

2014

Advertising  
Expenditures  
in Japan

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### **About Dentsu's Advertising Expenditures in Japan**

Dentsu's annual report on advertising expenditures in Japan is an estimate of advertising spending in Japan during the calendar year (January to December), representing the advertising media fees and production costs for the traditional media (newspapers, magazines, radio and television), along with those for the Internet and promotional media categories. It is prepared in cooperation with media companies and production companies. Advertising expenditures in the traditional media are also broken down into estimates for 21 industry categories.

Dentsu had used the same methods and category scope in its estimate of expenditures from 1947 through 1986, but in 1987 the scope of the report was expanded beyond the four traditional media, and figures were revised retroactively to 1985. The scope of estimates was revised again in the 2007 report, with figures revised retroactively to 2005. After Japan switched from analog to terrestrial digital broadcasting in 2011, televisions capable of receiving both terrestrial and satellite broadcasts became the norm. Therefore, starting in 2014, advertising expenditures in Television were redefined to include expenditures in both Terrestrial Television and Satellite Media-Related advertising.

# I. Overview of Advertising Expenditures in Japan for 2014

## Total advertising expenditures rose 2.9%, to ¥6,152.2 billion

Japan's advertising expenditures in 2014 totaled ¥6,152.2 billion, an increase of 2.9% over the previous year. Despite the effects of an increase in the consumption tax rate, overall spending on advertising posted year-on-year gains for a third straight year.

### General Characteristics of Advertising Expenditures during 2014

1. Advertising expenditures in 2014 were boosted by last-minute demand before the consumption tax rate increase in April, and by spending related to the Sochi 2014 Olympic Games. Expenditures fell in response to the tax rate increase, but still maintained modest growth, thanks in part to the 2014 FIFA World Cup Brazil™. Expenditures for the year totaled ¥6,152.2 billion, marking the first time in six years that Japan's advertising market had surpassed the ¥6,000 billion level.

2. Broken down by medium, expenditures fell slightly in Newspapers (down 1.8%) and were unchanged in Magazines, but rose in Radio (up 2.3%) and Television\* (up 2.8%, including both Terrestrial Television and Satellite Media-Related spending). As a result, overall spending in the traditional media posted a gain of 1.6%. The Internet advertising market (up 12.1%) reached the ¥1,000 billion level for the first time ever, driven by growth in smartphone and video ads, and ads using new advertising technologies. Moreover, Promotional Media (up 0.8%) also contributed to overall growth, expanding for the third year in a row.

\* Starting in 2014, the Television category has been revised to include spending in both Terrestrial Television and Satellite Media-Related advertising.

3. By industry category (for the traditional media, but excluding Satellite Media-Related spending), year-on-year spending rose in 14 of the 21 industry categories, and fell in 7 categories.

Major categories posting gains included Information/Communications (up 7.2% on increased placements related to satellite broadcasts, mobile phone rates and services, and smartphone-related services); Home Electric Appliances/AV Equipment (up 7.1% on growth in ads for electric vacuum cleaners, refrigerators and LCD televisions); Cosmetics/Toiletries (up 5.6% on placements related to shampoos and conditioners, and direct-marketed cosmetic lines for women); Automobiles/Related Products (up 3.4% on a rise in ads for wagons and imported SUVs); and Beverages/Cigarettes (up 2.0% on growth in advertising for domestic beer and *happo-shu* (low-malt beers)).

Expenditures fell in 7 of the 21 industry categories, including Hobbies/Sporting Goods (down 7.9% on weak demand for game and audio software ads); Education/Medical Services/Religion (down 4.4% on cutbacks in ads for vocational and other educational institutions, and correspondence education); Foodstuffs (down 3.2% on lowered spending in the areas of health foods, instant noodles and snack foods); Apparel/Fashion, Accessories/Personal Items (down 3.0% on reduced placements for women's clothing, and men's and women's shoes).

Japan's nominal gross domestic product (GDP) grew at an annualized rate of 1.7% in 2014. Total advertising expenditure as a percentage of GDP was 1.26%, up from 1.24% the previous year.

1. Japan's economy stalled in 2014 after the consumption tax rate was raised from 5% to 8% in April.

The economy expanded 1.3% (5.5% on an annualized basis) during the January–March quarter as the result of a last-minute surge in demand prior to the increase in the consumption tax rate, but then shrank 1.7% (annualized 6.7%) in the April–June quarter as demand evaporated and the consumption tax rate hike drove down real incomes. Internal demand was depressed by simultaneous declines in consumer spending, housing investment and capital investment, and external demand was also weak as exports fell below previous-year levels. The expected recovery in the July–September quarter failed to materialize, with unseasonable weather contributing to a further decline of 0.6% (annualized 1.9%) compared with the same period in 2013. However, after posting losses for two consecutive quarters the economy did bounce back to a 0.6% growth rate in October–December (annualized 2.2%). As a result real GDP in calendar 2014 was unchanged from the previous year, while nominal GDP rose 1.7%.

With regard to the corporate earnings of listed companies, revenues grew 5.1% across all industries (excluding the financial sector) during the first half of fiscal 2014 (April through September), and consolidated ordinary profits also remained strong, up 10.3% compared with the same period in 2013. Moreover, for the fiscal year as a whole (ending March 2015), corporate earnings across all industries are expected to rise 3.6%, and consolidated ordinary profits to increase 2.5%, a level approaching the record high set in the fiscal year ended March 2008, just before the collapse of Lehman Brothers Holdings Inc. From a composition viewpoint, the depreciation of the yen led to improved business performance in automobiles and other industries, and this helped compensate for weakness in the retail sector.

The employment situation improved for a second straight year. The unemployment rate remained at the 3.5% level, and the effective opening-to-application ratio rose to around 1.12.

In currency markets, the depreciation of the yen accelerated sharply in 2014. After starting the year at ¥103 to the dollar (January average), the currency weakened to the ¥107–¥108 range in the fall as the US economy showed signs of recovery, and then dropped sharply to the ¥116 level in November, after the Bank of Japan announced that it would carry out further monetary easing. The yen closed the year at ¥119.79 to the dollar (December 30, 2014), which was more than ¥14 lower than at the close of 2013, and even weaker than before the collapse of Lehman Brothers Holdings Inc.

Japanese stock prices turned upward in the fall as markets reacted positively to the weakening of the yen. The Nikkei monthly average began the year at 15,578 in January, and after some fluctuations ended the year at 17,450, up 7% compared with the end of 2013.

Oil prices fell sharply from the fall of 2014 to the end of the year. Slowdowns in the economies of Europe and China reduced the demand for oil, and this, together with increased shale oil production in the United States, created a sense of oversupply in the market.

2. In the area of consumer spending, sales fell across the board at department stores, supermarkets, and convenience stores. Demand evaporated after the increase in the consumption tax rate due to the resulting declines in real income. Unseasonable weather may also have helped to depress consumption. Statistics for the period from January through the end of November 2014 showed that, after April, same-period spending fell for eight

consecutive months. In the home electric appliances sector, shipments of major components of spending such as air conditioners, refrigerators, washing machines, and electric vacuum cleaners all posted declines from January through November, compared with the same period in 2013. However, relatively high-priced products did quite well, and as a result total shipment values were up 0.2%, holding firm at the previous year's level. Sales of AV equipment remained sluggish, falling 2.6% in the January–November period, but the rate of decline narrowed compared with the previous year. Domestic shipments of flat-screen televisions rose 1.8% from January through November after a decline in the same period in the previous year, and Blu-ray Disc recorders/players also showed a modest gain (up 0.4%). Among digital cameras, shipments of integral lens cameras plunged 28% in the January–October period. Interchangeable-lens cameras, including the mainstay mirrorless type, were down 16.7%. As a result, overall sales of digital cameras fell 24.8% compared with the first 10 months of 2013. Mobile phone sales decreased to 15.78 million units in the April–September period, down 4.1%. Smartphone shipments accounted for 10.50 million of these units, a major decline of some 13.7%. Total mobile phone shipments in fiscal 2014 (ending March 2015) are projected to fall 10.4%, to 35.30 million units. Of these, smartphones are expected to account for 25.10 million units, down 15.2%, whereas sales of so-called “*garakei*” (derived from “Galapagos cell phone,” a term indicating an ordinary flip-phone that has evolved to include features found only in the Japanese market) are forecast to reach 10.20 million units, a gain of 4.0%. Personal computers saw same-period shipments from April through September fall 2.7%, to 6.72 million units, but total shipment values were up 9.8% to ¥536.7 billion, as the weaker yen pushed up the cost of parts. In contrast, sales of tablet devices during the April–September period remained very brisk, reaching 4.13 million units, a jump of 20.8%, and full-year sales for fiscal 2014 (ending March 2015) are expected to reach the 9.10 million unit level, a gain of 21.7%. The domestic new-car market was sluggish after April, but overall vehicle sales for the year recorded solid growth (up 3.5%) thanks to a large surge in demand before the consumption tax rate increase took effect. K-car sales (engine displacement up to 660 cc) remained strong, up 7.6% compared with the previous year. Housing starts also enjoyed brisk demand ahead of the increase in the consumption tax rate, but remained weak thereafter. Statistics showed that housing starts had fallen for nine straight months from March through November. Cumulative housing starts from January through November were down 8.4% compared with the same period in 2013. Condominium sales were lackluster in Tokyo and surrounding prefectures, as well as in the Kansai region. Weaker consumer sentiment translated to sluggish demand for both domestic and international travel, but thanks to the weak yen the number of foreign visitors was up sharply in 2014, exceeding the 13 million mark for the first time. At theme parks, new attractions were very popular, and overall theme park attendance posted solid gains. In food services, sales were higher in family-style restaurants and dinner restaurants, but remained weak at fast-food restaurants and pubs.

A variety of hit products attracted attention in 2014. Among foods, croissant donuts were picked up by all the convenience store chains and quickly became a popular item. In the instant noodle category, Asian-style cup noodles became such a big hit that production was unable to keep up with demand. Popular among women were foods and beverages made with non-fattening “rare sugars,” and cereals containing dried fruits. In beverages, drinks in the Foods for Specialized Health Uses category offering multiple health benefits, such as functional tea drinks, were big hits. Also popular in 2014 were carbonated water drinks for direct consumption. Among alcoholic drinks, purine- and sugar-free *happo-shu* (low-malt

beers) attracted a great deal of attention and led to the formation of a new market for "functional beer." High-priced premium beers also remained in high demand, continuing the trend from the previous year. In pharmaceuticals, a headache remedy that promised quick relief was a big seller, despite its relatively high price. In the Cosmetics/Toiletries category, a round-shaped lip cream that enabled the user to apply balm to both lips at the same time was a hit product, along with shampoos aimed at the male market. Antiperspirants for women, and an entire lineup of products, ranging from shampoos to sprays, designed to combat the oily body odor distinctive to men in their thirties and forties, enjoyed brisk sales. Gel-pod laundry detergent was a big hit, and, being neither a powder nor a liquid, created an entirely new "third category" of laundry detergent. In the Precision Instruments/Office Supplies category, wristwatches were in high demand for a second straight year, boosted by demand from an influx of foreign tourists with money to spend. Erasable color pencils and low-priced fountain pens for elementary school pupils were big hits among young women. The Home Electric Appliances/AV Equipment category saw the introduction of a number of innovative new products, including a futon dryer that could dry shoes and didn't require the use of a hose or air mattress, a fold-up massage chair, high-end tea makers, and automatic pasta makers. In addition, a new type of hair curling iron capable of creating beautiful curls in a short time enjoyed strong demand from women, despite its high price tag. High-resolution audio is permeating the market, especially among audiophiles, and portable high-resolution music players and music distribution websites became very trendy. In addition, the start of 4K test broadcasts boosted demand for 4K Ultra HD televisions. In automobiles, crossover SUVs and cars featuring clean diesel engine technology expanded their sales. A car powered by fuel cells also finally appeared on the market. In household goods, there was strong demand for specialized mattress products. In game software, *Yo-Kai Watch* role-playing video games were such a huge hit that they became a social phenomenon. *Yo-Kai Watch* software for the Nintendo 3DS player, as well as related items such as *DX Yo-Kai* watches and *Yo-Kai* medals enjoyed explosive sales, and advance ticket sales for the *Yo-Kai Watch* movie, released at the end of the year, smashed all previous records. Among game machine consoles, the PlayStation 4 generated a great deal of publicity when it hit the market. In the health devices market, an easy-to-use abdominal fitness machine was a big seller. In the Information/Communications category, the iPhone 6 was introduced to great success. Discount smartphones, however, were also quite popular, particularly among housewives and senior citizens. Big hits among online games were the active role-playing game *Monster Strike (Monsuto)* and the *LINE: Disney Tsum Tsum* puzzle game modeled after the Tsum Tsum stuffed doll sold at the Disney Store. Also popular was a manga magazine app that enables users to read the latest works by famous authors free of charge. Among movies, the animated film *Frozen* generated box-office revenues of ¥25.4 billion, making it the third-biggest hit of all time in Japan. Videos of people performing their own versions of the songs and dances in the film spread all over the Internet, helping to make the movie an international sensation.

## II. 2014 Advertising Expenditures Classified by Medium

### Growth driven by Internet and Television

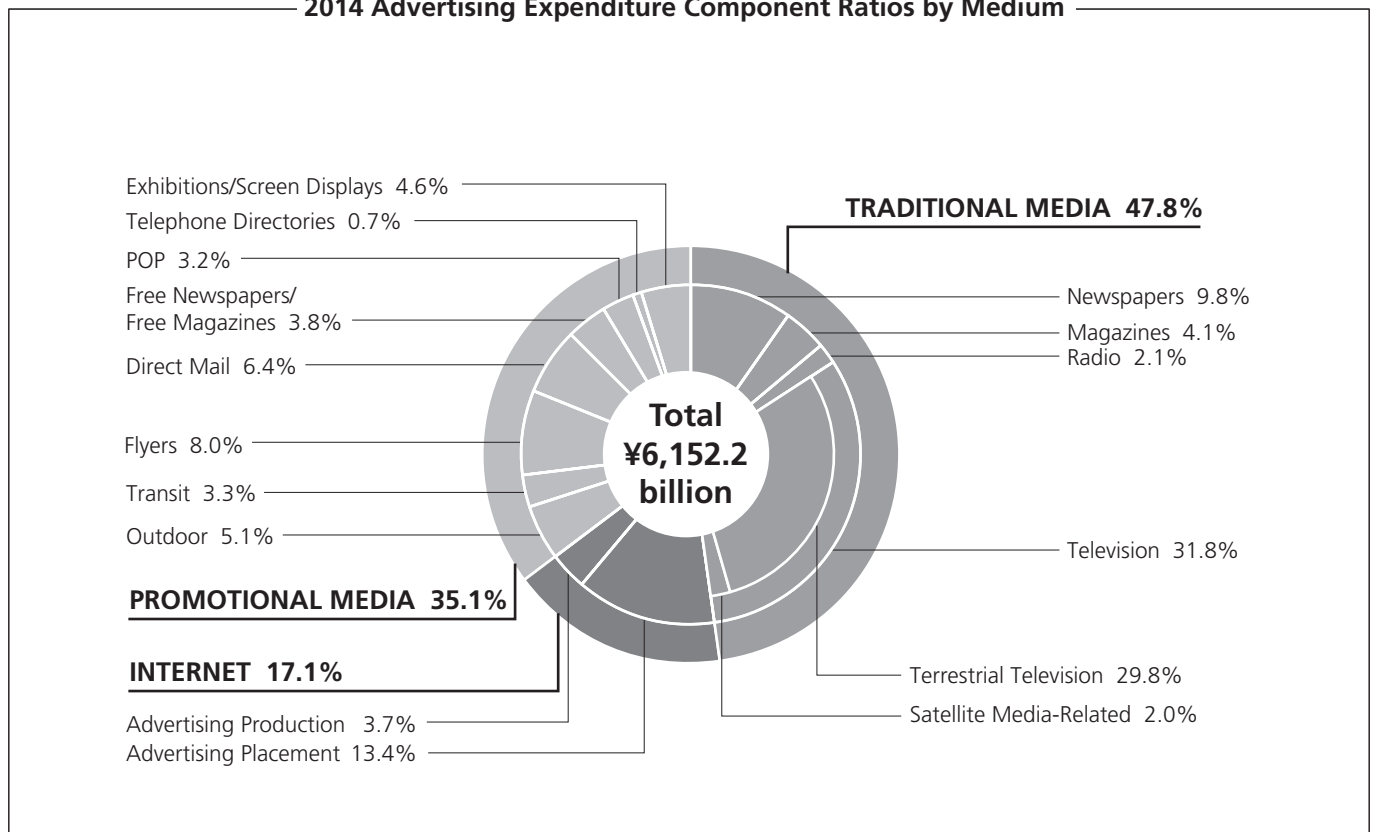
Broken down by medium, Internet advertising expenditures (¥1,051.9 billion, up 12.1%) for the first time ever exceeded ¥1,000 billion, as a result of growth in the smartphone market, video advertising, and the widespread adoption of ad delivery systems utilizing new technologies. Internet advertising expenditures rose to account for 17.1% of spending in all media.

Television advertising expenditures (¥1,956.4 billion, up 2.8%) also helped to drive overall spending, with steady gains in both Terrestrial Television (¥1,834.7 billion, up 2.4%, with program sponsorship up 1.2% and spot advertising up 3.2%) and Satellite Media-Related spending (¥121.7 billion, up 9.6%).

Including Newspapers (down 1.8%), Magazines (flat at 0.0%) and Radio (up 2.3%), advertising expenditures for Traditional Media (including Satellite Media-Related spending) rose 1.6% year on year to ¥2,939.3 billion.

Promotional Media expenditures rose for the third consecutive year (¥2,161.0 billion, up 0.8%).

2014 Advertising Expenditure Component Ratios by Medium



## Newspaper Advertising

- Newspaper advertising spending fell 1.8% year on year, to ¥605.7 billion.
- Spending rose considerably ahead of the consumption tax rate increase, but failed to recover from April as a result of the sluggish economy. Despite such positive factors as the Sochi 2014 Olympic Games and Lower House election, spending was down for the full year.
- Placements were up in Precision Instruments/Office Supplies (wristwatches), Energy/Materials/Machinery (notably B2B advertising), Pharmaceuticals/Medical Supplies, direct-marketed Foodstuffs (health foods), and Beverages/Cigarettes (health drinks). Placements were down in the Information/Communications and Apparel/Fashion, Accessories/Personal Items categories.
- Newspapers have begun new initiatives, including expanding content for young people, with the launch or renewal of newspapers aimed at middle and high school students, and the digitization of content.

## Magazine Advertising

- Magazine advertising spending, at ¥250.0 billion, was on a par with the previous year.
- The business environment for the magazine industry continued to be harsh, and while spending grew in certain categories, overall expenditures were flat year on year.
- Expenditures rose 0.5% in the Apparel/Fashion, Accessories/Personal Items category, which accounts for a large proportion of magazine advertising, and 0.2% in Cosmetics/Toiletries. Spending was also brisk in Automobiles/Related Products, and Transportation/Leisure.
- In an effort to revitalize magazines, publishers are utilizing various resources, including publishing small-sized versions, editions with and without supplements, and electronic editions, as well as launching web-based magazines.

## Radio Advertising

- Radio advertising spending rose 2.3% year on year, to ¥127.2 billion.
- Spending in Tokyo and surrounding prefectures was flat year on year, but continued to show signs of recovery in the Kansai, Chubu, Hokkaido and Kyushu regions, resulting in an increase in spending overall.
- Spending rose in Precision Instruments/Office Supplies (up 18.2%) on greater demand for radio advertising aimed at office workers, Real Estate/Housing Facilities (up 12.6%) on growing demand for home-buying and rebuilding, and Automobiles/Related Products (up 12.5%) on an increase in placements for both domestic and imported passenger cars.
- The number of unique users of the online radio service radiko.jp reached 13 million listeners per month, with 170,000 members acquired for radiko premium (a fee-based service for unrestricted, region-free listening) launched in April 2014.

## Television Advertising

(Terrestrial Television and Satellite Media-Related spending)

- Television advertising spending rose 2.8% year on year, to ¥1,956.4 billion.

### Terrestrial Television spending rose 2.4%, to ¥1,834.7 billion.

- Program sponsorship expenditures rose (up 1.2%) as a result of popular sporting events, including the Sochi 2014 Olympic Games, the 2014 FIFA World Cup Brazil™, and the Asian Games Incheon 2014, together with steady sponsorship for regular programming.
- Spot advertising (up 3.2%) increased sharply in the first quarter (January–March) of the year, during the demand rush prior to the consumption tax rate hike, then declined year on year in April. The market turned brisk again from May, and continued to grow through the end of the year.
- By industry category, expenditures increased for Information/Communications (a sharp increase in smartphones and game apps), Cosmetics/Toiletries (shampoos and conditioners), and Pharmaceuticals/Medical Supplies (direct-to-consumer (DTC) advertising and health drinks).



## Advertising Production Costs for the Traditional Media

(Excluding Satellite Media-Related spending)

Note: Production costs are included in the advertising expenditures in newspapers, magazines, radio and terrestrial television.

## Quarterly Breakdown of 2014 Advertising Expenditure Growth in the Traditional Media

**Satellite Media-Related spending** rose 9.6% year on year, to ¥121.7 billion.

- Spending reached double-digit growth during the first half, with gains in the second half as well.
- By industry category, spending was steady throughout the year for mail-order services, health foods, finance/insurance products, beauty-related products, and beverages. There were also increases in the Automobiles/Related Products and Home Electric Appliances/AV Equipment categories, ahead of the consumption tax rate increase.

**BS digital broadcasting** rose 12.8%, to ¥83.15 billion.

Programming of many talked-about sports programs led to an increase in first-time advertisers. Awareness of the medium is also rising, with an increasing number of advertisers from outside Tokyo and surrounding prefectures.

**CS broadcasting** rose 4.5%, to ¥21.20 billion.

Placements increased steadily on sports, movies, and terrestrial flagship station channels.

**Cable TV (CATV)** rose 3.4%, to ¥17.32 billion.

Placements increased on community broadcast channels.

- Advertising production costs for the traditional media rose 1.0% year on year, to ¥312.1 billion.
- Production costs for terrestrial TV commercials amounted to ¥217.0 billion (up 1.1%).
- Spending on production weakened slightly from April as a result of the higher-than-usual spending related to the Sochi 2014 Olympic Games and the rush in demand before the consumption tax rate hike in the first quarter, but gradually recovered in the second half to finish higher year on year.
- By industry category, spending was steady for Automobiles/Related Products and Finance/Insurance.

A quarterly breakdown of advertising expenditures in the traditional media (including Satellite Media-Related spending) shows that growth rates were fairly weak from April, but spending remained positive throughout the year.

Advertising Expenditures in the Traditional Media (including Satellite Media-Related spending)	(Year on year, %)						
	2013 (Full Year)	H1 Jan.–Jun.	H2 Jul.–Dec.	Q1 Jan.–Mar.	Q2 Apr.–Jun.	Q3 Jul.–Sep.	Q4 Oct.–Dec.
	100.4	99.2	101.7	98.7	99.6	102.2	101.3
2014 (Full Year)	H1 Jan.–Jun.	H2 Jul.–Dec.	Q1 Jan.–Mar.	Q2 Apr.–Jun.	Q3 Jul.–Sep.	Q4 Oct.–Dec.	
	101.6	102.3	100.8	104.0	100.6	100.6	101.1

## Internet Advertising

- Internet advertising spending (medium costs and ad production costs) rose 12.1%, to ¥1,051.9 billion.

**Internet Advertising Medium Costs** rose 14.5%, to ¥824.5 billion.

- Performance-based advertising\* spending amounted to ¥510.6 billion (up 23.9%).
- The growth rate for Internet advertising medium costs overall exceeded that of the previous year as a result of growth in the smartphone market, video advertising, and the proliferation of ad delivery utilizing new technologies. By market segment, ad-space sales and affiliate advertising grew steadily, with a sharp rise in performance-based advertising.

- While targeting ads on portal sites are gradually being replaced by performance-based advertising, ad space sales increased year on year as a result of the use of large-format and rich-media advertising to meet the needs of advertisers for company branding, utilization of smartphone advertising, and the rise of curated and other new types of media.

The segmentation of marketing needs, together with diversification in the media that users encounter, has led to expanded utilization of sites specializing in particular genres, with conventional tie-up and native advertising, and methods such as content marketing starting to become established. Further, advertisers embraced many new developments in earnest, such as utilization of video ads for both PCs and smartphones.

- The market for search engine advertising, which accounts for the majority of performance-based advertising, expanded overall, with a sharp rise in smartphone and tablet searches amid sluggish growth in PC searches. Another area with considerable growth was demand-side platforms (DSPs, which maximize advertising efficiency from the advertiser's perspective). Utilizing real-time bidding (RTB) to broadly and efficiently deliver ads, this method has been widely adopted. The spread of such technologies as DSPs and supply-side platforms (SSPs, which maximize advertising efficiency from the media company's perspective), has created a business environment that allows advertisers to easily utilize the stock of ad space on various sites. There has also been advancement in new initiatives, such as DSP delivery employing a data management platform (DMP, which analyzes and processes a variety of accumulated data to optimize ad delivery).
- Performance-based advertising employing video increased, centered on use as branding for the advertiser.

\* Performance-based advertising refers to advertising methods that utilize platforms to process vast amounts of data for the automatic or instantaneous optimization of advertising. Typical examples include search engine advertising and certain ad networks, as well as the recently developed DSPs, ad exchanges, and SSPs. Performance-based advertising does not include such methods as ad space sales, tie-up ads, or affiliate advertising.

**Internet Advertising Production Costs** rose 4.4%, to ¥227.4 billion.

- Growth was sluggish compared with the previous year's level (up 6.2% in 2013). While the total number of ad production projects increased, the number of large projects and cost per project continued to decline.
- Corporate sites, e-commerce sites and membership sites continued to grow with the increasing use of smartphones. The distinctive feature of such sites is the longer-term commitment for not only planning and content production, but also system/program development, operation and maintenance, and effect verification.

## Promotional Media Advertising

- Promotional Media advertising expenditures rose 0.8% year on year, to ¥2,161.0 billion.
- Spending increased for the third straight year.
- Outdoor and Transit advertising expenditures were boosted by digital signage and event development projects designed to promote dissemination of information through social networking service (SNS) channels
- Other media categories recording solid growth were Direct Mail, helped by an increase in unaddressed mail delivery; Free Newspapers/Free Magazines, which saw a notable expansion in collaborative print and online campaigns; and point-of-purchase (POP) advertising targeting the individual consumer. Exhibition/Screen Display advertising also contributed to the overall

rise in Promotional Media, as development of new commercial facilities generated strong demand for display advertising.

- Live events and letterbox distribution of flyers and leaflets have been attracting renewed attention in recent years. Currently these categories are not included in this report, but the market for such services is expected to grow.
- Omni-channel retailing, which greatly increases the number of contact points between brand and consumer, is stimulating the evolution of cross-media advertising, helping optimize media selection, and accelerating the testing of new approaches to marketing. This is an area in which fusion or cooperation between the online and the real worlds is rapidly creating opportunities for new types of multimedia linkages.

**Outdoor advertising expenditures** rose 3.3%, to ¥317.1 billion.

- Spending on billboards was up slightly, mainly because production costs were forced up by the high cost of building materials and construction services.
- Spending on neon signs continued to spiral downward with most spending now focused on remodeling or repair. However demand for LED signs is growing.
- Poster boards were actively used in a variety of industry categories, including Beverages/Cigarettes, Automobiles/Related Products (especially for imported passenger cars) and Finance/Insurance, as well as in the music, television programming, and movie fields.
- Spending on large-screen displays rose, thanks in particular to strong demand from the Beverages/Cigarettes industry. Placements by airline, game software, and video game machine companies were also higher.
- Sports stadium billboards saw few new installations, but demand was strong for spot advertising during major sporting events such as the professional baseball All-Star Game and the Climax Series.
- Banner advertising fell in some markets due to building reconstruction, but other regions recorded solid gains.
- Commercial facility media enjoyed a steady flow of placements throughout the year in association with events at various types of facilities.

**Transit advertising expenditures** rose 2.5%, to ¥205.4 billion.

- Demand for station and in-car digital signage in trains remained high. The number of new facilities increased, and many existing installations were expanded. Spending on aisle hanging posters and in-car media (above the windows or beside the doors) was lower.
- The market for airport-related advertising is growing, and preparations are gearing up in anticipation of the Tokyo Summer Olympic Games in 2020.
- By industry category, solid growth in spending included Beverages/Cigarettes, Finance/Insurance and Information/Communications (mainly on ads for smartphone apps).

**Flyer advertising expenditures** fell 3.6%, to ¥492.0 billion.

- Placements were higher during the January–March quarter in the Automobiles/Related Products (automobile dealers) and Distribution/Retailing (small-scale supermarkets) industry categories. Spending also grew during this period on home renovation, help-wanted ads and health food ads as a result of last-minute demand ahead of the rise in the consumption tax rate, but placements fell steadily thereafter.
- Spending was noticeably lower among volume retailers of consumer electronics and general merchandise stores (GMSs), as well in the Apparel/Fashion, Accessories/Personal Items industry

category. Ad expenditures related to preparatory and tutoring schools and real estate sales also declined.

- The volume of flyer advertising placements continued to shrink, and paper sizes are becoming smaller.
- By region, spending was down everywhere except in Tohoku.

**Direct Mail advertising expenditures** rose 0.8%, to ¥392.3 billion.

- Although some advertisers are taking a cautious approach due to issues pertaining to the handling of personal information, Direct Mail (DM) is well recognized as a medium that can effectively and individually reach existing customers. Spending grew slightly in 2014.
- The graying of Japanese society is making advertisers take a new look at the usefulness of print media in their marketing activities. Demand for DM grew in regional markets, particularly for catalogs and mail order advertising.
- DM has a high affinity with online and other media, and with the renewed focus on customer relationship management (CRM), DM is seen as a medium that can support an “integrated marketing strategy” that seeks to increase the lifetime value (LTV) of each customer.
- The market for attracting new customers through unaddressed mail deliveries (direct marketing based on area databases) is continuing to expand. The increase was especially noteworthy in the area of unaddressed mail with free samples, which is a very interesting new medium for area-based advertising.
- Demand for direct (mail order) marketing was firm. Spending related to travel, home electric appliances, and department stores remains strong.

**Free Newspapers/Free Magazines advertising expenditures** rose 1.2%, to ¥231.6 billion.

- Spending in Free Newspapers grew 1.1%, to ¥75.4 billion.
- There was an upsurge in spending on ads for high-priced products and services in Real Estate/Housing Facilities before the consumption tax rate increase took effect. Expenditures related to job and hospital information also increased.
- Conditions in this component remain severe due to the continuing trend toward smaller-scale placements and an increased emphasis on cost-effectiveness. However, some new strategies, such as the use of independently developed distribution networks, are being implemented to diversify income sources.
- Spending in Free Magazines rose 1.2%, to ¥156.2 billion.
- Ad expenditures in free magazines fell in Tokyo and surrounding prefectures due to the continuing shift toward online advertising. However the circulation of free magazines expanded in regional cities, especially as a means of promoting tourism.
- Ad campaigns linking print and online coupons are stimulating the evolution and growth of free magazines as a community-oriented medium.

**POP advertising expenditures** rose 0.6%, to ¥196.5 billion.

- Spending on point-of-purchase (POP) advertising posted a modest increase as the result of last-minute demand ahead of the consumption tax rate hike, and a recovery in consumption during the second half of the year.
- By industry category, demand was strong in Real Estate/Housing Facilities, Automobiles/Related Products and Finance/Insurance.
- The decline in consumer spending after the consumption tax rate increase kept spending on ads for daily necessities at previous-year levels in Beverages/Cigarettes and Foodstuffs.

- Spending increased on POP advertising tailored to facilitate the work of salespeople in bricks-and-mortar stores, but the production cost situation is severe.
- POP advertising is also evolving and finding application in areas such as online to offline (O2O) commerce-related campaigns and digital signage POP, and it is expected that this fusion of print and digital media will develop further.

**Telephone Directory advertising expenditures** fell 7.9%, to ¥41.7 billion.

- Spending fell in Tokyo and surrounding prefectures, but telephone directory advertising still enjoys deeply rooted support as a community-oriented medium in regional markets.

**Exhibition/Screen Display advertising expenditures** rose 6.1%, to ¥284.4 billion.

- Spending was up on content-oriented exhibits at game show conventions, and strong demand for display advertising associated with the development of new large-scale commercial facilities contributed greatly to growth in this category. An increase in material costs also helped boost spending.
- Indications are that the long-term slump in consumption in regional cities is coming to an end, as events featuring popular characters, marathons, and earthquake recovery-related events helped drive up demand in these markets.
- Spending was also higher in cinema advertising, as hit movies generated increased placements. Community-oriented advertising for theater productions also rose, and exhibitions/screen displays are starting to be used more often in area-based marketing campaigns. Concentrated use of all the available video screens in a certain area for a single promotion at the same time was also notable in 2014.

#### Reference

The estimated size of the commercial printing market in 2014 was ¥2,029.0 billion (up 3.0% year on year), of which posters, leaflets and pamphlets accounted for ¥1,255.5 billion (up 2.5%).

- The overall printing market is facing severe conditions as a result of cost increases and the ongoing shift from print to online publishing. However, commercial printing showed solid growth, and it appears that the commercial printing market is making efforts to revitalize itself by developing high valued-added services that are unaffected by fluctuations in costs.

Print is actually a very user-friendly medium, and it will be increasingly important for the printing industry to find ways to make potential customers more aware of the special characteristics of this medium.

### III. 2014 Advertising Expenditures Classified by Industry (Traditional Media Only, Excluding Satellite Media-Related Spending)

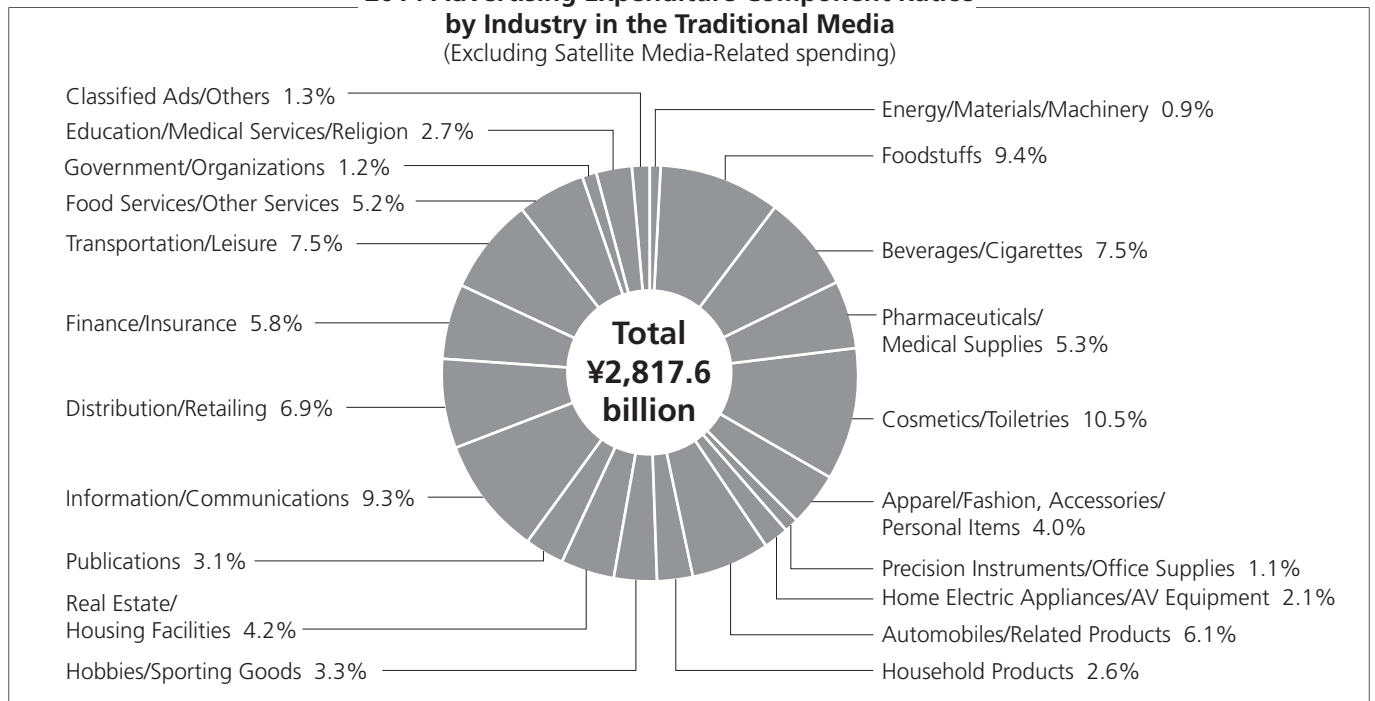
#### Spending increased in 14 industry categories, including Information/Communications, Cosmetics/Toiletries, Automobiles/Related Products and Home Electric Appliances/AV Equipment

Advertising expenditures in the traditional media increased in 14 of the 21 industry categories surveyed during 2014, and declined in 7 categories. In the previous year, spending increased in 8 categories, and declined in 13 categories.

The 14 industry categories with expenditure increases were: Precision Instruments/Office Supplies (up 7.6%) on increased placements for wristwatches; Government/Organizations (up 7.3%), which saw higher spending by advertising-related organizations; Information/Communications (up 7.2%), helped by strong demand related to satellite broadcasts, mobile phone rates and services, and smartphone services; Home Electric Appliances/AV Equipment (up 7.1%) due to an increase in ads for electric vacuum cleaners, refrigerators and LCD televisions; Cosmetics/Toiletries (up 5.6%) on growth in ads for shampoos and conditioners, and direct-marketed cosmetic lines for women; Household Products (up 5.6%) on a rise in placements for measuring instruments for home use and specialized mattresses; Automobiles/Related Products (up 3.4%) on campaigns related to wagons and imported SUVs; Energy/Materials/Machinery (up 2.8%) on stronger demand for petroleum product and electricity ads; Real Estate/Housing Facilities (up 2.6%) on higher spending on ads for rental housing and home renovation; Beverages/Cigarettes (up 2.0%) helped by a rise in ads for domestic beer and *happo-shu* (low-malt beers); Food Services/Other Services (up 1.9%) on higher spending by law firms, and door-to-door delivery and moving services; Pharmaceuticals/Medical Supplies (up 1.7%) on ads for general health supplements and health drinks; Transportation/Leisure (up 0.9%) on spending related to theme parks and various events; and Distribution/Retailing (up 0.5%) on spending by direct marketing businesses.

The seven industry categories with expenditure declines were: Hobbies/Sporting Goods (down 7.9%) on weak demand for game and audio software ads; Classified Ads/Others (down 7.3%) on decreased demand for classified and ad-hoc ads; Education/Medical Services/Religion (down 4.4%) on cutbacks related to vocational and other educational institutions, and correspondence education; Foodstuffs (down 3.2%) on lowered spending in the areas of health foods, instant noodles and snack foods; Apparel/Fashion, Accessories/Personal Items (down 3.0%) on reduced placements for women’s clothing, and men’s and women’s shoes; Publications (down 2.4%) which saw fewer placements related to women’s and home magazines, and language study materials; and Finance/Insurance (down 1.9%) which slipped due to reduced placements related to direct-marketed insurance products and housing loans.

**2014 Advertising Expenditure Component Ratios  
by Industry in the Traditional Media**  
(Excluding Satellite Media-Related spending)



**Breakdown of Advertising Expenditures by Industry**

- 1. Energy/Materials/Machinery:** Up 2.8%, with a 0.9% component ratio.
  - First increase in four years.
  - Spending positive for petroleum products.
  - Sharp increase in placements for gasoline, and by electric power companies.
  - Sharp decline in placements by gas companies.
  - By medium, sharp increase in newspaper and magazine placements.
  
- 2. Foodstuffs:** Down 3.2%, with a 9.4% component ratio.
  - Second consecutive year of decline.
  - Sharp decline in placements for health foods, instant noodles and snack foods.
  - Considerable increase in spending for direct-marketed dietary supplements and beauty-related food products.
  - Spending positive for *ponzu* vinegar and olive oil.
  - By medium, sharp decline in terrestrial television placements.
  
- 3. Beverages/Cigarettes:** Up 2.0%, with a 7.5% component ratio.
  - Increase following decline in 2013.
  - Placements positive for domestic beer, *happo-shu* and pre-mixed cocktails.
  - Spending increase in carbonated beverages and tobacco products.
  - Sharp decline in the previously robust coffee segment.
  - Sharp decline in placements for other fermented liquor and beer-like non-alcoholic beverages.
  - By medium, steady growth in terrestrial television and newspaper placements.
  
- 4. Pharmaceuticals/Medical Supplies:** Up 1.7%, with a 5.3% component ratio.
  - Increase following decline in 2013.
  - Sharp increase in spending for both over-the-counter medicines and health drinks.
  - Sharp decline in previously robust placements for contact lenses and eyeglasses.
  - Decrease in spending for digestive aids.
  - By medium, steady growth in terrestrial television placements.
  
- 5. Cosmetics/Toiletries:** Up 5.6%, with a 10.5% component ratio.
  - Increase following decline in 2013.
  - Considerable increase in placements for direct-marketed women's cosmetic products.
  - Spending positive for shampoos and conditioners.
  - Sharp increase in placements for toothbrushes and fabric softeners.
  - Decline in placements for emulsions, hair growth products and dentifrices.
  - By medium, sharp increase in terrestrial television placements.
  
- 6. Apparel/Fashion, Accessories/Personal Items:** Down 3.0%, with a 4.0% component ratio.
  - First decline after four consecutive years of increases.
  - Sharp falloff in spending for fashion-related placements such as women's clothing.
  - Increase in placements for jewelry products and accessories.
  - By medium, decrease in newspaper and terrestrial television placements.
  
- 7. Precision Instruments/Office Supplies:** Up 7.6%, with a 1.1% component ratio.
  - Sharp increase following decline in 2013.
  - Continued increase in placements for wristwatches.

- Increase in placements for digital cameras.
- Decline in spending for digital single-lens reflex cameras.
- By medium, increase in all media, especially newspaper placements.

**8. Home Electric Appliances/AV Equipment:** Up 7.1%, with a 2.1% component ratio.

- Second consecutive year of increase.
- Sharp increase in placements for electric vacuum cleaners and refrigerators.
- Increase in placements for 4K televisions.
- Increase in placements for hairdressing and beauty equipment.
- Sharp decline in spending for other electric kitchen appliances such as coffee makers, as a result of the large placement volume in 2013.
- By medium, considerable increase in terrestrial television placements.

**9. Automobiles/Related Products:** Up 3.4%, with a 6.1% component ratio.

- Third consecutive year of increase.
- Sharp increase in placements for domestic passenger cars, including wagons and SUVs.
- Increase in placements for imported passenger cars, including SUVs and sports coupes.
- Spending positive for motorcycles and automotive products.
- Reactive decline from the extensive placements for K-cars in 2013.
- By medium, increase in terrestrial television placements.

**10. Household Products:** Up 5.6%, with a 2.6% component ratio.

- Third consecutive year of increase.
- Sharp increase in placements for household appliances such as measuring instruments for home use.
- Continued sharp increase in placements for beds (specialized mattresses).
- Sharp decline in spending for mothballs and other insect repellents, as well as placements for air fresheners and deodorizers..
- Decline in placements for general household goods, including pots such as functional frying pans and kettles, as well as containers and tableware.
- By medium, sharp increase in terrestrial television and newspaper placements.

**11. Hobbies/Sporting Goods:** Down 7.9%, with a 3.3% component ratio.

- Sixth consecutive year of decline, since 2009.
- Spending positive for home gardening products, dolls and toys.
- Sharp decline in placements for game software, audio software, and video software.
- Overall sluggishness in spending for sporting goods such as golf clubs and running gear.
- By medium, decline in placements in all media, particularly terrestrial television.

**12. Real Estate/Housing Facilities:** Up 2.6%, with a 4.2% component ratio.

- Fourth consecutive year of increase, since 2011.
- Sharp increase in placements for rental housing, home renovation and cemetery burial plots.
- Positive placements for kitchen and bath units.
- Sharp decline in placements for condominiums and window sashes.
- By medium, increase in terrestrial television and radio placements.



**13. Publications:** Down 2.4%, with a 3.1% component ratio.

- Second consecutive year of decline.
- Sharp decline in placements for other publications such as English-language learning materials and textbooks.
- Sharp decline in placements for women's and home magazines.
- Spending positive for hobby-related magazines.
- By medium, sharp decline in newspaper placements.

**14. Information/Communications:** Up 7.2%, with a 9.3% component ratio.

- Sharp increase following decline in 2013.
- Positive placements for satellite broadcasts.
- Spending positive for mobile phone services such as rate plans.
- Sharp increase in placements for web content.
- Sharp decline in placements for mobile phones and smartphones.
- By medium, sharp increase in terrestrial television placements.

**15. Distribution/Retailing:** Up 0.5%, with a 6.9% component ratio.

- Increase following decline in 2013.
- Sharp increase in placements by direct marketing businesses.
- Sharp decline in placements for general merchandise stores (GMSs).
- Decline in spending by both large-scale and specialty high-volume retailers.
- By medium, steady growth in terrestrial television placements.

**16. Finance/Insurance:** Down 1.9%, with a 5.8% component ratio.

- Decline following increase in 2013.
- Sharp decline in placements for direct-marketed cancer, automobile, life and medical insurance.
- Sharp increase in placements by life insurance firms and credit card companies.
- Positive spending by securities companies for investment trusts.
- By medium, sharp decline in newspaper placements.

**17. Transportation/Leisure:** Up 0.9%, with a 7.5% component ratio.

- Increase following decline in 2013.
- Increase in placements for leisure facilities, events and concerts.
- Continued positive spending for theme parks.
- Sharp increase in placements for membership sports clubs.
- Considerable decline in spending by travel agents and placements for movies.
- By medium, increase in terrestrial television placements.

**18. Food Services/Other Services:** Up 1.9%, with a 5.2% component ratio.

- Third consecutive year of increase.
- Positive spending in the other services sector.
- Sharp increase in placements by law firms and for services such as home meal deliveries.
- Increase in spending for previously sluggish door-to-door delivery and moving services.
- Sharp decrease in placements for restaurants.
- By medium, steady growth in terrestrial television placements.

**19. Government/Organizations:** Up 7.3%, with a 1.2% component ratio.

- Sharp increase following decline in 2013.
- Sharp increase in placements by advertising organizations such as the Advertising Council Japan.
- Sharp increase in spending by central government agencies.
- Decrease in placements by the Japan Agricultural Cooperative and other organizations.
- By medium, sharp increase in terrestrial television placements.

**20. Education/Medical Services/Religion:** Down 4.4%, with a 2.7% component ratio.

- Decline following increase in 2013.
- Sharp decline in placements for preparatory and tutoring schools, and correspondence education.
- Increase in placements for hospitals and medical services such as cosmetic surgery, and religion.
- By medium, sharp decline in newspaper placements.

**21. Classified Ads/Others:** Down 7.3%, with a 1.3% component ratio.

- Seventh consecutive year of decline, since 2008.
- Sluggishness in the category overall.
- Sharp decline in placements for other ad-hoc ads and other classified ads in newspapers.
- By medium, continued decline in newspaper placements.

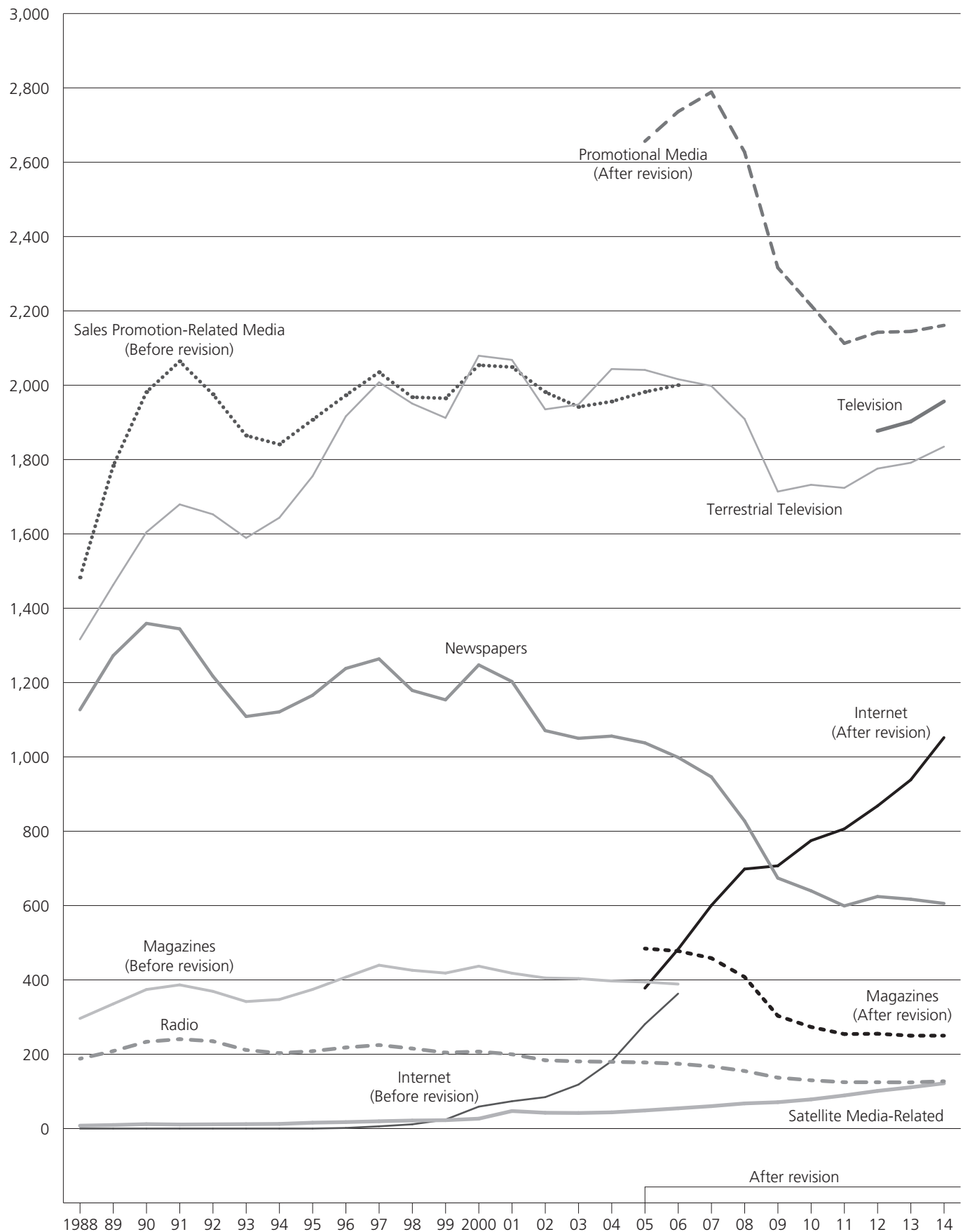
## Advertising Expenditures and Japan's GDP (1988–2014)

Year		Advertising Expenditures (A)		Gross Domestic Product (B)		A / B (%)
		Advertising Expenditures (¥ billion)	Compared to Previous Year (%)	GDP (¥ billion)	Compared to Previous Year (%)	
1988		4,417.5	112.0	380,742.9	107.5	1.16
1989		5,071.5	114.8	410,122.2	107.7	1.24
1990		5,564.8	109.7	442,781.0	108.0	1.26
1991		5,726.1	102.9	469,421.8	106.0	1.22
1992		5,461.1	95.4	480,782.8	102.4	1.14
1993		5,127.3	93.9	483,711.8	100.6	1.06
1994		5,168.2	100.8	495,743.4	101.0	1.04
1995		5,426.3	105.0	501,706.9	101.2	1.08
1996		5,771.5	106.4	511,934.8	102.0	1.13
1997		5,996.1	103.9	523,198.3	102.2	1.15
1998		5,771.1	96.2	512,438.6	97.9	1.13
1999		5,699.6	98.8	504,903.2	98.5	1.13
2000		6,110.2	107.2	509,860.0	101.0	1.20
2001		6,058.0	99.1	505,543.2	99.2	1.20
2002		5,703.2	94.1	499,147.0	98.7	1.14
2003		5,684.1	99.7	498,854.8	99.9	1.14
2004		5,857.1	103.0	503,725.3	101.0	1.16
2005	Before revision	5,962.5	101.8	503,903.0	100.0	1.18
2006		5,995.4	100.6	506,687.0	100.6	1.18
2005	After revision	6,823.5	102.9	503,903.0	100.0	1.35
2006		6,939.9	101.7	506,687.0	100.6	1.37
2007		7,019.1	101.1	512,975.2	101.2	1.37
2008		6,692.6	95.3	501,209.3	97.7	1.34
2009		5,922.2	88.5	471,138.7	94.0	1.26
2010		5,842.7	98.7	482,384.4	102.4	1.21
2011		5,709.6	97.7	471,310.8	97.7	1.21
2012		5,891.3	103.2	475,110.4	100.8	1.24
2013		5,976.2	101.4	480,128.0	101.1	1.24
<b>2014</b>		<b>6,152.2</b>	<b>102.9</b>	<b>488,215.5</b>	<b>101.7</b>	<b>1.26</b>

- Notes:** 1. The method for estimating "Advertising Expenditures in Japan" was modified in 2007, retroactive to 2005.  
2. Please see page 26 for details regarding the above revision.  
3. The above figures for GDP are taken from the Cabinet Office's "Annual Report on National Accounts" and "Quarterly Estimates of GDP."  
4. All the above figures are for the calendar year.

### Advertising Expenditures by Medium (1988–2014)

(¥ billion)



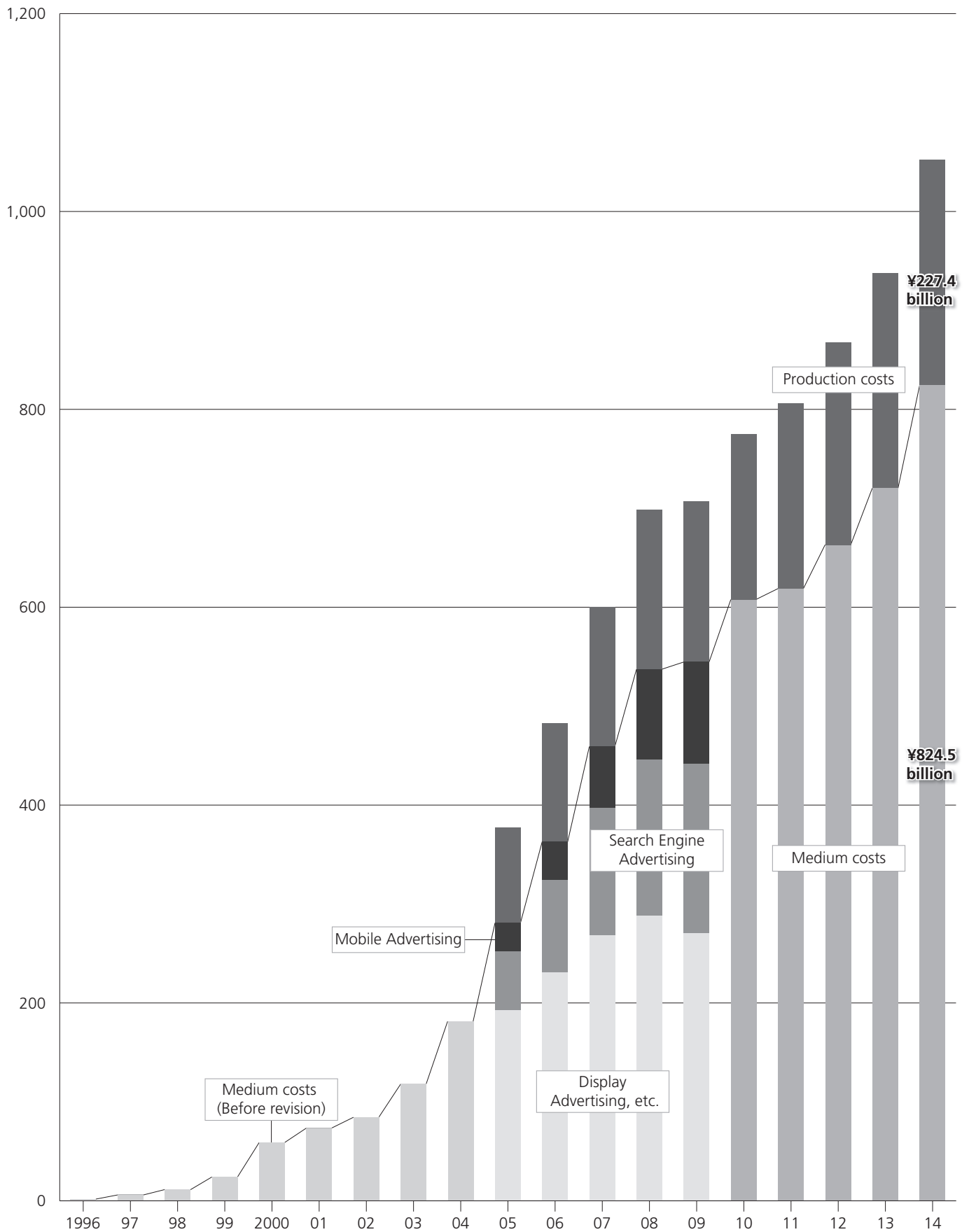
Media	Newspapers		Magazines		Radio		Television						Internet		Sales Promotion-Related Media / Promotional Media		
	Year	¥ billion	Comparison Ratio (%)	¥ billion	Comparison Ratio (%)	¥ billion	Comparison Ratio (%)	¥ billion	Comparison Ratio (%)	¥ billion	Comparison Ratio (%)	¥ billion	Comparison Ratio (%)	¥ billion	Comparison Ratio (%)	¥ billion	Comparison Ratio (%)
1988		1,126.7	114.0	296.2	114.9	187.9	108.8	-	-	1,316.1	112.1	7.8	109.9	-	-	1,482.8	110.3
1989		1,272.5	112.9	335.4	113.2	208.4	110.9	-	-	1,462.7	111.1	9.5	121.8	-	-	1,783.0	120.2
1990		1,359.2	106.8	374.1	111.5	233.5	112.0	-	-	1,604.6	109.7	11.9	125.3	-	-	1,981.5	111.1
1991		1,344.5	98.9	386.6	103.3	240.6	103.0	-	-	1,679.3	104.7	10.9	91.6	-	-	2,064.2	104.2
1992		1,217.2	90.5	369.2	95.5	235.0	97.7	-	-	1,652.6	98.4	11.4	104.6	-	-	1,975.7	95.7
1993		1,108.7	91.1	341.7	92.6	211.3	89.9	-	-	1,589.1	96.2	11.9	104.4	-	-	1,864.6	94.4
1994		1,121.1	101.1	347.3	101.6	202.9	96.0	-	-	1,643.5	103.4	12.5	105.0	-	-	1,840.9	98.7
1995		1,165.7	104.0	374.3	107.8	208.2	102.6	-	-	1,755.3	106.8	15.8	126.4	-	-	1,907.0	103.6
1996		1,237.9	106.2	407.3	108.8	218.1	104.8	-	-	1,916.2	109.2	17.4	110.1	1.6	-	1,973.0	103.5
1997		1,263.6	102.1	439.5	107.9	224.7	103.0	-	-	2,007.9	104.8	19.6	112.6	6.0	375.0	2,034.8	103.1
1998		1,178.7	93.3	425.8	96.9	215.3	95.8	-	-	1,950.5	97.1	21.6	110.2	11.4	190.0	1,967.8	96.7
1999		1,153.5	97.9	418.3	98.2	204.3	94.9	-	-	1,912.1	98.0	22.5	104.2	24.1	211.4	1,964.8	99.8
2000		1,247.4	108.1	436.9	104.4	207.1	101.4	-	-	2,079.3	108.7	26.6	118.2	59.0	244.8	2,053.9	104.5
2001		1,202.7	96.4	418.0	95.7	199.8	96.5	-	-	2,068.1	99.5	47.1	177.1	73.5	124.6	2,048.8	99.8
2002		1,070.7	89.0	405.1	96.9	183.7	91.9	-	-	1,935.1	93.6	42.5	90.2	84.5	115.0	1,981.6	96.7
2003		1,050.0	98.1	403.5	99.6	180.7	98.4	-	-	1,948.0	100.7	41.9	98.6	118.3	140.0	1,941.7	98.0
2004		1,055.9	100.6	397.0	98.4	179.5	99.3	-	-	2,043.6	104.9	43.6	104.1	181.4	153.3	1,956.1	100.7
2005	Before revision	1,037.7	98.3	394.5	99.4	177.8	99.1	-	-	2,041.1	99.9	48.7	111.7	280.8	154.8	1,981.9	101.3
2006		998.6	96.2	388.7	98.5	174.4	98.1	-	-	2,016.1	98.8	54.4	111.7	363.0	129.3	2,000.2	100.9
2005	After revision	1,037.7	98.3	484.2	99.3	177.8	99.1	-	-	2,041.1	99.9	48.7	111.7	377.7	148.0	2,656.3	103.6
2006		998.6	96.2	477.7	98.7	174.4	98.1	-	-	2,016.1	98.8	54.4	111.7	482.6	127.8	2,736.1	103.0
2007		946.2	94.8	458.5	96.0	167.1	95.8	-	-	1,998.1	99.1	60.3	110.8	600.3	124.4	2,788.6	101.9
2008		827.6	87.5	407.8	88.9	154.9	92.7	-	-	1,909.2	95.6	67.6	112.1	698.3	116.3	2,627.2	94.2
2009		673.9	81.4	303.4	74.4	137.0	88.4	-	-	1,713.9	89.8	70.9	104.9	706.9	101.2	2,316.2	88.2
2010		639.6	94.9	273.3	90.1	129.9	94.8	-	-	1,732.1	101.1	78.4	110.6	774.7	109.6	2,214.7	95.6
2011		599.0	93.7	254.2	93.0	124.7	96.0	-	-	1,723.7	99.5	89.1	113.6	806.2	104.1	2,112.7	95.4
2012		624.2	104.2	255.1	100.4	124.6	99.9	1,877.0	-	1,775.7	103.0	101.3	113.7	868.0	107.7	2,142.4	101.4
2013		617.0	98.8	249.9	98.0	124.3	99.8	1,902.3	101.3	1,791.3	100.9	111.0	109.6	938.1	108.1	2,144.6	100.1
<b>2014</b>		<b>605.7</b>	<b>98.2</b>	<b>250.0</b>	<b>100.0</b>	<b>127.2</b>	<b>102.3</b>	<b>1,956.4</b>	<b>102.8</b>	<b>1,834.7</b>	<b>102.4</b>	<b>121.7</b>	<b>109.6</b>	<b>1,051.9</b>	<b>112.1</b>	<b>2,161.0</b>	<b>100.8</b>

**Notes:** 1. The method for estimating "Advertising Expenditures in Japan" was modified in 2007, retroactive to 2005.

2. Advertising expenditures in Television were redefined in 2014, retroactive to 2012, to include expenditures in both Terrestrial Television and Satellite Media-Related advertising.

### Breakdown of Advertising Expenditures for Internet-Related Spending (1996–2014)

(¥ billion)



Year	Internet Advertising Expenditures		Internet Advertising Medium Costs										Internet Advertising Production Costs		
			Categories used from 2005 to 2011								New Category from 2012				
			Display Advertising, etc.		Search Engine Advertising		Mobile Advertising		Performance-Based Advertising's Share of Total						
			¥ billion	Comparison Ratio (%)	¥ billion	Comparison Ratio (%)	¥ billion	Comparison Ratio (%)	¥ billion	Comparison Ratio (%)	¥ billion	Comparison Ratio (%)			¥ billion
1996			1.6	–											
1997			6.0	375.0											
1998			11.4	190.0											
1999			24.1	211.4											
2000			59.0	244.8											
2001			73.5	124.6											
2002			84.5	115.0											
2003			118.3	140.0											
2004	Before revision		181.4	153.3											
2005	After revision	377.7	148.0	280.8	154.8	193.0	–	59.0	–	28.8	–	–	–	96.9	–
2006		482.6	127.8	363.0	129.3	231.0	119.7	93.0	157.6	39.0	135.4	–	–	119.6	123.4
2007		600.3	124.4	459.1	126.5	268.8	116.4	128.2	137.8	62.1	159.2	–	–	141.2	118.1
2008		698.3	116.3	537.3	117.0	288.5	107.3	157.5	122.9	91.3	147.0	–	–	161.0	114.0
2009		706.9	101.2	544.8	101.4	270.7	93.8	171.0	108.6	103.1	112.9	–	–	162.1	100.7
2010		774.7	109.6	607.7	111.5	284.1	105.0	203.5	119.0	120.1	116.5	246.0	–	167.0	103.0
2011		806.2	104.1	618.9	101.8	282.7	99.5	219.4	107.8	116.8	97.3	285.3	116.0	187.3	112.2
2012		868.0	107.7	662.9	107.1	–	–	–	–	–	–	339.1	118.9	205.1	109.5
2013		938.1	108.1	720.3	108.7	–	–	–	–	–	–	412.2	121.6	217.8	106.2
<b>2014</b>		<b>1,051.9</b>	<b>112.1</b>	<b>824.5</b>	<b>114.5</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>510.6</b>	<b>123.9</b>	<b>227.4</b>	<b>104.4</b>

- Notes:** 1. The method for estimating “Advertising Expenditures in Japan” was modified in 2007 to include production costs, and the data through 2005 has been retroactively revised.  
2. The method of breaking down Internet advertising medium costs was modified in 2012, and data through 2010 has been estimated retroactively.

Performance-based advertising refers to advertising methods that utilize platforms to process vast amounts of data for the automatic or instantaneous optimization of advertising. Typical examples include search engine advertising and certain ad networks, as well as the recently developed DSPs, ad exchanges, and SSPs. Performance-based advertising does not include such methods as ad space sales, tie-up ads, or affiliate advertising.

1. Data through 2011 for search engine advertising includes some performance-based advertising that, strictly speaking, does not fall within the scope of search engine advertising.
2. Online ad networks refer to arrangements under which multiple web sites that want to host advertisements are aggregated together to create a network for ad distribution.
3. DSP stands for Demand Side Platform. Demand Side Platforms are systems that help advertisers optimize the effectiveness of their online advertising.
4. Ad exchanges are services that facilitate the sale of online media advertising inventory with prices set through bidding from multiple ad networks.
5. SSP stands for Supply Side Platform. Supply Side Platforms are systems that help media companies to optimize the effectiveness of their online advertising.

**Advertising Expenditures by Industry (2012–2014)**

Industry	Advertising Expenditures (¥10 million)			Comparison Ratio (%)		Component Ratio (%)		
	2012	2013	<b>2014</b>	2013	<b>2014</b>	2012	2013	<b>2014</b>
Energy / Materials / Machinery	2,624	2,490	<b>2,560</b>	94.9	<b>102.8</b>	1.0	0.9	<b>0.9</b>
Foodstuffs	28,329	27,209	<b>26,350</b>	96.0	<b>96.8</b>	10.2	9.8	<b>9.4</b>
Beverages / Cigarettes	20,987	20,688	<b>21,096</b>	98.6	<b>102.0</b>	7.6	7.4	<b>7.5</b>
Pharmaceuticals / Medical Supplies	14,847	14,745	<b>14,992</b>	99.3	<b>101.7</b>	5.3	5.3	<b>5.3</b>
Cosmetics / Toiletries	28,783	27,985	<b>29,551</b>	97.2	<b>105.6</b>	10.4	10.1	<b>10.5</b>
Apparel / Fashion, Accessories / Personal Items	11,645	11,732	<b>11,382</b>	100.7	<b>97.0</b>	4.2	4.2	<b>4.0</b>
Precision Instruments / Office Supplies	2,886	2,834	<b>3,050</b>	98.2	<b>107.6</b>	1.0	1.0	<b>1.1</b>
Home Electric Appliances / AV Equipment	5,412	5,533	<b>5,926</b>	102.2	<b>107.1</b>	2.0	2.0	<b>2.1</b>
Automobiles / Related Products	16,473	16,710	<b>17,277</b>	101.4	<b>103.4</b>	5.9	6.0	<b>6.1</b>
Household Products	6,496	6,856	<b>7,242</b>	105.5	<b>105.6</b>	2.3	2.5	<b>2.6</b>
Hobbies / Sporting Goods	10,853	10,227	<b>9,414</b>	94.2	<b>92.1</b>	3.9	3.7	<b>3.3</b>
Real Estate / Housing Facilities	10,869	11,503	<b>11,804</b>	105.8	<b>102.6</b>	3.9	4.1	<b>4.2</b>
Publications	9,216	8,988	<b>8,769</b>	97.5	<b>97.6</b>	3.3	3.2	<b>3.1</b>
Information / Communications	24,525	24,332	<b>26,091</b>	99.2	<b>107.2</b>	8.8	8.8	<b>9.3</b>
Distribution / Retailing	20,297	19,273	<b>19,374</b>	95.0	<b>100.5</b>	7.3	6.9	<b>6.9</b>
Finance / Insurance	14,499	16,762	<b>16,437</b>	115.6	<b>98.1</b>	5.2	6.0	<b>5.8</b>
Transportation / Leisure	21,123	20,976	<b>21,172</b>	99.3	<b>100.9</b>	7.6	7.6	<b>7.5</b>
Food Services / Other Services	12,896	14,229	<b>14,504</b>	110.3	<b>101.9</b>	4.6	5.1	<b>5.2</b>
Government / Organizations	3,327	3,149	<b>3,380</b>	94.6	<b>107.3</b>	1.2	1.1	<b>1.2</b>
Education / Medical Services / Religion	7,823	8,069	<b>7,717</b>	103.1	<b>95.6</b>	2.8	2.9	<b>2.7</b>
Classified Ads / Others	4,050	3,960	<b>3,672</b>	97.8	<b>92.7</b>	1.5	1.4	<b>1.3</b>
<b>Total</b>	277,960	278,250	<b>281,760</b>	100.1	<b>101.3</b>	100.0	100.0	<b>100.0</b>



## APPENDIX 5 Traditional Media Only (Excluding Satellite Media-Related spending)

**Advertising Expenditures by Industry in the Traditional Media (2013–2014)**

(Unit: ¥10 million)

Media Industry	Newspapers			Magazines			Radio			Terrestrial Television			Total		
	2013	2014	Comparison Ratio (%)	2013	2014	Comparison Ratio (%)	2013	2014	Comparison Ratio (%)	2013	2014	Comparison Ratio (%)	2013	2014	Comparison Ratio (%)
Energy / Materials / Machinery	628	<b>701</b>	<b>111.6</b>	126	<b>148</b>	<b>117.5</b>	274	<b>265</b>	<b>96.7</b>	1,462	<b>1,446</b>	<b>98.9</b>	2,490	<b>2,560</b>	<b>102.8</b>
Foodstuffs	5,528	<b>5,865</b>	<b>106.1</b>	1,410	<b>1,354</b>	<b>96.0</b>	999	<b>1,008</b>	<b>100.9</b>	19,272	<b>18,123</b>	<b>94.0</b>	27,209	<b>26,350</b>	<b>96.8</b>
Beverages / Cigarettes	2,099	<b>2,167</b>	<b>103.2</b>	1,380	<b>1,321</b>	<b>95.7</b>	514	<b>565</b>	<b>109.9</b>	16,695	<b>17,043</b>	<b>102.1</b>	20,688	<b>21,096</b>	<b>102.0</b>
Pharmaceuticals / Medical Supplies	1,694	<b>1,816</b>	<b>107.2</b>	743	<b>769</b>	<b>103.5</b>	1,078	<b>1,011</b>	<b>93.8</b>	11,230	<b>11,396</b>	<b>101.5</b>	14,745	<b>14,992</b>	<b>101.7</b>
Cosmetics / Toiletries	3,450	<b>3,405</b>	<b>98.7</b>	3,071	<b>3,077</b>	<b>100.2</b>	452	<b>418</b>	<b>92.5</b>	21,012	<b>22,651</b>	<b>107.8</b>	27,985	<b>29,551</b>	<b>105.6</b>
Apparel / Fashion, Accessories / Personal Items	1,627	<b>1,379</b>	<b>84.8</b>	6,568	<b>6,602</b>	<b>100.5</b>	65	<b>75</b>	<b>115.4</b>	3,472	<b>3,326</b>	<b>95.8</b>	11,732	<b>11,382</b>	<b>97.0</b>
Precision Instruments / Office Supplies	600	<b>718</b>	<b>119.7</b>	915	<b>999</b>	<b>109.2</b>	55	<b>65</b>	<b>118.2</b>	1,264	<b>1,268</b>	<b>100.3</b>	2,834	<b>3,050</b>	<b>107.6</b>
Home Electric Appliances / AV Equipment	608	<b>568</b>	<b>93.4</b>	685	<b>662</b>	<b>96.6</b>	152	<b>148</b>	<b>97.4</b>	4,088	<b>4,548</b>	<b>111.3</b>	5,533	<b>5,926</b>	<b>107.1</b>
Automobiles / Related Products	1,662	<b>1,552</b>	<b>93.4</b>	849	<b>916</b>	<b>107.9</b>	933	<b>1,050</b>	<b>112.5</b>	13,266	<b>13,759</b>	<b>103.7</b>	16,710	<b>17,277</b>	<b>103.4</b>
Household Products	1,163	<b>1,225</b>	<b>105.3</b>	555	<b>537</b>	<b>96.8</b>	202	<b>218</b>	<b>107.9</b>	4,936	<b>5,262</b>	<b>106.6</b>	6,856	<b>7,242</b>	<b>105.6</b>
Hobbies / Sporting Goods	1,174	<b>1,080</b>	<b>92.0</b>	1,420	<b>1,377</b>	<b>97.0</b>	274	<b>241</b>	<b>88.0</b>	7,359	<b>6,716</b>	<b>91.3</b>	10,227	<b>9,414</b>	<b>92.1</b>
Real Estate / Housing Facilities	2,846	<b>2,803</b>	<b>98.5</b>	802	<b>760</b>	<b>94.8</b>	587	<b>661</b>	<b>112.6</b>	7,268	<b>7,580</b>	<b>104.3</b>	11,503	<b>11,804</b>	<b>102.6</b>
Publications	5,647	<b>5,469</b>	<b>96.8</b>	300	<b>255</b>	<b>85.0</b>	664	<b>660</b>	<b>99.4</b>	2,377	<b>2,385</b>	<b>100.3</b>	8,988	<b>8,769</b>	<b>97.6</b>
Information / Communications	3,570	<b>3,415</b>	<b>95.7</b>	1,096	<b>1,054</b>	<b>96.2</b>	725	<b>758</b>	<b>104.6</b>	18,941	<b>20,864</b>	<b>110.2</b>	24,332	<b>26,091</b>	<b>107.2</b>
Distribution / Retailing	7,439	<b>7,392</b>	<b>99.4</b>	946	<b>1,027</b>	<b>108.6</b>	877	<b>777</b>	<b>88.6</b>	10,011	<b>10,178</b>	<b>101.7</b>	19,273	<b>19,374</b>	<b>100.5</b>
Finance / Insurance	2,304	<b>2,121</b>	<b>92.1</b>	630	<b>584</b>	<b>92.7</b>	934	<b>898</b>	<b>96.1</b>	12,894	<b>12,834</b>	<b>99.5</b>	16,762	<b>16,437</b>	<b>98.1</b>
Transportation / Leisure	9,991	<b>9,733</b>	<b>97.4</b>	1,647	<b>1,785</b>	<b>108.4</b>	980	<b>973</b>	<b>99.3</b>	8,358	<b>8,681</b>	<b>103.9</b>	20,976	<b>21,172</b>	<b>100.9</b>
Food Services / Other Services	2,125	<b>2,081</b>	<b>97.9</b>	599	<b>538</b>	<b>89.8</b>	1,335	<b>1,675</b>	<b>125.5</b>	10,170	<b>10,210</b>	<b>100.4</b>	14,229	<b>14,504</b>	<b>101.9</b>
Government / Organizations	1,327	<b>1,385</b>	<b>104.4</b>	229	<b>292</b>	<b>127.5</b>	849	<b>822</b>	<b>96.8</b>	744	<b>881</b>	<b>118.4</b>	3,149	<b>3,380</b>	<b>107.3</b>
Education / Medical Services / Religion	2,820	<b>2,527</b>	<b>89.6</b>	965	<b>885</b>	<b>91.7</b>	439	<b>400</b>	<b>91.1</b>	3,845	<b>3,905</b>	<b>101.6</b>	8,069	<b>7,717</b>	<b>95.6</b>
Classified Ads / Others	3,398	<b>3,168</b>	<b>93.2</b>	54	<b>58</b>	<b>107.4</b>	42	<b>32</b>	<b>76.2</b>	466	<b>414</b>	<b>88.8</b>	3,960	<b>3,672</b>	<b>92.7</b>
<b>Total</b>	61,700	<b>60,570</b>	<b>98.2</b>	24,990	<b>25,000</b>	<b>100.0</b>	12,430	<b>12,720</b>	<b>102.3</b>	179,130	<b>183,470</b>	<b>102.4</b>	278,250	<b>281,760</b>	<b>101.3</b>

**Component Ratio of Media Expenditures by Industry and Industry Expenditures by Medium for 2014**

(Unit: %)

Industry	Media Expenditures by Industry					Industry Expenditures by Medium				
	Newspapers	Magazines	Radio	Terrestrial Television	<b>Total</b>	Newspapers	Magazines	Radio	Terrestrial Television	<b>Total</b>
Energy / Materials / Machinery	1.2	0.6	2.1	0.8	<b>0.9</b>	27.4	5.8	10.3	56.5	<b>100.0</b>
Foodstuffs	9.7	5.4	7.9	9.9	<b>9.4</b>	22.3	5.1	3.8	68.8	<b>100.0</b>
Beverages / Cigarettes	3.6	5.3	4.4	9.3	<b>7.5</b>	10.3	6.2	2.7	80.8	<b>100.0</b>
Pharmaceuticals / Medical Supplies	3.0	3.1	7.9	6.2	<b>5.3</b>	12.1	5.1	6.8	76.0	<b>100.0</b>
Cosmetics / Toiletries	5.6	12.3	3.3	12.3	<b>10.5</b>	11.5	10.4	1.4	76.7	<b>100.0</b>
Apparel / Fashion, Accessories / Personal Items	2.3	26.4	0.6	1.8	<b>4.0</b>	12.1	58.0	0.7	29.2	<b>100.0</b>
Precision Instruments / Office Supplies	1.2	4.0	0.5	0.7	<b>1.1</b>	23.5	32.8	2.1	41.6	<b>100.0</b>
Home Electric Appliances / AV Equipment	0.9	2.7	1.2	2.5	<b>2.1</b>	9.6	11.2	2.5	76.7	<b>100.0</b>
Automobiles / Related Products	2.6	3.7	8.3	7.5	<b>6.1</b>	9.0	5.3	6.1	79.6	<b>100.0</b>
Household Products	2.0	2.2	1.7	2.9	<b>2.6</b>	16.9	7.4	3.0	72.7	<b>100.0</b>
Hobbies / Sporting Goods	1.8	5.5	1.9	3.7	<b>3.3</b>	11.5	14.6	2.6	71.3	<b>100.0</b>
Real Estate / Housing Facilities	4.6	3.0	5.2	4.1	<b>4.2</b>	23.8	6.4	5.6	64.2	<b>100.0</b>
Publications	9.0	1.0	5.2	1.3	<b>3.1</b>	62.4	2.9	7.5	27.2	<b>100.0</b>
Information / Communications	5.6	4.2	6.0	11.4	<b>9.3</b>	13.1	4.0	2.9	80.0	<b>100.0</b>
Distribution / Retailing	12.2	4.1	6.1	5.5	<b>6.9</b>	38.2	5.3	4.0	52.5	<b>100.0</b>
Finance / Insurance	3.5	2.3	7.1	7.0	<b>5.8</b>	12.9	3.5	5.5	78.1	<b>100.0</b>
Transportation / Leisure	16.1	7.1	7.6	4.7	<b>7.5</b>	46.0	8.4	4.6	41.0	<b>100.0</b>
Food Services / Other Services	3.4	2.2	13.2	5.6	<b>5.2</b>	14.3	3.7	11.6	70.4	<b>100.0</b>
Government / Organizations	2.3	1.2	6.5	0.5	<b>1.2</b>	41.0	8.6	24.3	26.1	<b>100.0</b>
Education / Medical Services / Religion	4.2	3.5	3.1	2.1	<b>2.7</b>	32.7	11.5	5.2	50.6	<b>100.0</b>
Classified Ads / Others	5.2	0.2	0.2	0.2	<b>1.3</b>	86.3	1.6	0.8	11.3	<b>100.0</b>
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>21.5</b>	<b>8.9</b>	<b>4.5</b>	<b>65.1</b>	<b>100.0</b>

**Eleven-Year Trends in Advertising Expenditures by Industry (2004–2014)**

(Unit: ¥10 million)

Industry	Before Revision	Revised									
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Energy / Materials / Machinery	4,726	5,012	5,621	6,409	4,874	3,272	3,429	2,724	2,624	2,490	<b>2,560</b>
Foodstuffs	30,177	30,237	29,893	29,933	30,145	28,850	28,804	26,619	28,329	27,209	<b>26,350</b>
Beverages / Cigarettes	28,769	28,224	27,651	26,374	24,685	22,701	21,786	19,621	20,987	20,688	<b>21,096</b>
Pharmaceuticals / Medical Supplies	17,692	18,451	17,791	18,288	18,367	16,333	14,597	14,354	14,847	14,745	<b>14,992</b>
Cosmetics / Toiletries	37,913	32,601	31,932	31,145	29,380	27,591	28,792	27,687	28,783	27,985	<b>29,551</b>
Apparel / Fashion, Accessories / Personal Items	9,655	11,074	12,320	12,787	11,582	9,312	10,129	10,818	11,645	11,732	<b>11,382</b>
Precision Instruments / Office Supplies	4,746	4,085	4,236	4,465	4,080	3,073	2,942	2,630	2,886	2,834	<b>3,050</b>
Home Electric Appliances / AV Equipment	8,245	9,076	9,192	8,503	8,188	7,056	7,337	5,449	5,412	5,533	<b>5,926</b>
Automobiles / Related Products	25,490	24,822	23,503	21,691	19,228	13,456	13,163	12,981	16,473	16,710	<b>17,277</b>
Household Products	6,697	6,761	6,257	6,384	6,105	5,899	6,506	6,421	6,496	6,856	<b>7,242</b>
Hobbies / Sporting Goods	14,230	16,274	16,523	15,695	16,925	14,200	12,314	11,061	10,853	10,227	<b>9,414</b>
Real Estate / Housing Facilities	15,596	16,605	16,680	17,304	14,753	11,268	10,294	10,445	10,869	11,503	<b>11,804</b>
Publications	15,135	14,824	14,313	13,712	11,414	9,451	9,267	8,949	9,216	8,988	<b>8,769</b>
Information / Communications	26,646	26,774	26,853	26,675	24,145	20,338	22,091	22,200	24,525	24,332	<b>26,091</b>
Distribution / Retailing	25,489	25,393	23,486	22,348	21,064	19,139	18,226	18,694	20,297	19,273	<b>19,374</b>
Finance / Insurance	29,120	32,728	30,478	24,620	21,296	15,144	15,383	14,121	14,499	16,762	<b>16,437</b>
Transportation / Leisure	28,457	28,818	28,804	28,976	26,944	23,352	21,118	19,527	21,123	20,976	<b>21,172</b>
Food Services / Other Services	12,409	14,738	14,847	15,188	14,425	13,487	13,867	12,356	12,896	14,229	<b>14,504</b>
Government / Organizations	4,681	5,239	4,367	5,413	4,558	4,766	4,082	10,873	3,327	3,149	<b>3,380</b>
Education / Medical Services / Religion	13,090	13,673	12,880	11,926	10,016	8,546	8,177	7,579	7,823	8,069	<b>7,717</b>
Classified Ads / Others	8,637	8,671	9,053	9,154	7,776	5,586	5,186	5,051	4,050	3,960	<b>3,672</b>
<b>Total</b>	<b>367,600</b>	<b>374,080</b>	<b>366,680</b>	<b>356,990</b>	<b>329,950</b>	<b>282,820</b>	<b>277,490</b>	<b>270,160</b>	<b>277,960</b>	<b>278,250</b>	<b>281,760</b>

**Note:** The method for estimating “Advertising Expenditures in Japan” was modified in 2007, and the data for 2005 and 2006 have been retroactively revised.

## Sources of Media Expenditures

<b>Traditional Media</b>	Advertising expenditures spent in the traditional media of newspapers, magazines, radio and television.
<b>Newspapers</b>	Advertising rates of national daily and trade newspapers, and advertising production costs.
<b>Magazines</b>	Advertising rates of national monthly, weekly and specialized magazines, and advertising production costs.
<b>Radio</b>	Time rates and production costs of private broadcasting stations nationwide and commercial production costs (but not including event-related costs).
<b>Television</b>	
<b>Terrestrial Television</b>	Time rates and production costs of private terrestrial broadcasting stations nationwide and commercial production costs (but not including event-related costs).
<b>Satellite Media-Related</b>	Advertising expenditures for satellite broadcasts, CATV and teletext (placement and production costs).
<b>Internet</b>	Placement (includes mobile advertising) and production costs (includes production costs for banner ads as well as website set-up costs related to products, services and ad campaigns) for Internet sites.
<b>Promotional Media</b>	Advertising expenditures for sales promotion-related media.
<b>Outdoor</b>	Production and placement costs for billboards, neon signs, outdoor video screens, etc.
<b>Transit</b>	Placement costs for transit advertisements.
<b>Flyers</b>	Insertion costs for flyers in newspapers nationwide.
<b>Direct Mail</b>	Postage and private delivery costs spent on direct mail.
<b>Free Newspapers / Free Magazines</b>	Advertising costs in free newspapers and magazines.
<b>POP</b>	Production costs for point-of-purchase (POP) displays.
<b>Telephone Directories</b>	Placement costs for advertisements in telephone directories.
<b>Exhibitions / Screen Displays</b>	Production costs for exhibitions, expositions and PR centers; production and screening costs for promotional films and videos, etc.

**Note:** The method for estimating "Advertising Expenditures in Japan" was modified in 2007, and the data for 2005 and 2006 have been retroactively revised.

### Contents of the revision:

- (1) The range of "Magazines" included in the traditional media was expanded to include a wider variety of specialty magazines, local magazines, etc.
- (2) "Internet" advertising expenditures include estimated production costs.
- (3) The "Sales Promotion" medium was renamed "Promotional Media," and the breakdown within it was revised.
- (4) "Outdoor" was revised to include outdoor video screens and poster boards along with billboards and neon signs.
- (5) "Transit" was revised to include airports and taxis along with trains and buses.
- (6) In "Flyers," the nationwide insertion costs for flyers were revised.
- (7) In addition to postal fees, "Direct Mail" was revised to include delivery fees charged by private delivery companies.
- (8) Estimated advertising expenditures for "Free Newspapers/Free Magazines" are included in the figures.

## Breakdown of Industry Categories

<b>Energy / Materials / Machinery</b>	Electricity, gas, petroleum products, paper, steel, chemical materials, agricultural machinery, construction and civil engineering machinery, machine tools, store equipment, etc.
<b>Foodstuffs</b>	Dairy products, meat products, seasonings, bread, confectioneries, health foods and beauty-related food products, processed foods, etc.
<b>Beverages / Cigarettes</b>	Alcoholic beverages, non-alcoholic beverages, tobacco products, etc.
<b>Pharmaceuticals / Medical Supplies</b>	Medicines, medical supplies, health drinks, eyeglasses, etc.
<b>Cosmetics / Toiletries</b>	Skin and hair products, makeup and other cosmetics, shampoos and conditioners, razors and razor blades, electric toothbrushes, dentifrices, soap, detergents, feminine hygiene products, disposable diapers, etc.
<b>Apparel / Fashion, Accessories / Personal Items</b>	Clothing, fabrics, home-use textile products, shoes, handbags, umbrellas, jewelry and accessories, etc.
<b>Precision Instruments / Office Supplies</b>	Timepieces, cameras, digital cameras and other optical equipment, office supplies, stationery, etc.
<b>Home Electric Appliances / AV Equipment</b>	Electric cooking appliances and household appliances, home air-conditioning equipment, audio-visual equipment (including digital video cameras), lighting fixtures, hairdressing and beauty equipment, etc.
<b>Automobiles / Related Products</b>	Automobiles, motorcycles, motor scooters, bicycles, motorboats, tires, car navigation systems, etc.
<b>Household Products</b>	Petroleum/gas-related equipment, bedding, interior decoration products, furniture, memorial goods, kitchen accessories, insecticides, mothballs and other insect repellents, air fresheners, deodorizers, etc.
<b>Hobbies / Sporting Goods</b>	Hobby products, game machines and software, audio-visual software, gardening supplies, pet foods, pachinko machines and "pachi-slo" slot machines, sporting goods, etc.
<b>Real Estate / Housing Facilities</b>	Land, housing and other buildings, materials used in building, household fixtures such as toilets, bathtubs, bathroom sink units and kitchen units, solar power generation systems and hot water systems.
<b>Publications</b>	Newspapers, magazines, books, language study materials, other publications.
<b>Information / Communications</b>	Computers, computer-related products, computer software, mobile phones, tablet computers, telephone services, communications facilities and services, Internet, web content, mobile device content, broadcasting, etc.
<b>Distribution / Retailing</b>	Department stores, supermarkets, convenience stores, direct marketing businesses, high-volume retailers, shopping centers, other retailers, etc.
<b>Finance / Insurance</b>	Banks, securities firms, insurance firms, consumer finance and credit card companies, electronic money, lotteries, Internet banking, etc.
<b>Transportation / Leisure</b>	Transportation facilities and services, travel and hotels, sports and leisure facilities, publicly managed racing, movies, concerts and various events, etc.
<b>Food Services / Other Services</b>	Restaurants, door-to-door delivery and moving services, beauty salons, rental businesses, temporary job placement agencies, wedding planning, security services, legal services, wigs and hairpieces, etc.
<b>Government / Organizations</b>	Government offices, local autonomous bodies, political parties, foreign government offices, advertising organizations, various other organizations, etc. (Organizations operating within a single industry are classified under that industry.)
<b>Education / Medical Services / Religion</b>	Schools, preparatory and tutoring schools, vocational schools, correspondence education, medical-service organizations, medical and nursing services, nursing homes, religion, etc.
<b>Classified Ads / Others</b>	Classified ads (newspaper and magazine), ad-hoc ads, personal notices, multi-advertiser messages, corporate group advertising, etc.



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