



REPRESENTATION IN ADVERTISING IN ASIA

RESEARCH REPORT

MARCH 2023

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“ Images and stories in the media can deeply influence public opinion and establish societal norms. Persons with disabilities are seldom covered in the media, and when they are featured, they are often negatively stereotyped and not appropriately represented. It is not uncommon to see persons with disabilities treated as objects of pity, charity or medical treatment that have to overcome a tragic and disabling condition or conversely, presented as superheroes who have accomplished great feats, so as to inspire the non-disabled. ”

United Nations Department of Economic and Social Affairs

FOREWORD

Dear Reader,

The Interactive Advertising Bureau Southeast Asia and India (IAB SEA+India) is the industry association for the digital advertising sector. We represent brands, agencies, publishers and platforms in the digital, online and mobile space across seven countries: Singapore, India, Indonesia, Malaysia, Vietnam, Thailand and The Philippines.

Each year our Regional Board identifies key research topics which we feel would be well served with Asia-first knowledge. *Representation in Advertising in Asia* is one such area requiring further understanding. In collaboration with Meta, Spotify, TikTok, Teads and Google, our in-house research team created a survey to better understand how people who live in Asia feel about their representation in the digital advertising they see. Our objective is to drive awareness and help marketers to connect with real audiences across the region.

The research for this survey was spearheaded by IAB SEA+India Regional Board members:

- Tawana Murphy Burnett, Head of Global Clients & Categories APAC, Meta
- Katie Potter, Head of Luxury, Beauty & Sports, APAC, Teads
- Delilah Chan, Vice Chair IAB SEA+India Regional Board; Head, Brand (Global and Key Accounts) and Growth Partnerships SEA, TikTok
- Sea Yen Ong, Regional Head of Sales for SEA, Hong Kong & Taiwan, Spotify
- Rika Sharma, Head of Agency, Partner & Industry Relations APAC, Google

We hope that this research report generates discussion about, and consideration of creative messaging in the future. If you have any questions or would like further information about this research, please contact us at hello@iabseaindia.com

Miranda Dimopoulos
Regional CEO
IAB SEA+India



METHODOLOGY

1. Questions were devised by a special projects group of the IAB SEA + India Regional Board and the IAB SEA+India in-house research team
2. Surveys were created in four languages -
 - a. English (distributed to respondents in Singapore, Malaysia and the Philippines)
 - b. Bahasa Indonesia
 - c. Thai
 - d. Vietnamese
3. Surveys were distributed by the IAB SEA+India and Meta to their business networks as well as TikTok who leveraged their creator community for a cross-section of respondents from their databases across Singapore, Malaysia, Indonesia, India, Philippines, Vietnam and Thailand
4. The survey was conducted during September and October 2022
5. It was voluntary to answer each question
6. There were 5956 responses to this survey
7. Age groups ranged from 18 years old up to 75 years or older, categorised into two main groups - 34 years and under; and 35 years and over
8. Additional research was done by IAB SEA+India Research Team to provide context and background to this survey and to analyse the results.



KEY POINTS



All age groups from 18 to 75 years or older had a voice in this survey



The four main religions in the region are Buddhism, Islam, Catholic, Hindu



41% of respondents to the English survey were from India, Pakistan & Bangladesh



81% of Vietnamese respondents feel their disability is barely represented in advertising



More than 50% of respondents say it is important their disability is represented in advertising



30% of Indonesian respondents did not state their sexual orientation, the highest in the region



61% of respondents say brands are responsible for ensuring representation in advertising



80% of Vietnamese respondents feel their sexual orientation is not represented in advertising



48% of Singapore/Malaysia/Philippines respondents feel it is important their body type is represented in advertising



60% of Indonesian respondents feel their ethnicity is not represented in advertising



42% of Thai respondents say it is important that their religion is represented in advertising



Top 2 non-work activities are using social media & watching user-generated video content - platforms where most advertising is served

“ When done right, it's a refreshing and welcome image of inclusivity. When not done right, there's a real risk of tokenism and being inauthentic ”

Respondent Quote

EXECUTIVE SUMMARY

Society is changing in Southeast Asia reflecting the [decline of poverty](#) and increasing incomes. As the consumer population diversifies, brands must authentically reflect this diversity in their messaging and within their own organisations. However, there remain barriers to full inclusion in Southeast Asia because of political and religious barriers to sexual orientations other than heterosexuality. Despite this, globally advertisers have started to test the impact of representation, measuring business outcomes and [unlocking the power](#) that diversity offers.

Today's consumers across Asia want more than just skin-deep images of diversity; they want to see everyday lifestyles and cultures portrayed by people like themselves. A report from the Kellogg School of Management talks about authenticity in advertising through storytelling to invoke a feeling of connection between brand and consumer; showcasing products less at a functional level and more at an emotional level; and steering away from [unrelatable perfection](#).

Respondents to this survey feel there remains a significant underrepresentation of ethnicities, ages, genders, disabilities, religions, sexual orientations, and body types in advertising in Asia, and believe overwhelmingly that it is the responsibility of brands to ensure that there is inclusion when advertising their products.

Half of respondents to the surveys in Bahasa (54%), Thai (45%) and Vietnamese (48%) feel there is little to no representation of their gender in advertising, compared with just 26% of respondents to the survey in English (Singapore, Malaysia and The Philippines). In all countries surveyed, women feel up to 20% less represented than men, particularly in Vietnam, Thailand and Indonesia.

Across the four main religions, significantly fewer women than men feel they are represented in advertising where 44% of Muslim women feel they are represented (compared with 76% men); Buddhist women 46% (men 87%); 42% of Hindu women (80%men) and 55% of Catholic women (71% men).

A 2021 study of diversity and inclusion in advertising in Asia found that many brands continue to represent women in [domestic and caregiving roles](#), and that one-third of ads show negative stereotypes of body image. The report also found that 60% of agencies in Southeast Asia have no formal process to ensure diversity and inclusion in the advertisements they create; only 40% of agencies had received a brief from a brand that specified diversity; and 40% said there was no change in representation in the ads they created over the previous 12 months.

A little over half of respondents across the region are single or have never married. There is an interesting comment echoed by more than one respondent that they would like to see more diversity in the way society is portrayed in advertising, where the happy stereotypical family is balanced with equally happy people on their own to reflect changes in how people are choosing to live today.

17% of people in the Asia-Pacific region [live with a disability](#) and this statistic is reflected in responses from Vietnam and Thailand. This is slightly higher in Singapore/Malaysia/Philippines (18%) and in Indonesia (19%). Most respondents to the Vietnamese survey (81%) feel their disability or learning difficulty is either not represented at all or only a little in advertising, as do 71% of respondents to the Bahasa survey and 65% of Thai respondents. However, just 44% of respondents to the English survey feel the same way. A little over half of respondents feel that it is important to represent people with disabilities or learning difficulties.

In our study, 20% of respondents to the English (Singapore/Malaysia/Philippines) and Bahasa surveys say they are Asexual compared with 17% of respondents in Vietnam and 6% in Thailand. This is in comparison to studies indicating that in any population globally, between 1% and 4% of people [identify as Asexual](#). Half of Vietnamese respondents say it is important or very important that their sexual orientation is represented in advertising, as do just under half of Thai respondents, compared with one-third of respondents to the survey in English, and a quarter of respondents to the Bahasa survey.

In summary, consumers want to see greater representation in advertising and this research study is the first step to helping marketers and the wider digital industry understand their audiences to improve this.

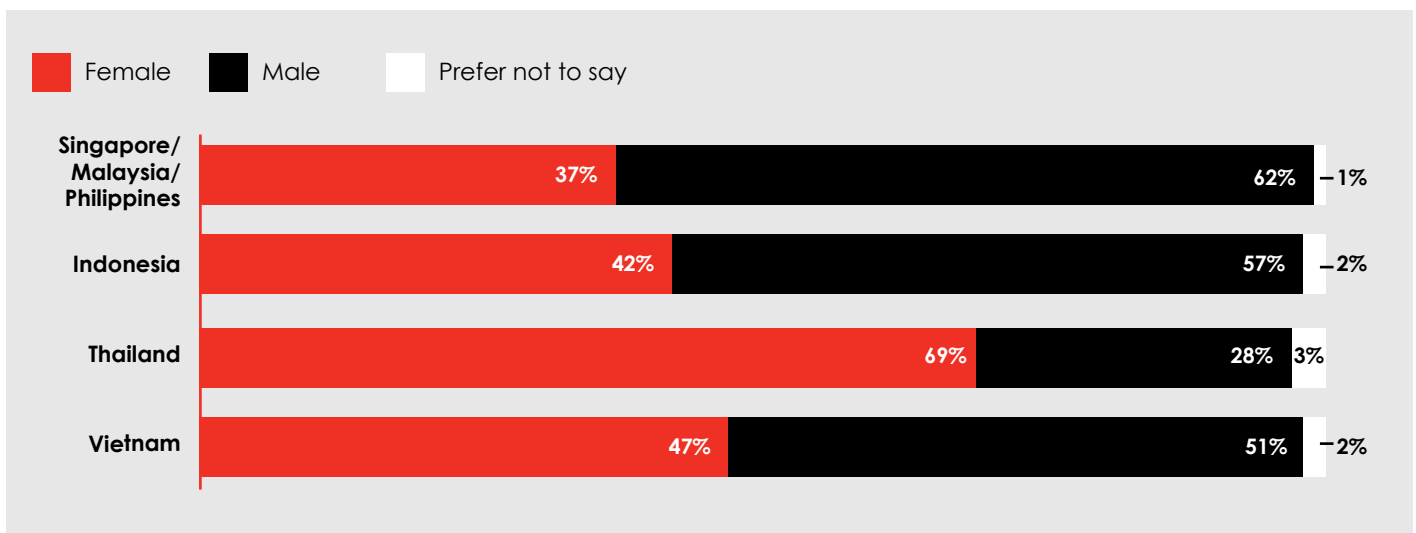


“ I would like to see advertising that does not determine the gender of the product such as cosmetics for women or men ”

Respondent Quote

Gender Profile

Overall, men and women replied equally to this survey and there was little gender difference in respondents from Indonesia and Vietnam. However, significantly more women in Thailand responded (69%) to men (28%) while this was reversed in SG/MY/PP where more men responded (62%) than women (37%).



Age Group

While the predominant age group is 25-44 years, as this table illustrates, all age groups had a voice in this survey.

Age Group	Singapore/Malaysia/Philippines	Indonesia	Thailand	Vietnam
18-24 years	8%	9%	9%	10%
25-34 years	28%	30%	31%	34%
35-44 years	32%	31%	36%	25%
45-54 years	17%	19%	15%	16%
55-64 years	10%	8%	6%	11%
65-74 years	3%	2%	2%	3%
75 years or older	2%	1%	1%	1%

“ I want to see LGBT people/couples in family-based advertising eg, getting a home loan from a bank, buying a car, caring for elderly people. Positive representation of LGBT people in normal everyday settings. ”

Respondent Quote

Sexual Orientation

Around half of respondents identify as heterosexual, with another 20% identifying as asexual. Other respondents identified as bisexual (4%-7%), gay/lesbian (2%-10%), and pansexual or queer; while others chose not to answer this question.

Sexual Orientation	Singapore/Malaysia/ Philippines	Indonesia	Thailand	Vietnam
Heterosexual	52%	44%	60%	43%
Asexual	20%	20%	6%	17%
Bisexual	4%	4%	5%	7%
Gay/Lesbian	7%	2%	10%	10%
Pansexual	2%	0	5%	0
Queer	1%	0	1%	5%
Prefer not to say	14%	30%	13%	16%
A sexual orientation not listed here	0	0	0	0



Disability/Learning Difficulty

Eight out of ten respondents say they do not have a disability (81%-83%). Of those with disabilities, these range from visible physical disabilities such as mobility issues, to unseen disabilities such as mental health difficulties, asthma, diabetes, epilepsy and the like.

Disability/Learning Difficulty	Singapore/Malaysia/ Philippines	Indonesia	Thailand	Vietnam
No known disability	82%	81%	83%	83%
Personal support need	2%	1%	1%	1%
Mental health difficulty	2%	2%	1%	1%
Unseen disability eg, asthma, diabetes, epilepsy	4%	5%	4%	5%
Dyslexia	1%	1%	1%	1%
Multiple disabilities	2%	1%	3%	1%
Wheelchair user/mobility problems	3%	4%	3%	4%
Disabled	1%	1%	1%	0
Blind/partially sighted	1%	2%	2%	2%
Deaf/hearing impairment	2%	2%	1%	2%
Disability other than listed	0	0	0	0



“ There is no representation of religious diversity in advertising ”

Respondent Quote

Religion

The two main religions represented in this survey are Buddhist and Muslim; followed by Catholic and Christian.

Religion	Singapore/Malaysia/ Philippines	Indonesia	Thailand	Vietnam
Buddhist	7%	2%	82%	48%
Muslim	27%	74%	3%	0
Hindu	18%	6%	0	0
Christian	11%	12%	2%	2%
Catholic	18%	6%	2%	7%
Unaffiliated/atheist	10%	0	8%	33%
Taoist	1%	0	0	0
Jewish	1%	0	0	0
Prefer not to say	5%	0	3%	10%
Other	2%	0	0	0
Other	Jain, Zoroastrian	-	-	-



“ When I’m seeing an advertisement, in order to make a buying decision I must be able to connect with the actor of the ad. If I’m a plus size woman, I would want to see ads of people who have the same sizing for buying clothes or anything else too. Unnecessary fake and perfect portrayal of people makes me disinterested. ”

Respondent Quote

Body Type

Most respondents describe their body types as Average or Lean, the remainder being Athletic or Plus Size.

Body Type	Singapore/Malaysia/ Philippines	Indonesia	Thailand	Vietnam
Average	58%	58%	64%	55%
Lean	11%	24%	15%	29%
Athletic	14%	4%	7%	7%
Plus size	12%	4%	10%	9%
Prefer not to say	5%	10%	4%	0



“ I'd like to see equal representation for all genders, ages and ethnicities across all advertising platforms, regardless of the product or service advertised ”

Respondent Quote

Country of Identification

All respondents to the survey in Vietnamese identify 100% with that country. Most respondents (98%) to the Thai survey identify with Thailand. For the survey in Bahasa, eight out of 10 respondents (78%) identify with Indonesia and the remaining 22% with Malaysia.

For the English survey, 19% of respondents identify with Singapore, 19% with The Philippines and 13% with Malaysia which are the three countries in which this English survey was distributed. As well as this, 24% of respondents in the English survey identify with India, and 17% of respondents identified with other countries, largely Pakistan and Bangladesh.

Country of Identification	Singapore/Malaysia/Philippines	Indonesia	Thailand	Vietnam
Singapore	19%	0	0	0
Malaysia	13%	22%	1%	0
Indonesia	3%	78%	0	0
Philippines	19%	0	0	0
Vietnam	3%	0	0	100%
Thailand	2%	0	98%	0
India	24%	0	1%	0
Other	17%	0	0	0
Other	Mainly Pakistan and Bangladesh, plus UK, USA, Australia, Hong Kong, Japan, Germany, France, Korea, Taiwan, Argentina and Italy	-	-	-

“ In the future, I hope there won't be any hype around the image of success in life, such as the perfect family being parents and children, nor emphasising that we need to have a partner to be happy. Some of us choose to live alone. If I want solitude and I live alone then I have achieved what I want in life. In my country, advertising imposes a lot of values from the past which is an influence that prevents the country from progressing. ”

Respondent Quote

Marital Status

Most respondents are single, and have never married.

Marital Status	Singapore/Malaysia/Philippines	Indonesia	Thailand	Vietnam
Single, never married	48%	50%	56%	54%
Married or in a domestic partnership	47%	42%	42%	44%
Widowed	2%	8%	1%	0
Divorced	2%	0	1%	2%
Separated	1%	0	0	0

Children

Fewer than 40% of respondents have children.

Children	Singapore/Malaysia/Philippines	Indonesia	Thailand	Vietnam
Yes	39%	36%	29%	31%
No	61%	64%	71%	69%

“ I want to see a celebration of diversity that is authentic to each brand's niche and purpose ”

Respondent Quote

Employment Status

Most respondents are either full-time employees or self-employed.

Employment status	Singapore/Malaysia/ Philippines	Indonesia	Thailand	Vietnam
Full-time employee	61%	42%	46%	66%
Self-employed	20%	27%	45%	18%
Part-time employee	5%	6%	3%	7%
Currently unemployed	4%	6%	1%	5%
Student	7%	4%	1%	4%
Full-time housewife/househusband	1%	2%	3%	0
Retired	0	0	1%	0
Prefer not to say	2%	13%	1%	0



“ People want to see themselves represented in advertising ”

Respondent Quote

Industry/sector of work

Most respondents work in the Advertising & Media, and Marketing & Communications sectors, followed by Hospitality & Tourism, Information Technology, Arts, Audio/Visual Technology; and Business Management & Administration.

Industry	Singapore/Malaysia/ Philippines	Indonesia	Thailand	Vietnam
Advertising & media	45%	47%	40%	46%
Marketing & communications	12%	10%	8%	5%
Information technology	6%	0	4%	6%
Business management & admin	6%	2%	5%	5%
Education & training	5%	4%	9%	5%
Hospitality & tourism	3%	8%	7%	3%
Arts, Audio/Visual Technology	2%	2%	4%	8%
Architecture & construction	0	0	3%	2%
Finance	2%	0	2%	2%
Health science	6%	8%	5%	5%
Human services	1%	4%	1%	3%
Agriculture	3%	4%	3%	2%
Manufacturing	3%	2%	5%	2%
Science & engineering	1%	0	1%	0
Transport, distribution & logistics	2%	4%	1%	2%
Government & public admin	1%	1%	2%	2%
Law, public safety & security	1%	2%	2%	2%

Number of years experience in Advertising and Media

Most respondents working in the advertising and media industry have between five and 12 years experience.

Number of years experience	Singapore/Malaysia/Philippines	Indonesia	Thailand	Vietnam
1-4	18%	22%	19%	26%
5-8	44%	43%	34%	38%
9-12	14%	27%	28%	24%
13-16	12%	4%	12%	4%
17+	12%	4%	7%	8%

Business category in which working

Most respondents working in the Advertising and Media Sector are working for a tech platform, followed by publisher, media agency and creative agency.

Business category	Singapore/Malaysia/Philippines	Indonesia	Thailand	Vietnam
Brand	15%	9%	9%	12%
Publisher	16%	17%	37%	16%
Tech platform	29%	35%	33%	34%
Creative agency	15%	22%	10%	8%
Media agency	19%	9%	7%	30%
Consultancy	2%	9%	0	0
Other	4%	0	0	0
Other	Influencer, real estate, talent agency, record label	-	-	-

Hours Spent Online

Overall, most respondents spend six to eight hours a day online, particularly in Thailand (42%) compared with SG/MY/PP (25%), Indonesia (25%) and Vietnam (38%). 17% of respondents in SG/MY/PP spend more than 12 hours a day online, the highest in this survey, compared with respondents in Vietnam (5%).

Hours	Singapore/Malaysia/ Philippines	Indonesia	Thailand	Vietnam
<20 (less than 3 hours a day)	15%	9%	10%	11%
20-39 (3-5 hours a day)	24%	18%	25%	38%
40-59 (6-8 hours a day)	25%	26%	42%	38%
60-79 (9-11 hours a day)	19%	36%	11%	8%
80+ (12 hours a day or more)	17%	11%	12%	5%



Online Activities

Most time spent in online activities (weighted averages)

Most respondents spend their time online on social media, followed by work and watching user-generated video content. The least amount of time is spent in online gaming. The top two non-work activities are engaging in social media and watching user-generated video content - the same activities where they are served the most advertising.

Online activities	Singapore/Malaysia/ Philippines	Indonesia	Thailand	Vietnam
Social media eg, Facebook, Instagram, Twitter	5.6	5.6	6.2	6.0
Work	5.5	4.8	5.0	6.0
Watch user-generated video content eg, YouTube, TikTok, Twitch	4.6	5.0	6.3	5.2
Education	4.5	5.0	3.5	4.3
Music/podcasts	4.3	4.5	4.0	4.4
Watch subscription TV eg, Netflix, Apple TV	4.2	3.4	4.3	3.2
Shopping	3.7	4.4	4.0	3.3
Gaming	3.5	3.7	2.8	3.2



“ I would like to see advertising without discrimination and without proscribed beauty standards ”

Respondent Quote

Influences In Advertising

How respondents relate to these statements:

When I am shopping online, I am influenced by advertising

52% of respondents to the survey in Bahasa say they are influenced by advertising when shopping online, followed by respondents from Vietnam (48%), to the survey in English (44%) and in Thai (39%).

Country	Not at all	A little	Somewhat	Relate	Relate a lot	N/a
Singapore/Malaysia/Philippines	9%	20%	24%	33%	11%	3%
Indonesia	9%	24%	15%	31%	21%	0
Thailand	6%	31%	23%	26%	13%	2%
Vietnam	10%	23%	19%	42%	6%	0

When I am shopping in-store, I am influenced by advertising

34% of respondents to the survey in Bahasa say they are influenced by advertising when shopping in-store, followed by respondents to the survey in English (30%), Thai (29%) and Vietnamese (29%).

Country	Not at all	A little	Somewhat	Relate	Relate a lot	N/a
Singapore/Malaysia/Philippines	13%	28%	25%	20%	10%	4%
Indonesia	26%	21%	18%	22%	13%	0
Thailand	13%	34%	24%	24%	5%	1%
Vietnam	25%	23%	23%	26%	3%	0

I feel my gender is represented in advertising

Half of respondents to the surveys in Bahasa (54%), Thai (47%) and Vietnamese (48%) feel there is little to no representation of their gender in advertising, compared with just 26% of respondents to the survey in English (Singapore, Malaysia and The Philippines).

Country	Not at all	A little	Somewhat	Relate	Relate a lot	N/a
Singapore/Malaysia/Philippines	14%	12%	19%	30%	17%	8%
Indonesia	29%	25%	13%	20%	13%	0
Thailand	31%	16%	19%	18%	10%	7%
Vietnam	29%	19%	13%	23%	10%	6%

I feel my age group is represented in advertising

48% of respondents to the survey in Bahasa say their age group is either not represented in advertising at all or only a little. This is similarly felt by respondents in Thailand (47%), Vietnam (46%) and to the survey in English (43%).

Country	Not at all	A little	Somewhat	Relate	Relate a lot	N/a
Singapore/Malaysia/Philippines	22%	21%	13%	22%	15%	5%
Indonesia	27%	21%	16%	20%	16%	0
Thailand	22%	25%	22%	18%	11%	2%
Vietnam	22%	24%	21%	23%	10%	3%

I feel my ethnicity is represented in advertising

60% of respondents to the survey in Bahasa feel that their ethnicity is not represented in advertising, followed by 40% of respondents to the English survey, 34% of Thai respondents, 29% of Vietnamese respondents.

Country	Not at all	A little	Somewhat	Relate	Relate a lot	N/a
Singapore/Malaysia/Philippines	18%	22%	20%	23%	10%	8%
Indonesia	34%	26%	8%	24%	8%	0
Thailand	17%	17%	20%	30%	15%	1%
Vietnam	10%	19%	23%	40%	8%	0

I feel my sexual orientation is represented in advertising

80% of respondents in Vietnam feel their sexual orientation is either not represented at all or only a little in advertising. This is similarly felt by respondents to the Thai survey (60%); and the survey in Bahasa (46%). While fewer respondents to the survey in English feel this, still four in 10 respondents (37%) would like to see their sexual orientation better represented in advertising.

Country	Not at all	A little	Somewhat	Relate	Relate a lot	N/a
Singapore/Malaysia/Philippines	20%	17%	13%	23%	17%	10%
Indonesia	22%	24%	7%	26%	11%	10%
Thailand	40%	20%	18%	13%	6%	3%
Vietnam	60%	20%	13%	5%	0	2%

I feel my disability or learning difficulty is represented in advertising

81% of respondents to the Vietnamese survey feel their disability or learning difficulty is either not represented at all or only a little in advertising. Similar feedback with 71% of respondents to the Bahasa survey, 65% of Thai respondents and 44% of respondents to the English survey feeling the same way

Country	Not at all	A little	Somewhat	Relate	Relate a lot	N/a
Singapore/Malaysia/Philippines	30%	14%	9%	8%	4%	34%
Indonesia	44%	27%	18%	11%	0	0
Thailand	45%	20%	9%	14%	7%	5%
Vietnam	71%	10%	6%	3%	0	10%

I feel my religion is represented in advertising

78% of respondents to the Thai survey feel their religion is either not represented at all or only a little in advertising, followed by 55% of respondents to the survey in Bahasa, 51% of Vietnamese respondents and 46% of respondents to the English survey.

Country	Not at all	A little	Somewhat	Relate	Relate a lot	N/a
Singapore/Malaysia/Philippines	29%	17%	11%	15%	7%	21%
Indonesia	37%	18%	18%	11%	11%	5%
Thailand	70%	8%	10%	6%	1%	6%
Vietnam	35%	16%	26%	32%	0	10%

I feel my body type is represented in advertising

64% of respondents to the Thai survey feel their body type is either not represented at all or only a little in advertising, followed by 58% of respondents to the Bahasa survey, 40% of Vietnamese respondents and 34% of respondents to the survey in English.

Country	Not at all	A little	Somewhat	Relate	Relate a lot	N/a
Singapore/Malaysia/Philippines	19%	15%	18%	24%	14%	9%
Indonesia	34%	24%	13%	18%	5%	5%
Thailand	39%	25%	15%	11%	6%	5%
Vietnam	23%	17%	19%	37%	0	4%

I feel influencers I see represent who I am

50% of respondents to the survey in Bahasa do not feel that influencers represent who they are. This is also similarly felt by respondents in Vietnam (48%), Thailand (43%) and to the survey in English (44%).

Country	Not at all	A little	Somewhat	Relate	Relate a lot	N/a
Singapore/Malaysia/Philippines	21%	23%	21%	23%	6%	7%
Indonesia	26%	24%	16%	16%	13%	5%
Thailand	17%	26%	27%	19%	9%	1%
Vietnam	32%	16%	13%	19%	0	19%

I feel I am represented as a parent (parents-only question)

Half of parents from Thailand (50%) and Vietnam (49%) who answered this question feel that they are either not represented at all or only a little in advertisements, as do 37% of Indonesian respondents and 28% of respondents to the survey in English.

Country	Not at all	A little	Somewhat	Relate	Relate a lot	N/a
Singapore/Malaysia/Philippines	17%	11%	15%	20%	5%	32%
Indonesia	24%	13%	13%	21%	5%	24%
Thailand	34%	16%	16%	9%	3%	22%
Vietnam	35%	14%	6%	13%	0	32%



Importance of Representation In Advertising

How important are the following to you when it comes to advertising?

My gender is represented in advertising

Half of respondents to the English survey (49%) say that representation of gender in advertising is important, to very important, followed by Thailand (45%), Vietnam (48%) and Indonesia (47%).

Country	Not important	A little	Somewhat	Important	Very important	N/a
Singapore/Malaysia/Philippines	19%	10%	20%	30%	19%	2%
Indonesia	26%	14%	13%	31%	16%	0
Thailand	22%	12%	18%	27%	18%	3%
Vietnam	17%	13%	19%	32%	16%	3%

My age group is represented in advertising

Half of respondents (50%) to the surveys in English and Vietnamese say it is important or very important that their age group is represented in advertising. This is similarly felt by respondents to the survey in Bahasa (42%). However, it is of less importance (32%) to respondents in Thailand.

Country	Not important	A little	Somewhat	Important	Very important	N/a
Singapore/Malaysia/Philippines	14%	13%	18%	32%	18%	5%
Indonesia	21%	24%	13%	24%	18%	0
Thailand	20%	23%	22%	22%	10%	3%
Vietnam	11%	20%	19%	32%	18%	0

My ethnicity is represented in advertising

46% of respondents to the survey in English say it is important or very important that their ethnicity is represented in advertising, as do respondents in Vietnam (44%), Thailand (41%), and to the survey in Bahasa (40%).

Country	Not important	A little	Somewhat	Important	Very important	N/a
Singapore/Malaysia/Philippines	20%	15%	15%	26%	20%	4%
Indonesia	21%	23%	13%	27%	13%	3%
Thailand	22%	18%	14%	31%	10%	5%
Vietnam	24%	19%	11%	28%	16%	2%

My sexual orientation is represented in advertising

Half of Vietnamese respondents (49%) say it is important or very important that their sexual orientation is represented in advertising, as do 45% of Thai respondents compared with 32% from the survey in English, 26% of respondents to the Bahasa survey.

Country	Not important	A little	Somewhat	Important	Very important	N/a
Singapore/Malaysia/Philippines	24%	16%	19%	21%	11%	8%
Indonesia	32%	24%	13%	18%	8%	5%
Thailand	20%	19%	11%	32%	13%	5%
Vietnam	22%	13%	13%	33%	16%	3%

My disability or learning difficulty is represented in advertising

54% of respondents to the survey in English say it is important or very important that their disability or learning difficulty is represented in advertising, as do 52% of respondents to the survey in Bahasa and 52% of respondents in Thailand and 51% of Vietnamese respondents.

Country	Not important	A little	Somewhat	Important	Very important	N/a
Singapore/Malaysia/Philippines	21%	10%	15%	32%	22%	0
Indonesia	18%	17%	13%	29%	23%	0
Thailand	19%	17%	12%	30%	22%	0
Vietnam	20%	17%	12%	31%	20%	0

My religion is represented in advertising

42% of Thai respondents say it is important or very important that their religion is represented in advertising, compared with 31% of respondents to the Bahasa survey, 30% to the Vietnamese survey and 27% to the survey in English.

Country	Not important	A little	Somewhat	Important	Very important	N/a
Singapore/Malaysia/Philippines	29%	17%	12%	15%	12%	15%
Indonesia	29%	21%	16%	26%	5%	3%
Thailand	24%	13%	17%	32%	10%	4%
Vietnam	28%	23%	19%	24%	6%	0

My body type is represented in advertising

Representation of different body types in advertising is more important to respondents from the English survey - Singapore, Malaysia and The Philippines (48%), closely followed by respondents from Thailand (44%), and to the Bahasa survey (42%). It is less important to respondents from Vietnam (29%).

Country	Not important	A little	Somewhat	Important	Very important	N/a
Singapore/Malaysia/Philippines	16%	10%	19%	25%	23%	7%
Indonesia	24%	18%	16%	23%	16%	3%
Thailand	21%	15%	16%	28%	16%	5%
Vietnam	23%	26%	16%	19%	10%	6%



Influencers I see represent who I am

Influencers should represent everyday people say respondents to the English survey (40%), the survey in Bahasa (35%), and respondents from Vietnam (33%) and Thailand (32%).

Country	Not important	A little	Somewhat	Important	Very important	N/a
Singapore/Malaysia/Philippines	14%	17%	22%	23%	17%	7%
Indonesia	23%	21%	18%	19%	16%	3%
Thailand	11%	31%	23%	22%	10%	3%
Vietnam	23%	10%	26%	23%	10%	8%

I am represented as a parent

Overall, representation as parents in advertising is not identified as important as other factors. Respondents to the English survey (34%) and from Vietnam (28%) feel it is important to very important, compared with 18% from Thailand and 21% of respondents to the survey in Bahasa.

Country	Not important	A little	Somewhat	Important	Very important	N/a
Singapore/Malaysia/Philippines	14%	8%	14%	21%	13%	13%
Indonesia	24%	18%	16%	13%	8%	21%
Thailand	31%	15%	13%	11%	7%	23%
Vietnam	39%	11%	20%	23%	5%	2%

Considerations When Making Purchasing Decisions

Most important considerations when making purchase decisions

Price and quality are the predominant factors influencing respondents' purchase decision making, while the range offered is the least influencing factor. Respondents are now also considering both representation, environmental and social issues when making purchases.

Singapore/Malaysia/Philippines

Factor	Order of importance 1 is highest score, 5 is lowest				
	1	2	3	4	5
Quality	47%	37%	10%	4%	2%
Price	40%	39%	12%	7%	1%
Range offered	4%	13%	56%	17%	9%
Representation	9%	11%	19%	36%	25%
Efforts towards social issues eg, climate change & recycling	21%	21%	23%	17%	18%

Indonesia

Factor	Order of importance 1 is highest score, 5 is lowest				
	1	2	3	4	5
Quality	45%	26%	18%	8%	3%
Price	37%	47%	8%	3%	5%
Range offered	0	13%	53%	29%	5%
Representation	14%	18%	24%	33%	11%
Efforts towards social issues eg, climate change & recycling	18%	10%	21%	25%	26%

Thailand

Factor	Order of importance 1 is highest score, 5 is lowest				
	1	2	3	4	5
Quality	28%	52%	11%	6%	3%
Price	59%	29%	10%	2%	0
Range offered	2%	5%	39%	34%	20%
Representation	10%	11%	27%	36%	16%
Efforts towards social issues eg, climate change & recycling	15%	21%	26%	18%	20%

Vietnam

Factor	Order of importance 1 is highest score, 5 is lowest				
	1	2	3	4	5
Quality	48%	29%	13%	0	0
Price	36%	34%	10%	3%	3%
Range offered	3%	13%	61%	17%	6%
Representation	9%	15%	26%	31%	19%
Efforts towards social issues eg, climate change & recycling	10%	13%	23%	34%	20%



“ The market is dominated by consumer choices and the brand has to understand this ”

Respondent Quote

Responsibility For Fair Representation In Advertising

Who do you feel is responsible for ensuring you are represented in advertising?

Eight out of 10 respondents (81%) in Vietnam say it is the responsibility of brands to ensure there is representation in advertising, which is echoed by the other countries in this survey.

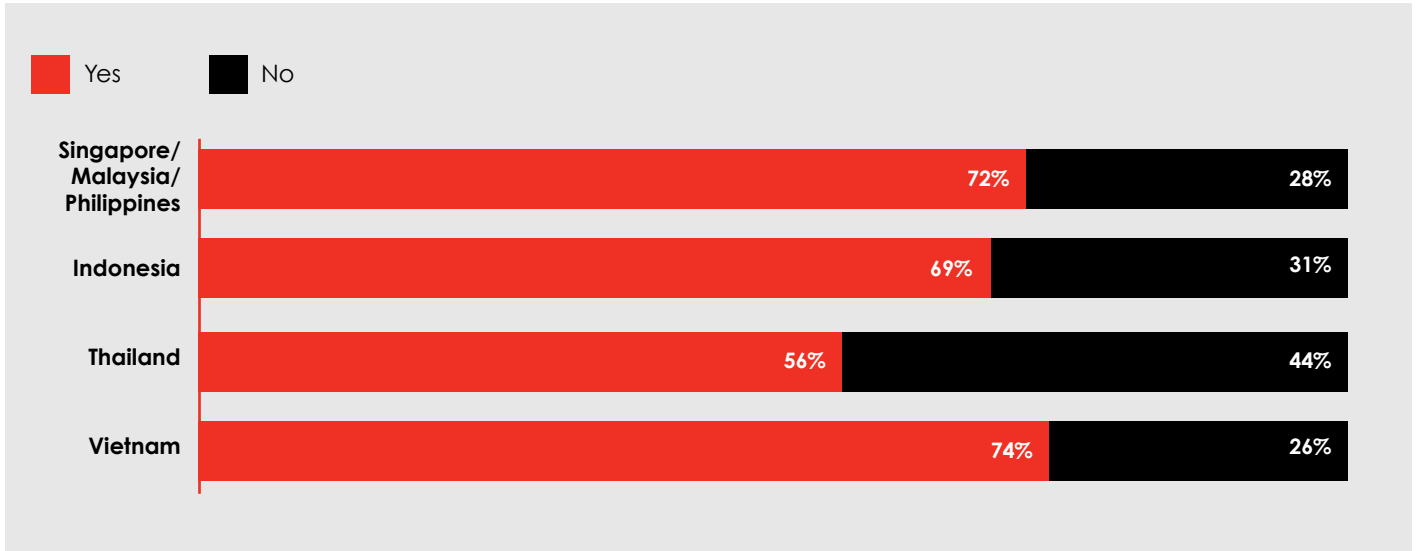
Responsible	Singapore/Malaysia/ Philippines	Indonesia	Thailand	Vietnam
The brand - it's their products	62%	61%	60%	81%
The brand's agency - they create the advertising	20%	19%	21%	10%
Consumers - they choose from which brands to buy	15%	15%	17%	6%
Industry associations - they unite brands, agencies & government representatives	2%	1%	1%	0
The government - they create policies	1%	4%	1%	3%
Other	0	0	0	0



Fair Representation In Advertising

Overall, respondents across the region feel they are fairly represented in advertising in Asia. The largest group of respondents who feel they are not represented are from Thailand (44%).

Language



Fair Representation in advertising - by gender

More men (70%-80%) than women feel they are fairly represented in advertising in Asia. While 68% of women from Singapore/Malaysia/Philippines feel they are represented, less women in Thailand (52%), Indonesia (57%) and Vietnam (59%) agree with this.

Country	Female		Male	
	Yes	No	Yes	No
Singapore/Malaysia/Philippines	68%	32%	75%	25%
Indonesia	57%	43%	70%	30%
Thailand	52%	48%	70%	30%
Vietnam	59%	41%	79%	21%

Fair Representation in advertising - by religion and gender

While 87% of Buddhist men say they are represented in advertising, just 46% of Buddhist women feel the same. Similarly, just 42% of Hindu women feel they are represented in advertising compared to 80% of Hindu men; and 76% of Muslim men compared to 44% of Muslim women. There is a smaller gap between genders in the Catholic religion with 71% of men to 55% of women saying they are fairly represented in advertising in Asia.

Religion	Female		Male	
	Yes	No	Yes	No
Muslim	44%	56%	76%	24%
Buddhist	46%	54%	87%	13%
Hindu	42%	58%	80%	20%
Catholic	55%	45%	71%	29%





The Interactive Advertising Bureau Southeast Asia and India (IAB SEA+India) is the not-for-profit industry association uniting the digital advertising industry across Singapore, India, Indonesia, Malaysia, Thailand, Vietnam and The Philippines. It represents its members to governments at all levels across the region.

The hyper-engaged membership of the IAB SEA+India is made up of brands, publishers, agencies and tech platforms from across the region. Developing Asia-first research, guidelines and content is our priority to keep the digital industry up to date and informed about the rapidly evolving ecosystem. Powered by our specialist groups including the Regional Board and three Regional Councils, the IAB SEA+India is the primary resource for learning, networking and connection.

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