

MALAYSIAN DIGITAL ADEX REPORT FOR Q3, 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 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 29% to RM300mil in Q3 2021 vs. Q3 2020 RM233mil.

	Q3 2020 (RM)	Q3 2021 (RM)
Reported Digital Adex	233,101,127.75	300,726,005.79
Direct Advertisers/Long Tail	155,400,751.83	200,484,003.86
Total MY Digital Adex	388,501,879.58	501,210,009.65
% Growth in Spends		29%

DIGITAL ADEX SHARE BY FORMAT

We are seeing an increase in Social, Native and Search platforms mainly driven by *Food & Beverage* category. With the re-opening of the economy and social activities, we see Video spending dropped by 6% compared to Q3 2020.

Format \ Period	Q3 2020	Q3 2021
Social	33.6%	38.5%
Video	31.7%	25.5%
Display	20.0%	18.3%
Search	8.1%	9.4%
Others	4.1%	3.2%
Native	2.3%	4.9%
Audio	0.2%	0.2%

DIGITAL ADEX SHARE BY INDUSTRY

Food & Beverage, Tech & Electronics, Personal Care and Shops categories maintain as the top digital spending categories driving 76% of the total digital spends. *Food Outlets & Restaurants* is the only sub-category under *Shops* category in driving the highest growth percentage at 10.5% compared against Q3 2020.

Category	Q3 2020 (%)	Q3 2021 (%)
Food & Beverage	27.5%	21.4%
Tech & Electronics	20.5%	22.3%
Personal Care	15.9%	14.3%
Shops	12.3%	17.7%
Finance & Banking	7.0%	7.2%
Automotive	4.9%	4.7%
Others	3.7%	6.2%
Pharmaceuticals	2.3%	2.0%
Household Care	2.0%	1.5%
Housing	1.8%	1.2%
Clothing	0.9%	0.7%
Education	0.6%	0.5%
Travel & Tours	0.5%	0.2%
Health & Wellness	0.0%	0.0%

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.