



### For immediate release

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## Japan Invests US\$160 Million in Online Display Advertising in September 2006

*Nielsen//NetRatings Launches AdRelevance in Japan*

**Tokyo, 16 October 2006** — Nielsen//NetRatings, a global leader in internet media and market research, today announced the launch of its online advertising measurement service, AdRelevance, in Japan.

The very first Japanese AdRelevance insights, collected in September 2006, reveal that 3 thousand online display advertising campaigns, consisting of almost 6.5 thousand banners, were run by 1,254 advertisers during the month. The total monthly ad impressions reached 29.5 billion and September's online display advertising expenditure was an estimated ¥19.2 billion, or US\$ 160 million. This investment equals one fifth of the US market's total online display advertising spend in September (US\$771 million) and over three times the monthly online display ad expenditure in China (US\$51 million).

**Chart 1: Japan's Online Display Advertising Activity – September 2006**

Advertisers	1,254
Campaigns	3,004
Banners / creatives	6,453
Ad impressions	29.5 billion
Estimated Ad expenditure	19.2 billion
Average number of campaigns per advertiser	2.4
Average number of banners per campaign	2.1

*Source: Nielsen//NetRatings AdRelevance, Japan; excludes in-house ads*

Following the rapid growth of online advertising in the Asia Pacific region, NetRatings recently introduced the spider-based online display advertising monitoring service in Australia and China. Commenting on its successful introduction in the region, Mr Forrest Didier, Managing Director, Nielsen//NetRatings Asia Pacific and Latin America, comments: "AdRelevance is the widely accepted standard for online advertising measurement in the US and Europe. We are progressively bringing AdRelevance to Asia Pacific and the overwhelming interest and uptake of the service in Australia, China and now Japan has encouraged plans for further expansion into additional markets in the near future."

The launch of AdRelevance in Japan has been much anticipated by all online industry players as, according to Mr. Didier, AdRelevance offers comprehensive data on the Japanese online advertising market; "AdRelevance supports the full online ad planning, management and evaluation process through the delivery of e-mail alerts for new ads and campaigns and daily updated information that includes impressions, expenditure, as well as a capture of the ad creative itself. We strongly believe that the introduction of the service in Japan will make an enormous contribution to the development of the country's online advertising market."



NetRatings Japan President and Chief Analyst Masashi Hagihara said: "AdRelevance not only provides numerical data on ad impressions and estimated spend, it also tracks detailed ad activity, ad formats and ad creatives by advertiser, website and campaign. Subscribers to the service will be able to plan, buy or sell their online campaigns more efficiently and to keep track of online advertising activity within their industry and nationwide through daily delivery of near real-time AdRelevance information."

## Japan's Online Display Advertising Leaders

In September, Japan's beauty industry topped the ad spend list with ¥1.23 billion or 6.4% of the month's total online display advertising expenditure. The food industry followed in a close second place with ¥1.20 billion (6.3%) and the financial securities and investment sector closed the top 3 with an expenditure of ¥1 billion (5.5%).

**Chart 2 – Top 10 Online Display Advertising Sectors, September 2006**

Rank	Sector	Estimated ad expenditure (in millions ¥)	Ad impressions (in millions)
1	Beauty	1,229.8	1,945
2	Food	1,208.1	1,866
3	Financial Securities and Investment	1,054.3	648
4	Mobile Communications	1,011.5	1,633
5	Personal Loans	991.7	2,246
6	Real Estate	868.5	1,120
7	Employment	835.6	2,506
8	Computers	803.6	1,157
9	Car Manufacturers	679.3	1,112
10	Others	671.1	1,189

Source: Nielsen//NetRatings AdRelevance, Japan; excludes in-house ads

With the top 50 advertisers accounting for 50% of the total monthly 29.5 million ad impressions, Vodafone-Softbank, MediaRights and DHC formed the top 3 online display advertisers in Japan in September 2006 with respectively 1.2 billion, 941 million and 882 million ad impressions.

**Chart 3 – Top 10 Online Display Advertisers, September 2006**

Rank	Advertiser	Ad impressions (in millions)	Share of total ad impressions
1	Vodafone	1,214	4.1%
2	MediaRights	941	3.2%
3	DHC	882	3.0%
4	Carview	598	2.0%
5	Kenkou Corporation	515	1.7%
6	SOFTBANK Human Capital	511	1.7%
7	ORIX Credit	453	1.5%
8	At-Loan	433	1.5%
9	Japan Airlines	401	1.4%
10	INTELLIGENCE	391	1.3%

Source: Nielsen//NetRatings AdRelevance, Japan; excludes in-house ads



Yahoo! Japan was the top online advertising vendor with an overwhelming 13.3 billion ad impressions, followed at quite a distance by Mixi's 3.3 billion ad impressions and MSN came third with 1.1 billion ad impressions. These three players accounted for over 60% of the total monthly ad impressions in Japan.

**Chart 4 – Top 10 Online Display Vendors, September 2006**

Rank	Vendor	Ad impressions (in millions)	Share of total ad impressions
1	Yahoo! Japan	13,298	45.1%
2	mixi	3,319	11.3%
3	MSN	1,159	3.9%
4	goo	951	3.2%
5	NikkeiNET	751	2.6%
6	Infoseek	697	2.4%
7	EC Navi	647	2.2%
8	Excite Japan	551	1.9%
9	Kakaku.com	528	1.8%
10	Nikkansports.com	496	1.7%

Source: Nielsen//NetRatings AdRelevance, Japan; excludes in-house ads

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**Editor's note: Please source all above information to Nielsen//NetRatings**

**About Nielsen//NetRatings:**

Nielsen//NetRatings is a global leader in Internet media and market research and is the industry's premier source for online advertising intelligence with its NetView, SiteCensus, Market Intelligence, AdRelevance, Analytics and Consulting services. Covering 70 percent of the world's Internet usage, the Nielsen//NetRatings services offer syndicated Internet and digital media research reports and custom-tailored data to help companies gain valuable insight into their business.

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