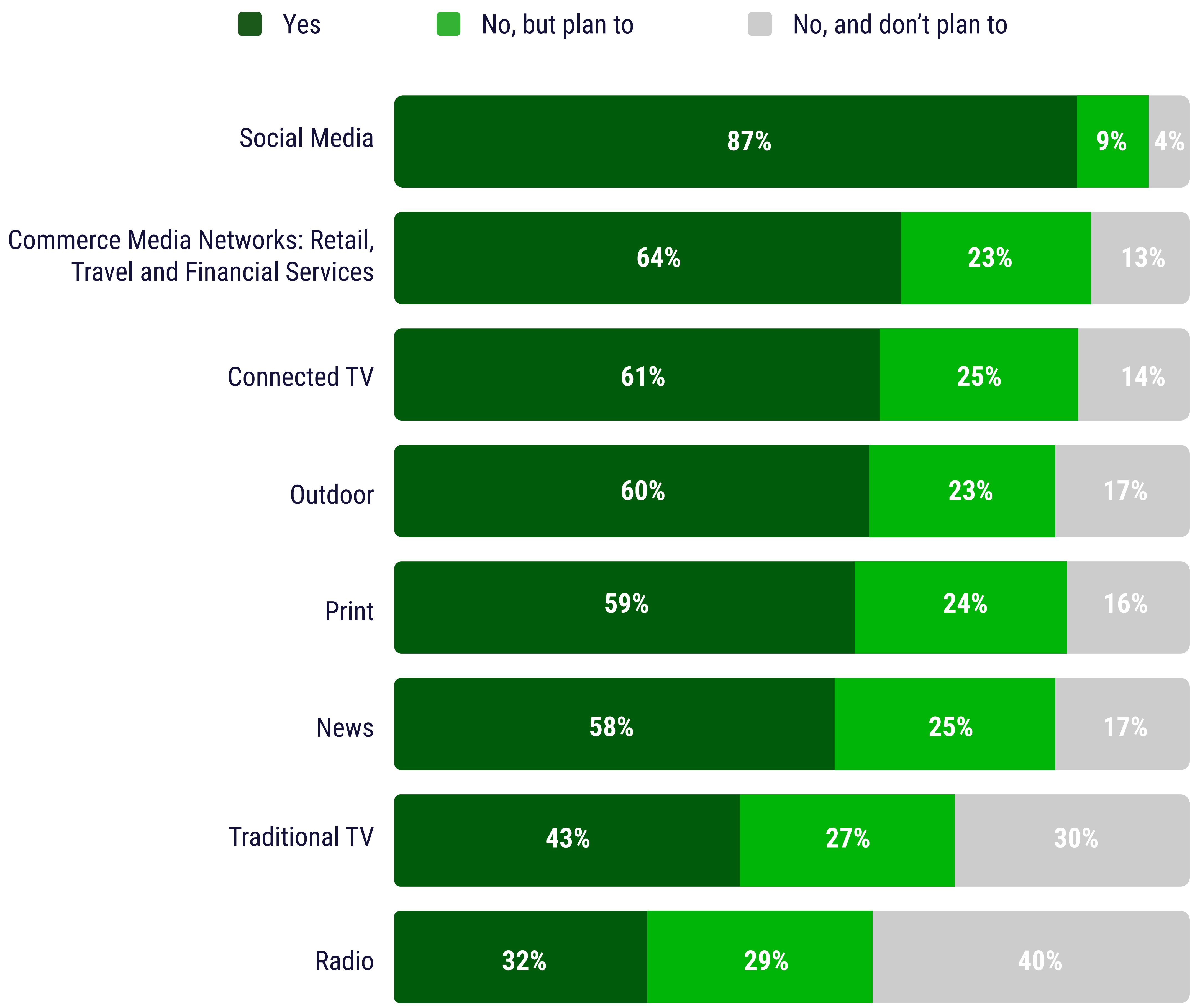
This section presents high-level statistics from a survey conducted among 520 marketers in the APAC region. Commissioned by DV through Sapio Research, this survey offers insights into buying trends in the region and provides context for the benchmarks discussed throughout the rest of the report.

Channel Planning: Where Marketers Are Allocating 2025 Budgets

An overwhelming majority of APAC marketers invest in social media.

Budget allocation strategies vary notably across markets, but an overwhelming majority of APAC marketers invest in social media. Breaking this down, in Australia and New Zealand, 68% of marketers currently advertise on social media, and the vast majority plan to increase investment this year. Additionally, more than 70% of marketers in Southeast Asia and India already advertise on commerce media networks, with over 20% in each market planning to expand their investments further.

APAC Marketer Investment by Advertising Channel

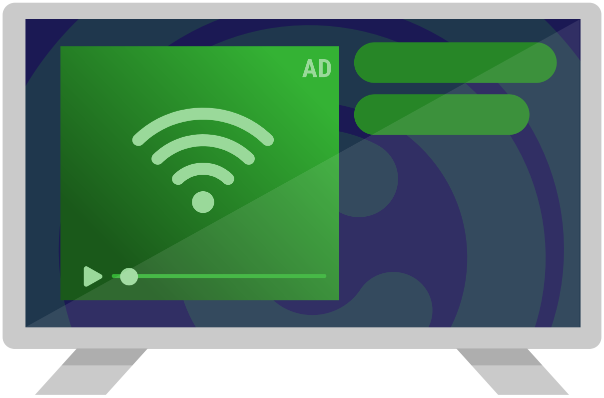


Performance: The Top 5 Formats According to Marketers

When asked which formats outperform campaign baselines, social media emerged as a clear leader. In India and Southeast Asia, over 90% of marketers said social media feeds deliver better-than-average performance, which is unsurprising in these mobile-first markets where social and mobile behaviors are deeply intertwined.

In Australia and New Zealand, reels were ranked highest, with 81% of marketers citing them as a top-performing format. Meanwhile, in Japan, 56% of marketers reported that connected TV (CTV) delivers above-average performance, despite fewer than half currently buying on the channel, pointing to untapped potential in the region's evolving media mix.

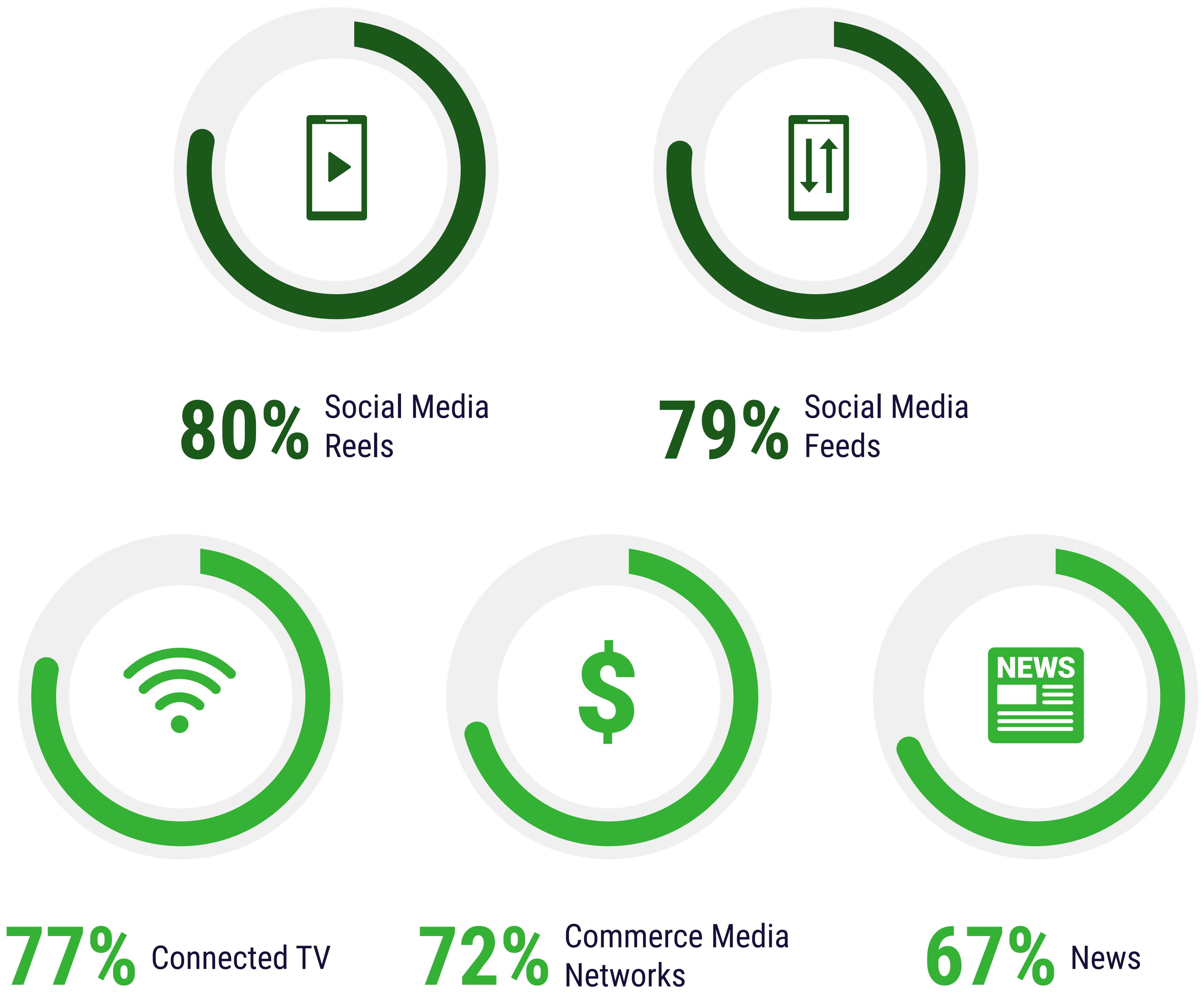
81% of marketers in Australia and New Zealand rank reels as a top performing format.



56% of marketers in Japan reported CTV delivers above average performance.

Top Channels According to Marketers

Percent of Marketers Who Say Channel Performs Better than Baseline



APAC Consumer Insights

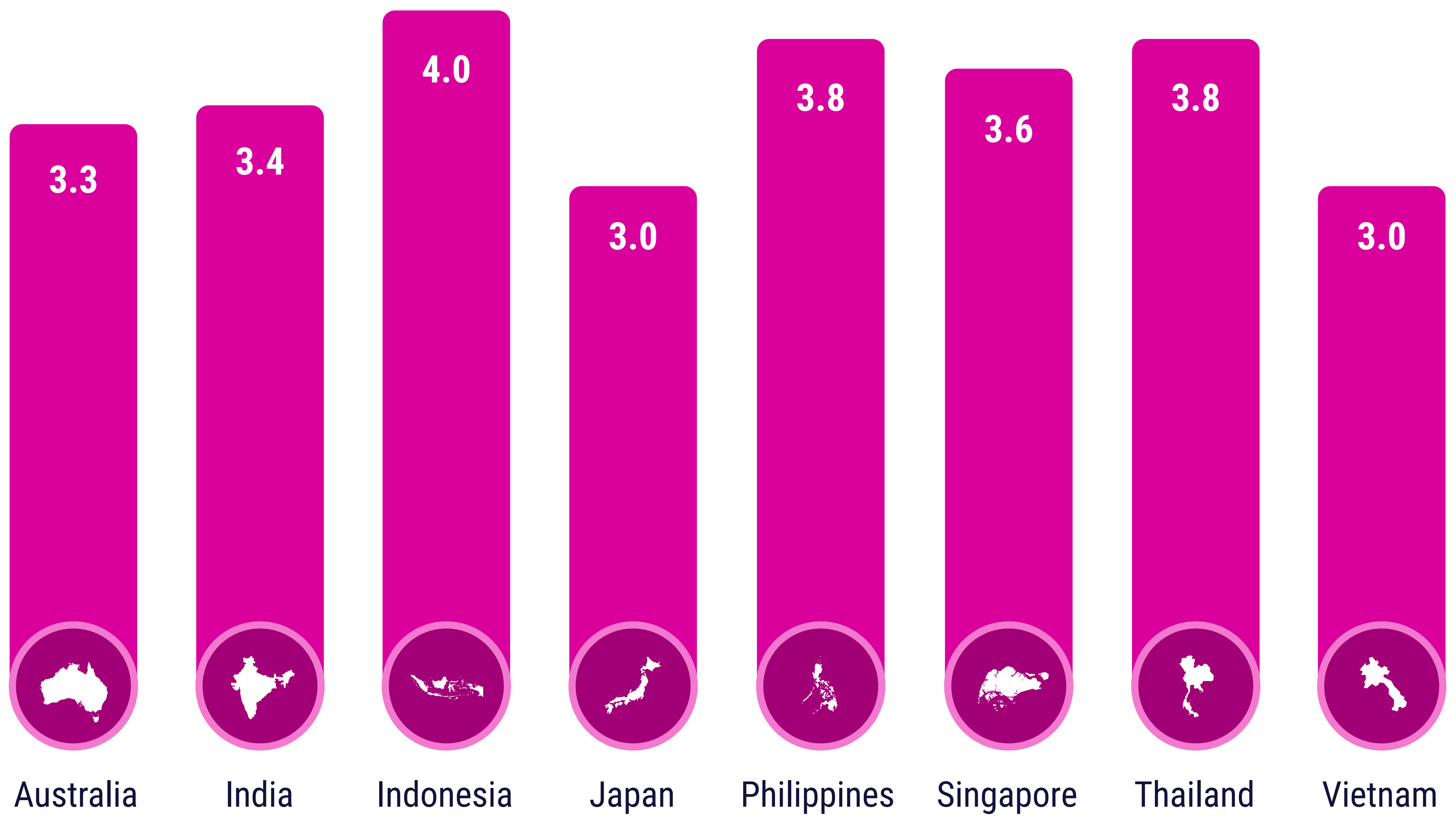
This section presents high-level statistics from a survey of 8,000 consumers in the APAC region commissioned by DV through Sapio Research. These statistics provide insights into consumer behavioral trends that impact online ad performance.

Online Content Consumption Is Growing Steadily

Online content consumption continues to grow steadily across the region, with consumers spending an average of 3.5 hours of their daily leisure time engaging with digital content. Social media plays a central role in this trend: 95% of APAC consumers report regularly engaging with social content, and 34% expect to spend even more time on these platforms over the next 12 months, outpacing the global average of 28%.

95% of APAC
consumers reported regularly engaging with social content.

Average Online Content Consumption (Hours) by Country

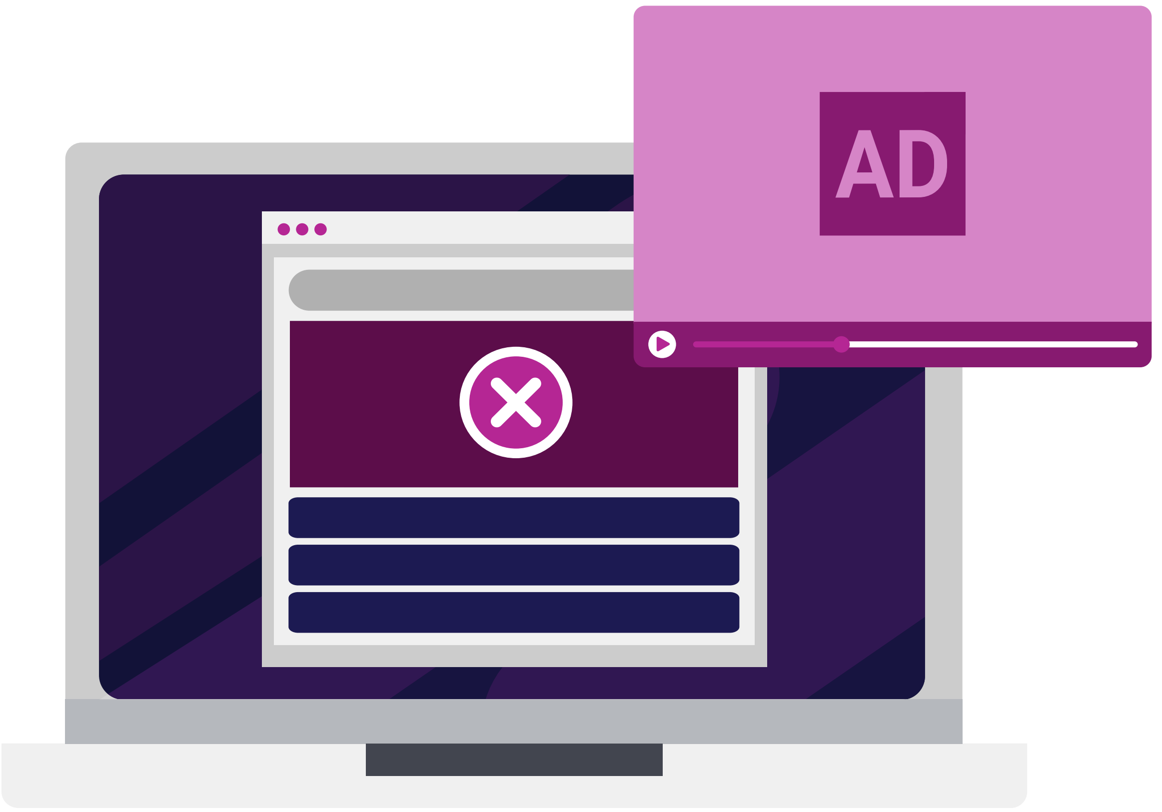


Ad Avoidance Is a Growing Reality

The survey found that **46% of consumers in APAC** use ad blockers. This underscores the urgent need for relevant, high-quality ad experiences. Advertisers must prioritize media quality to ensure their messages are seen and trusted, even as consumer control over ad experiences increases.

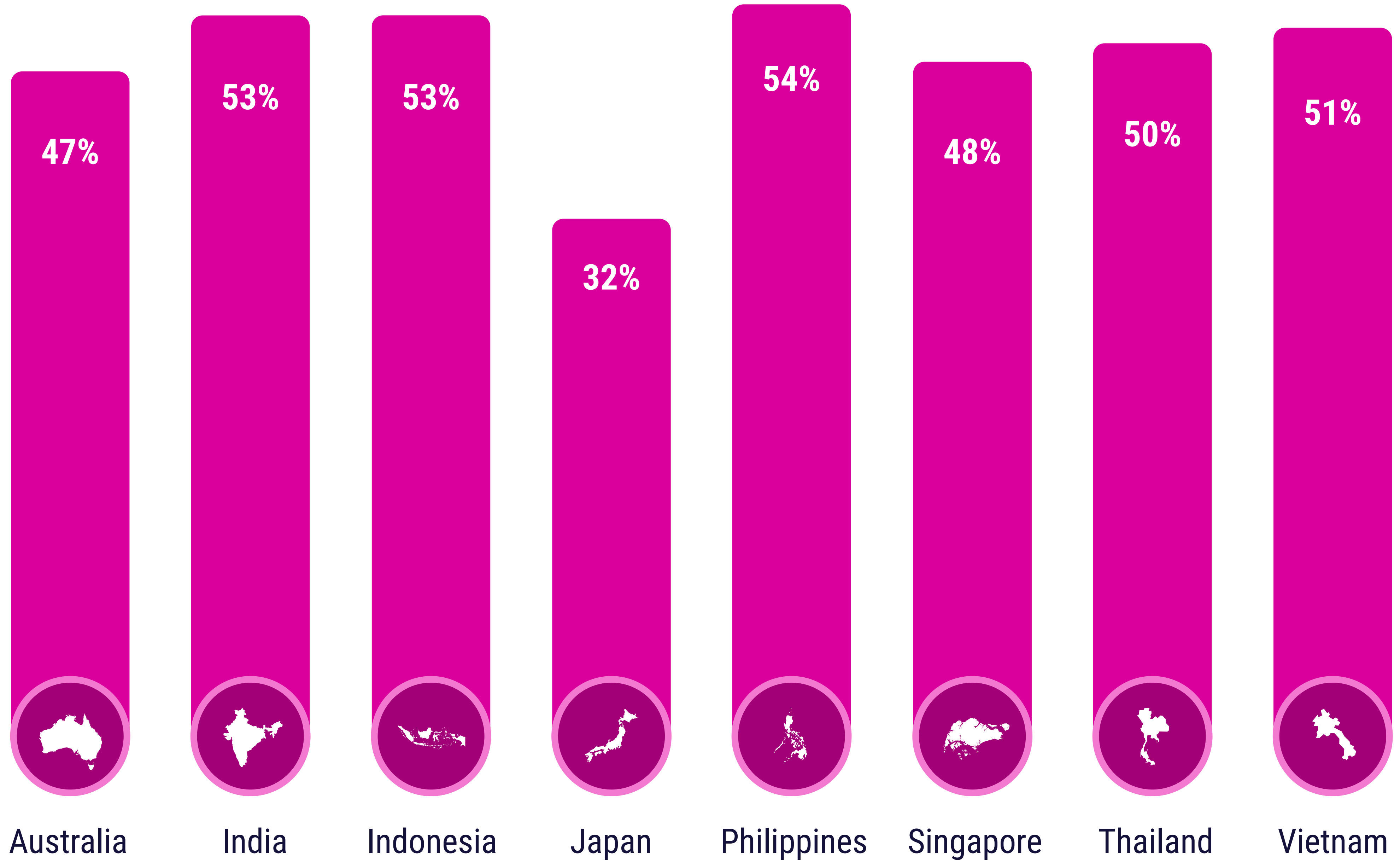
Misaligned Content Leads to Fewer Conversions for Brands

With this increased consumption comes heightened sensitivity to content alignment. Nearly half of APAC consumers say they're less likely to purchase from brands whose ads appear alongside content they find objectionable. This effect is especially pronounced among parents with young children, 52% of whom said misaligned ads would negatively influence their purchase decisions. The impact also extends to brand reputation, with 61% of Indian consumers and 60% of Filipino consumers saying they would encourage friends and family to stop using a brand or product they perceived as being poorly aligned.



Nearly half of APAC consumers say they're less likely to purchase from brands whose ads appear alongside content they find objectionable.

Percent of Consumers That Would Stop Using a Brand Seen Next to False, Objectionable or Inflammatory Content



Brand Suitability Insights

This section provides essential benchmarks for brand suitability across APAC, incorporating relevant dimensions such as media, device and buy type. By presenting these metrics, we aim to help brands assess their current standing and identify areas for improvement. In regions with high brand suitability violations, it's crucial for marketers to take proactive steps to ensure their ad budgets are spent effectively and content is placed in appropriate environments.

Brand Suitability Violations Are Up in APAC

The brand suitability violation rate in the APAC region increased by 15% year-over-year, reaching a level 50% higher than the global average and making it the highest rate among all regions. A volatile news cycle contributed to this trend, due to multiple political-related events and other sensational news.

APAC's brand suitability violation rate is **50% higher than the global average.**

	Brand Suitability Violation Rate
Australia/New Zealand	5.1% ↓10%
Japan	12.2% ↑67%
Hong Kong	9.2% ↓1%
India	4.3% ↓3%
Southeast Asia	7.2% ↓2%
Indonesia	6.3% ↑19%
Malaysia	5.3% ↓49%
Philippines	2.9% ↓44%
Singapore	9.4% ↑14%
Thailand	8.1% ↑19%
Vietnam	8.3% ↑14%
Total	**7.7% ↑15%**

Japan played a significant role in the brand suitability violation increase in APAC, surging by 67% year-over-year. Additionally, 80% of the brand suitability violations in Japan were Unsuitable Category violations — the rate of which increased 58% year-over-year.

This coincided with Japan's 2024 general election cycle, which saw a series of both political and sex abuse scandals throughout the year, implicating high-profile public figures and dominating the news.

Brand suitability incidents in Japan increased up to 107%, with Crime, Celebrity News and Adult & Sexual content categories having the highest share of violations during periods of heightened media coverage in the Japanese market.

Brand suitability incidents spiked by up to 107% in Japan in 2024.

DV also observed a 342% spike in brand suitability violations in Japan during the nationwide elections. The Law, Government & Politics: Politics content category accounted for the highest share of violations among the Unsuitable Categories. Elections in Indonesia and Thailand also played a role in the increases seen in those countries.

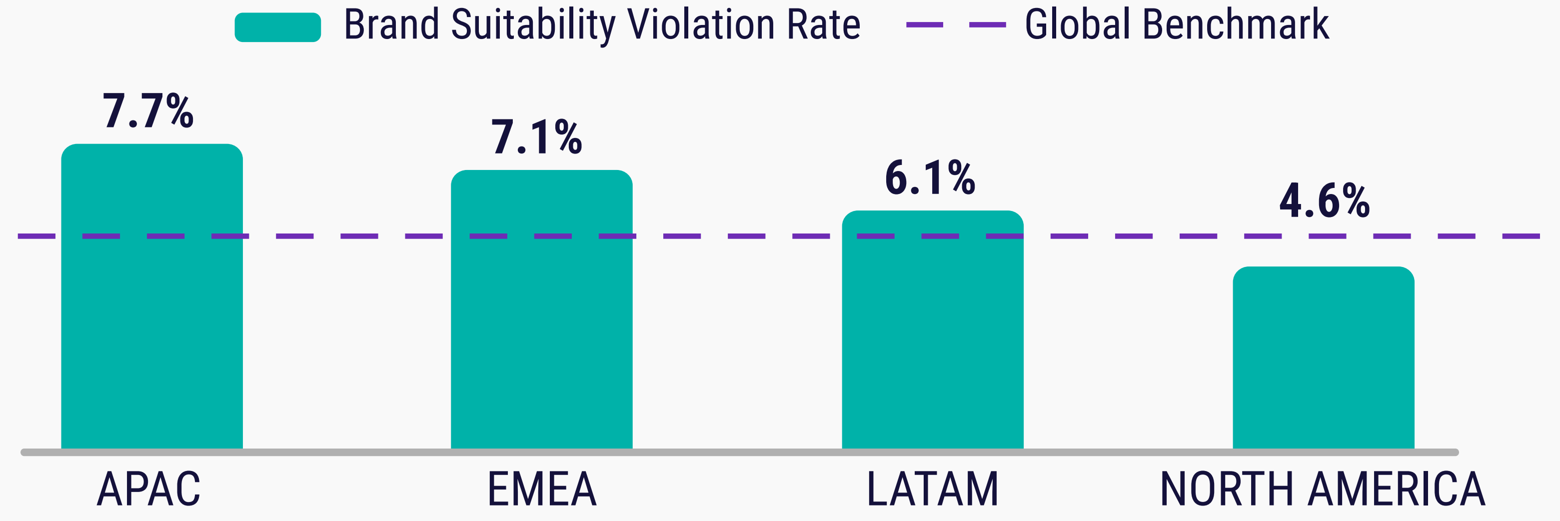
Across the APAC region, mobile web display ads had the highest brand suitability violation rate at 14%, accounting for 62% of all violations in APAC last year. The display ad violation rate increased by 26% year-over-year, while the video ad violation rate decreased by 32%. Programmatic buys experienced a 22% year-over-year increase.

GLOBAL SNAPSHOT

The Status of Brand Suitability Across Regions in 2024

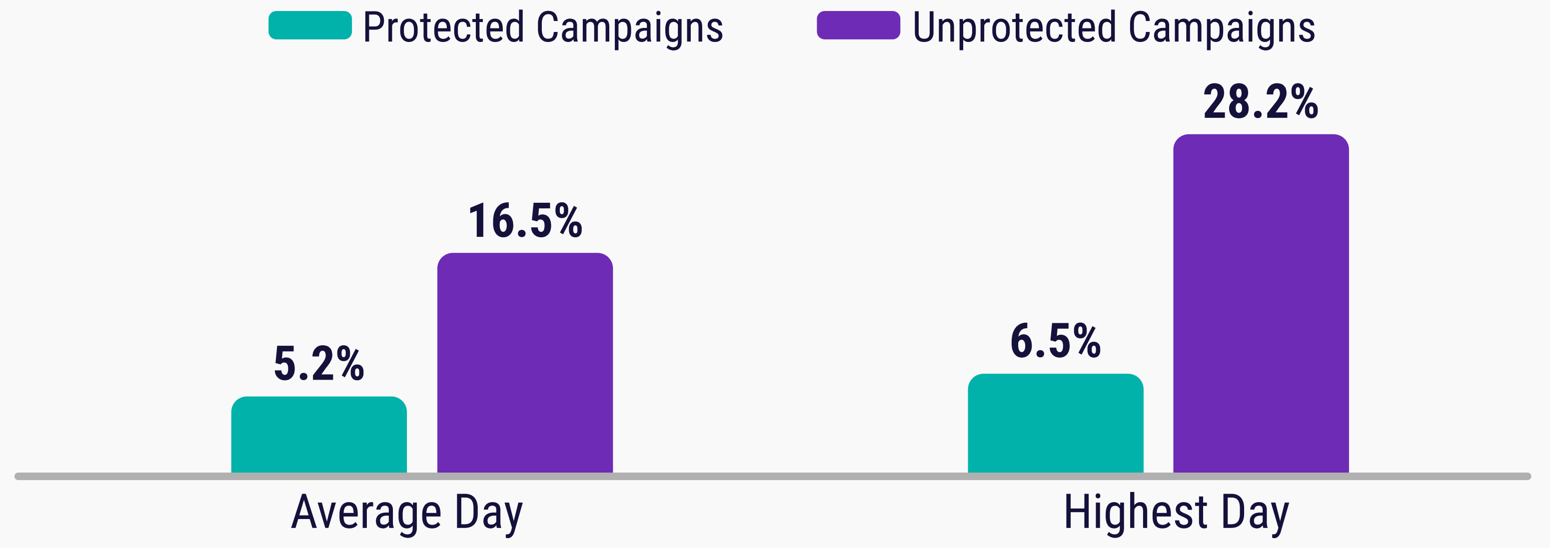
The global brand suitability violation rate went down 15% year-over-year, marking the global benchmark in 2024 at 5.2%.

Brand Suitability Violations: Global Benchmark vs. Regional Rates



Unprotected campaigns faced a significantly higher brand suitability violation rate — 2.2x greater than campaigns protected by DV, which receive pre-bid protections, video filtering and direct client support. The chart below displays this side-by-side comparison by highlighting an average day versus the highest day. This shows the swings that can occur in the open market without protections in place.

Brand Suitability Violations: DV's Protected Campaigns vs. Unprotected Campaigns



GLOBAL SNAPSHOT

To understand the overall decline in brand suitability violations across the globe, here are some additional insights to consider.

Unsuitable Category Violation Rate Was Down 12% in 2024

- Unsuitable Category violations represent 65% of all brand suitability violations.
- In 2024, Unsuitable Category violations dropped by 12%, resulting in it being a large contributor to the overall drop in brand suitability violations.

What Are Unsuitable Categories?

An Unsuitable Category violation refers to content deemed unsuitable for brand alignment based on categories that DV defines and clients configure. In order to meet their unique suitability needs, each client sets up profiles in which they select unsuitable categories for their brand. If an ad serves on the same page, site or app as content from these categories, it is flagged by DV as an Unsuitable Category incident.

Keyword Violations Also Dropped by 7%

- Keyword violations also fell slightly, down 7% year-over-year.
- Mobile web display ads had an 80% higher rate than the overall keyword violation rate global benchmark (1.1%).

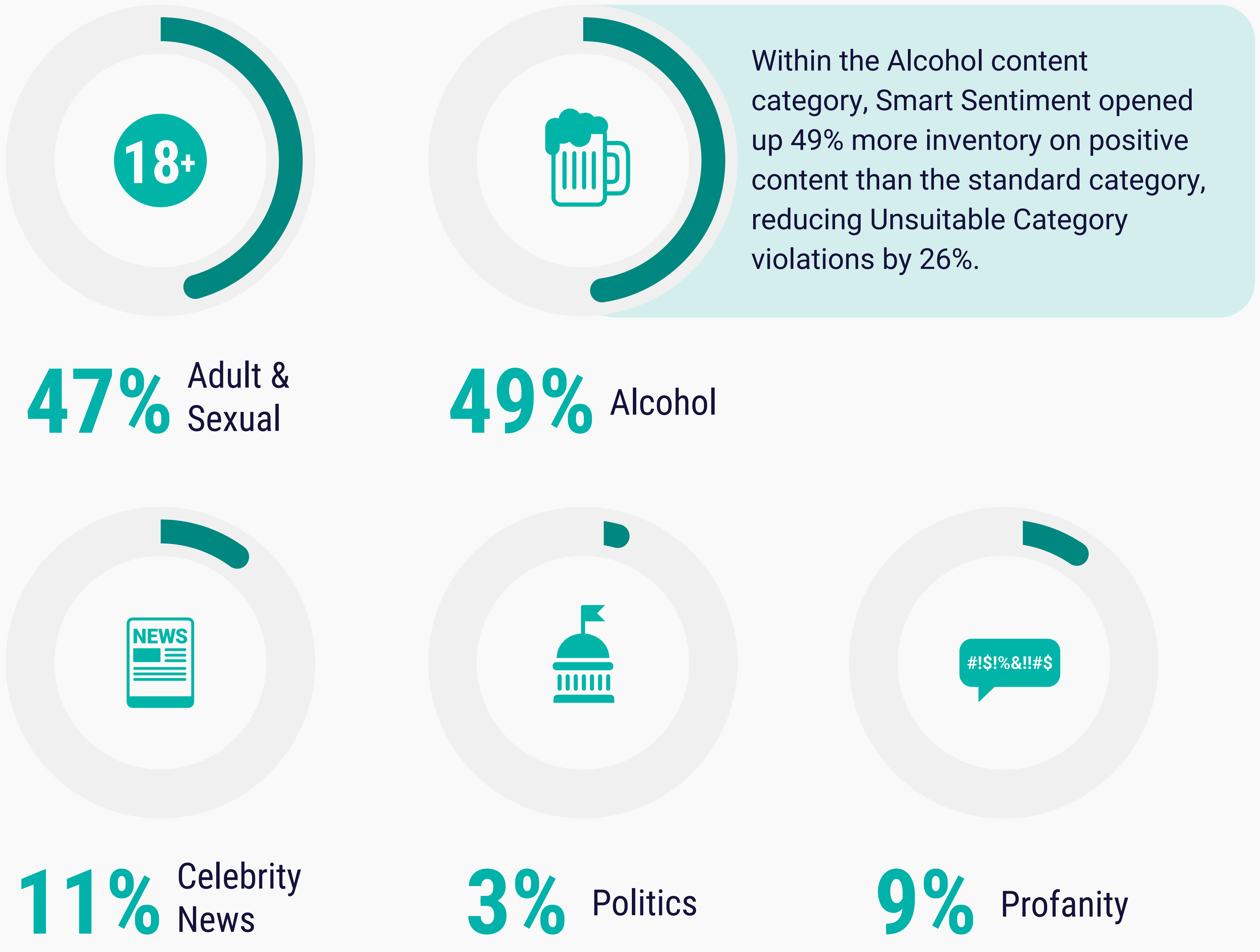
Smart Sentiment Opened Inventory

- Smart Sentiment Category avoidance offered a meaningful improvement over traditional brand suitability categories by opening up greater scale and reach for brands. This approach helps reduce waste and increase awareness, ultimately leading to better outcomes for brand campaigns.

What Is Smart Sentiment?

Smart Sentiment refers to DV's advanced sentiment analysis technology that classifies content based on its emotional tone: positive, negative or neutral.
This feature enables advertisers to deliver ads on web pages with positive sentiment, enhancing brand suitability while expanding inventory options.

Expanded Inventory: Share of Standard Category Opened by Smart Sentiment Category



Fraud Insights

In this section, we present key benchmarks for fraud and sophisticated invalid traffic (SIVT) violations across global and APAC markets. This analysis provides valuable insights for brands to understand the prevalence of fraudulent activities and invalid traffic, identify high-risk areas and implement strategies to safeguard their ad investments to ensure campaigns reach genuine and engaged audiences.

APAC Fraud/SIVT Remained Stable

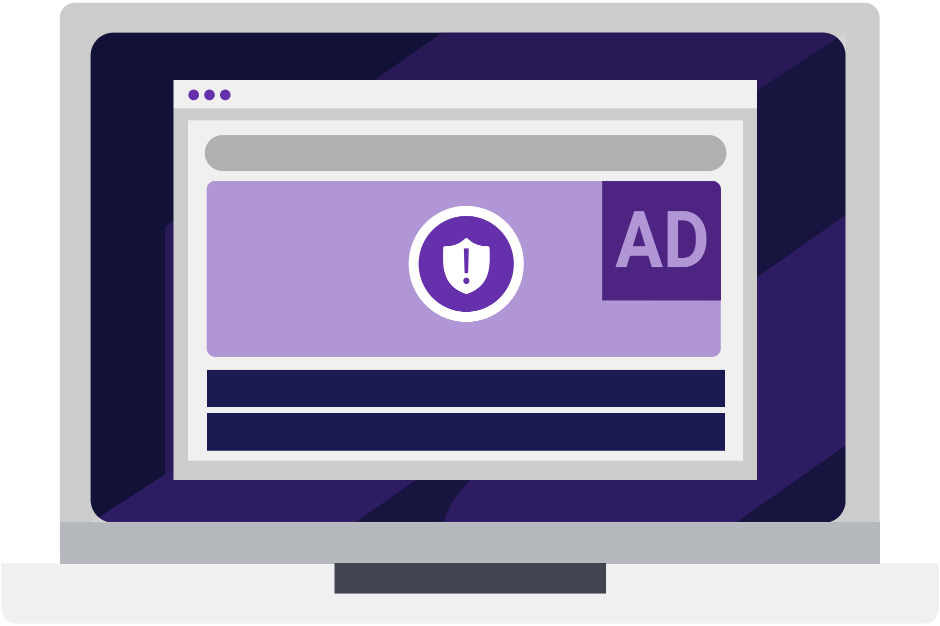
The fraud/SIVT violation rate for APAC advertisers campaigns increased by 2% year-over-year, although it remains 18% lower than the global benchmark, making it the second-lowest rate globally.

APAC fraud was 18% lower than the global benchmark, making it the second-lowest rate globally.

	Fraud/SIVT Violation Rate
Australia/New Zealand	1.2% ↓ 7%
Japan	0.7% ↑ 6%
Hong Kong	1.3% ↓40%
India	0.6% ↑23%
Southeast Asia	0.8% ↓ 2%
Indonesia	0.3% ↑ 6%
Malaysia	0.9% ↑50%
Philippines	0.2% ↓61%
Singapore	1.6% ↑38%
Thailand	0.4% ↓31%
Vietnam	0.4% ↓ 1%
Total	**0.8% ↑ 2%**

This slight rise was mainly due to higher fraud/SIVT rates observed in Singapore and Australia, 1.6% and 1.2%, respectively. Australia and Singapore also saw a surge in nonhuman data center traffic rates, which rose by 36% and 54%, respectively. The total fraud/SIVT increase in APAC was also influenced by a 25% rise in nonhuman data center traffic violations, an 18% increase in bot fraud and a 60% increase in emulator fraud. These increases occurred even though the rates for other types of fraud went down.

Desktop display ads had the highest fraud rate at 1.7%. This was followed by mobile web and mobile app display ads, which had a fraud rate of 0.7% and 0.8%, respectively. When comparing buy types, programmatic advertising has a fraud/SIVT rate that is 35% lower than that of publisher direct.



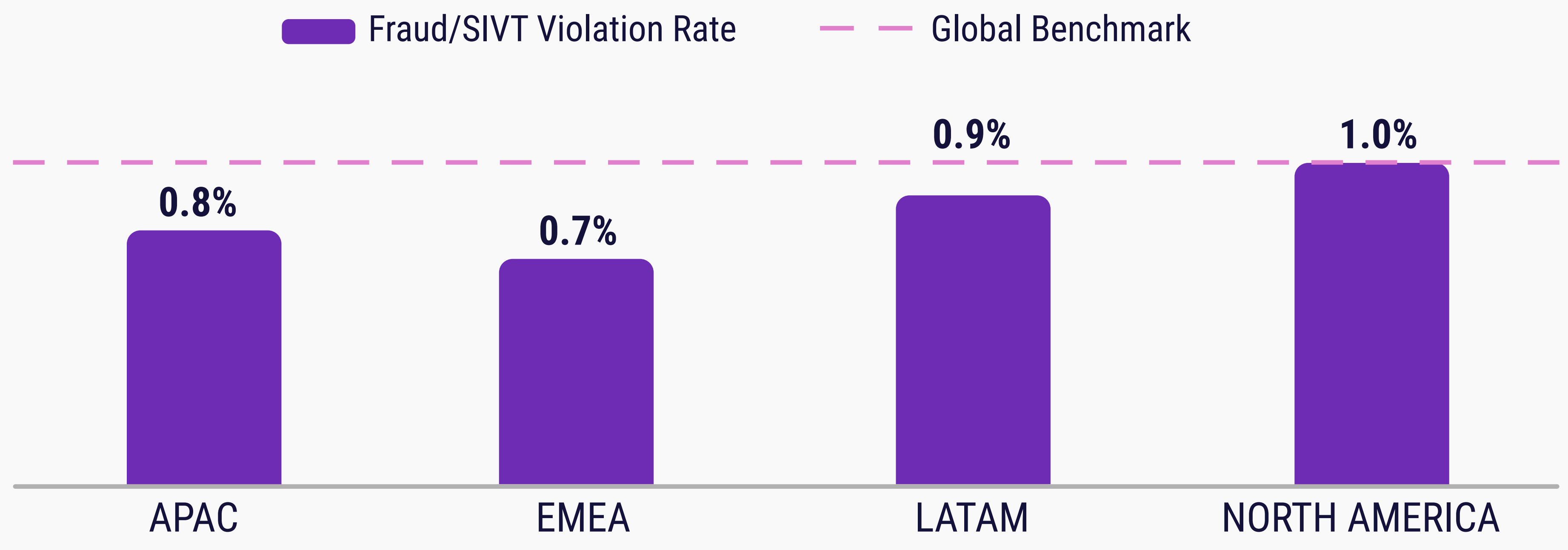
Desktop display ads had the highest fraud rate at 1.7%. This was followed by mobile web and mobile app display ads, which had fraud rates of 0.7% and 0.8%.

GLOBAL SNAPSHOT

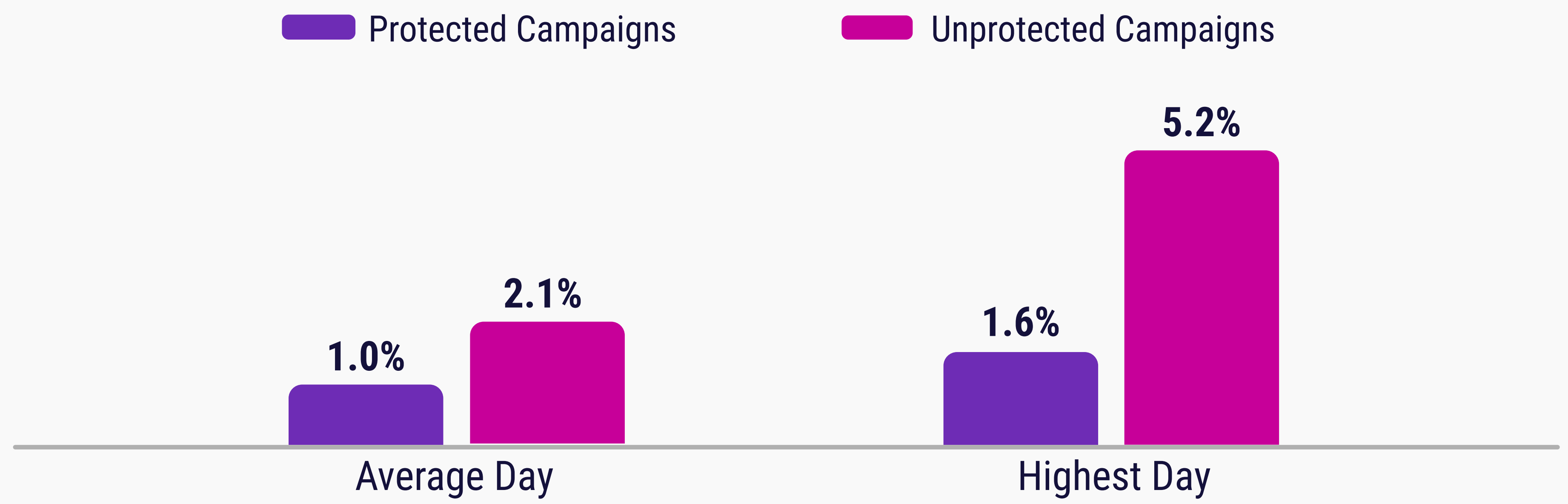
The Status of Fraud Across Regions in 2024

The global fraud/SIVT violation rate declined 7%, year-over-year, resulting in a global benchmark of 1.0%.

Fraud/SIVT Violation Rate: Global Benchmark vs. Regional Rates



Fraud Violations: DV's Protected Campaigns vs. Unprotected Campaigns



GLOBAL SNAPSHOT

To understand the overall decline of fraud across the globe, here are some additional insights to consider.

Fraud Went Down, But GIVT Is a Growing Issue

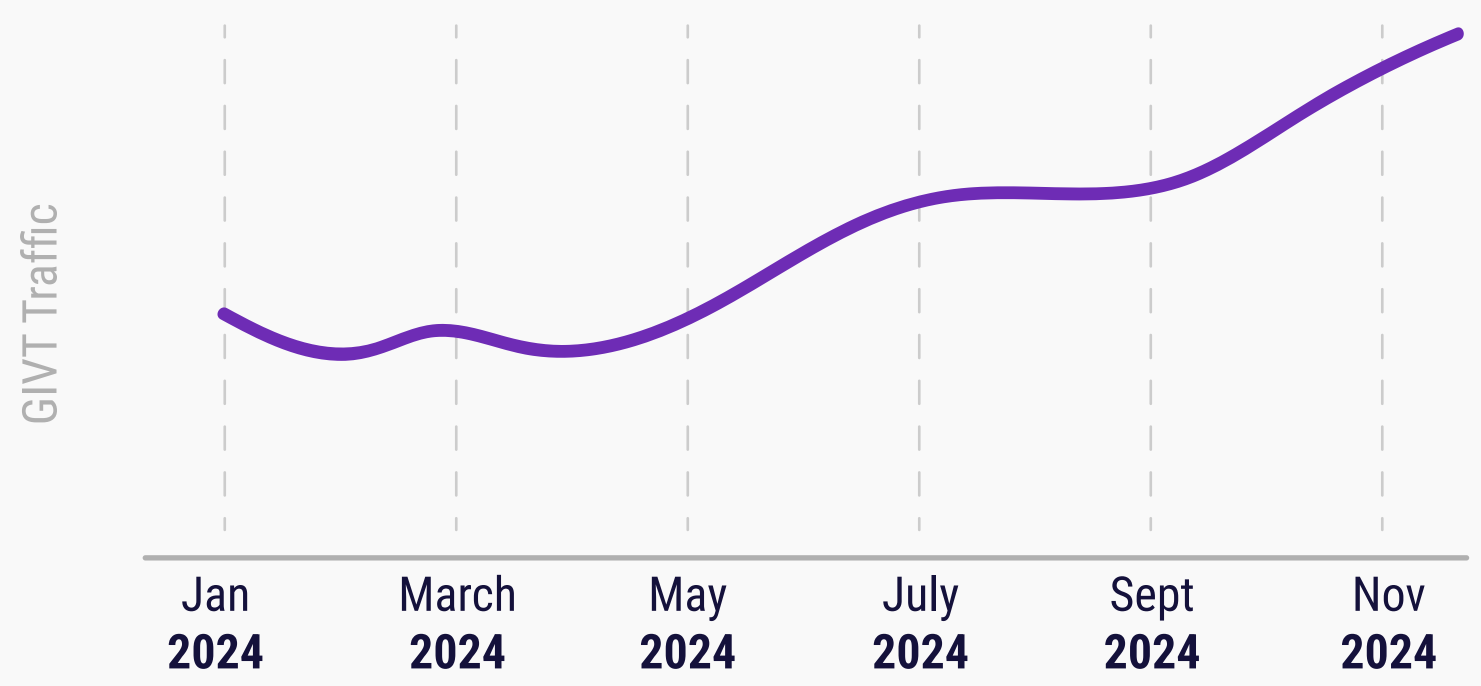
- Globally, the fraud/SIVT violation rate declined 7% year-over-year to 1.0%.
- AI-powered crawlers and scrapers are now a growing cause of invalid traffic. General invalid traffic (GIVT) spiked 86% year-over-year in 2H, with 16% of GIVT stemming from bots linked to AI tools such as GPTBot, ClaudeBot and AppleBot.

GIVT vs. SIVT: What's the Difference?

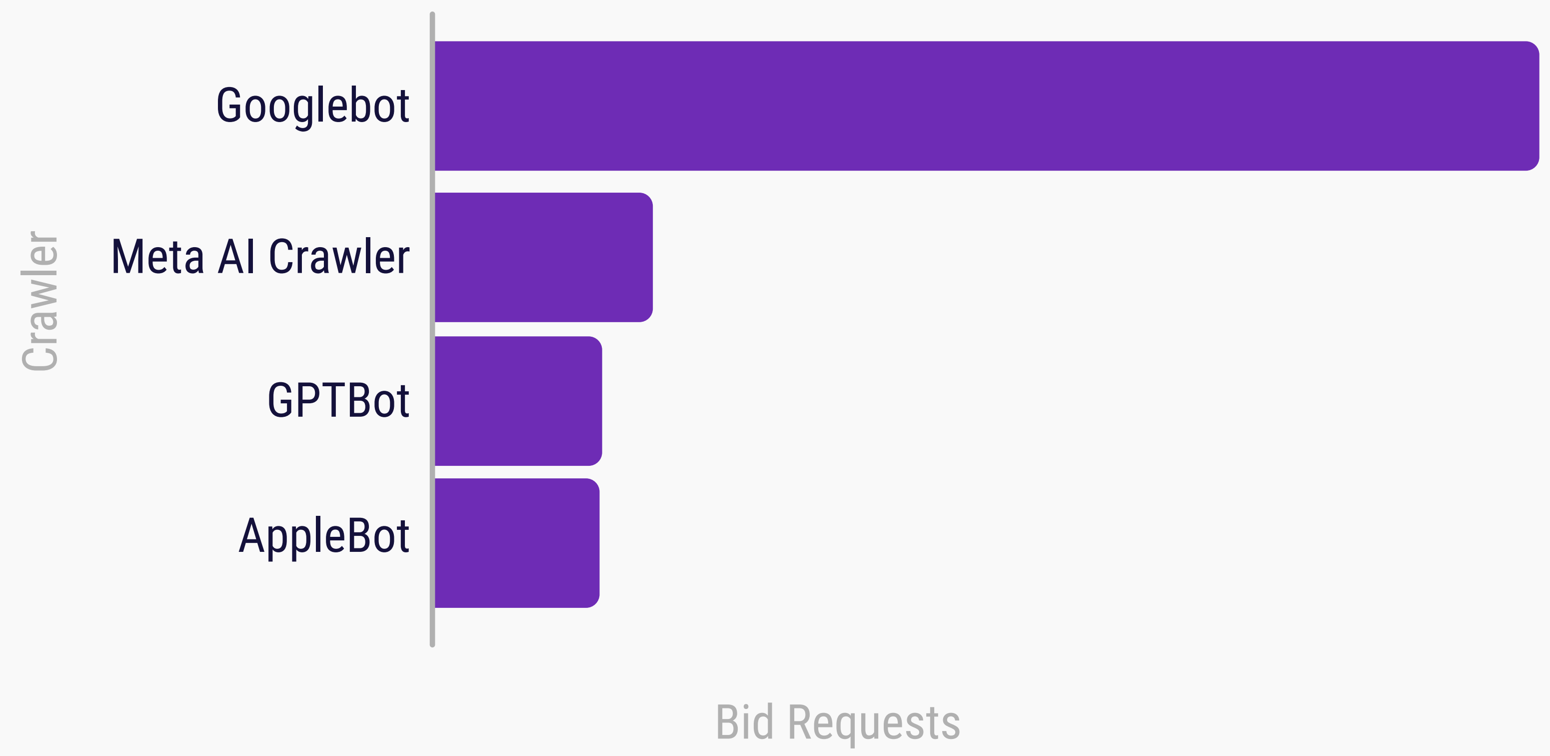
GIVT refers to non-human traffic that can be identified through declared or standard means of detection, such as using publicly available lists from the Interactive Advertising Bureau (IAB) and Trustworthy Accountability Group (TAG). GIVT includes known bots, spiders and other automated tools used for legitimate and non-intrusive purposes. In contrast, SIVT involves complex fraudulent activities that require advanced analytics and significant human involvement to detect, such as ad stacking or domain spoofing.

To the right, we see the overall increase in AI-based scraping in 2024, which amplifies the need for advertisers to measure and account for GIVT in their campaigns.

GIVT Traffic Volume 2024



Top Crawlers and Scrapers Driving Known-Bot GIVT Impressions
December 2024



Viewability Insights

This section provides crucial benchmarks for viewability and the Authentic Viewable Rate across global and APAC markets, incorporating relevant dimensions such as media, device and buy type. Understanding these benchmarks helps brands evaluate their current performance and identify opportunities to enhance their ad visibility. This ensures that advertising budgets are utilized efficiently, maximizing the impact of their campaigns.

APAC Authentic Viewable Rate Is the Lowest Globally

The Authentic Viewable Rate in APAC edged down, marking the lowest rate globally.

	2024 Authentic Viewable Rate	2024 Display Viewable Rate	2024 Video Viewable Rate
Australia/New Zealand	70% ↑2%	73% ↑1%	73% ↓2%
Japan	42% ↓14%	46% ↓10%	60% ↓14%
Hong Kong	62% -	68% ↑3%	78% ↑9%
India	72% ↑8%	69% ↓3%	86% ↑9%
Southeast Asia	72% ↑4%	73% ↑2%	85% ↑9%
Indonesia	78% ↑5%	77% ↑2%	88% ↑8%
Malaysia	74% ↑5%	76% ↑1%	81% ↑6%
Philippines	80% ↑12%	80% ↑3%	81% ↑26%
Singapore	64% ↓5%	68% ↓2%	74% ↑1%
Thailand	76% ↑5%	77% ↑9%	91% ↑6%
Vietnam	69% ↓4%	69% ↓3%	83% ↓4%
Total	61% ↓2%	62% ↓4%	82% ↑6%

This decline was primarily driven by significant decreases in Japan, where the display and video Authentic Viewable Rate dropped by 15% and 13%, respectively. The notable drop in Japan's Authentic Viewable Rate was compounded by a massive 67% spike in brand suitability violations year-over-year and a 6% uptick in fraud/SIVT violations.

The video viewable rate in APAC increased 6% year-over-year throughout the region, attributed primarily to a 9% increase in India, along with a 8% increase in Indonesia. This shift was largely driven by changes seen in mobile app ads, which increased 9% year-over-year.

On the other hand, display viewability decreased by 4%, driven by a 10% drop in Japan's display viewable rate, which was largely influenced by desktop and mobile web display ads.

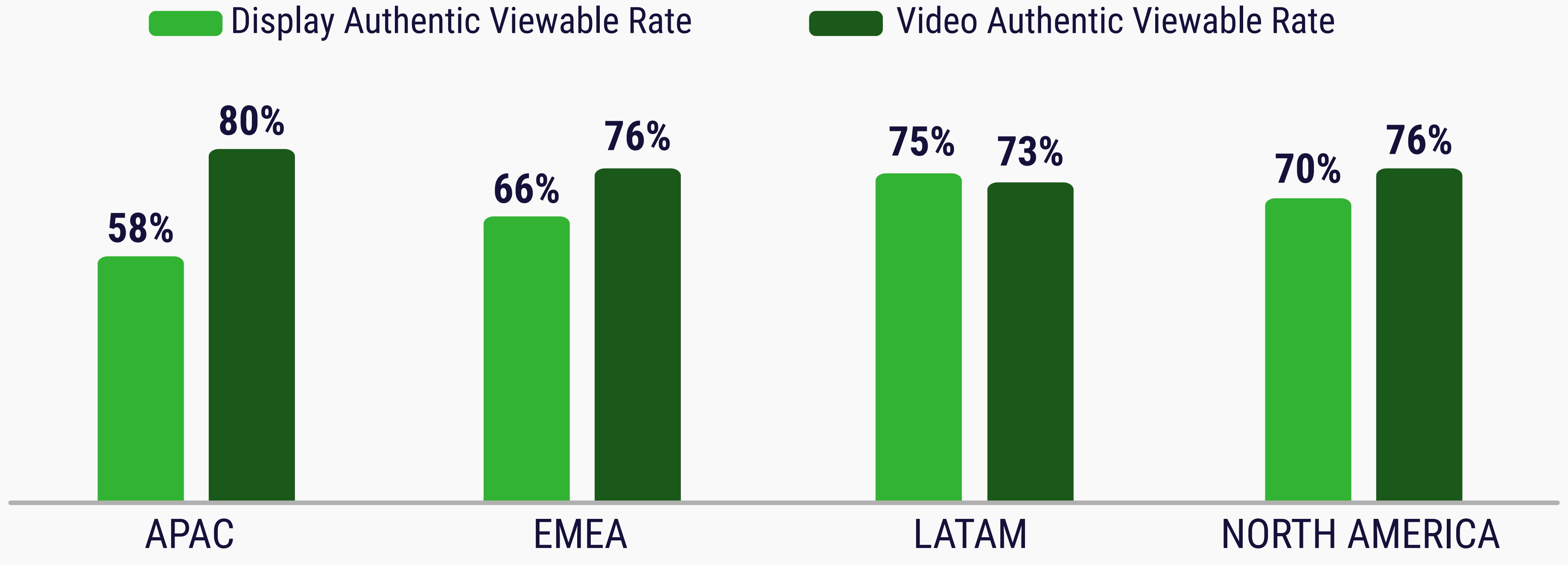
In Japan, mobile web display ads saw the most substantial drop in the Authentic Viewable Rate year-over-year, plummeting by 17%. Programmatic buys were a major factor in the overall dip in the Authentic Viewable Rate, with a year-over-year decrease of 4%. Programmatic mobile web was particularly affected, experiencing the heaviest drop at 13%.

GLOBAL SNAPSHOT

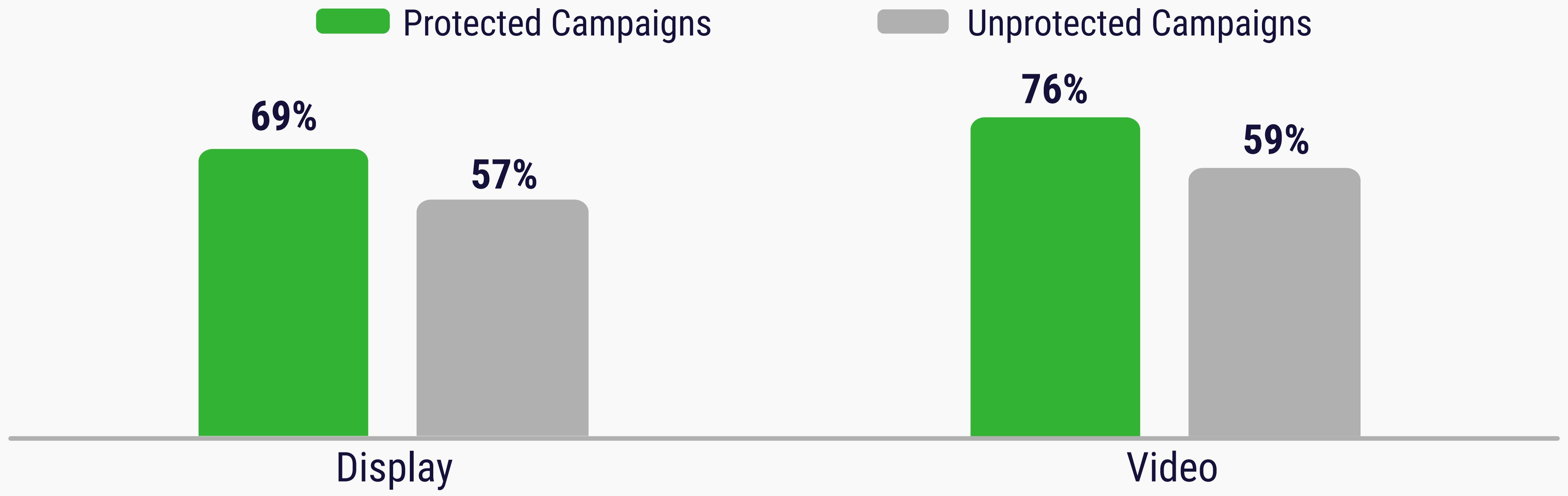
The Status of Viewability Across Regions in 2024

The global authentic viewable rate was 70% in 2024, a 3% year-over-year improvement. For display ads, this rate was 69%, a 2% year-over-year increase; for video ads, this rate was 76%, an 8% year-over-year increase.

Authentic Viewable Rate Across Regions



Authentic Viewable Rate: DV's Protected Campaigns vs. Unprotected Campaigns



Media waste for unprotected campaigns totaled an estimated $336,000 per billion impressions.

Attention Insights

This section highlights key attention metrics across global and APAC markets, providing essential benchmarks for brands to gauge their performance. By examining these metrics, we offer insights into how effectively ads are capturing and maintaining user attention, which helps brands identify areas for improvement and optimize their strategies to enhance engagement and maximize the impact of their advertising efforts.

Understanding Attention Metrics

The two critical dimensions of attention are exposure and engagement. DV Authentic Attention® analyzes over 50 data points in real time across the exposure of and engagement with an ad.

Exposure: Considers an ad's entire presentation, quantifying its intensity and prominence through metrics that include viewable time, share-of-screen, video presentation, audibility and more.

Engagement: Analyzes key user-initiated events that occur while the ad creative is displayed, including user touches, screen orientation, video playback and audio control interactions

APAC's Attention is 14% Higher Than the Global Benchmark

	Attention Index	Engagement Index	Exposure Index
Australia/New Zealand	99	94	104
Japan	123	143	102
Hong Kong	110	106	115
India	118	81	155
Southeast Asia	119	102	135
Indonesia	125	89	161
Malaysia	112	101	123
Philippines	117	110	124
Singapore	114	108	119
Thailand	115	84	146
Vietnam	127	110	145
Total	**114**	**104**	**124**

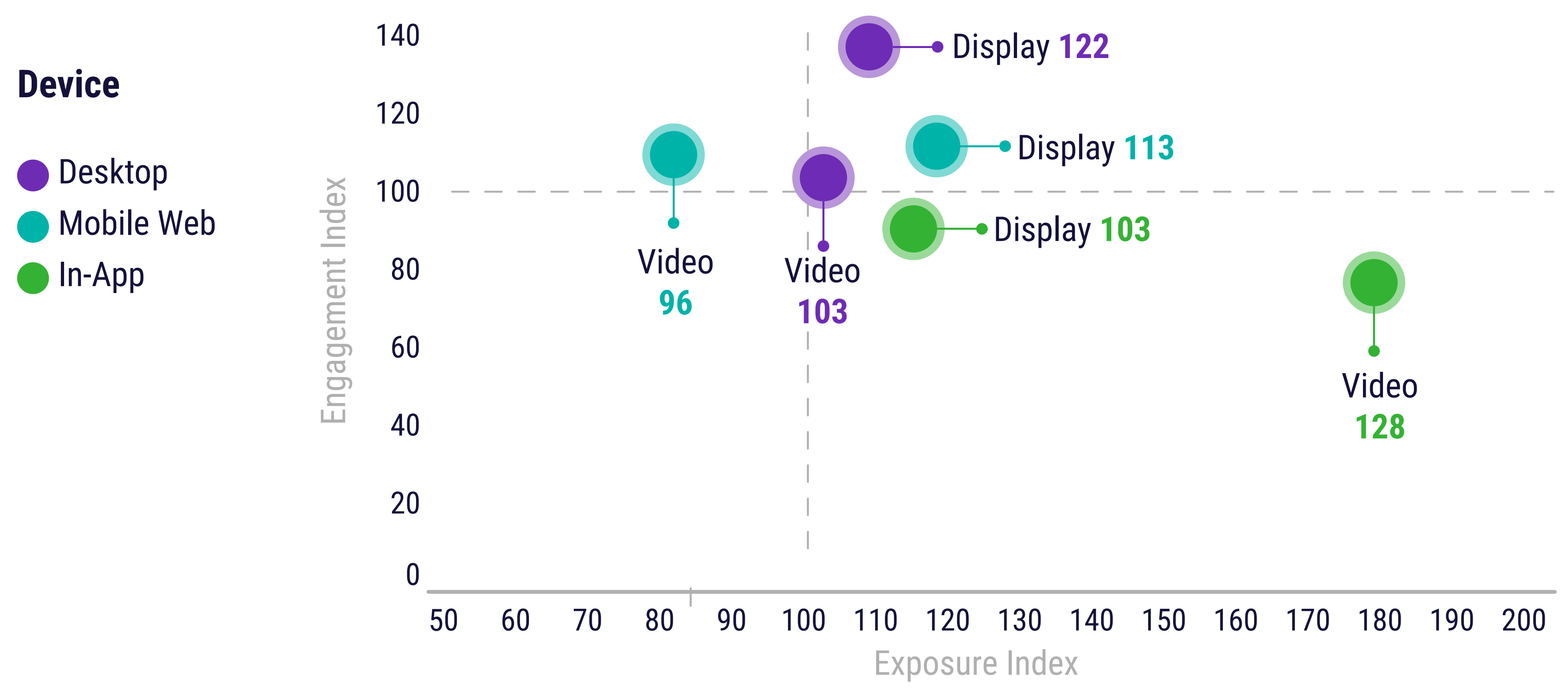
In the APAC region, the Attention Index is 14% higher than the global benchmark, highlighting the region's exceptional ability to capture and maintain viewer engagement.

Vietnam has the highest Attention Index in APAC, standing 27% above the global benchmark. This is primarily due to the Exposure Index for medium-sized mobile web display ads indexing 51% higher.

Indonesia's Attention Index was driven by both small- and medium-sized mobile web display ads, which were over the global benchmark by 34% and 43%, respectively. Japan's strong overall Attention Index was driven by medium-sized desktop display ads, which had an Attention Index 45% higher than the overall benchmark.

Desktop display and in-app video ads in APAC significantly outperform the global index by 22% and 28%, respectively, showcasing the region's strength in these key media types. Additionally, mobile web display ads also excel, outperforming the global benchmark by 13%.

APAC Engagement and Exposure Index by Device



GLOBAL SNAPSHOT

How Attention Levels Varied by Region in 2024

In 2024, the global Attention Index across all environments and device types was set at a baseline of 100. APAC led all regions with an Attention Index 14% above the global average, driven by strong performance from medium-sized desktop display ads (24% above the global index).

EMEA also outperformed the global index by 8%, bolstered by medium-sized desktop display ads that exceeded the global index by 12%. LATAM followed closely, with an Attention Index 4% above the global index, thanks to high performance on video in-app ads (26% above the global index).

In contrast, North America trailed the global average by 4%, largely due to the poor performance of small-sized in-app display ads, which had an Exposure Index 35% below the global index. This suggests a gap between ad placement and user attention in mature markets.

Key Takeaways for APAC Marketers

DV's *2025 Global Insights: APAC Report* reveals a complex media quality landscape — one where global improvements are encouraging, but regional challenges persist. APAC stands out for its growing brand suitability violation rate and relatively low authentic viewability, even as it maintains lower fraud rates and industry-leading attention scores.

APAC stands out for its growing brand suitability violation rate and relatively low authentic viewability, even as it maintains lower fraud rates and industry-leading attention scores.

These findings are reinforced by insights from APAC marketers and consumers, whose responses illustrate the growing importance of precision in media planning and brand alignment. As content consumption rises and consumer expectations sharpen, aligning media quality efforts with behavioral trends becomes not just strategic, but essential.

Marketers in the region must be proactive. Investments in media quality tools and safeguards reduce media waste and pay measurable dividends. As demonstrated throughout this report, DV-protected campaigns consistently outperform unprotected ones across key metrics: viewability, brand suitability and fraud prevention, and media waste for unprotected campaigns totaled an estimated $336,000 per billion impressions. And attention metrics show that APAC campaigns have a strong foundation to build upon, particularly in mobile environments.

To maximize campaign ROI and consumer trust, APAC marketers should:

- Implement protection tools that reduce waste and risk across all media buys, focusing on avoidance strategies that unlock inventory while maintaining brand suitability..
- Optimize branding and upper-funnel campaigns for mobile-first and video formats, where exposure performance excels, and optimize mid- and lower-funnel campaigns for mobile web and desktop formats.

With the right strategies in place, media quality becomes more than a safeguard — it becomes a competitive advantage.

Methodology

Data Notice

Unless otherwise noted, all data contained in this report is based on DV-generated data. All data is post-bid unless otherwise indicated. Post-bid monitoring and blocking technology record violations. Violation rates are post-bid metrics because violations are tracked after an ad has been purchased. Pre-bid technology stops an advertiser from bidding on an unsuitable impression, thereby preventing violations from occurring in the first place. That is why many of the numbers we report, while directionally accurate, do not represent the full scope of DV's protection. Unless otherwise noted, comparative data points should be interpreted as year-over-year comparisons that span January 1, 2024, to December 31, 2024, versus the same time period for the prior year. However, the DV Authentic Attention® data spans July 1, 2024, to December 31, 2024. All data in this report is DV tag-based data from the open web.

Unprotected Campaign

As a point of comparison to DV customer campaigns (the majority of which use a combination of pre- and post-bid protections), DV created a test campaign with no protections. We collected monitoring data on the unprotected campaign for the full year and compared it alongside our 2024 benchmark data, which is referenced throughout the report as protected campaign data and spans January 1, 2024, to December 31, 2024. Media waste refers to the estimated cost associated with total media violations, including brand suitability, fraud/SIVT and other related issues. This cost figure is derived by multiplying the total violations by a $3 cost-per-mille (CPM), which reflects the cost per 1,000 impressions.

Survey Methodology

DV contracted with Sapio Research to conduct multiple surveys cited in this report. The "consumer survey" surveyed 8,000 consumers from eight countries across APAC (Australia, India, Indonesia, Japan, the Philippines, Singapore, Thailand, Vietnam). The survey outcomes are referenced throughout this report, cited as the trends among consumers.

The "marketer survey" surveyed 520 marketing and advertising decision-makers from APAC (Australia, India, Indonesia, Japan, New Zealand, the Philippines, Singapore, Thailand, Vietnam). The survey outcomes are referenced throughout this report, cited as the opinions of marketers or media buyers.

Sample data was collected from online partner panels. The interviews were conducted by Sapio Research in March 2025 using an email invitation to an online survey.

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is influenced by the number of interviews and the level of precision in the percentages used to express the results. In the consumer survey, the chances are 95 in 100 that the survey result does not vary, plus or minus, by more than 0.7 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample. In the marketer survey, the chances are 95 in 100 that the survey result does not vary, plus or minus, by more than 2.2 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

DoubleVerify

www.DoubleVerify.com