

MALAYSIAN DIGITAL ADEX REPORT FY2024

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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 FY2017 to FY2024. 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 Messr 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

The Digital Adex has seen a decrease in 2024, at RM1.422 billion in 2024 compared to RM1.425 billion in 2023. As a result, MSA estimates the Total Digital Adex to be RM2.370 billion in 2024, including 40% from the direct advertisers and long tail spends. Q4 2024 stands out as the highest spending quarter, driving 30% of total spend observed throughout 2024.

RM in millions	2019	2020	2021	2022	2023	2024
Reported Digital Adex	937.83	939.87	1,357.54	1,381.97	1,425.16	1,422.43
Direct Advertisers/Long Tail	625.22	626.58	905.03	921.31	950.11	948.29
Total MY Digital Adex	1,563.05	1,566.45	2,262.57	2,303.28	2,375.27	2,370.71
% Growth in Spends	8.0%	0.2%	44.5%	1.8%	3.1%	-0.2%

DIGITAL ADEX SHARE BY PLATFORM

In 2024, the leading 3 platforms collectively accounted for 83.3% of the total Digital Adex. Social claimed the largest share among all platforms, followed by Video and Display. Social maintained its dominance with a growth of 1.2% compared to the previous year, reaching 42.8% of the total Digital Adex. However, Video showed a slight decrease of 0.7% from 2023. Overall, the expenditures in 2024 remained relatively similar compared to 2023, showing no significant changes.



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Platform \ Years	2019	2020	2021	2022	2023	2024
	%	%	%	%	%	%
Display	27.1	20.3	19.0	16.6	16.1	14.7
Video	25.9	28.7	27.5	26.3	26.5	25.8
Audio	0.1	0.3	0.2	0.1	0.2	0.2
Social	26.8	33.2	36.6	40.8	41.6	42.8
Native	5.2	3.3	4.2	5.7	5.7	6.4
Search	9.3	9.1	8.3	8.1	7.5	7.1
Others	2.4	5.1	4.3	2.4	2.4	2.9

DIGITAL ADEX SHARE BY INDUSTRY

Food & Beverage, Tech & Electronics and Personal Care together, accounted for 54.6% of the reported Digital Adex in 2024. Travel & Tours garnered the most significant rise, increasing by 4.1% from 2023 to 2024. One contributing factor to this growth could be the increasing public interest in travelling, prompting heightened advertising efforts in the travel sector.

Industry \ Years	2019	2020	2021	2022	2023	2024
	%	%	%	%	%	%
Finance & Banking	8.7	6.9	6.8	8.9	8.2	8.3
Tech & Electronics	20.8	20.1	21.9	19.0	16.3	18.6
Food & Beverage	18.8	24.5	21.8	20.9	20.1	19.3
Shops	14.3	14.8	16.9	17.3	16.7	8.9
Education	0.5	0.7	0.5	0.4	0.4	0.8
Personal Care	14.3	13.8	14.3	13.8	16.4	16.7
Clothing	1.6	1.3	1.0	1.2	1.7	1.7
Household Care	1.9	2.6	2.2	2.2	1.7	1.9
Automotive	8.6	3.1	4.9	5.9	8.6	9.4
Housing	1.2	1.8	1.7	0.7	1.4	1.7
Pharmaceuticals	2.2	2.3	2.1	3.0	2.1	2.1
Travel & Tours	2.6	0.7	0.5	1.1	1.4	5.5
Others	4.5	4.4	5.6	5.6	5.0	5.2



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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.