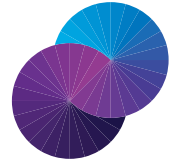


# Asia-Pacific Net Advertising Revenue Overview

By Country	All Advertising Expenditure 2008 (US\$m)	Advertising Expenditure as a % of Asia-Pacific	TV Advertising Expenditure 2008 (US\$m)	% TV share
Australia	8,097	7.0	2,535	31.3
Bangladesh	142	0.1	51	36.1
China	34,818	30.0	21,594	62.0
Hong Kong	4,242	3.7	1,634	38.5
India	4,738	4.1	1,741	36.7
Indonesia	2,626	2.3	1,661	63.3
Japan	45,659	39.4	18,317	40.1
Malaysia	1,707	1.5	575	33.7
New Zealand	1,331	1.1	406	30.5
Pakistan	255	0.2	164	64.4
Philippines	1,351	1.2	1,038	76.8
Singapore	1,043	0.9	329	31.6
S. Korea	5,522	4.8	1,772	32.1
Taiwan	1,610	1.4	624	38.7
Thailand	2,182	1.9	1,157	53.0
Vietnam	584	0.5	420	71.9
By Region	All Advertising Expenditure 2008 (US\$m)	Advertising Expenditure as a % of Asia-Pacific	TV Advertising Expenditure 2008 (US\$m)	% TV share
<b>ASIA-PACIFIC</b>	<b>115,906</b>		<b>54,017</b>	<b>46.6</b>
North Asia	91,851	79.2	43,940	47.8
South Asia	5,134	4.4	1,956	38.1
South East Asia	9,492	8.2	5,179	54.6
Australasia	9,428	8.1	2,941	31.2

# MINDSHARE



Twice a year we update our global forecasts for measured media spending in a report we call 'This Year, Next Year'.

Given the current economic turbulence it seems that many companies are thinking more along the lines of 'This Week, Next Week'. 2008 saw a small growth in overall advertising spend across Asia-Pacific, with a drop in Japan spend that was more than made up for by significant 'Olympic' growth from China.

## **T**V continues to be the dominant media across the region,

TV continues to be the dominant media across the region, at 47% of all spend, and an incredible 62% spend in China. The outlook for 2009 is understandably cloudy right now, but we are forecasting a modest drop in total revenues across the region, with China seeing slight growth, TV holding its share of total spend, and internet spend to continue with double-digit growth.



**James Chadwick,**  
Leader -  
Business Planning  
Asia-Pacific

**Source:** GroupM, TNYN December 2008, Estimated Net Expenditure including agency commission

**North Asia:** China, Hong Kong, Taiwan, South Korea & Japan

**South Asia:** India, Pakistan, Bangladesh

**South East Asia:** Indonesia, Malaysia, Philippines, Singapore, Thailand & Vietnam

**Australasia:** Australia & New Zealand

Note:

South Korea, Malaysia & Vietnam are gross figures

US\$ conversions are subject to fluctuation at the time of printing