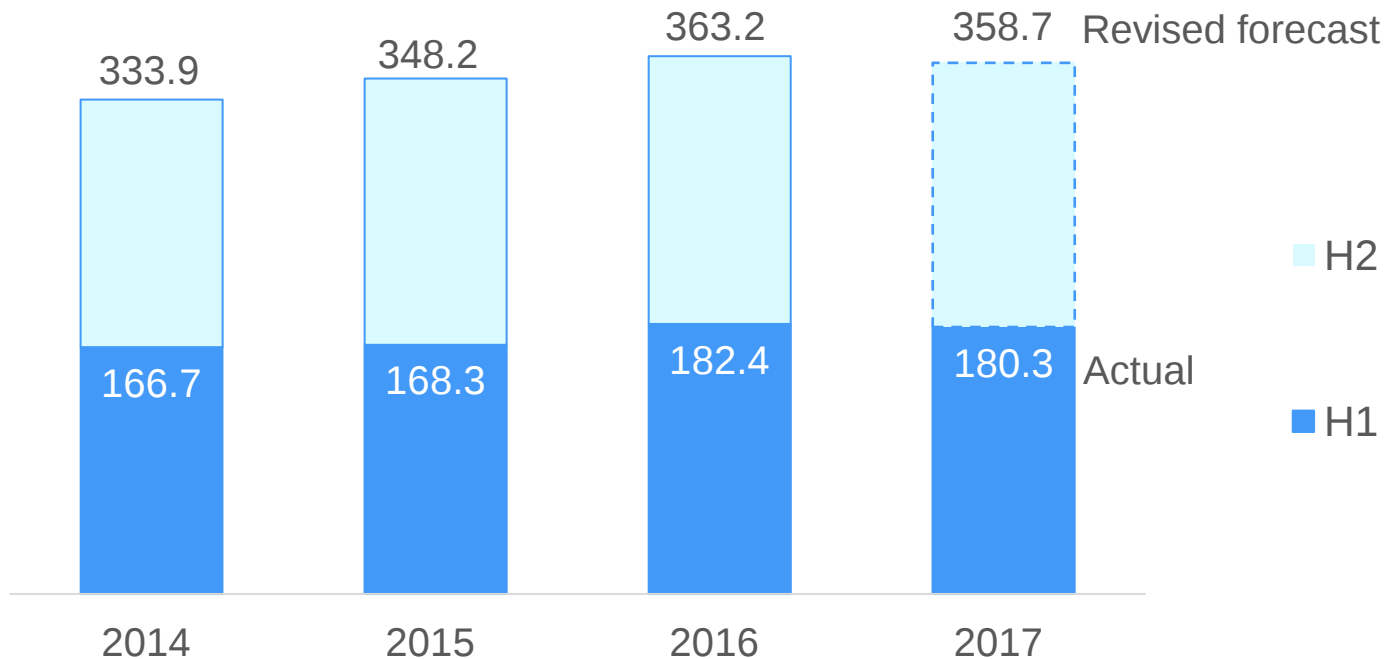


Current Status & Outlook for the Dentsu Group

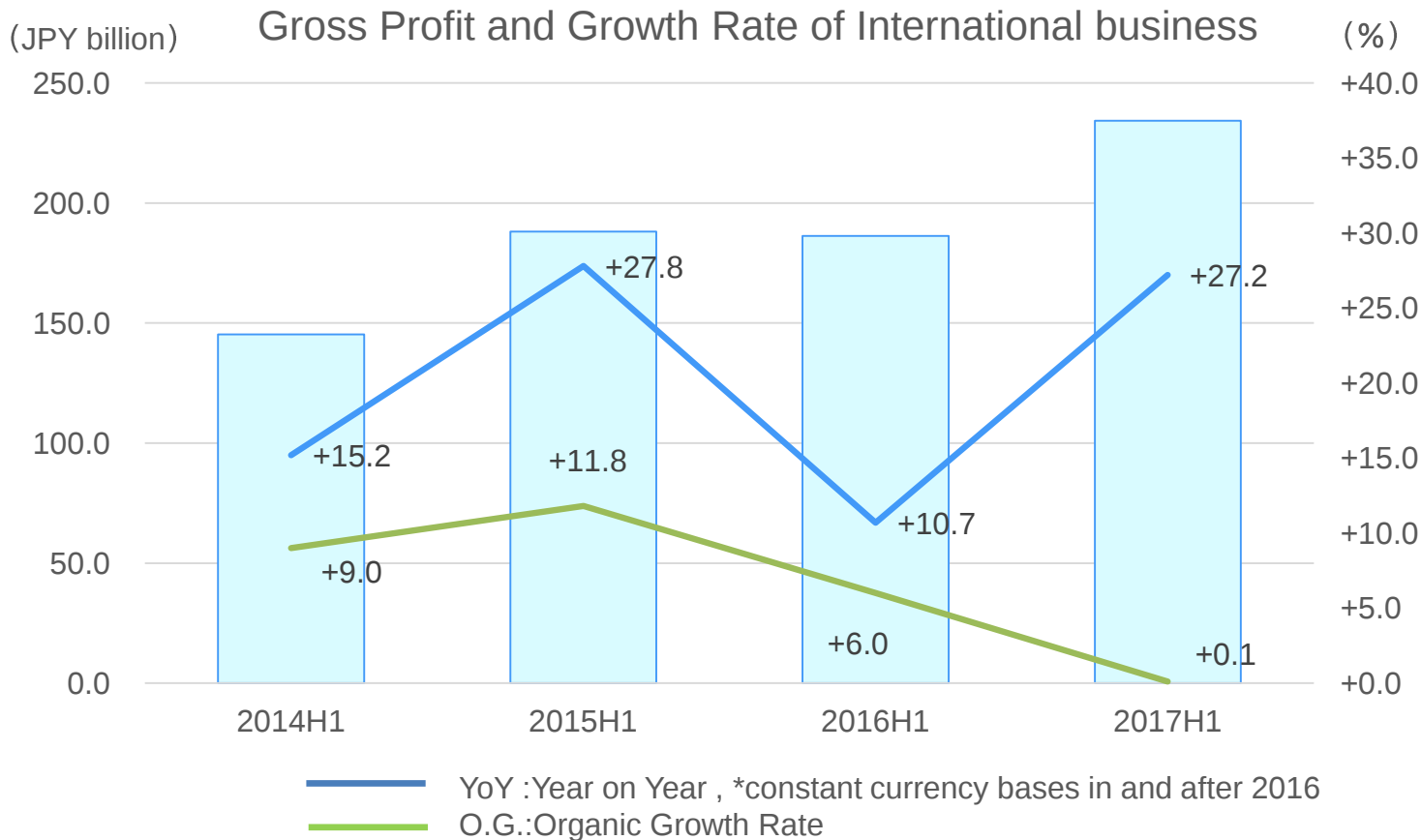
Toshihiro Yamamoto
President & CEO

Outlook for the Japan business

Gross Profit Japan business (JPY billion)



Outlook for the International business

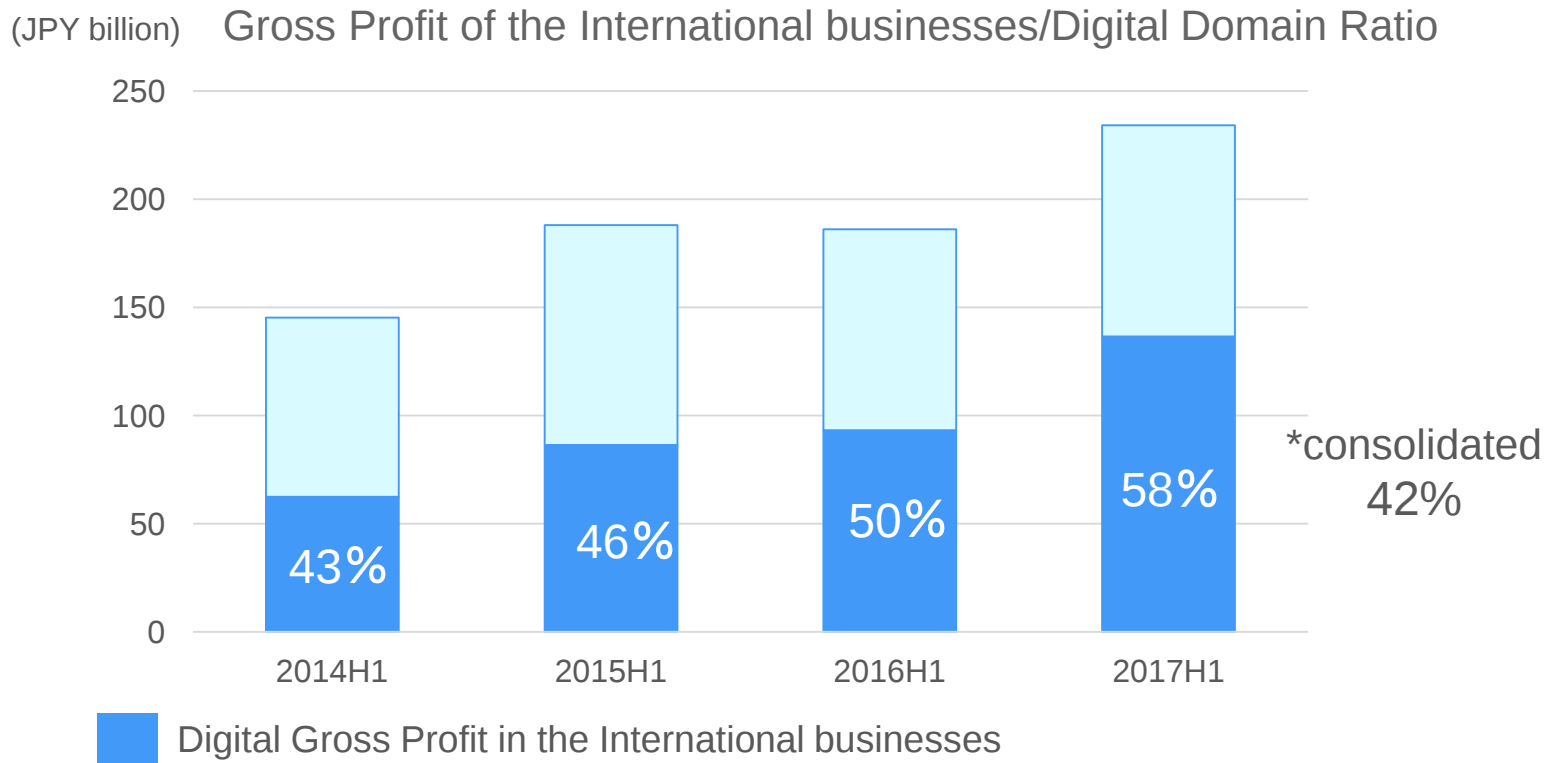


Global Ad Spend Trends

	2016	2017	2018
Global (59 countries)	4.8%	3.8%	4.3%
Japan	1.9%	1.7%	1.7%
EMEA	3.1%	2.6%	3.4%
Americas	5.7%	4.0%	4.5%
APAC Excluding Japan	6.0%	5.5%	5.8%
Digital	17.7%	14.7%	12.9%
Digital 's share of global ad spend	30.7%	33.9%	36.7%

*Source: DAN Ad Spend Report June 2017 (Figures are on a calendar year basis)

◆ Progress of Digital business



◆ Create Global Data Platform

MERKLE
A Performance Marketing Agency



The Rise of People Based Marketing

Name & Address

Phone #

Email Address

Cookie & Device ID

Person ID

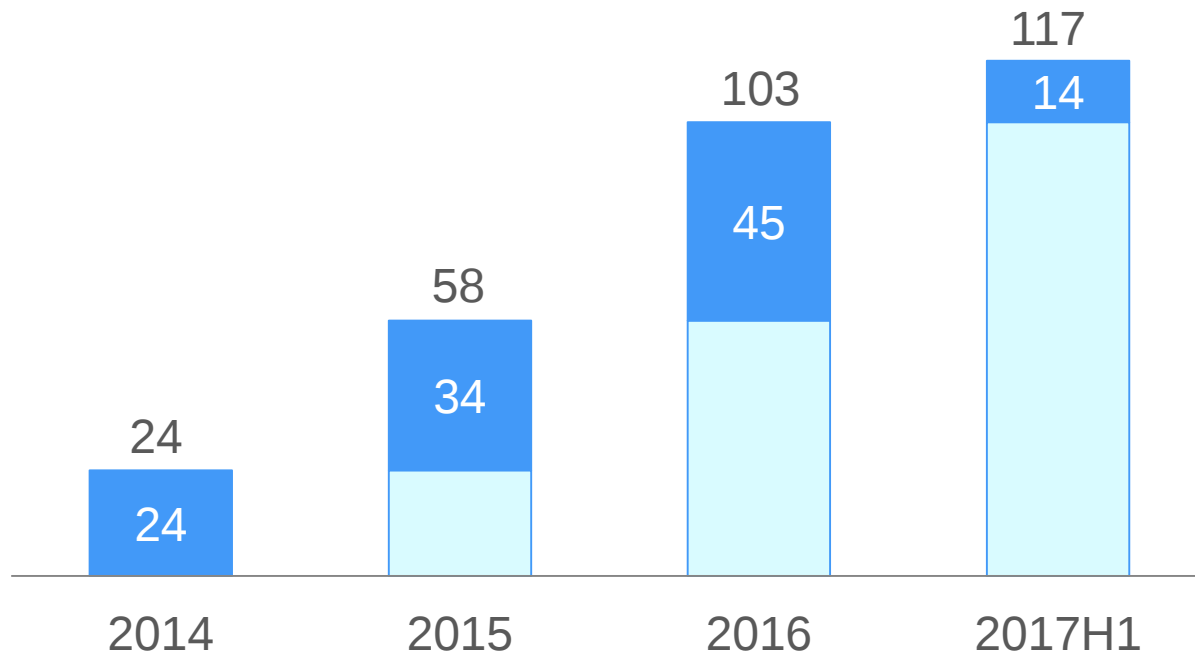
1990

The digital audience platform marketplace that is now at massive scale

2017

Growth opportunities in the International businesses

- ◆ M&A /
accumulative numbers of transactions (2014~)



Leadership for the International businesses

◆ New Leadership



DOMINIC SHINE

Global Chief Technology Officer



NIGEL MORRIS

Chief Strategy & Innovation Officer



NICK BRIEN

CEO Americas & US



GIULIO MALEGORI

CEO EMEA

Outlook for the Japan business

◆ To Create a new Dentsu



Growth opportunities of the Japan business

People driven Marketing™



Growth opportunities of the Japan business

◆ Seed Creativity / Business design

We challenge to extend our capabilities developed in the communication field to the consultation field for business development or business transformation that many Japanese companies are challenged.



Dentsu Group Moves Toward the Future

Transforming into a self-innovative corporate group that
consistently reinvents itself to achieve growth and evolution