



CCI Releases Report on Japan's Internet Advertising Market H1 2024

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TOKYO, JAPAN, August 27, 2024 -- CARTA COMMUNICATIONS Inc. (Headquarters: Minato-ku, Tokyo; Taku Meguro, Representative Director, President; "CCI"), a group company of CARTA HOLDINGS, Inc., conducted a survey of over 100 marketing professionals across the country in July 2024 to understand meaningful trends in the Internet advertising market for the first half of 2024, future issues and challenges facing the industry, and medium- to long-term plans and trends. The results have been released as Japan's Internet Advertising Market Insights H1 2024.



About the survey

The survey has been conducted biannually since July 2020 to provide insights into how Japan's Internet advertising market changes over time. The latest and 9th survey was implemented from July 16 through July 29, 2024 via email with a mix of advertisers, advertising agencies,

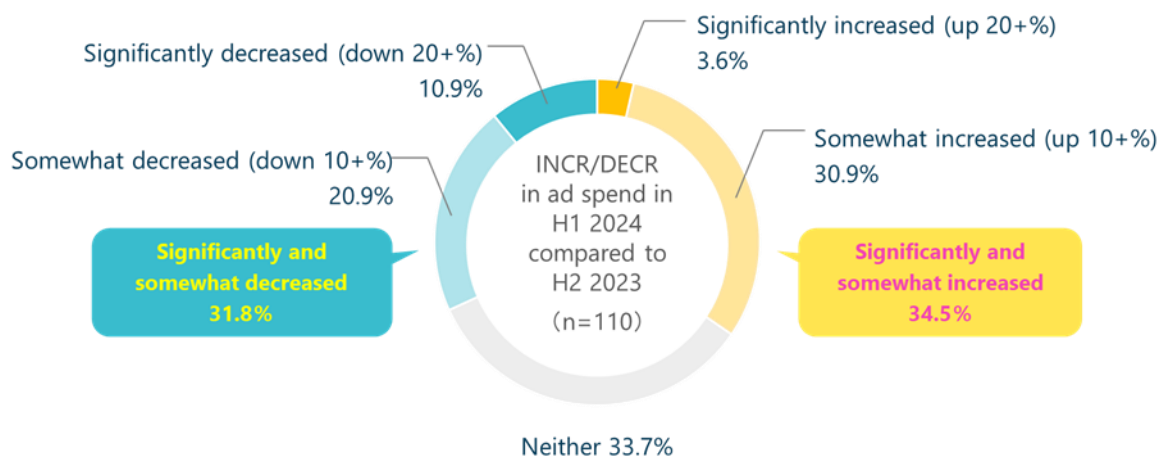


publishers, media owners, platforms, ad tech vendors, and media reps. A total of 110 responses were received. The report was generated based on the survey results and data from CCI 360 Programmatic Display Market Analytics (see below).

Key findings

- **34.5% of respondents reported an increase in online ad spend in H1 2024.**

34.5% of respondents reported an increase in online ad spend in the first half of 2024 compared to the second half of 2023, which is up 0.7 percentage points from the previous survey. While few respondents indicated a large increase, those that reported at least a slight increase (10% or more compared to H2 2023) accounted for 30.9%, or about one-third of the total. Also note that the (significant/some) increase exceeded the (significant/some) decrease by 2.7%.

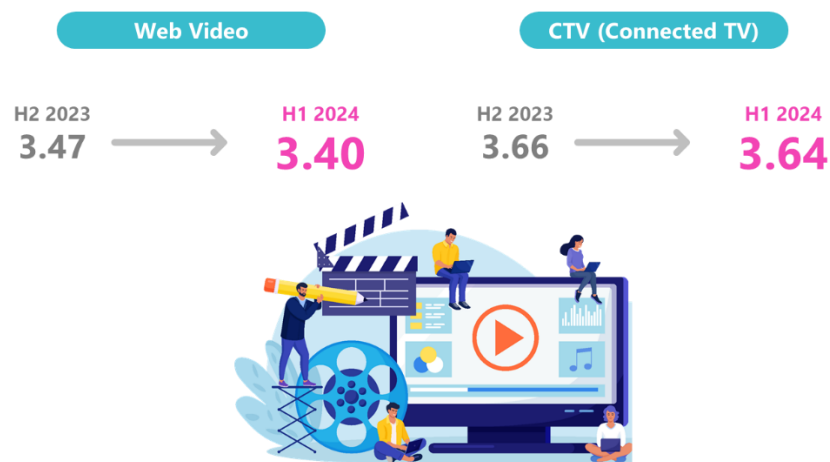


- **The appetite for video investment remains high.**

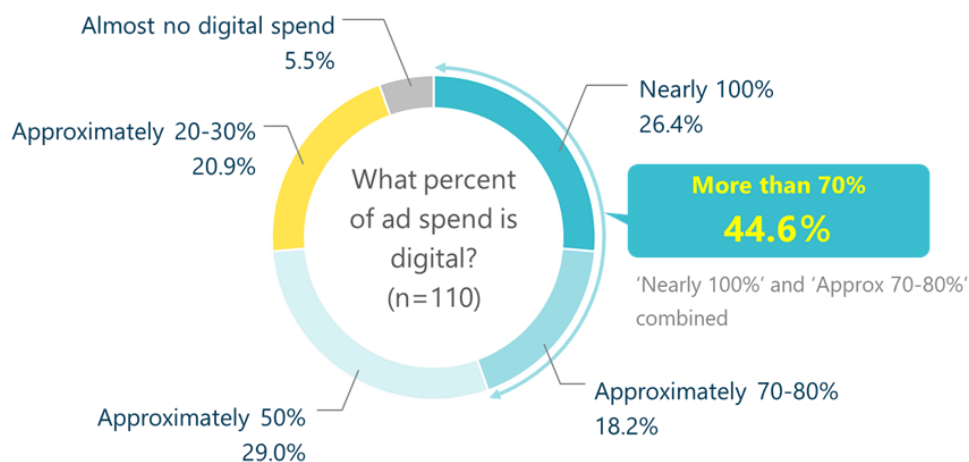
Looking at how much was spent by format, marketers' appetite for video (Web video and CTV) investment remains high. Based on the survey, this trend is expected to continue moving forward.



Note: Since the second half of 2020, the survey has been asking respondents to report whether their ad spend has increased or decreased compared to the previous 6 months by offering six-scale options to choose from, including significantly increased, somewhat increased, somewhat decreased, significantly decreased, neither and N/A. Responses are analyzed over time and points are calculated to assign to different types of advertising.



- **Nearly half (44.6%) of respondents are investing more than 70% of their advertising budget in digital.**

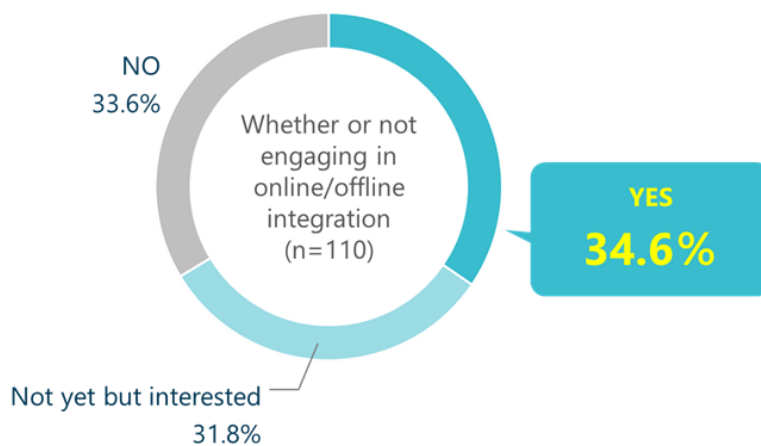




- **More than one third of respondents are engaging in online and offline integration.**

While 34.6% of respondents said they are currently working on online and offline integration efforts, another one-third showed interest in such integration, indicating the potential for further expansion.

Are you currently engaging in online and offline integration or media mix modeling?
Or have you already received an integrated proposal?



Other topics covered in this survey to gain insight on issues, challenges, medium to long term trends and efforts surrounding Internet advertising include:

- Investment in retail media
- Use of generative AI in business operations
- Preparations for third-party cookie deprecation
- Brand safety and JICDAQ certification
- Human resource management for Internet ad operations



About CCI 360 Programmatic Display Market Analytics

CCI 360 Programmatic Display Market Analytics ("CCI360") is a tool that aggregates and compiles data from the company's supply partners to provide insights into the size of Japan's programmatic display advertising market, as well as the scale and trends in campaign spend among advertisers who invest a large portion of their marketing budgets in programmatic display.

To request a full copy of the report, please fill out the form below. Please note that the report and the request form are only available in Japanese: https://www.cci.co.jp/form_cci360_9/.

Contact: PR Office, CARTA COMMUNICATIONS Inc.

Inquiry form is available at <https://www.cci.co.jp/en/contact/>