



MediaSpecialistsAssociation

In collaboration with   MALAYSIAN DIGITAL ASSOCIATION

MALAYSIAN DIGITAL ADEX REPORT

Copyright © 2020 by the Media Specialists Association of Malaysia. All rights reserved.

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 36% to RM279 Mil in Q1 2021 vs Q1 2020. With the continued lockdown, the investment on Digital continues to increase.

Time Period	Q1 2020 RM	Q1 2021 RM
Reported Digital Adex	205,138,109.06	279,716,964.18
Direct clients/long tail	136,758,739.37	186,477,976.12
Total MY Digital Adex	341,896,848.43	466,194,940.30
Growth in Spends		36%

GROWTH BY PLATFORM

Video and Social continues to grow while Display seeing decline Quarter to Quarter. MSA believes due to Covid19 and lockdown brand spends shifted to digital video as part of multiscreen planning to build additional reach while Social attracted the highest Adex contributed largely by 'Finance and Banking' and 'Food and Drinks' category. The combined platform of Display, Video, Social and Search account for 89% of total Digital Adex in Q1' 2021

Time Period	Q1 2020	Q1 2021
Platforms	%	%
Display	22	17
Video	27	29
Audio	0.12	0.18
Social	31	38
Native	3	4
Search	9	7
Others	7	5



MediaSpecialistsAssociation

In collaboration with   MALAYSIAN DIGITAL ASSOCIATION

'Tech and Electronics' and 'Food and Beverage' categories are the biggest contributor to the growth in Q1 2021 over Q1 2020 while 'Finance', 'Automotive' and 'Travel & Tours' continue to see the decline in the Reported Digital Adex.

Category	Q1 2020 %	Q1 2021 %
Finance & Banking	7	6
Tech & Electronics	21	20
Food & Beverage	20	24
Shops	18.3	17.6
Education	0.7	0.6
Personal Care	11.3	14.3
Clothing	1.7	1.2
Household Care	1.6	3.1
Automotive	6.9	5.1
Housing	2.2	1.7
Pharmaceuticals	2.1	1.9
Travel & Tours	1.5	0.5
Others	4.8	4.6



MediaSpecialistsAssociation

In collaboration with   MALAYSIAN DIGITAL ASSOCIATION

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.