Going native: Prospects of native advertising development in the ASEAN and BRICS countries

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Received: 27 March 2021 / Accepted: 6 February 2022
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Abstract
Native advertising is the most effective tool to deal with the refusal of Internet users to perceive advertising messages that determine its originality and novelty. The purpose of the study is to analyze the prospects of development of these markets and their current status, marketing research companies. The result shows that the markets of the ASEAN countries and similar economies like Kazakhstan are characterized by a hardly predictable but rather big domestic advertising market, which is expected to become as big as the BRICS market in the next 10 years, as well as get ahead of it. The biggest changes are noted in China, where the native advertising market has won an extra 30% of the total digital advertising market for the last 5 years. The lowest growth rate of the native advertising market is noted in Brazil, India and South Africa (12.92%, 17.53% and 17.96% of the total online market, respectively). Prospects for further research are based on the possibility of using the results in the analysis of regional features of native advertising in the media of other countries in a comparative aspect, taking into account a system of criteria: socio-political situation, cultural traditions, economics, education, and media.

Keywords Economic growth · Digital advertising · Marketing · Native advertising

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1 Introduction

Native advertising is expanding and every year the amount of funds invested in this type of advertising increases. At the same time, the effectiveness of native advertising is difficult to analyze and confirm as the metrics of its application are too broad and include a large number of factors that can influence customer loyalty.

Native advertising is the fastest growing segment, which in 2020 and 2021 showed a steady growth of 45% per year. In 2020, more than $41.1 billion was spent on this type of advertising and in the United States the share of native advertising in the total digital display advertising amounted to 61%, which is the world record according to eMarketer. According to the surveys and studies conducted by various marketing companies around the world, an average of at least 70% of consumers prefer to study product information through content rather than through traditional advertising products. Native advertising gets 53% more views compared to traditional advertising types (according to Content Marketing Institute and Share through). At the same time, the growth of views and responses to hidden native ads is at least 18% after its launch by a specific brand (Springer 2018; Dwivedi et al. 2020).

Most researchers believe that this type of advertising is appropriate to the needs of large corporations and multinational companies, whose success is determined by customer loyalty rather than a rapid increase in sales (Campbell and Marks 2015). Native advertising provides businesses with two critical advantages: the ability to beat banner blindness and the disregard of modern native user to ads; on the other hand, it allows companies to take advantage of information resources and message context to connect the user to the proposed products more strongly (Einstein 2016; Harms et al. 2017).

Native advertising is a controversial issue as well as it has been criticized by the supervisory authorities of many major developed countries, researchers and the public (Amazeen and Vargo 2021; Wang and Guo 2021). Native advertising assumes the fact that the user will not be able to distinguish advertising from the traditional information and entertainment content. Although companies mark sponsored advertising content, this has little effect on user cheating (Schauster et al. 2016; Sweetser et al. 2016). This often leads to serious scandals involving information and media businesses that host advertising content on their platforms that does not meet the interests of their users. The most famous example was the use of the Forbs platform for the communication of the American Scientology Church, which caused a negative response and forced the company to delete the article (Schauster et al. 2016).

At the same time, user surveys show that the vast majority of them easily perceive native advertising as brand information, and do not consider it a kind of cheating or manipulation. Users neutrally perceive native advertising as information content on a website or social network, and more than 56% of them are ready to use it for increasing their own awareness (Wojdynski 2016). The assumption, made by some well-known experts in the advertising business, that native advertising develops and rapidly grows as an independent advertising market only in the countries and regions that are characterized by the great media space connectivity and density has not been confirmed yet (Cherkasov et al. 2015; Wojdynski and Evans 2016). While the saturation of the Internet and the media is low, native advertising is not required, and it
may be uncompetitive compared to other types of advertising (Wojdynski and Golan 2016).

The limits of the growth of native advertising in developed countries cannot be
determined due to the constant growth of digital economy and the transformation of
a number of businesses in e-commerce companies (Wojdynski 2016). The growth
limits in the BRICS countries are determined by the potential of their own domestic
market and participation in the international division of labor. The problem is that
native advertising is aimed at the ultimate retail consumer rather than the corpo-
rate buyer and the corporate relationship. Thus, countries that produce most mass
consumption products are donors to native advertising while countries that supply
resources and labor are consumers (Wu et al. 2016; Wojdynski and Evans 2020). On
the other hand, native advertising arises and becomes an effective tool of sales in
the context of a saturated market and dense information flow with a large number of
advertisements and promotional interactions per day. The large density of advertising
is typically observed in developed economies. Thus, people living in countries with a
higher standard of living and purchasing power can better filter advertising and it is to
overcome their resistance that native advertising is used (Springer 2018). In addition,
native advertising is of little use when targeting an audience with low cultural needs
and poor cultural competence. This is a characteristic of most ASEAN countries that
are introducing the culture of mass consumption and digital environment (Sarasomb-
bat 2017; Fink and Elisabetta 2019). The status of a number of big countries, such as
Kazakhstan, which are in-between position in terms of the trend described, is
important in the context of the study. The level of their technological and market
development is closer to the indicators of the BRICS countries, in particular, the
Russian ones; however, the social state, the prevalence of traditional values and char-
acteristics of customers are much closer to the indicators of the ASEAN countries. It
should be expected that the national advertising market of Kazakhstan will developed
according to the ASEAN scenario (Davletova et al. 2017; Zhanpeisova et al. 2020).

2 Materials and methods

2.1 Research design

The design of the study is based on the assessment of the economic system of a
number of countries being compared, the identification of the dynamics of their
development and the projected indicators of both general economic character and in
advertising.

2.2 Sample and survey

The study is qualitative research that compares and analyzes the information found
in the studies devoted to national advertising in the ASEAN and BRICS countries.
The criteria for sample were such factors as quantitative economic data, economic
development data, GDP per capita, employment rate, trade balance, indicators of
international reserves, and national debt were used (Garg 2016; Boonyasana et al. 2018; Khan et al. 2020; Kolosova et al. 2020).

It is quite challenging to find accurate comparative data due to the fact that marketing research companies use completely different evaluation techniques that do not allow an adequate comparison based on the same basis of comparison. Thus, many companies estimate advertising costs while others assess the revenue from certain types of ads; in addition, in each country there are different methods to determine the revenue. Therefore, a number of marketing companies conducting research on the national advertising market in each of the countries under study were surveyed; they provided averaged data on the percentage of native advertising in the online advertising of each country according to the consolidated opinion of the experts of these companies and their available statistics.

2.3 Data analysis and statistical processing

One of the key problems related to the determination of the characteristics of advertising markets is the fact that according to many researchers, native advertising does not provide clear metrics that would allow the evaluation of its effectiveness in attracting customers. It mostly affects long-term loyalty, which is also difficult to determine due to the short period of the study (Boonyasana et al. 2018). However, there are huge investments in native ads that are expected to provide the long-term return on investment effect (Burtseva et al. 2016). The difficulties are also due to the fact that there is little or no research on advertising markets by countries in terms of the characteristics and features of the implementation of native advertising (Dant et al. 2016; Chernova et al. 2017). Market research conducted by private marketing research companies is inaccessible to the public and is often carried out based on questionable techniques that cast doubt on their real statistical validity and significance (Dant et al. 2016).

A number of experts in advertising and online technologies state that native advertising is built on deception and deprivation of the freedom of choice of Internet users, which also leads to opposing opinions; however, most users treat native advertising as an information tool.

The formation of early loyalty is critical for large companies. To do this, it is necessary to try to retain customers who are still in the search for the product and have not become loyal consumers yet. Such customers are found in emerging markets, which include the ASEAN countries, as well as a number of post-Soviet countries with significant economic potential, in particular Kazakhstan (Davletova 2016). Therefore, despite the dubious effectiveness of native advertising, corporations will invest more in the development of the ASEAN national advertising market as a more reliable one.

The estimates of native advertising in the BRICS countries are critically different as the unification of countries is exclusively due to information and media reasons (Garg 2016). The level and pace of economic development, as well as the major economic indicators of the BRICS countries are also different, which does not allow us to state unity of trends in this group of economies (Nordenstreng and Thussu 2015; Garg 2016). In addition, a number of rapidly developing countries, such as Kazakhstan, can enter the association in accordance with various economic indicators and due to traditional economic, transport, and other linkages. According to researchers,
the BRICS countries are united based on the fact that in the 2000s, all of them demonstrated an outpacing rate of economic growth that exceeded the expectations of all developed economies; they are also characterized by enormous natural resources and large population that ensure a large domestic consumer market, labor market, and labor migration opportunities (Tuccio 2017; Sinclair 2018). A number of research shows that the development of the advertising market in each of the BRICS countries has its own trajectory and is based on different trends (Nordenstreng and Thussu 2015; Sinclair 2018; Kolosova et al. 2020).

The completeness of the native advertising market and its limits cannot be accurately defined, but native advertising has clear growth limits associated with the number of information resources and users’ time perception. In addition, native advertising is expensive and requires great effort and the availability of creative human resources (Manic 2015). Some groups of researchers tend to believe that the future of the native advertising market may be determined by the tendency towards cognitive addictiveness of users or the ability of users to recognize native advertising that will make advertising ineffective and undermine the credibility of the media and advertisers that use it (Matteo and Dal Zotto 2015).

All media corporations have become stand-alone players in the corporate property rights and assets market (Flor and Gonzalez-Flor 2019; Zimand-Sheiner et al. 2020). They invest in other companies’ stock and act as their own advertising agents. Therefore, native advertising is a kind of response to the disappearance of advertising agencies as intermediaries in the creation and distribution of advertising content (Wojdynski et al. 2017; Santini et al. 2020).

2.4 Ethical issues

The study was conducted in compliance with all ethical standards, confidential information was not required. Only opinions on the issue were taken into account.

2.5 Research limitations

The restrictions are due to the large number of countries selected for analysis. Given the limited number of statistical studies and the lack of available information, the research relies on the comparative analysis of general economic indicators of the countries under consideration. The information obtained should be carefully evaluated; however, it was the only available source of reliable data and it could be applied in the context of the enormous amount of data which statistically neutralize a possible evaluation error.

3 Results

The results of the study show that major challenge of the current assessment of the market of digital, online, and in particular, native advertising is that it is extremely mobile and it is very difficult to obtain reliable metrics. In the course of the study, it was found that most market research and available information are characterized by
a large margin of error and cannot be perceived as completely credible. Therefore, any statistical estimates can be described as indicative ones. However, they provide rather relevant data differences in terms of chronology, as well as the amount of data obtained and averaged.

Figure 1 demonstrates statistical averages of one of the most popular international marketing information collection companies, Statista, which shows the history of the income growth of the owners of media companies that offer native advertising. Despite a significant decrease (from $586.95 billion to $517.49 billion) in 2020 due to the epidemic of coronavirus, a steep rise in revenue that will exceed the peak level of 2019 is expected in 2022. At the same time, other marketing research companies assume that the native advertising market will grow by 46% in 2021 (Einstein 2016; Wojdynski and Evans 2020).

The unrestrained growth of native advertising opportunities is firmly associated with its digital nature. As already noted, native advertising is part of online advertising and is of digital nature. Other types of advertising media also try to use the methods and approaches of native advertising, but their success cannot be statistically evaluated due to the inaccessibility of relevant information and the share of these types of advertising is rapidly decreasing.

Figure 2 shows advertising market changes that took place over the period of the development of electronic media of different types (almost 40 years). Obviously, since 2010, with the advent of really effective contextual advertising tools, the role of all other advertising platforms has been decreasing and can be disregarded. The percentage of native advertising in this process cannot be accurately estimated (Matteo and Dal Zotto 2015); however, it makes up a significant share of Internet advertising and is commonly found on social networks highlighted in Fig. 2. It should also be considered that native advertising on social networks strives for the most complete

![Image of Figure 1](image-url)

**Fig. 1** Advertising media owners revenue worldwide from 2012 to 2024 (in billion U.S. dollars (according to Statista 2020))
distribution as it most naturally fits into the concept of custom storytelling, which is determined as the ideology of the operation of these electronic resources (Rasmussen 2018).

Figure 3 shows indicative statistics on the changes in the share of native advertising in the online advertising market of the ASEAN countries for which there is available statistical information. Naturally, the assessment is biased due to the fact that it

![Figure 2](image1.png)

**Fig. 2** Changes in the global advertising market in 1980–2019 (accordingly to TadViser n.d.)

![Figure 3](image2.png)

**Fig. 3** Growth in the volume of the native advertising market in the ASEAN countries, 2015–2020, percent (there are no data for Brunei, Cambodia, Laos and Myanmar)
cannot take into account the real native advertising cost and revenue, but the change of its share in online advertising indicates a number of important trends. Despite the different levels of economic development and economic growth in the countries under study, the change in the share of native advertising falls within a very close framework reaching about a third of the online advertising market in each country considered.

A completely different trend is observed in the BRICS countries, where the nominal change in the native advertising market share varies dramatically in all member countries. The biggest changes are noted in China, where the native advertising market has won an extra 30% of the total digital advertising market for the last 5 years. Today, this is the fastest rate of the native advertising market development that is ahead of the US market data in percentage ratio (in real terms, the US market dominates).

The lowest growth rate of the native advertising market is noted in Brazil, India and South Africa (12.92%, 17.53% and 17.96% of the total online market, respectively). These indicators are closely related to the orientation of the economy and the nature of international trade in each country, as well as the quantitative domestic market indicators.

When comparing the characteristics described in Figs. 3 and 4 and a relatively uniform structural growth of the advertising market in the ASEAN countries can be noted in addition to the fact that it makes up a smaller share of the global digital advertising market compared to most BRICS countries. It should be considered that the size of the ASEAN markets in monetary terms is also much larger due to the lower purchasing power of the population and the rapid rate of penetration of mobile communications and the Internet in these countries. That is, the level of development
of the ASEAN countries is much higher than that of the BRICS economies. The most active economies, such as China, are obviously approaching the saturation limit of the native advertising market, after which its growth will not be due to the growth of its share in the global advertising market, but due to the increase in turnover against the background of the fixed share. Based on this, we can assume that over the next 10 years it is the ASEAN countries that will have the fastest and most stable native advertising markets. In accordance with the development rate, some BRICS countries can be included in the group, namely Brazil and India (Garg 2016; Sinclair 2018).

4 Discussion

Most ASEAN markets are actively developing based on similar scenarios as well as it is determined in the studies of scientists from USA, Malaysia and European countries (Hui 2021; Sadiq et al. 2021). These scenarios are mainly determined by similar factors: the specifics of international trade, the peculiarities of long-standing sectors of the economy, as well as national traditions (Fink and Elisabetta 2019; Khan et al. 2020). The ASEAN countries are characterized by the same economic features: all of them have a significant percentage of rural population, relatively low level of industrialization compared to other countries, high levels of poverty, and relatively low per capita income. In addition, the penetration rate of the Internet and mobile communications is also lower compared to their more developed neighbors. In this regard, the ASEAN region is no longer a coherent region as the ASEAN economies have different rates of development and reserves (Sarasombat 2017; Tuccio 2017). The modern economy is being increasingly universalized, and the relationship between countries based on their geographical proximity and common trade and regional interests may become irrelevant over time compared to other types of international relations.

Indonesia stands out from all ASEAN countries; it is intensively developing telecommunications, digital communications, and all services related to the Internet and Web technologies. The Philippines, in turn, has been one of the most popular donors of IT specialists and IT services to the world market for a long time (Sinclair 2016). Statistics on the Indonesian native advertising market are not available now, but a secondary estimate suggests that it is also predominantly targeted at the Western user and users from developed Asian countries, in particular South Korea, Japan and China (Sarasombat 2017; Flor and Gonzalez-Flor 2019).

Based on the results of the study, native advertising in the ASEAN countries is a market that is being developed. Kazakhstan can adjoin ASEAN in accordance with a number of parameters, in particular, the level of dissemination of information technologies and advertising techniques (Davletova et al. 2017). Most researchers of the global advertising market do not distinguish the BRICS countries as a single group confirming that there are no common methodological reasons for recognizing the existence of this group as an association except for the ideological and informational ones. This is also manifested in relation to the native advertising market. In China, the market is rapidly growing as the Chinese segment of the Internet is developing extremely intensively due to the natural filling of this process and the fact that it is controlled and partially closed to the outside world. The Russian segment of the
Internet is fully open and active; it is characterized by the same trends as the segment of Western Europe and the United States, but its financial capacity is much lower and it does not have any significant impact on the global network and the economic relations taking place there. In Russia, native advertising follows the same trends as in most countries of Western Europe and North America (Chernova et al. 2017). In Kazakhstan, the market is developing much slower but it has large potential, which is more typical for the countries of the ASEAN region (Davletova et al. 2017). The situation is roughly the same in South Africa. Brazil is out of this context due to the deep property stratification of society and its traditional structure. In the state, native advertising is used at the minimal level and it is predominantly targeted at the international consumer of Brazilian goods and services, in particular, those related to sports, networking, shopping, and tourism.

The ASEAN countries are characterized by high internal migration within the association. The BRICS countries are heterogeneous: some of them encourage brain-drain while others suffer from this phenomenon to a much lesser extent (Garg 2016; Tuccio 2017; Fink and Elisabetta 2019; Kolosova et al. 2020). Kazakhstan is intensively losing young well-educated people in the course of “intellectual migration” (Zhanpeisova et al. 2020). Migration is part of the phenomenon of native advertising as the perception of content is highly dependent on where it comes from and the linguistic factors. There is a conditional assumption that native ads may be easier to recognize by non-native speakers, but this hypothesis should be studied and tested (Mutiarani 2017; Hashim and Leitner 2020). Native advertising relies on context, in particular, the context that is homogeneous to thinking and language of the percipient. While other types of advertising are not strongly associated with the contextual identity of the culture of perception, native advertising depends directly on this context (Campbell and Marks 2015; Prasithrathsint et al. 2019).

Researchers point out that perception of an advertising message depends on the cultural background of the percipient. Researchers divide the culture of perception into two types: predominantly collectivist and individualistic cultures (Dant et al. 2016). When making a purchase, collectivist cultures tend to trust “their close people” to a greater extent, that is, to ask friends, relatives, or people from the immediate environment for advice. The representatives of collectivist cultures often use the purchases made by other members of their country, company, family, etc. They do not tend to stand out from the environment or demonstrate autonomy and independence with the help of any unique objects or clothing (Dant et al. 2016). Individualistic cultures are characterized by the opposite tendency; the phenomenon of fashion is stratified and cannot spread to all social strata and groups at the same time (Dant et al. 2016). Accordingly, advertising is more positively perceived by the representatives of individualistic cultures and is more likely to provoke disgust and defensive reactions among the representatives of collectivist cultures as evidenced by numerous statistical marketing studies (Martin and Dwyer 2019).

The BRICS and ASEAN countries are more traditional in nature. In accordance with this parameter, Kazakhstan also adjoins them being characterized as a traditional society with a collectivist consciousness. This also affects the perception of native advertising in the country (Davletova 2016). The ASEAN countries retain the features of collectivist consciousness to a greater extent compared to the BRICS econo-
mies that are rapidly losing them in the process of accelerated economic development and infusion into the global culture. Even traditionalist cultures like the Chinese one are losing the features of collectivist behavior and perception in marketing and consumer behavior as a result of globalization and digitalization (Jung and Heo 2019). According to scientific research results, in the ASEAN region, this trend is most actively observed in Indonesia and the Philippines (Fink and Elisabetta 2019). Therefore, native advertising in a traditionally local and collectivist society is much less effective as it appeals to an atomized and individualized consumer consciousness that is typically found in Western economies and countries with high levels of digitalization and mass consumption culture (Dant et al. 2016).

5 Conclusions

The rapid development of native advertising is due to its ability to most effectively overcome the mechanisms of banner blindness and blocking the perception of advertising content by Internet users. The volumes of this type of advertising increase every year and are crucial in most advertising markets. The growth rate of this segment is increasing every year – from the estimated growth of 15% per year in 2015 to the expected growth of 46% in 2020 for the global market and the leading Chinese and American advertising markets. Unlike developed countries with a high level of marketing and production digitalization, in the BRICS and ASEAN regions there are peculiarities of the advertising market formation. To determine the prospects of development of these markets and their current status, marketing research companies were surveyed and the research data obtained by scientists of different countries over the past five years were used. The results obtained show that the markets of the ASEAN countries provide a rapidly growing and extremely large market for the growth of native advertising, and in the next 10 years this market may reach the volumes of similar BRICS markets and outperform them. The results show that the biggest changes are noted in China, where the native advertising market has won an extra 30% of the total digital advertising market for the last 5 years. The lowest growth rate of the native advertising market is noted in Brazil, India and South Africa (12.92%, 17.53% and 17.96% of the total online market, respectively). The practical significance of the study is the fact that it can provide companies with strategic information on making a decision to enter the native advertising markets of the ASEAN and BRICS countries and serve as a basis for further marketing and cultural studies in this direction. Prospects for further research are based on the possibility of using the results in the analysis of regional features of native advertising in the media of other countries in a comparative aspect, taking into account a system of criteria: socio-political situation, cultural traditions, economics, education, and media.

Author contributions Larissa Noda: Conceptualization, Validation, Investigation, Data curation, Writing—original draft, Visualization, Writing—review & editing. Olga Kolosova: Methodology, Formal analysis, Investigation, Data curation, Visualization, Writing—review & editing. Natalia Levoshich: Conceptualization, Methodology, Resources, Writing—original draft, Writing—review & editing. Elena Zatarsinnaya: Validation, Formal analysis, Resources, Writing—original draft, Writing—review & editing.
Data availability  Data will be available on request.

Declarations

Funding  This research did not receive any specific grant from funding agencies in the public, commercial, or not-for-profit sectors.

Conflict of interests  Authors declare that they have no conflict of interests.

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