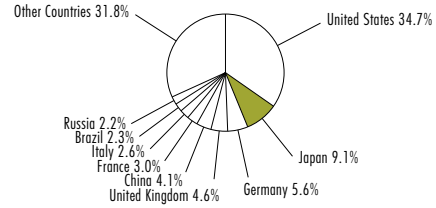




● Leader in Japan, the World's Second-Largest Advertising Market

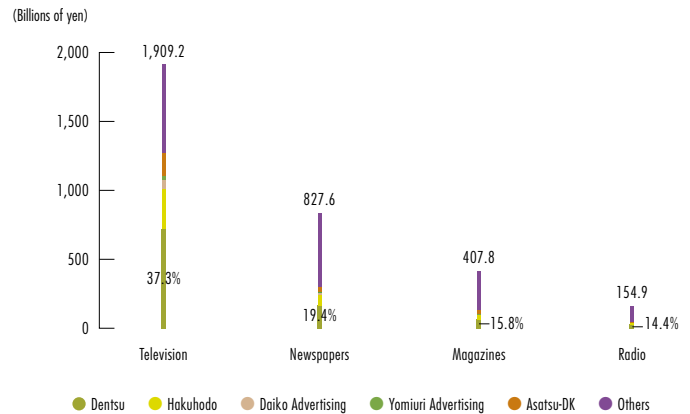
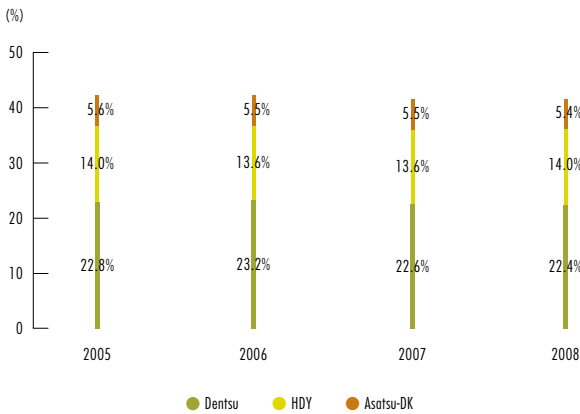


Relative Scale of Advertising Markets, by Principal Media\*1 (2008)

\*1 : Advertising media includes television, newspapers, magazines, radio, movies, outdoor and Internet.  
Source: Prepared by Dentsu, based on ZenithOptimedia's World Advertising Expenditure Forecasts, July 2009 edition

Dentsu holds the top share of the Japanese advertising market, which constitutes 9.1% of the world total. The April 2009 edition of *Advertising Age* ranked the Dentsu Group the world's fifth largest entity in the advertising communications industry in terms of 2008 gross profit.

● Dentsu's Advertising Market Position



Japanese Advertising Expenditure, by Percentage of Sales\*2 (2008)

Share of Principal Mass Media\*3 (2008)

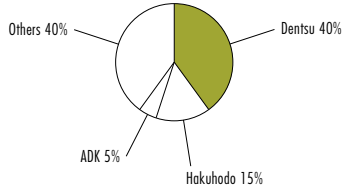
(Percentage of sales: non-consolidated advertising sales for each company ÷ total Japanese advertising expenditure)

\*2 : (1) HDY refers to the simple total of non-consolidated net sales of Hakuodo, Daiko Advertising and Yomiuri Advertising. (2) In some instances, the scope used in calculating net sales figures for individual companies differs from that used in *Advertising Expenditures in Japan*. Percentage figures refer to comparisons given in *Advertising Expenditures in Japan*.  
Sources: *Current Situation of Japanese Advertising Agencies, Advertising and Economy, Advertising Expenditures in Japan*.

\*3 : (1) Non-consolidated figures for calendar year 2008. (2) In some instances, the scope used in calculating net sales figures for individual companies differs from that used in *Advertising Expenditures in Japan*. Percentage figures refer to comparisons given in *Advertising Expenditures in Japan*.  
Sources: Individual net sales figures are from *Advertising and Economy*. The denominator for this calculation is from the 2008 edition of *Advertising Expenditures in Japan*.

Dentsu holds a leading share of all mass media. This media strength creates a robust platform that underpins Dentsu's leading position in the Japanese advertising market.

● Highly Regarded Creative Skills



Ratings in Japan  
Comparison of TV CM awards\*4 received at the 2008 ACC CM Festival\*5

\*4 : Sponsored by the All Japan Radio & Television Commercial Confederation (ACC), established in 1961. This festival is regarded as the most authoritative contest in Japan for commercials.  
\*5 : Source: Prepared by Dentsu, based on *Advertising and Economy*, October 2008 edition.

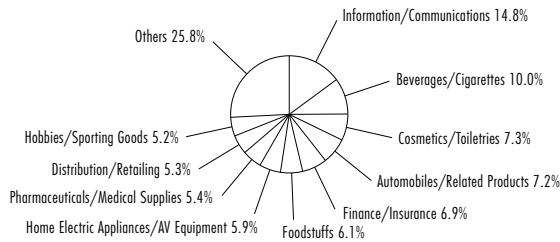
Ranking	Advertising Agency
1	DDB (London)
2	Dentsu
3	Crispin Porter & Bogusky (Miami)
4	Abbott Mead Vickers.BBDO (London)
4	AlmapBBDO (Sao Paulo)
6	Wieden & Kennedy (Portland, OR & N York)
7	TBWA \ Paris (Paris)
8	TBWA \ Chiat \ Day (USA)
9	Bartle Bogle Hegarty (London)
10	Lowe (London)

Overseas Ratings  
Gunn Report's Most Awarded Agency Rankings\*6 (1999 – 2008)

\*6 : Source: *THE GUNN REPORT AND SHOWREEL OF THE YEAR 2008*

Dentsu's abundant creativity and carefully constructed organizational strengths, as well as its powers of expression and persuasion, are widely regarded in Japan and overseas.

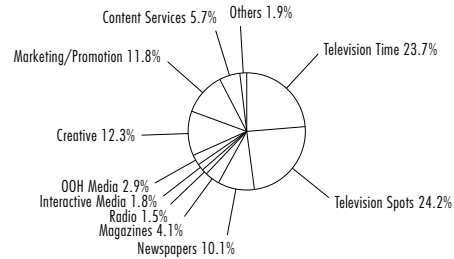
● Dentsu's Composition of Sales



Net Sales by Industry\*7  
(Fiscal Year Ended March 31, 2009)

\*7 : Non-consolidated figures for the fiscal year ended March 31, 2009

By industry, the information/communications, beverages/cigarettes and cosmetics/toiletries sectors constitute a high percentage of net sales. Dentsu's diverse client portfolio ensures a stable profit base.



Net Sales by Business Category\*8  
(Fiscal Year Ended March 31, 2009)

\*8 : Non-consolidated figures for the fiscal year ended March 31, 2009

Starting with the mass media business, Dentsu offers a diverse range of services, spanning marketing/promotion, creative, sports and other content businesses.

● Robust Financial Base

Dentsu has a strong financial base, currently holding the highest Standard & Poor's ranking of any advertising agency in the world.

	Long-Term	Short-Term
Standard & Poor's (S&P)	AA-	A-1+
Rating & Investment Information (R&I)	AA	a-1+

(As of September 31, 2009)