

ASIA PACIFIC

ADVERTISING TRENDS

April 2017

Table of Contents

Executive Summary	1-24
Sources And Methodology	3
Overview	4-8
Asia Pacific Advertising Revenue (US\$ mil.)	5
Asia Pacific Advertising Market Share By Segment	5
Comparison of Asia Pacific Advertising Growth	6
Comparison of Advertising Growth by Market	6
Leading Markets by Advertising Volume (2017)	7
Leading Markets by Advertising Volume (2022)	7
Leading TV Advertising Growth Markets	7
Leading Internet Advertising Growth Markets	8
TV Versus Internet, Advertising Market Share (2016)	8
TV Versus Internet, Advertising Market Share (2022)	8
Summary Of Market Trends	9-11
Market Projections	12-18
Real GDP Growth	12
Advertising Revenue (US\$ mil.)	12
Annual Advertising Growth	12
Total TV Advertising (US\$ mil.)	13
Free-To-Air TV Advertising (US\$ mil.)	13
Pay-TV Advertising (US\$ mil.)	13
Internet Advertising (US\$ mil.)	14
Print Advertising (US\$ mil.)	14
Newspaper Advertising (US\$ mil.)	14
Magazine Advertising (US\$ mil.)	15
OOH Advertising (US\$ mil.)	15
Radio Advertising (US\$ mil.)	15
Total TV Market Share of Advertising	16
Free-To-Air TV Market Share of Advertising	16
Pay-TV Market Share of Advertising	16
Internet Market Share of Advertising	17
Print Market Share of Advertising	17
OOH Market Share of Advertising	17
Radio Market Share of Advertising	18
Market Rankings	19-24
Total Advertising (US\$ mil.)	19
Total TV Advertising (US\$ mil.)	19
Free-To-Air TV Advertising (US\$ mil.)	19
Pay-TV Advertising (US\$ mil.)	20
Internet Advertising (US\$ mil.)	20
Print Advertising (US\$ mil.)	20
Newspaper Advertising (US\$ mil.)	21
Magazine Advertising (US\$ mil.)	21
OOH Advertising (US\$ mil.)	21
Radio Advertising (US\$ mil.)	22
Total TV Market Share of Advertising	22
Free-To-Air TV Market Share of Advertising	22
Pay-TV Market Share of Advertising	23
Internet Market Share of Advertising	23
Print Market Share of Advertising	23
OOH Market Share of Advertising	24
Radio Market Share of Advertising	24

Australia	25-30
Market Highlights	26
Advertising Trends, 2017 & 2022	26
Market Share By Media, 2017 & 2022	27
Advertising Annual Growth, 2017-22	27
Television	28
Internet	28
Other Media	28
Macroeconomics & Advertising Model	29
Advertising -- By Media	29
Advertising Annual Growth	29
Advertising Market Share	30
China	31-37
Market Highlights	32
Advertising Trends, 2017 & 2022	32
Market Share By Media, 2017 & 2022	33
Advertising Annual Growth, 2017-22	33
Television	34
Internet	34
Other Media	35
Macroeconomics & Advertising Model	36
Advertising -- By Media	36
Advertising Annual Growth	36
Advertising Market Share	37
Hong Kong	38-43
Market Highlights	39
Advertising Trends, 2017 & 2022	39
Market Share By Media, 2017 & 2022	40
Advertising Annual Growth, 2017-22	40
Television	41
Internet	41
Other Media	41
Macroeconomics & Advertising Model	42
Advertising -- By Media	42
Advertising Annual Growth	42
Advertising Market Share	43
India	44-50
Market Highlights	45
Advertising Trends, 2017 & 2022	45
Market Share By Media, 2017 & 2022	46
Advertising Annual Growth, 2017-22	46
Television	47
Internet	47
Other Media	48
Macroeconomics & Advertising Model	49
Advertising -- By Media	49
Advertising Annual Growth	49
Advertising Market Share	50

Indonesia	51-56
Market Highlights	52
Advertising Trends, 2017 & 2022	52
Market Share By Media, 2017 & 2022	53
Advertising Annual Growth, 2017-22	53
Television	54
Internet	54
Other Media	54
Macroeconomics & Advertising Model	55
Advertising -- By Media	55
Advertising Annual Growth	55
Advertising Market Share	56
Japan	57-62
Market Highlights	58
Advertising Trends, 2017 & 2022	58
Market Share By Media, 2017 & 2022	59
Advertising Annual Growth, 2017-22	59
Television	60
Internet	60
Other Media	60
Macroeconomics & Advertising Model	61
Advertising -- By Media	61
Advertising Annual Growth	61
Advertising Market Share	62
Korea	63-68
Market Highlights	64
Advertising Trends, 2017 & 2022	64
Market Share By Media, 2017 & 2022	65
Advertising Annual Growth, 2017-22	65
Television	66
Internet	66
Other Media	66
Macroeconomics & Advertising Model	67
Advertising -- By Media	67
Advertising Annual Growth	67
Advertising Market Share	68
Malaysia	69-74
Market Highlights	70
Advertising Trends, 2017 & 2022	70
Market Share By Media, 2017 & 2022	71
Advertising Annual Growth, 2017-22	71
Television	72
Internet	72
Other Media	72
Macroeconomics & Advertising Model	73
Advertising -- By Media	73
Advertising Annual Growth	73
Advertising Market Share	74

New Zealand	75-80
Market Highlights	76
Advertising Trends, 2017 & 2022	76
Market Share By Media, 2017 & 2022	77
Advertising Annual Growth, 2017-22	77
Television	78
Internet	78
Other Media	78
Macroeconomics & Advertising Model	79
Advertising -- By Media	79
Advertising Annual Growth	79
Advertising Market Share	80
Philippines	81-86
Market Highlights	82
Advertising Trends, 2017 & 2022	82
Market Share By Media, 2017 & 2022	83
Advertising Annual Growth, 2017-22	83
Television	84
Internet	84
Other Media	84
Macroeconomics & Advertising Model	85
Advertising -- By Media	85
Advertising Annual Growth	85
Advertising Market Share	86
Singapore	87-92
Market Highlights	88
Advertising Trends, 2017 & 2022	88
Market Share By Media, 2017 & 2022	89
Advertising Annual Growth, 2017-22	89
Television	90
Internet	90
Other Media	90
Macroeconomics & Advertising Model	91
Advertising -- By Media	91
Advertising Annual Growth	91
Advertising Market Share	92
Taiwan	93-98
Market Highlights	94
Advertising Trends, 2017 & 2022	94
Market Share By Media, 2017 & 2022	95
Advertising Annual Growth, 2017-22	95
Television	96
Internet	96
Other Media	96
Macroeconomics & Advertising Model	97
Advertising -- By Media	97
Advertising Annual Growth	97
Advertising Market Share	98

Thailand	99-104
Market Highlights	100
Advertising Trends, 2017 & 2022	100
Market Share By Media, 2017 & 2022	101
Advertising Annual Growth, 2017-22	101
Television	102
Internet	102
Other Media	102
Macroeconomics & Advertising Model	103
Advertising -- By Media	103
Advertising Annual Growth	103
Advertising Market Share	104
Vietnam	105-110
Market Highlights	106
Advertising Trends, 2017 & 2022	106
Market Share By Media, 2017 & 2022	107
Advertising Annual Growth, 2017-22	107
Television	108
Internet	108
Other Media	108
Macroeconomics & Advertising Model	109
Advertising -- By Media	109
Advertising Annual Growth	109
Advertising Market Share	110