

ASIA PACIFIC ADVERTISING TRENDS 2021

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Definitive report with detailed analysis, data and forecasts tracking net advertising expenditure in 14 key markets.

HIGHLIGHTS

- Pandemic-induced uncertainty and advertiser pullback in 1H 2020 resulted in a 4.3% Y/Y decline in Asia Pacific net advertising expenditure to US\$188 billion in 2020.
- Digital was the largest medium, contributing 59% of ad spend, followed by television (23%), out-of-home (9%), print (6%), radio (3%) and cinema (0.5%).
- Digital advertising proved most resilient to soft advertiser demand in 2020, netting growth in most markets. The medium is projected to grow to contribute 67% of APAC ad revenue in 2025, eating into TV's share (18%).
- APAC advertising expenditure is forecast to grow at 5.4% CAGR to reach US\$245 billion by 2025, powered by growth across key markets such as China, India, Japan, and Korea.

KEY METRICS (Historical data & projections with MPA proprietary analysis) (Full data provided in Excel format)

- 2015-2025 Net Advertising in Asia Pacific and By Market (14 Markets in total)
- Within each market:
 - Net Advertising By Medium, split into TV (FTA, Pay-TV), Internet, Online Video, Print (Newspapers, Magazines), OOH, Radio, Cinema
 - Net advertising expressed in 1) local currency; 2) USD based on constant 2020 exchange rate, and 3) USD based on fluctuating annual exchange rate
 - Annual Net Advertising Growth By Medium
 - Advertising Market Share By Medium

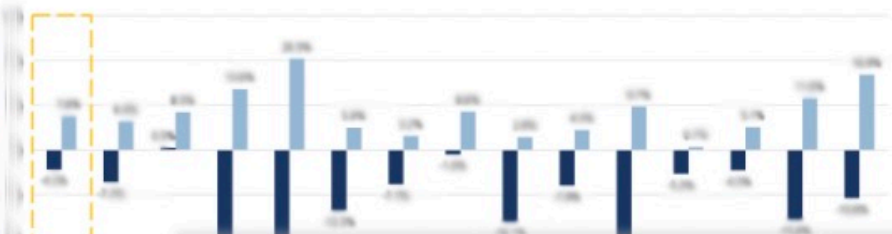
Market Coverage

Australia, China, Hong Kong, India, Indonesia, Japan, Korea, Malaysia, New Zealand, Philippines, Singapore, Taiwan, Thailand, Vietnam

SAMPLE CHARTS AND TABLES FROM EXECUTIVE SUMMARY

ASIA PACIFIC – TOTAL ADVERTISING GROWTH BY MARKET

Total Advertising Annual Growth, 2020 vs 2021

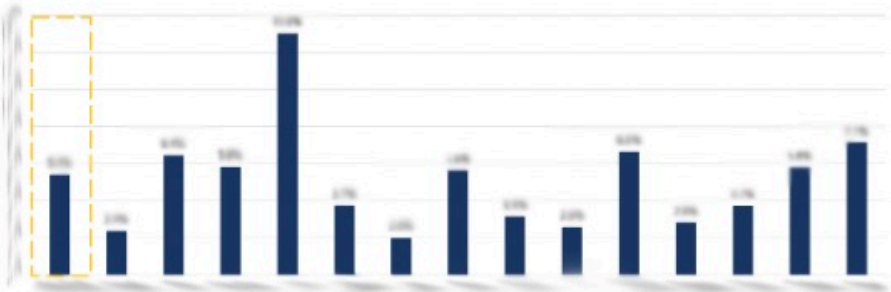


Source: Media Partners Asia



ASIA PACIFIC – TOTAL ADVERTISING 5-YEAR CAGR PROJECTIONS BY MARKET

Total Advertising Projected Growth, CAGR 2020-25



Source: Media Partners Asia



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ASIA PACIFIC – ADVERTISING SUMMARY

Advertising - By Media (in US\$, constant 2020 exchange)

US\$ mil.	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% CAGR 2015-20	% CAGR 2020-25
TV													
Free-to-air (FTA)													
Pay													
Internet													
Online Video*													
Print													
Newspapers													
Magazines													
OOH													
Radio													
Cinema													
Total													

*Online video is a subset of internet advertising
1. Advertising dollars calculated after discounts and
2. MPA data and forecasts based upon discussions
Source: Media Partners Asia



ASIA PACIFIC – NET ADVERTISING BY MARKET

Net Advertising - By Market (in US\$, constant 2020 exchange)

US\$ mil.	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% CAGR 2015-20	% CAGR 2020-25
Australia													
China													
Hong Kong													
India													
Indonesia													
Japan													
Korea													
Malaysia													
New Zealand													
Philippines													
Singapore													
Taiwan													
Thailand													
Vietnam													
Asia Pacific YY Growth													

Source: Media Partners Asia



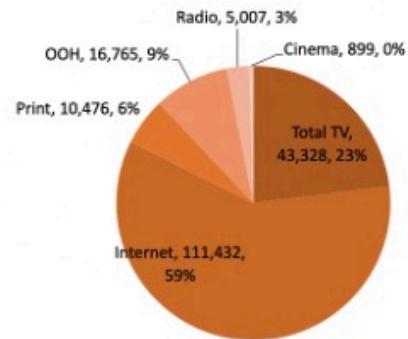
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DETAILED DASHBOARD

Market Comparison: Advertising Share

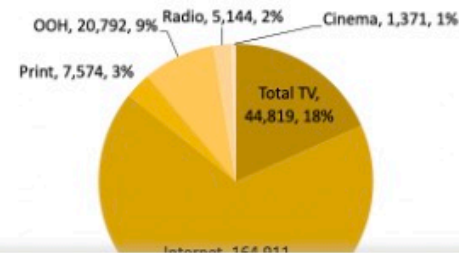
Ad value by medium in US\$ mil. (2020 exchange rate)

Country: Year: 2020



Ad value by medium in US\$ mil. (2020 exchange rate)

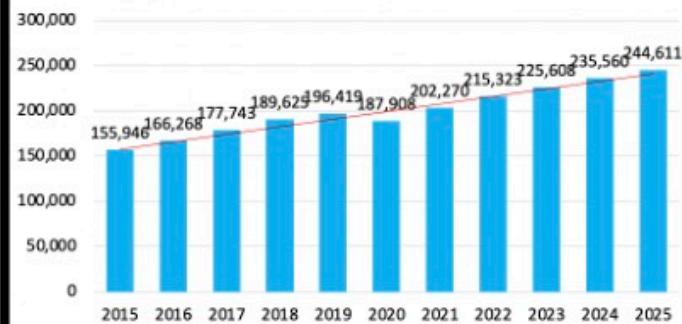
Country: Year: 2025



Market Comparison: Advertising Value

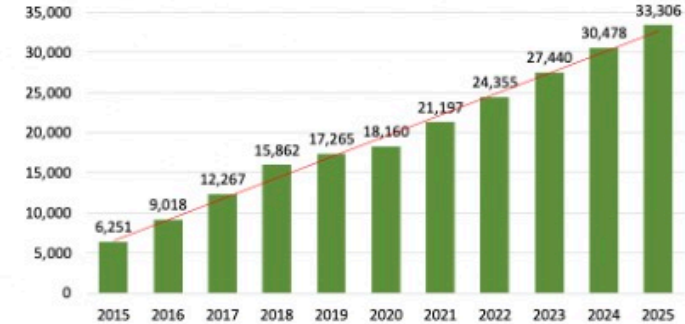
Ad value by year in US\$ mil. (2020 exchange rate)

Country: Medium: Total Advertising



Ad value by year in US\$ mil. (2020 exchange rate)

Country: Medium: Online Video



COUNTRY PROFILE

– MARKET HIGHLIGHTS

Macro Overview

Media Overview

TV

Digital / Online Video

– ADVERTISING SUMMARY

Advertising - By Media (in US\$, constant 2020 exchange)

US\$ mil.	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% CAGR 2015-20	% CAGR 2020-25
TV													
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Cinema													
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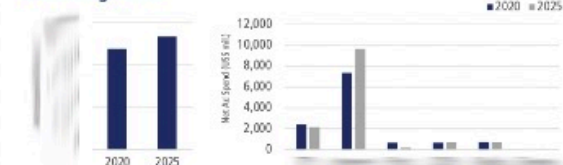
*Online video is a subset of internet advertising.
 1. Advertising estimates.
 Source: Media Partners Asia

– MARKET OVERVIEW

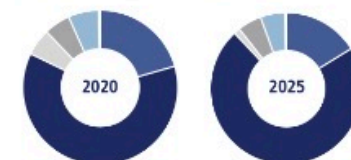
Overview

	TOTAL NET AD SPEND	MARKET SHARE	
		Television	Internet
2020			
2025			

Advertising Trends

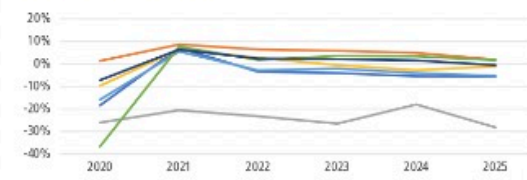


Market Share by Media



Source: Media Partners Asia

Advertising Annual Growth



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ABOUT MEDIA PARTNERS ASIA



Media Partners Asia (MPA) is the leading independent provider of research, advisory and consulting services across media, telecoms, sports and entertainment industries in Asia Pacific and the Middle East. We provide customized research with strategic recommendations to help clients launch new products & services, enter new markets, as well as acquire and sell businesses. MPA reports are used and sourced by local, regional and global companies for strategic planning and equity & debt transactions. We also offer dedicated primary research through subsidiary AMPD Research to measure consumer behaviour across the digital economy, including online video and gaming. MPA also hosts the APOS Summit, the defining voice for the Asia Pacific media, telecoms, sports and entertainment industry.

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