In collaboration with

MALAYSIAN DIGITAL ADEX REPORT FOR Q3, 2025

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 FY2017 and each subsequent year up 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:

STRONGER ECONOMY FUELS DIGITAL ADEX REBOUND

Reported Digital Adex surged by 52.1% to RM 535mil in Q3 2025 versus Q3 2024's RM 351mil. This marks a strong recovery following the marginal -0.6% contraction recorded in Q3 2024. The growth is underpinned by Malaysia's robust macroeconomic performance in Q3 2025, where GDP expanded by 5.2% — the fastest pace in a year — driven by resilient domestic demand, a stable labour market (unemployment at 3.0%), and contained inflation at 1.3%. Consumer confidence rose from 124 points in Q2 2025 to 136 points in Q3 2025, reflecting improved sentiment across households and businesses alike. The strong Q3 performance also aligns with the recovery momentum observed throughout the first half of 2025, where Q1 grew 6.4% and Q2 surged 22% year-on-year. Improved economic stability has translated into stronger consumption, particularly in discretionary and lifestyle categories. Advertisers are responding to this shift by scaling up digital investments to capture rising demand and engagement.

	Q3 2022 (RM)	Q3 2023 (RM)	Q3 2024 (RM)	Q3 2025 (RM)
Reported Digital Adex	323,565,227	353,601,791	351,448,675	534,690,543
Direct Advertisers/Long Tail	215,710,151	235,734,527	234,299,116	356,460,362
Total MY Digital Adex	539,275,378	589,336,319	585,747,792	891,150,905
% Growth in Spends		**9.0%**	**-0.6%**	**52.1%**

In collaboration with

Digital adex share by format:

SOCIAL DOMINANCE SIGNALS A SHIFT IN CONSUMER DECISION MAKING.

The top 3 formats continued to account for 83% of the overall Reported Digital Adex in Q3 2025 — Social, Video, and Display. Social recorded a significant 5 percentage point increase to 47%, driven by sustained investment in short-form video content, creator partnerships, social commerce, and conversational ad formats across platforms such as TikTok, Instagram, and Facebook and social first approach across clients. Video moderated to 23% (−2pp), while Display declined to 13% (−3pp) as advertiser budgets continued to shift toward engagement-first formats. The consistent rise in Social's dominance is a defining trend of 2025, reinforcing social platforms as the primary channel for brand reach and conversion in Malaysia's digital economy. Audio remained negligible at below 0.1%.

Format / Period	Q3 2022	Q3 2023	Q3 2024	Q3 2025
Social	41%	41%	42%	47%
Video	26%	26%	25%	23%
Display	16%	17%	16%	13%
Native	6%	6%	6%	7%
Search	9%	7%	7%	5%
Others	2%	3%	3%	4%
Audio	0.1%	0.2%	0.2%	0.0%

MEDIA SPECIALISTS ASSOCIATION

In collaboration with MAA mda

Digital adex share by industry:

GROWTH IS MOVING FROM CONSUMPTION TO ENABLEMENT

Tech & Electronics claimed the top position in Q3 2025 with a 22.6% share, overtaking Food & Beverage (21.2%) as the highest digital spending category. This is consistent with the trend observed throughout the first half of 2025. The growth in Tech & Electronics was primarily driven by the Phone & Accessories and Electrical Products sub-categories, reflecting elevated consumer appetite for devices and digital lifestyle products. The highest share growth was recorded in Tech & Electronics, with a 2.8 percentage point increase compared to Q3 2024, followed by Food & Beverage (+1.2pp) and Housing (+1.2pp). Automotive recorded the largest share decline (-3.5pp to 7.0%), though this reflects the overall market expansion rather than a contraction in absolute spending. Travel & Tours maintained its recovery momentum at 5.2% (Q3 2024: 4.7%), consistent with the sector's resurgence seen throughout 2025 as Malaysian consumers resumed travel and experience-based spending. Shops rose modestly to 7.7% (+0.5pp), driven by food service and retail channel activity.

Category	Q3 2022 (%)	Q3 2023 (%)	Q3 2024 (%)	Q3 2025 (%)
Tech & Electronics	23.0	14.0	19.8	22.6
Food & Beverage	21.0	20.0	20.0	21.2
Personal Care	15.0	16.0	16.2	14.8
Shops	16.0	17.0	7.2	7.7
Finance & Banking	9.0	10.0	9.4	7.6
Automotive	6.0	8.0	10.5	7.0
Others	3.0	6.0	3.9	5.4
Travel & Tours	1.0	2.0	4.7	5.2
Housing	1.0	1.0	1.7	2.9
Household Care	2.0	1.0	2.4	1.9
Pharmaceuticals	2.0	2.0	1.7	1.8
Clothing	1.0	1.0	1.3	1.2
Education	0.0	1.0	1.0	0.5
Health & Wellness	0.00	0.40	0.10	0.0

In collaboration with

GLOSSARY

Platform	Description	Sample Media Owners & Ad Formats
Display	Also known as banner ads, appears in a typically defined 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, 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	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	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 placed. Mostly appears as 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 appear 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.	Any other forms of digital advertising such as email, forum seeding, affiliate marketing etc.