

MALAYSIAN DIGITAL ADEX REPORT FOR Q2, 2021

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BACKGROUND

In early 2019, Media Specialists Association (MSA) of Malaysia in collaboration with Malaysian Digital Association and Malaysian Advertisers Association embarked on an initiative to provide an accurate view of the state of Digital Adex in Malaysia. 21 media agencies were involved in providing the Digital Adex for FY 2017, FY2018 and quarterly in 2019. MSA estimates that the 21 agencies account for approximately 60% of the total Digital Adex in the country. Information is provided by digital platforms and product categories to MSA's appointed independent auditor Ahmad Abdullah and Goh who in turn aggregated the numbers to provide a consolidated view of the total Digital Adex in Malaysia.

OVERALL DIGITAL ADEX GROWTH

Reported Digital Adex grew by 73% to RM320 Mil in Q2 2021 vs Q2 2020 RM184 Mil. With the continued lockdown, the investment on Digital continues to increase.

Time Period	Q2 2020 RM	Q2 2021 RM
Reported Digital Adex	184,517,688.40	320,613,737.25
Direct clients/long tail	123,011,792.27	213,742,491.33
Total MY Digital Adex	307,529,480.67	534,356,228.58
Growth in Spends		73%

GROWTH BY PLATFORM

Video spends are consistent at 28% while first time since the COVID 19 strike, we see a decline in the social spends and saw an increase in the Display spends. The increase in Display ads led by 'Tech & Electronics' category.

Time Period	Q2 2020	Q2 2021
Platforms	%	%
Display	20	24
Video	28	28
Audio	0.20	0.09
Social	36	31
Native	5	4
Search	8	7
Others	3	6



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‘Tech and Electronics’ and ‘Food and Beverage’ and ‘Shops’ and ‘personal care’ categories drive 73% of the total digital spends. Seeing the increase in the spends of sports and healthcare goods, we have created a separate category ‘Health & Wellness’ to track the spends.

Category	Q2 2020 %	Q2 2021 %
Finance & Banking	6	7
Tech & Electronics	18	20
Food & Beverage	25	23
Shops	17	15
Education	1.0	0.41
Personal Care	14	17
Clothing	1.3	1
Household Care	4	2
Automotive	5	4
Housing	3	3
Pharmaceuticals	3	2
Travel & Tours	0.47	0.4
Others	5	5.39
Health & Wellness	N/A	0.02

GLOSSARY

Platform	Description	Sample Media Owners & Ad Formats
Display	Also known as banner ads, appears in a typically define by width and height (WxH) format and either static, animated or rich media format.	Standard / rich media banners, dynamic banners, mobile interstitial, site takeovers bought via direct premium publishers, ad networks (e.g. Innity, Amobee, GDN or programmatic platforms (e.g. DV360, The Trade Desk etc.).
Video	Video ads are ads that are showed before (pre-roll), during (mid-roll) or after (post-roll); can be in-stream or out-stream.	Pre / mid / post-roll in-stream video ad, out-stream video ads (in-read, in-banner) bought via direct premium publishers, ad networks or programmatic platforms (e.g. YouTube, TonTon, Viu, Unruly, DV360, Adobe etc.).
Audio	Description: Audio ads are ads in audio form appearing in between live, on-demand or podcast content. Ads can be inserted pre, mid or post roll during stream.	Pre / mid / post-roll in-stream audio ad, sponsorship packages bought via direct premium publishers or programmatic platforms (e.g. JOOX, Spotify, Programmatic Radio, AdWizz etc.)..
Social	Description: Paid ads on social platforms (includes display, video, boosted etc.)	Any format buys (e.g. display, video, stories, messenger ads) on Facebook, Instagram, Twitter, LinkedIn, WeChat, LINE etc. Also includes paying for posting on other people (e.g. blogger, influencer) / brands / media social pages (e.g. social seeding, branded post etc.). * Not including organic postings or social media content development or management fees
Native	Ads that follows the natural form and function of where it is place. Mostly appears as a sponsored content, in-image or content recommendation.	Sponsored editorial write-up / articles on online publishers' sites (e.g. SAYS, PenMerah, Lowyat.net etc.) or sponsored content as paid media strategies that fit the form & function of the surrounding editorial content on a website. It could also be content dissemination/ recommendation ad with networks such as Outbrain, Taboola, FreakOut etc.
Search	Paid search ads that appears on search engine result pages (SERPs).	Paid search ads on Google, Bing, Yahoo!, Baidu
Others	Other digital expenditure that does not fall into the above categories can be lump to others.	Any other forms of digital advertising such as email, forum seeding, affiliate marketing etc.