

Market Data

Global Advertising Expenditures

Millions of U.S. dollars at current prices

Calendar year	2010		2011		2012		2013		2014	
North America	170,352.6	38.4%	172,524.7	37.7%	179,445.2	37.8%	186,984.8	37.9%	195,387.8	37.8%
U.S.A.	162,905.0	36.7	164,901.0	36.0	171,432.0	36.1	178,824.4	36.2	186,955.6	36.2
Canada	7,447.6	1.7	7,623.7	1.7	8,013.2	1.7	8,160.4	1.7	8,432.2	1.6
Western Europe	87,697.0	19.8	89,664.3	19.6	90,285.2	19.0	89,737.5	18.2	91,807.5	17.8
U.K.	19,182.2	4.3	20,403.6	4.5	21,320.7	4.5	22,661.4	4.6	24,199.5	4.7
Germany	13,702.8	3.1	13,767.4	3.0	16,308.1	3.4	16,252.4	3.3	16,485.0	3.2
France	11,505.3	2.6	12,187.6	2.7	11,808.8	2.5	11,490.4	2.3	11,387.0	2.2
Italy	10,690.6	2.4	10,400.8	2.3	9,158.7	1.9	8,235.5	1.7	8,073.9	1.6
Spain	6,662.9	1.5	6,219.6	1.4	5,219.0	1.1	4,777.4	1.0	5,054.6	1.0
Central & Eastern Europe	10,888.5	2.5	11,778.3	2.6	12,317.3	2.6	12,529.5	2.5	12,843.5	2.5
Russia	4,011.9	0.9	4,837.9	1.1	5,460.4	1.1	5,991.6	1.2	6,221.1	1.2
Asia Pacific	143,314.9	32.3	153,057.8	33.5	160,890.4	33.9	169,177.4	34.3	178,073.2	34.5
China	54,164.5	12.2	62,392.7	13.6	66,181.7	13.9	71,098.8	14.4	76,480.4	14.8
Japan	49,294.2	11.1	48,171.2	10.5	49,704.2	10.5	50,420.5	10.2	51,905.4	10.0
Australia	10,850.5	2.4	10,695.0	2.3	10,528.4	2.2	10,611.7	2.1	10,647.4	2.1
South Korea	7,018.8	1.6	7,654.3	1.7	7,992.7	1.7	8,165.2	1.7	8,286.8	1.6
Indonesia	4,178.9	0.9	4,943.8	1.1	6,086.1	1.3	7,223.2	1.5	8,030.5	1.6
India	3,493.1	0.8	3,810.1	0.8	4,099.2	0.9	4,430.0	0.9	4,815.4	0.9
Latin America	13,080.5	2.9	14,354.7	3.1	18,214.1	3.8	20,289.4	4.1	22,596.9	4.4
Brazil	7,602.0	1.7	8,229.6	1.8	9,674.4	2.0	10,668.4	2.2	11,680.6	2.3
Other Area	18,211.3	4.1	16,176.4	3.5	14,073.3	3.0	15,204.8	3.1	15,843.3	3.1
Total	443,544.9	100.0%	457,556.2	100.0%	475,225.4	100.0%	493,923.4	100.0%	516,552.3	100.0%

Source: Carat, Global Advertising Expenditure Forecasts—March 2015

Global Advertising Expenditures by Medium

Millions of U.S. dollars at current prices

Calendar year	2010		2011		2012		2013		2014	
Television	187,715.5	43.9%	192,374.8	43.5%	197,867.1	43.1%	205,205.0	42.8%	214,213.9	42.7%
Newspapers	85,459.6	20.0	81,755.2	18.5	76,241.2	16.6	74,077.9	15.5	69,714.1	13.9
Magazines	40,008.0	9.4	39,456.1	8.9	39,052.0	8.5	38,106.9	8.0	36,760.3	7.3
Radio	29,896.1	7.0	31,006.3	7.0	31,440.3	6.8	32,744.3	6.8	34,174.4	6.8
Cinema	2,326.6	0.5	2,403.7	0.5	2,703.6	0.6	2,645.5	0.6	2,710.8	0.5
Outdoor	28,296.2	6.6	30,328.7	6.9	32,751.9	7.1	33,778.8	7.0	35,474.6	7.1
Digital	53,893.5	12.6	64,732.2	14.6	79,531.8	17.3	92,703.8	19.3	108,869.1	21.7

Source: Carat, Global Advertising Expenditure Forecasts—March 2015

Advertising Expenditures in Japan and as a Percentage of Nominal GDP

Billions of yen

Calendar year	2010	2011	2012	2013	2014
Advertising expenditures in Japan	5,842.7	5,709.6	5,891.3	5,976.2	6,152.2
Nominal GDP	482,384.4	471,310.8	475,110.4	480,128.0	488,215.5
Advertising expenditures in Japan as a percentage of nominal GDP	1.21%	1.21%	1.24%	1.24%	1.26%

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, 2014 Advertising Expenditures in Japan

Advertising Expenditures in Japan by Medium

Billions of yen

Calendar year	2010		2011		2012		2013		2014	
Television	—		—		1,877.0	31.9%	1,902.3	31.8%	1,956.4	31.8%
Terrestrial Television	1,732.1	29.6%	1,723.7	30.2%	1,775.7	30.2	1,791.3	30.0	1,834.7	29.8
Satellite Media-Related	78.4	1.3	89.1	1.6	101.3	1.7	111.0	1.8	121.7	2.0
Newspapers	639.6	11.0	599.0	10.5	624.2	10.6	617.0	10.3	605.7	9.8
Magazines	273.3	4.7	254.2	4.4	255.1	4.3	249.9	4.2	250.0	4.1
Radio	129.9	2.2	124.7	2.2	124.6	2.1	124.3	2.1	127.2	2.1
Internet	774.7	13.3	806.2	14.1	868.0	14.7	938.1	15.7	1,051.9	17.1
Promotional Media	2,214.7	37.9	2,112.7	37.0	2,142.4	36.4	2,144.6	35.9	2,161.0	35.1
Total	5,842.7	100.0%	5,709.6	100.0%	5,891.3	100.0%	5,976.2	100.0%	6,152.2	100.0%

Note: Advertising expenditures in television were redefined in 2014, retroactive to 2012, to include expenditures in both terrestrial television and satellite media-related advertising.

Source: Dentsu, 2014 Advertising Expenditures in Japan

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

Billions of yen

Calendar year	2010		2011		2012		2013		2014	
Energy/Materials/Machinery	34.2	1.2%	27.2	1.0%	26.2	1.0%	24.9	0.9%	25.6	0.9%
Foodstuffs	288.0	10.4	266.1	9.9	283.2	10.2	272.0	9.8	263.5	9.4
Beverages/Cigarettes	217.8	7.9	196.2	7.3	209.8	7.6	206.8	7.4	210.9	7.5
Pharmaceuticals/Medical Supplies	145.9	5.3	143.5	5.3	148.4	5.3	147.4	5.3	149.9	5.3
Cosmetics/Toiletries	287.9	10.4	276.8	10.2	287.8	10.4	279.8	10.1	295.5	10.5
Apparel/Fashion, Accessories/ Personal Items	101.2	3.7	108.1	4.0	116.4	4.2	117.3	4.2	113.8	4.0
Precision Instruments/Office Supplies	29.4	1.1	26.3	1.0	28.8	1.0	28.3	1.0	30.5	1.1
Home Electric Appliances/ AV Equipment	73.3	2.6	54.4	2.0	54.1	2.0	55.3	2.0	59.2	2.1
Automobiles/Related Products	131.6	4.7	129.8	4.8	164.7	5.9	167.1	6.0	172.7	6.1
Household Products	65.0	2.3	64.2	2.4	64.9	2.3	68.5	2.5	72.4	2.6
Hobbies/Sporting Goods	123.1	4.4	110.6	4.1	108.5	3.9	102.2	3.7	94.1	3.3
Real Estate/Housing Facilities	102.9	3.7	104.4	3.9	108.6	3.9	115.0	4.1	118.0	4.2
Publications	92.6	3.3	89.4	3.3	92.1	3.3	89.8	3.2	87.6	3.1
Information/Communications	220.9	8.0	222.0	8.2	245.2	8.8	243.3	8.8	260.9	9.3
Distribution/Retailing	182.2	6.6	186.9	6.9	202.9	7.3	192.7	6.9	193.7	6.9
Finance/Insurance	153.8	5.5	141.2	5.2	144.9	5.2	167.6	6.0	164.3	5.8
Transportation/Leisure	211.1	7.6	195.2	7.2	211.2	7.6	209.7	7.6	211.7	7.5
Food Services/Other Services	138.6	5.0	123.5	4.6	128.9	4.6	142.2	5.1	145.0	5.2
Government/Organizations	40.8	1.5	108.7	4.0	33.2	1.2	31.4	1.1	33.8	1.2
Education/Medical Services/Religion	81.7	2.9	75.7	2.8	78.2	2.8	80.6	2.9	77.1	2.7
Classified Ads/Others	51.8	1.9	50.5	1.9	40.5	1.5	39.6	1.4	36.7	1.3
Total	2,774.9	100.0%	2,701.6	100.0%	2,779.6	100.0%	2,782.5	100.0%	2,817.6	100.0%

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

Source: Dentsu, 2014 Advertising Expenditures in Japan