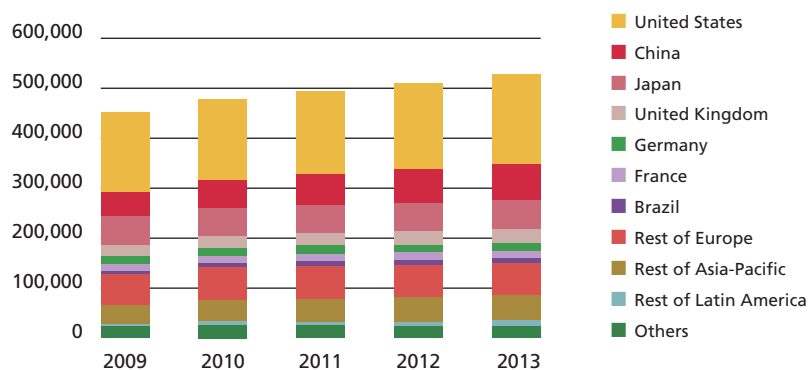


Market Data

(Calendar year)

(Millions of U.S. dollars)

Size of Major Advertising Markets



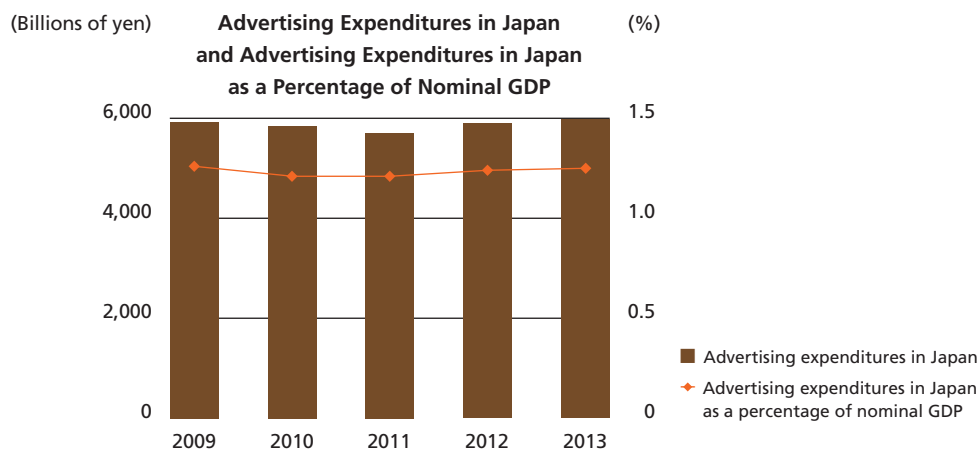
Size of Major Advertising Markets

Millions of U.S. dollars at current prices

Calendar year	2009		2010		2011		2012		2013	
United States	\$158,782.0	35.2%	\$162,905.0	34.1%	\$164,901.0	33.3%	\$171,432.0	33.6%	\$178,824.4	33.9%
China	47,972.9	10.6	54,702.2	11.4	63,012.1	12.7	66,838.7	13.1	71,804.6	13.6
Japan	57,863.2	12.8	57,086.5	11.9	55,786.0	11.3	57,561.3	11.3	58,390.8	11.0
United Kingdom	21,589.2	4.8	23,385.2	4.9	25,189.2	5.1	26,193.9	5.1	27,552.1	5.2
Germany	16,083.4	3.6	16,310.0	3.4	16,386.9	3.3	16,422.8	3.2	16,205.4	3.1
France	12,924.2	2.9	13,694.5	2.9	14,506.5	2.9	14,055.6	2.8	13,676.7	2.6
Brazil	7,674.8	1.7	9,065.2	1.9	9,813.7	2.0	10,467.1	2.1	11,207.4	2.1
Rest of Europe	61,854.2	13.7	65,137.8	13.6	67,023.0	13.5	65,009.3	12.7	63,678.4	12.1
Rest of Asia-Pacific	38,117.4	8.4	43,116.2	9.0	46,325.4	9.4	48,800.5	9.6	51,773.6	9.8
Rest of Latin America	5,300.1	1.2	6,145.0	1.3	6,860.0	1.4	9,770.7	1.9	10,993.9	2.1
Others	23,053.9	5.1	26,813.4	5.6	24,993.4	5.1	23,373.2	4.6	23,947.4	4.5
Total	\$451,215.2	100.0%	\$478,360.9	100.0%	\$494,797.3	100.0%	\$509,925.1	100.0%	\$528,054.7	100.0%

Note: These totals are for major mass media, including television, newspapers, magazines, radio, cinema, outdoor and Internet advertising.

Source: Carat "GLOBAL ADVERTISING EXPENDITURE TRENDS SEPTEMBER 2014 REPORT"



Advertising Expenditures in Japan and Advertising Expenditures in Japan as a Percentage of Nominal GDP

Calendar year	2009	2010	2011	2012	2013
Advertising expenditures in Japan	¥ 5,922.2	¥ 5,842.7	¥ 5,709.6	¥ 5,891.3	¥ 5,976.2
Nominal GDP	471,138.7	482,384.4	471,310.8	473,777.1	478,447.7
Advertising expenditures in Japan as a percentage of nominal GDP	1.26%	1.21%	1.21%	1.24%	1.25%

Note: Advertising expenditures include expenditures on terrestrial television, newspapers, magazines and radio advertising, expenditures on marketing flyers inserted in newspapers, exhibitions and screen displays, direct mailings, outdoor advertisements, transit advertisements, advertisements in telephone directories, point-of-purchase (POP) advertisements, satellite media-related and Internet advertisements.

Source: Dentsu, 2013 Advertising Expenditures in Japan

Advertising Expenditures in Japan by Medium

Billions of yen

Calendar year	2009		2010		2011		2012		2013	
Television	¥1,713.9	29.0%	¥1,732.1	29.6%	¥1,723.7	30.2%	¥1,775.7	30.2%	¥1,791.3	30.0%
Newspapers	673.9	11.4	639.6	11.0	599.0	10.5	624.2	10.6	617.0	10.3
Magazines	303.4	5.1	273.3	4.7	254.2	4.4	255.1	4.3	249.9	4.2
Radio	137.0	2.3	129.9	2.2	124.7	2.2	124.6	2.1	124.3	2.1
Satellite Media-Related	70.9	1.2	78.4	1.3	89.1	1.6	101.3	1.7	111.0	1.8
Internet	706.9	11.9	774.7	13.3	806.2	14.1	868.0	14.7	938.1	15.7
Promotional Media	2,316.2	39.1	2,214.7	37.9	2,112.7	37.0	2,142.4	36.4	2,144.6	35.9
Total	¥5,922.2	100.0%	¥5,842.7	100.0%	¥5,709.6	100.0%	¥5,891.3	100.0%	¥5,976.2	100.0%

Source: Dentsu, 2013 Advertising Expenditures in Japan

Advertising Expenditures in the Four Traditional Mass Media in Japan by Industry

Billions of yen

Calendar year	2009		2010		2011		2012		2013	
Energy/Materials/Machinery	¥ 32.7	1.2%	¥ 34.2	1.2%	¥ 27.2	1.0%	¥ 26.2	1.0%	¥ 24.9	0.9%
Foodstuffs	288.5	10.2	288.0	10.4	266.1	9.9	283.2	10.2	272.0	9.8
Beverages/Cigarettes	227.0	8.0	217.8	7.9	196.2	7.3	209.8	7.6	206.8	7.4
Pharmaceuticals/ Medical Supplies	163.3	5.8	145.9	5.3	143.5	5.3	148.4	5.3	147.4	5.3
Cosmetics/Toiletries	275.9	9.7	287.9	10.4	276.8	10.2	287.8	10.4	279.8	10.1
Apparel/Fashion, Accessories/ Personal Items	93.1	3.3	101.2	3.7	108.1	4.0	116.4	4.2	117.3	4.2
Precision Instruments/ Office Supplies	30.7	1.1	29.4	1.1	26.3	1.0	28.8	1.0	28.3	1.0
Home Electric Appliances/ AV Equipment	70.5	2.5	73.3	2.6	54.4	2.0	54.1	2.0	55.3	2.0
Automobiles/Related Products	134.5	4.8	131.6	4.7	129.8	4.8	164.7	5.9	167.1	6.0
Household Products	58.9	2.1	65.0	2.3	64.2	2.4	64.9	2.3	68.5	2.5
Hobbies/Sporting Goods	142.0	5.0	123.1	4.4	110.6	4.1	108.5	3.9	102.2	3.7
Real Estate/Housing Facilities	112.6	4.0	102.9	3.7	104.4	3.9	108.6	3.9	115.0	4.1
Publications	94.5	3.3	92.6	3.3	89.4	3.3	92.1	3.3	89.8	3.2
Information/Communications	203.3	7.2	220.9	8.0	222.0	8.2	245.2	8.8	243.3	8.8
Distribution/Retailing	191.3	6.8	182.2	6.6	186.9	6.9	202.9	7.3	192.7	6.9
Finance/Insurance	151.4	5.3	153.8	5.5	141.2	5.2	144.9	5.2	167.6	6.0
Transportation/Leisure	233.5	8.2	211.1	7.6	195.2	7.2	211.2	7.6	209.7	7.6
Food Services/Other Services	134.8	4.8	138.6	5.0	123.5	4.6	128.9	4.6	142.2	5.1
Government/Organizations	47.6	1.7	40.8	1.5	108.7	4.0	33.2	1.2	31.4	1.1
Education/Medical Services/ Religion	85.4	3.0	81.7	2.9	75.7	2.8	78.2	2.8	80.6	2.9
Classified Ads/Others	55.8	2.0	51.8	1.9	50.5	1.9	40.5	1.5	39.6	1.4
Total	¥2,828.2	100.0%	¥2,774.9	100.0%	¥2,701.6	100.0%	¥2,779.6	100.0%	¥2,782.5	100.0%

Note: Expenditures include expenditures on terrestrial television, newspapers, magazines and radio advertising, including related creative production costs.

Source: Dentsu, 2013 Advertising Expenditures in Japan