

2025 Advertising Expenditures in Japan: Detailed Analysis of Expenditures on Internet Advertising Media

—Detailed analysis of spending in 2025 and the forecast for 2026, jointly carried out by CARTA HOLDINGS, Dentsu, Dentsu Digital, and Septeni—

Four leading companies in the digital domain, CARTA HOLDINGS, Inc., Dentsu Inc. (Dentsu), Dentsu Digital Inc. (Dentsu Digital), and SEPTENI CO., LTD. (Septeni), have released a survey titled “2025 Advertising Expenditures in Japan: Detailed Analysis of Expenditures on Internet Advertising Media.”

The survey analyzes the results of “2025 Advertising Expenditures in Japan,” published by Dentsu on March 5, 2026*, and further breaks down data on internet advertising media spending. The analysis presents data based on variables such as ad category and transaction method. It also includes forecasts for 2026.

*2025 Advertising Expenditures in Japan: <https://www.dentsu.co.jp/en/news/release/2026/0305-011006.html>

In 2025, advertising expenditures in Japan totaled 8,062.3 billion yen (up 5.1% year on year), the fifth consecutive year of growth since 2021 and the fourth to reach a new record high.

Internet advertising expenditures (estimates began in 1996) grew robustly amid the ongoing digitization of society, increasing by 394.2 billion yen to reach a record-high of 4,045.9 billion yen (up 10.8% year on year), which accounted for 50.2% of total advertising expenditures in Japan, the first time to exceed half the total. Furthermore, excluding internet advertising production costs and advertising expenditures for Merchandise-related EC Platforms, internet advertising media expenditures amounted to 3,309.3 billion yen (up 11.8% year on year) coming from growth in video advertising, including strong growth in SNS-based vertical video ads.

The following are the key points of the survey, “2025 Advertising Expenditures in Japan: Detailed Analysis of Expenditures on Internet Advertising Media.”

1. Video advertisements surpassed 1 trillion yen for the first time since estimates began, accounting for more than 30% of total expenditures

Video advertisements grew to 1,027.5 billion yen, the first time to surpass 1 trillion yen since estimates began. Video advertisements account for more than 30% of total expenditures and maintained their high growth rate, increasing 21.8% year on year. Both performance-based and reserved advertising posted similarly large increases.

2. Social advertising reached 1,306.7 billion yen, maintaining double-digit growth

Social advertising maintained double-digit growth, growing 18.7% year on year to reach 1,306.7 billion yen. Social advertising accounted for 39.5% of overall internet media expenditures, closing in on the 40% level. Video sharing saw its share of the total continue to increase.

3. In 2026, internet advertising media expenditures are forecast to increase to 3,584.0 billion yen

On the back of continued growth in video advertising and social advertising, internet advertising media expenditures are expected to expand further in 2026, increasing 8.3% year on year to 3,584.0 billion yen. Video advertising is expected to maintain double-digit growth, rising 14.7% year on year to 1,178.3 billion yen.

Expenditures on Internet Advertising Media: Breakdown by Advertising Category

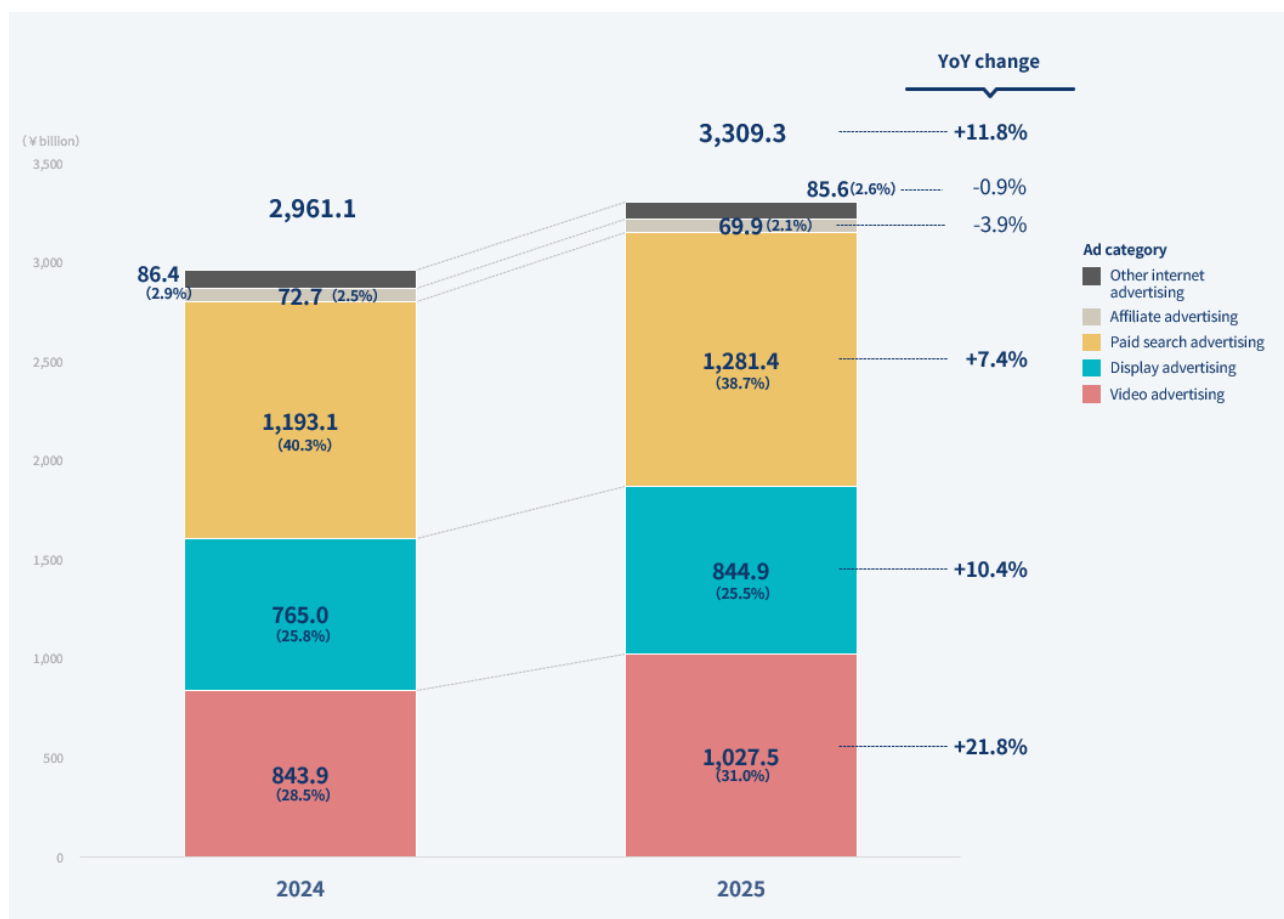
—Video advertising grew 21.8% year on year to 1,027.5 billion yen, topping 1,000 billion yen for the first time since estimates began—

In 2025, internet advertising media expenditures in Japan increased 11.8% year on year to 3,309.3 billion yen (according to “2025 Advertising Expenditures in Japan,” published by Dentsu). By ad type, video advertising posted the highest growth rate, increasing 21.8% year on year to 1,027.5 billion yen, topping 1,000 billion yen for the first ever time and continuing its strong growth rate, accounting for more than 30% of total expenditures. Display advertising overcame the stagnation of the past few years, recovering to a growth trajectory, focused around performance-based advertising. (Graph 1)

Definitions of advertising categories

Video advertising	Advertisements in video file format (video images/audio).
Display advertising	Advertisements in such formats as images and text, which are displayed in the advertising space of a site or app.
Paid search advertising	Advertisements displayed on a search results page based on their relevance to search keywords used in a search site.
Affiliate advertising	Advertisements whereby if a user views an internet advertisement and then performs a predetermined action, some remuneration is given to the media or user.
Other internet advertising	Advertisements in formats other than those mentioned above. For example, email advertising, audio advertising, and tie-up advertising.

Graph 1: Expenditures on Internet Advertising Media: Breakdown by Advertising Category



Note: Figures in parentheses are the percentages of overall internet advertising media expenditures.

Expenditures on Internet Advertising Media: Breakdown by Transaction Method

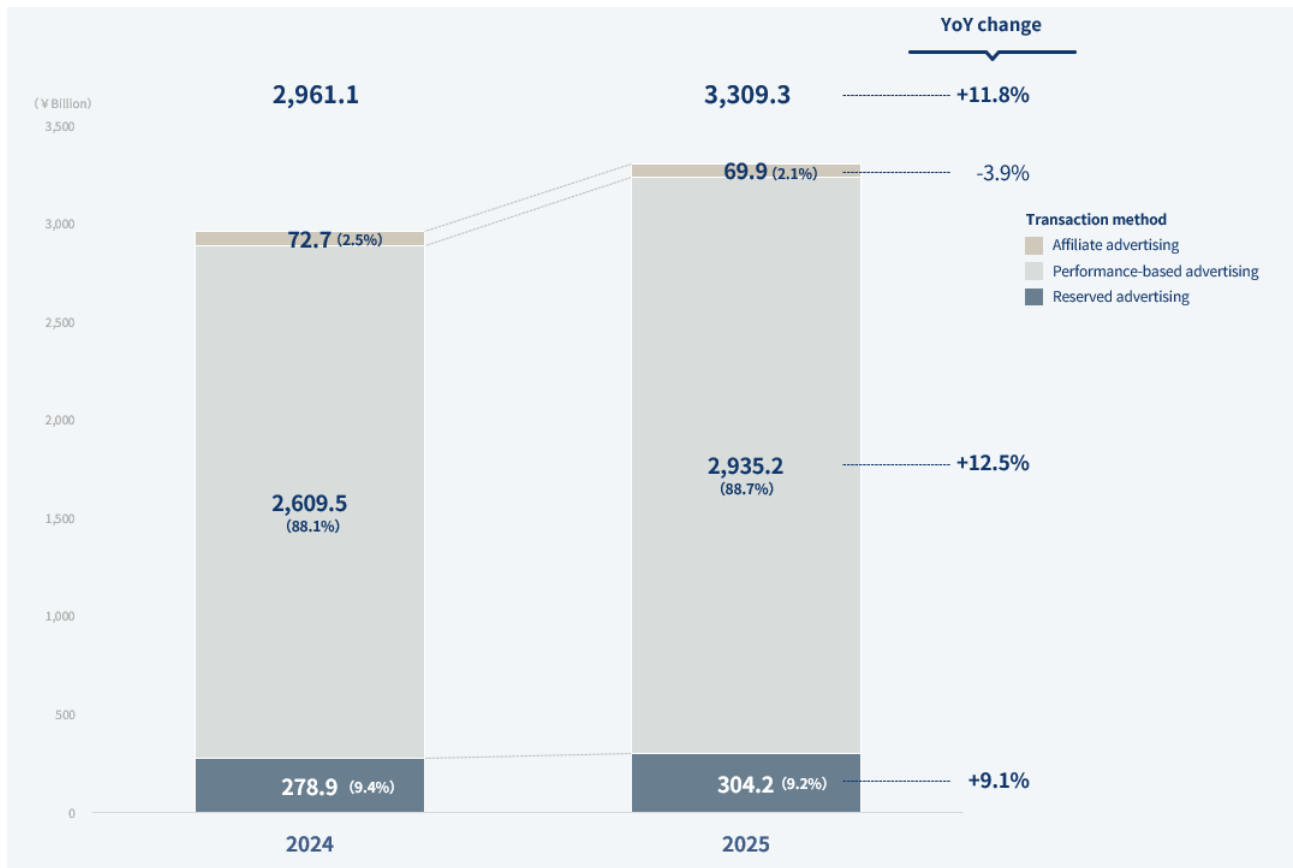
—Performance-based advertising reached 2,935.2 billion yen, accounting for nearly 90% of internet advertising media expenditures—

Looking at internet advertising media expenditures by transaction method, performance-based advertising rose 12.5% year on year to 2,935.2 billion yen, accounting for 88.7% of internet advertising media expenditures. Reserved advertising was up 9.1% year on year to 304.2 billion yen, and affiliate advertising marked a decline of 3.9% year on year to reach 69.9 billion yen. (Graph 2)

Definitions of transaction methods

- Reserved advertising** Conventional and tie-up advertising that is sold via advertising agencies or media representatives, or sold directly to the advertiser, and advertising that is transacted through a digital platform or ad network using a non-auction method (fixed price).
- Performance-based advertising** Paid search advertising and advertising that is transacted via an auction system through digital platforms or ad networks.
- Affiliate advertising** Advertisements whereby if a user views an internet advertisement and then performs a predetermined action, the media or user is paid some remuneration.

Graph 2: Expenditures on Internet Advertising Media by Transaction Method



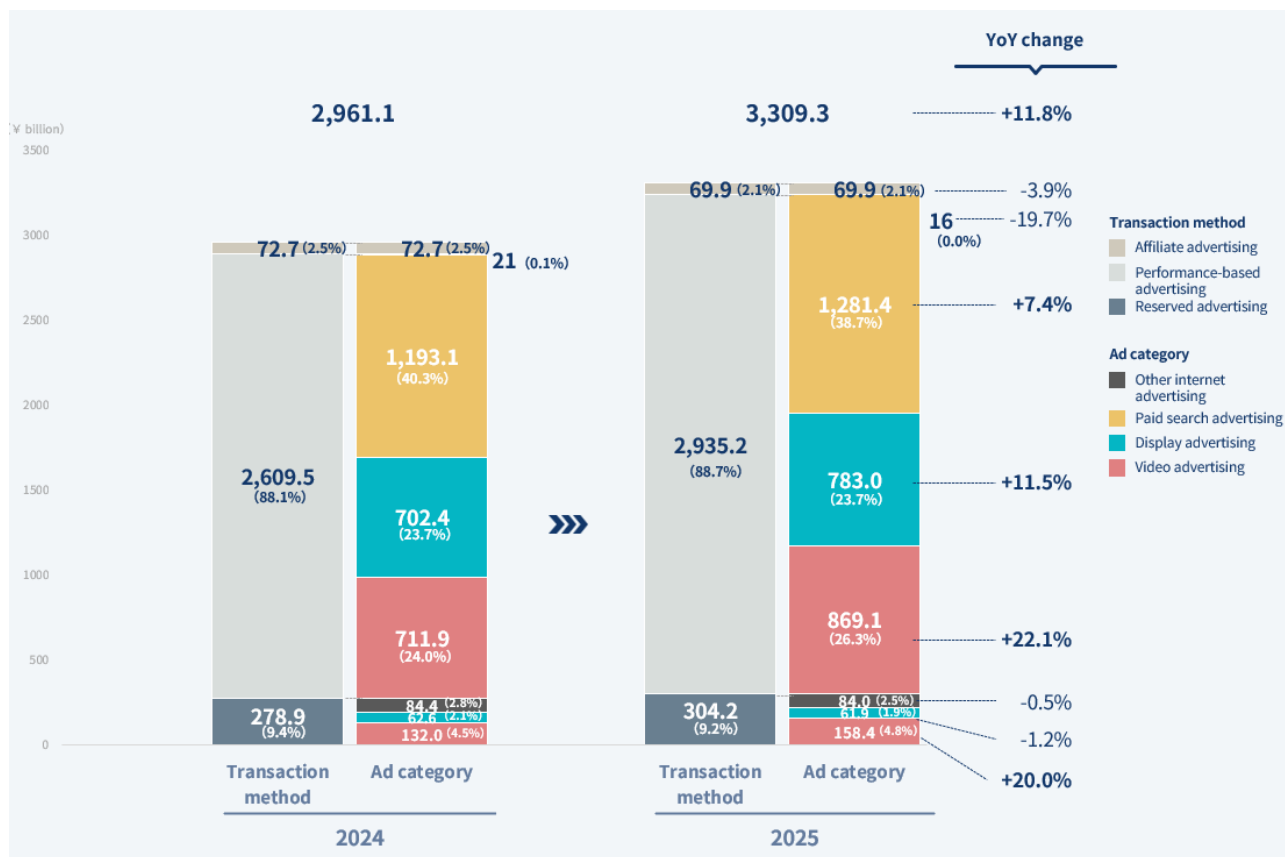
Note: Figures in parentheses are the percentages of overall internet advertising media expenditures.

Expenditure on Internet Advertising Media: Transaction Method and Advertising Category Cross Tabulation

—Within video advertisements, growth was significant in both performance-based advertising, which rose 22.1% year on year, and reserved advertising, which was up 20.0% year on year—

Cross-tabulating transaction method against advertising category, performance-based paid search advertising accounted for 38.7%, the highest among internet advertising media, followed by performance-based video advertising at 26.3%, which continued to outperform performance-based display advertising. In display advertising, while reserved advertising was 1.2% down year on year, performance-based advertising was up 11.5% on the year, ensuring overall positive growth. (Graph 3)

Graph 3: Expenditures on Internet Advertising Media: Transaction Method and Advertising Category Cross Tabulation



Note: Figures in parentheses are the percentages of overall internet advertising media expenditures.

Video Advertising Market

—Instream and outstream advertising were almost at the same level—

Video advertising posted the highest growth rate among all ad categories, increasing 21.8% year on year to 1,027.5 billion yen. Within video advertising expenditures, instream advertising inserted in video content totaled 524.6 billion yen (51.1% of the total), almost the same level as outstream advertising displayed in online advertising spaces and article content, which reached 502.9 billion yen (48.9%). (Chart 1)

Furthermore, in terms of transaction method, performance-based advertising accounted for 84.6% of the total. (Chart 2)

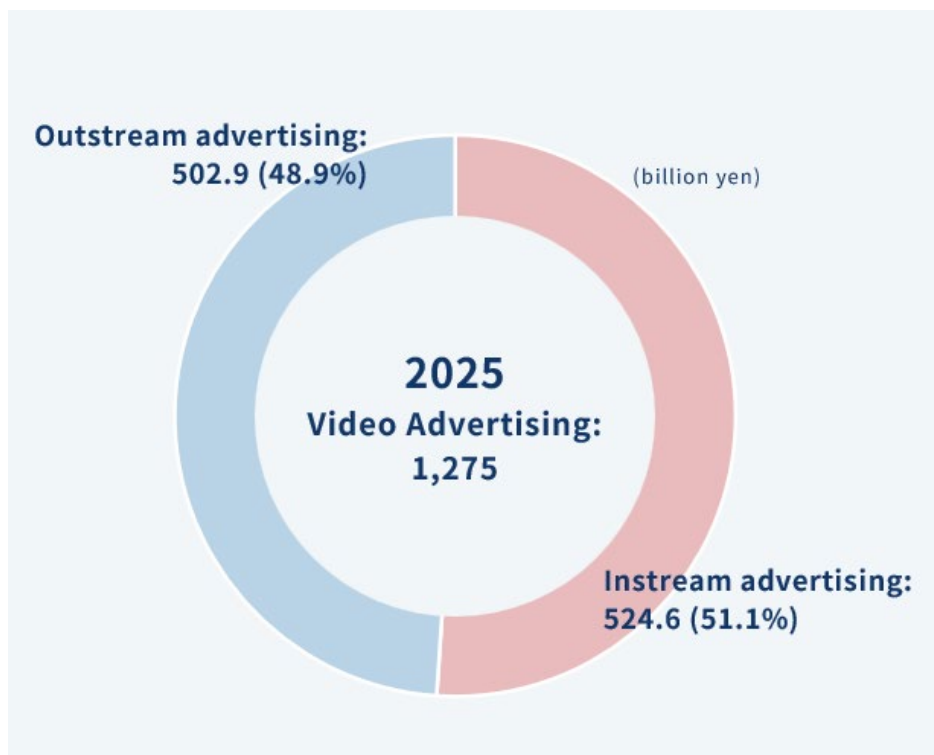
Definitions of video advertisement types

Advertisements in video file format (images and sound), including the following.

Instream advertising: Advertisements in video file format that play before, during, and after video content.

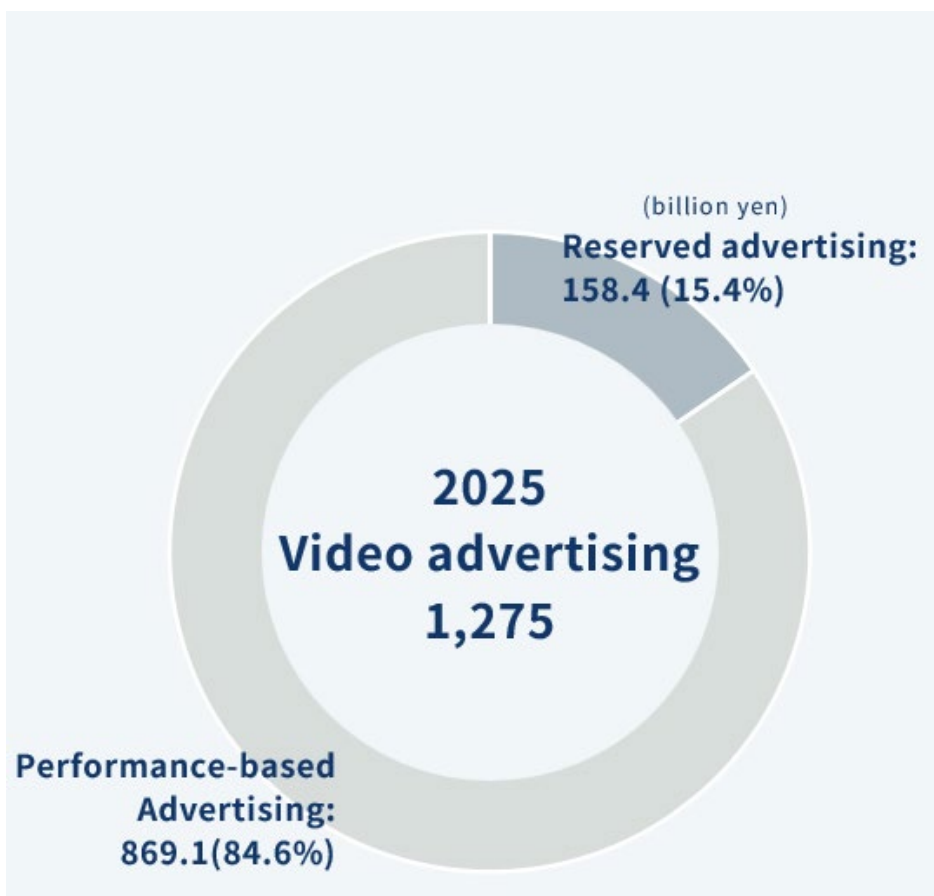
Outstream advertising: Video advertising in the form of displays and other advertisements displayed external to video content. Displayed in ad spaces on websites, within article content areas, and similar placements.

Chart 1: Video Advertising Expenditures: Breakdown by Advertising Category



Note: Figures in parentheses are the percentages of overall video advertising expenditures.

Chart 2: Video Advertising Expenditures: Breakdown by Transaction Method



Note: Figures in parentheses are the percentages of overall video advertising expenditures.

Social Advertising Market

—Social advertising grew 18.7% year on year to 1,306.7 billion yen—

Social advertising in social media services grew 18.7% year on year to 1,306.7 billion yen, maintaining double-digit growth from the previous year, and accounting for 39.5% of internet advertising media expenditures overall, closing in on the 40% level. (Graph 4)

By social media category, SNS (social networking services) amounted to 550.8 billion yen (42.1% of the total) with video sharing at 512.6 billion yen (39.2%), with other categories amounting to 243.4 billion (18.6%). Video sharing saw its share of the total continue to grow, following on from the previous year. (Chart 3)

Definitions of social advertising

Advertising placed on social media* services.

* Media (platforms) providing services enabling users to share and exchange information posted by users as content.

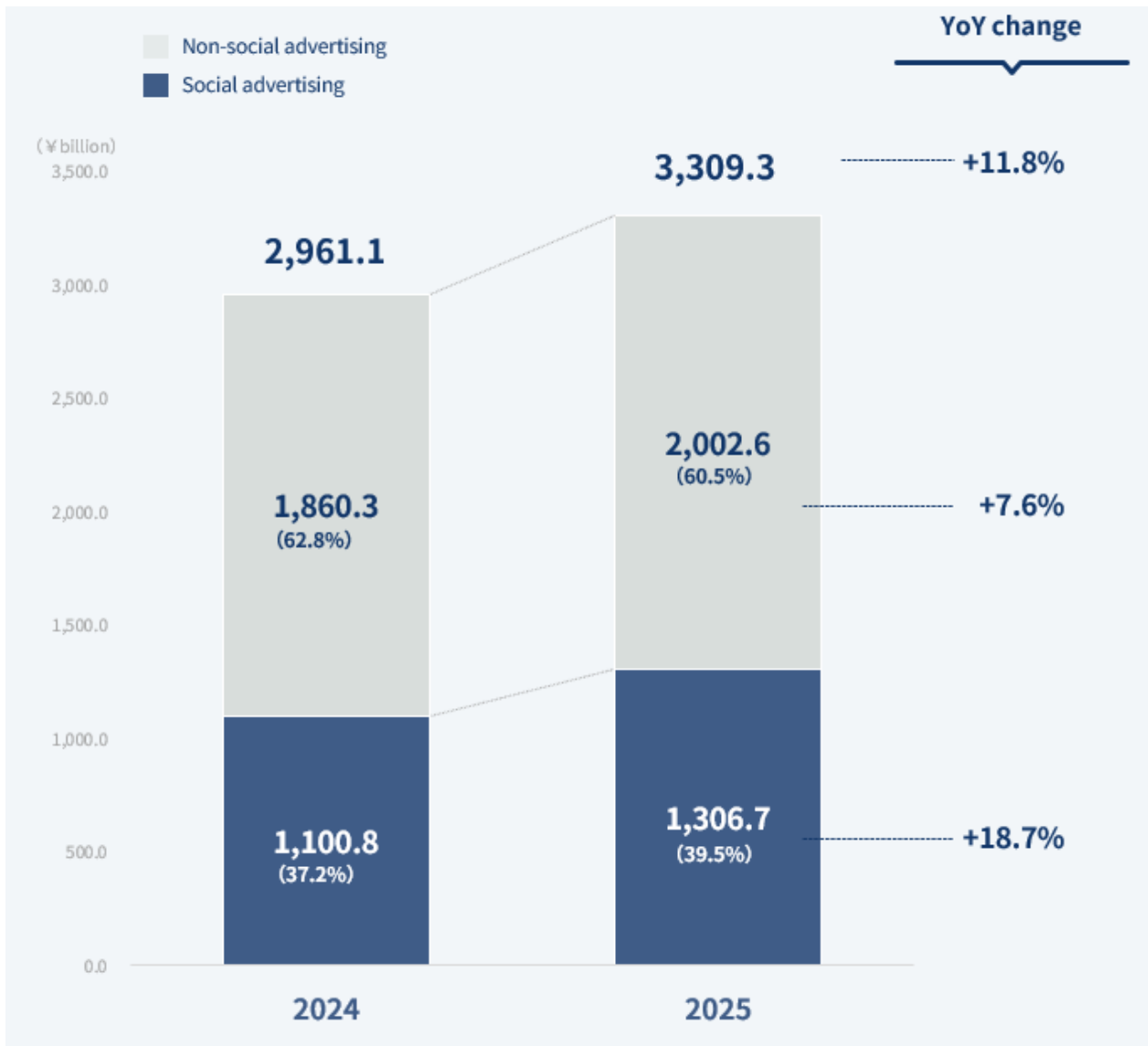
(Source: Internet Advertising, Basic Glossary 2024 Edition, Japan Interactive Advertising Association.)

Examples of social media: SNS, blog services, mini (micro) blogs, video sharing websites, social bookmarks, electronic bulletin board services.

Definitions of social classification

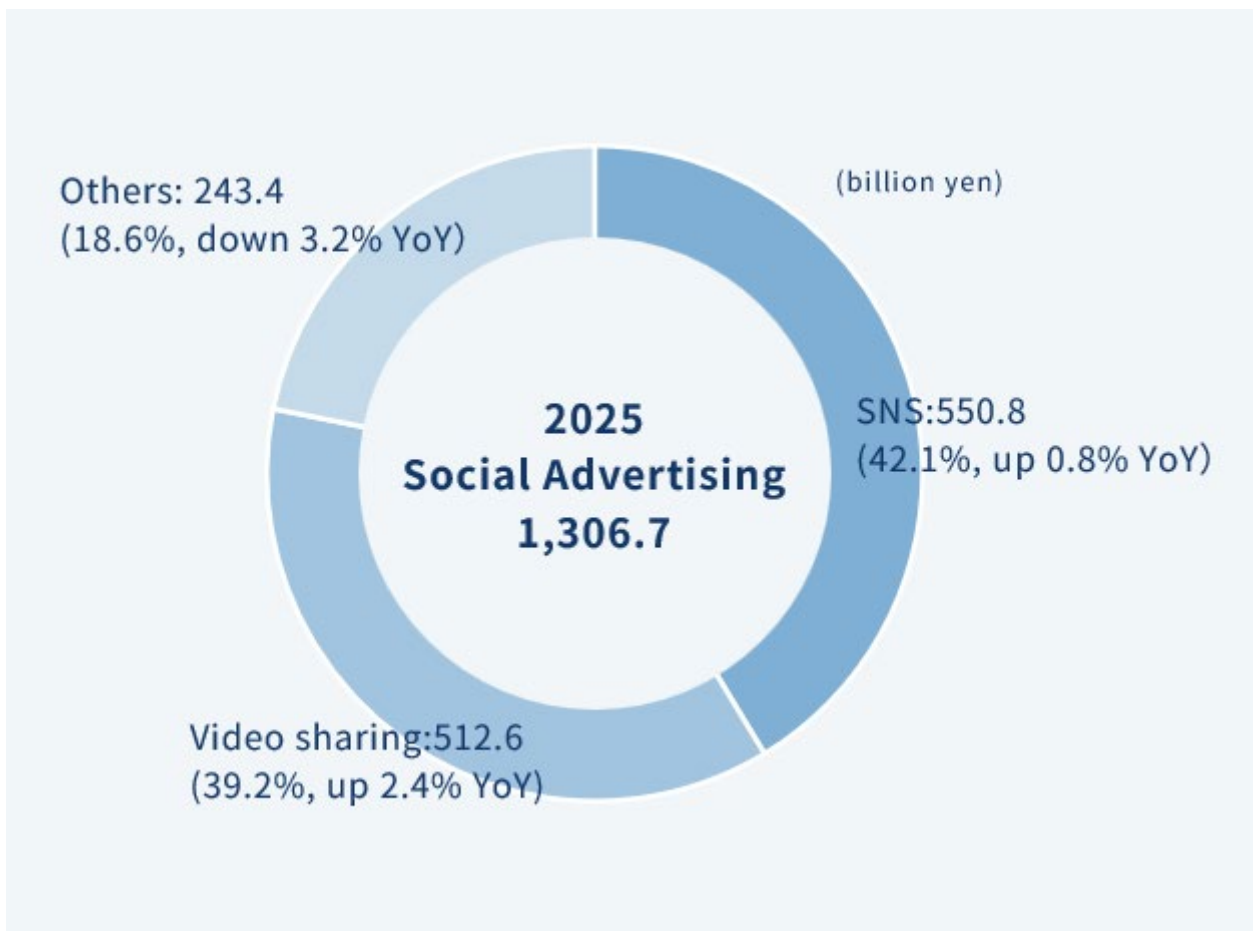
The SNS category includes SNS platforms (excluding the video sharing category). The video sharing category includes video sharing websites with user-submitted content. The others category includes blogs, electronic bulletin boards, and other websites.

Graph 4: Social Advertising Expenditures



Note: Figures in parentheses are the percentages of overall internet advertising media expenditures.

Chart 3: Social Advertising Expenditures by Ad Category



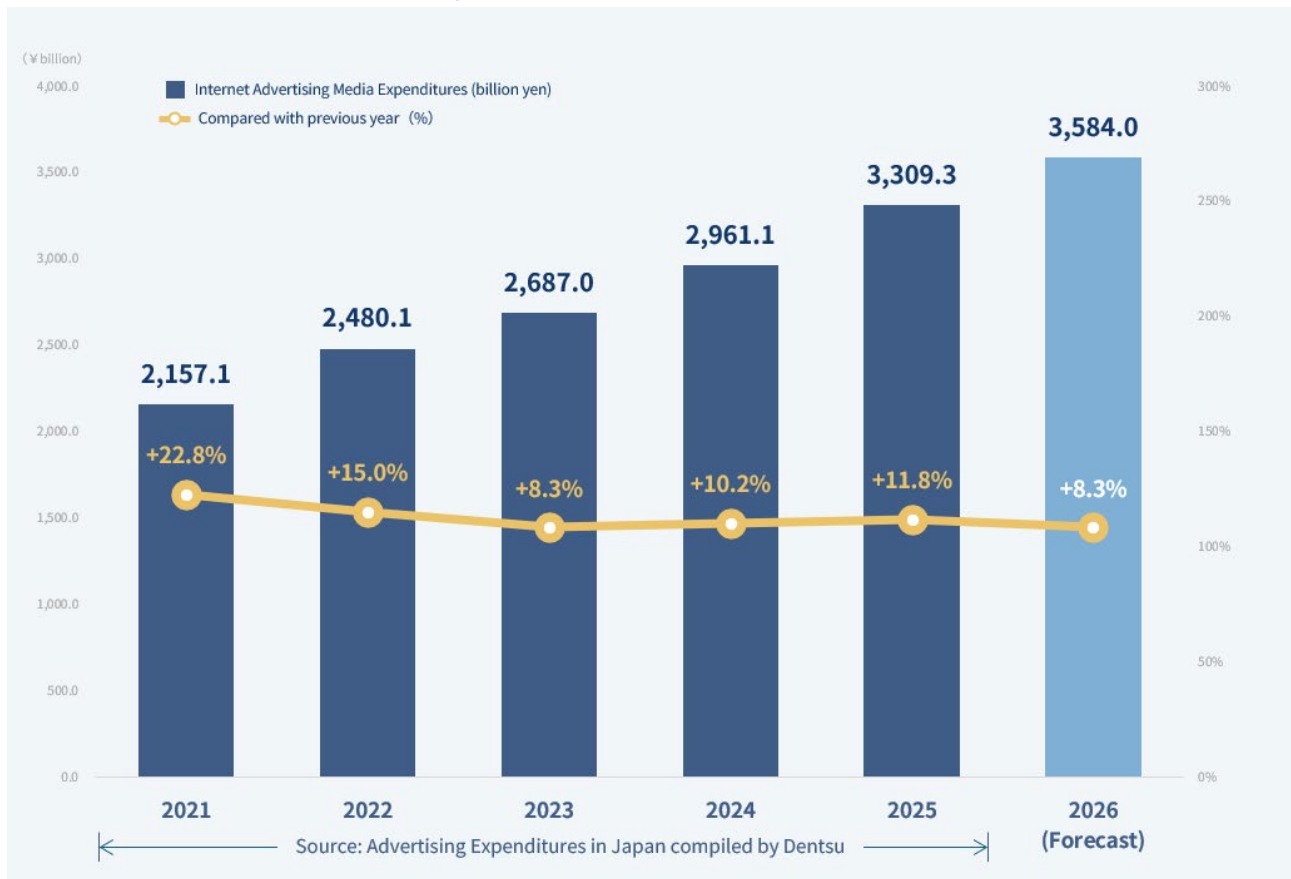
Note: Figures in parentheses are the percentages of overall internet advertising media expenditures.

Total Internet Advertising Media Expenditures (Forecast)

—In 2026, total internet advertising media expenditures in Japan are forecast to increase 8.3% year on year to 3,584.0 billion yen—

Internet advertising media expenditures are expected to maintain steady growth in 2026, increasing 8.3% year on year to 3,584.0 billion yen. (Graph 5)

Graph 5: Total Internet Advertising Media Expenditures (Forecast)

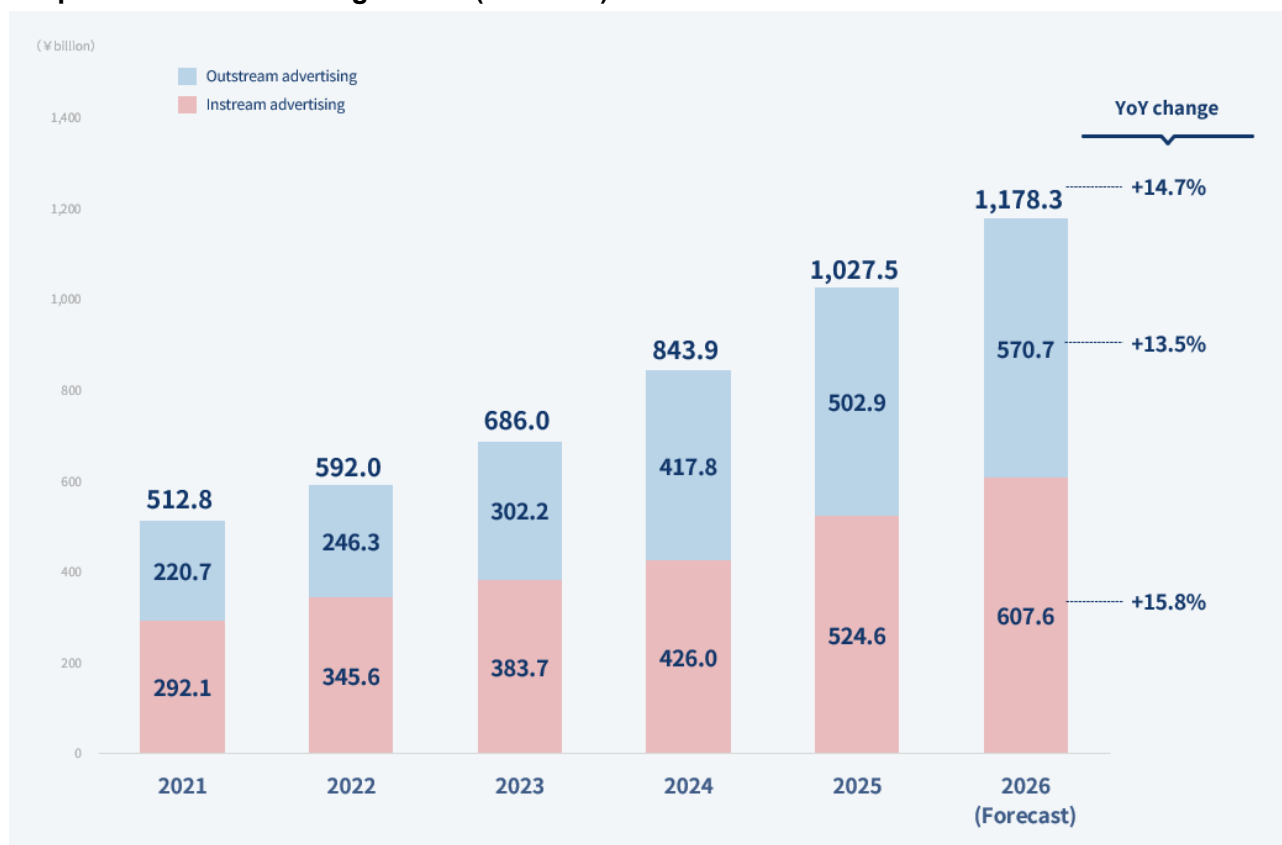


Video Advertising Market (Forecast)

—Video advertisements in 2026 are forecast to grow 14.7% year on year to 1,178.3 billion yen—

In 2026, video advertisements are forecast to maintain robust double-digit growth of 14.7% year on year to reach 1,178.3 billion yen. Outstream and instream advertisements are expected to grow at about the same rate. (Graph 6)

Graph 6: Video Advertising Market (Forecast)



Survey Overview

Survey organizations

CARTA HOLDINGS, Inc., Dentsu Inc., Dentsu Digital Inc., SEPTENI CO., LTD.

Survey period

December 2025 – February 2026

Survey methodology

Carried out estimates based on the following research

1. Research based on questionnaire surveys covering internet advertising media companies, etc. (web research)
The research was conducted by explaining to respondents that the survey would be asking about “2025 Advertising Expenditures in Japan” internet media expenditures.
2. Same as above, but with additional interview research
3. Various types of data collection and analysis

Note: The figures shown in graphs contained in this release are rounded to the nearest unit. Consequently, some totals differ from the sum of the components shown.

Company profiles

CARTA HOLDINGS Inc. (<https://cartaholdings.co.jp/>)

- Location: Toranomon Hills Station Tower 36F, 2-6-1, Toranomon, Minato-ku, Tokyo, 105-5536, Japan
- Representatives: Hideki Watanabe, Representative Director, President; Manabu Takahashi, Representative Director, Vice President
- Business outline:
CARTA HOLDINGS pursues a corporate philosophy as an “Evolution Factory,” seeking to drive the advancement of companies and industries. Through its digital marketing business, which addresses marketing challenges in advertising and media, and its internet business encompassing media operations, e-commerce, and human resources-related services, CARTA HOLDINGS continues to generate ongoing evolution.

Dentsu Inc. (<https://www.dentsu.co.jp/>)

- Location: 1-8-1, Higashi-shimbashi, Minato-ku, Tokyo 105-7001, Japan
- Representative: Takeshi Sano, Representative Director, President and CEO

- Business outline:
Based around deep insights into people, Dentsu identifies the essential challenges underlying our clients' increasingly complex and sophisticated needs, delivering Integrated Growth Solutions that go beyond advertising and marketing to support sustainable client growth and contribute to a more dynamic society.

Dentsu Digital Inc. (<https://www.dentsudigital.co.jp/>)

- Location: 1-8-1 Higashi-shimbashi, Minato-Ku, Tokyo, 105-7077, Japan
- Representative: Koh Takimoto, Representative Director, President and CEO
- Business outline:
Dentsu Digital is one of the largest integrated digital firms in Japan. Based on our purpose to "Inspire people, create new value, and improve how the world works," we are committed to realizing the full potential of new solutions that can emerge from the joining of creativity and technology that are closer to people's hearts and minds. As a business growth partner for our clients, our aim is to "change and grow" the economy and society by creating new value together.

SEPTENI CO., LTD. (<https://www.septeni.co.jp/>)

- Location: Sumitomo Shinjuku Grand Tower 28F, 8-17-1 Nishi-Shinjuku, Shinjuku-ku, Tokyo 160-6128
- Representative: Yusuke Shimizu, Representative Director, President
- Business outline:
Septeni provides comprehensive support for corporate digital transformation, through digital advertising, and provides solutions utilizing data and AI.

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Contact

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