

# **Dentsu Group Growth Strategies for the Interactive Business**

**September 7, 2006**

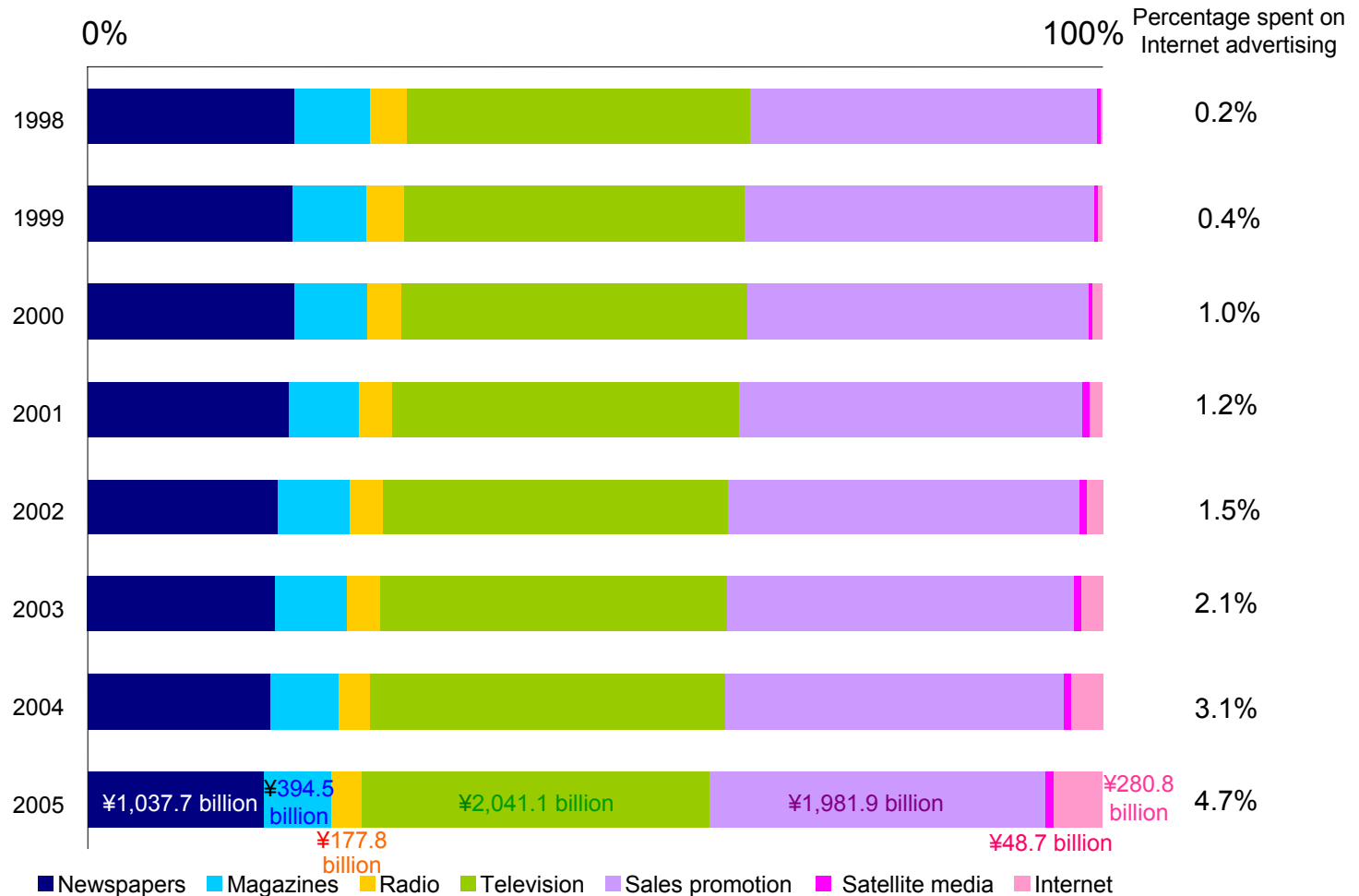
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Managing Director,  
Dentsu Inc.**

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# Rapidly Expanding Internet Advertising Expenditures

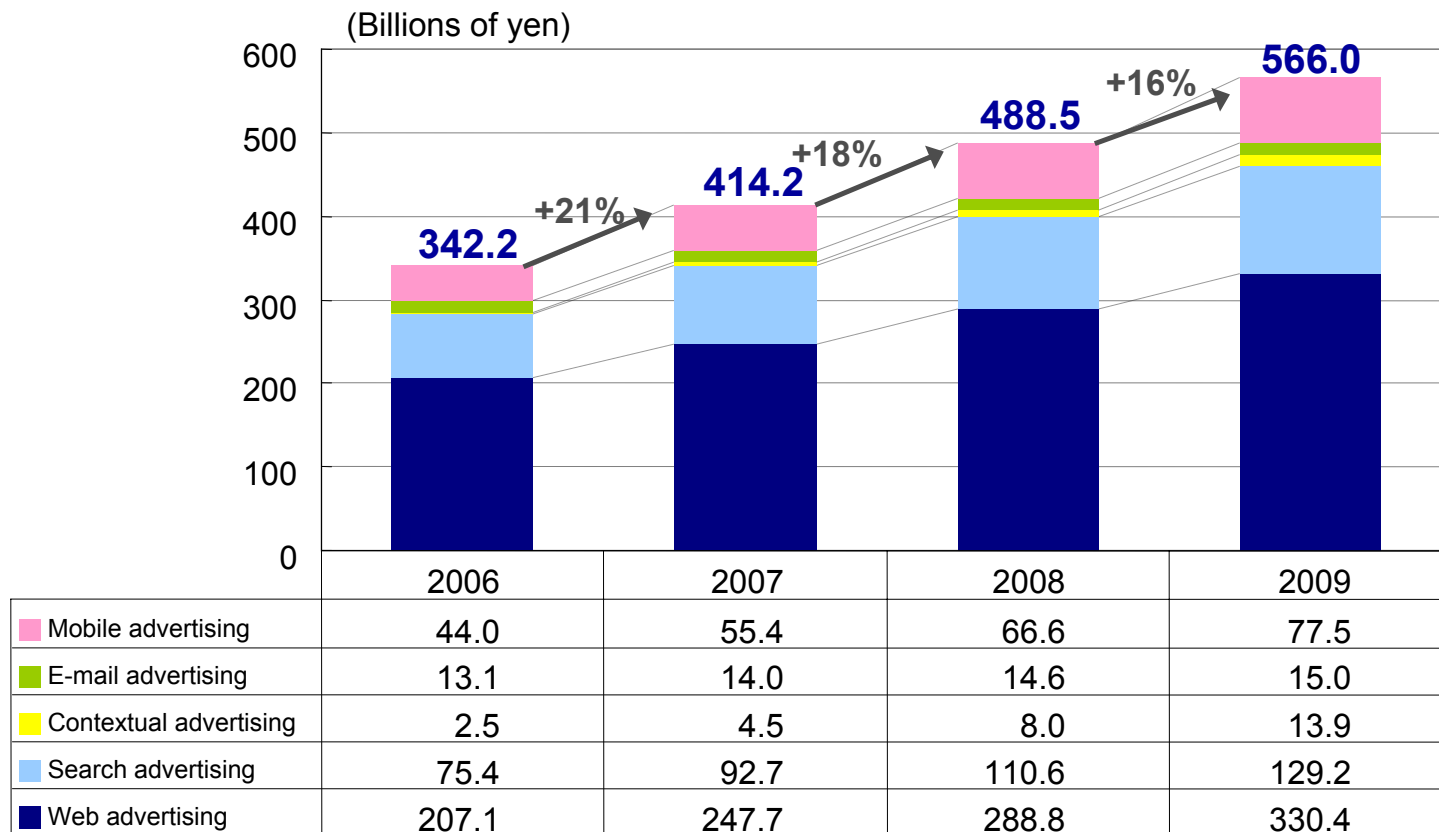
## Advertising Expenditures in Japan by Medium



Source: 2005 Advertising Expenditures in Japan

# Strong Ongoing Growth Forecast for Internet Advertising

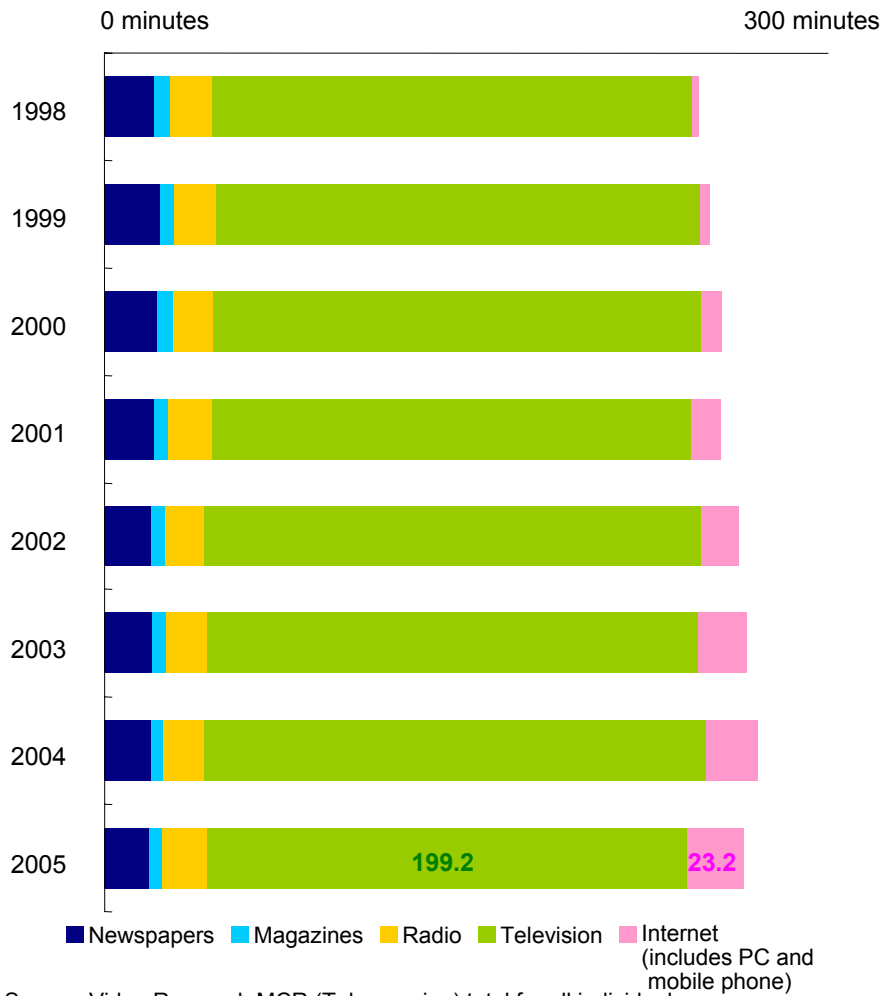
## Forecast Changes in the Internet and Mobile Advertising Markets



Source: Dentsu Communication Institute (July 2005)

# Internet Moves into Second Media Position, behind Television

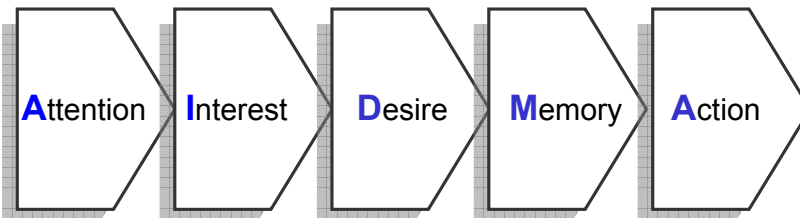
Amount of Media Contact at Home ( Minutes/Day )



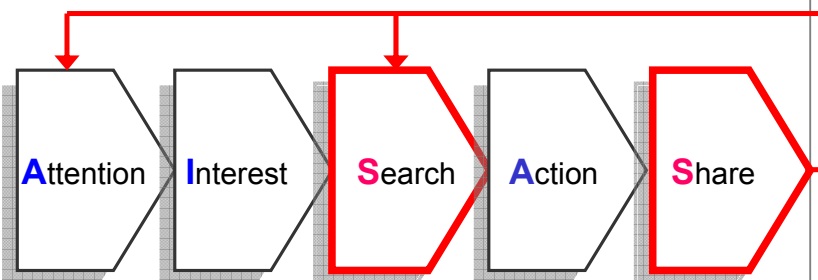
Source: Video Research MCR (Tokyo region) total for all individuals

From AIDMA to AISAS®

AIDMA

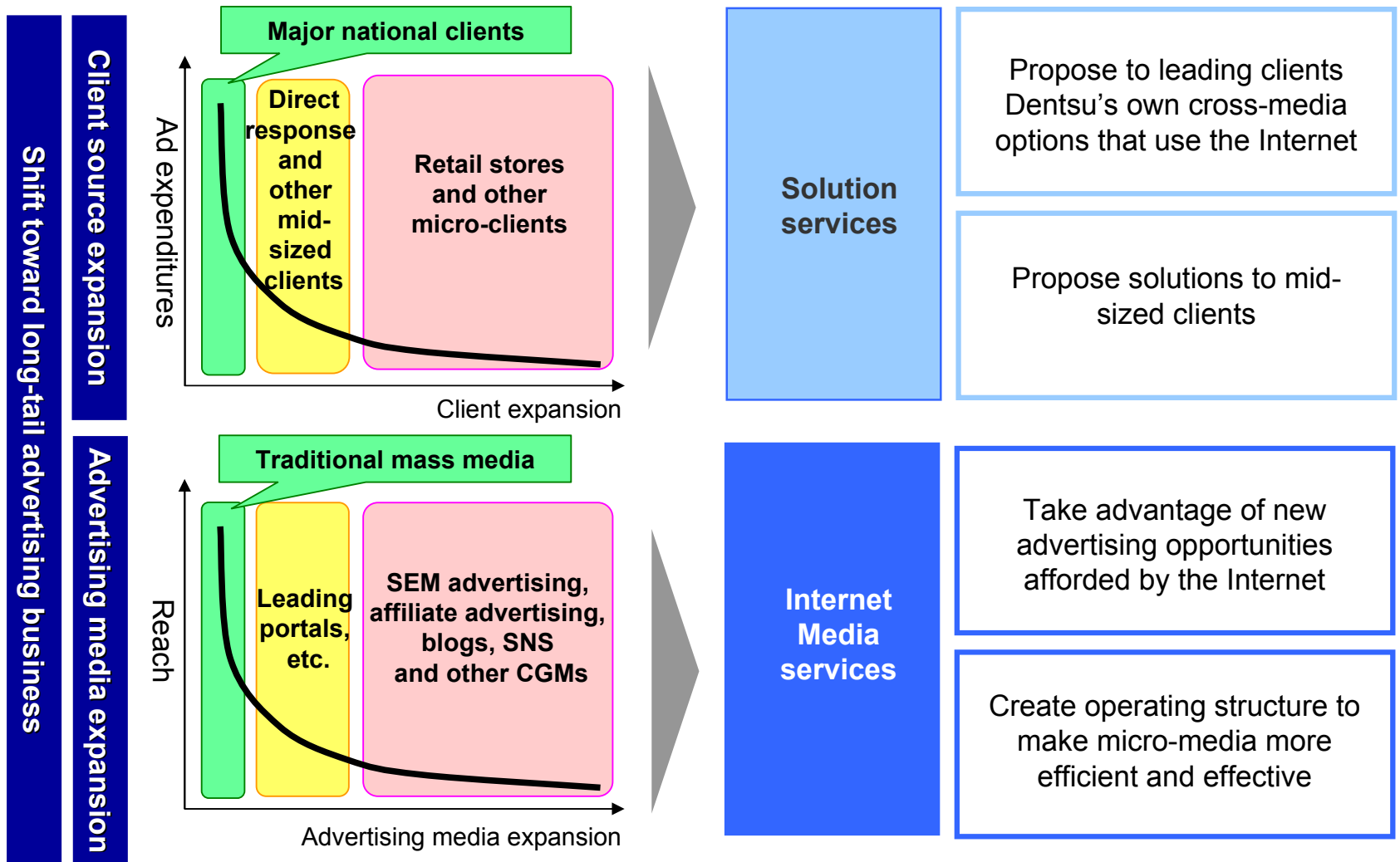


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# Internet Expands Ad Business Domain

## Advertising Business Expansion and Issues Facing the Dentsu Group



# New Revenue Opportunities from Partnerships with Excellent Companies

## Dentsu Group Structure in Interactive Business (Subsidiaries, Affiliates, Investees)

**Internet media**

Logos displayed in the Internet media section include: cyber communications, UBIQUITOUS CORE Inc., C.A. MOBILE, CGM Marketing, 24:7 SEARCH, ACTIONCLICK, PRESENTCAST, DoubleClick, JmOBILE, MEDIA SHAKERS, lipé, and RSS advertising.

**Solutions**

**Campaign production**

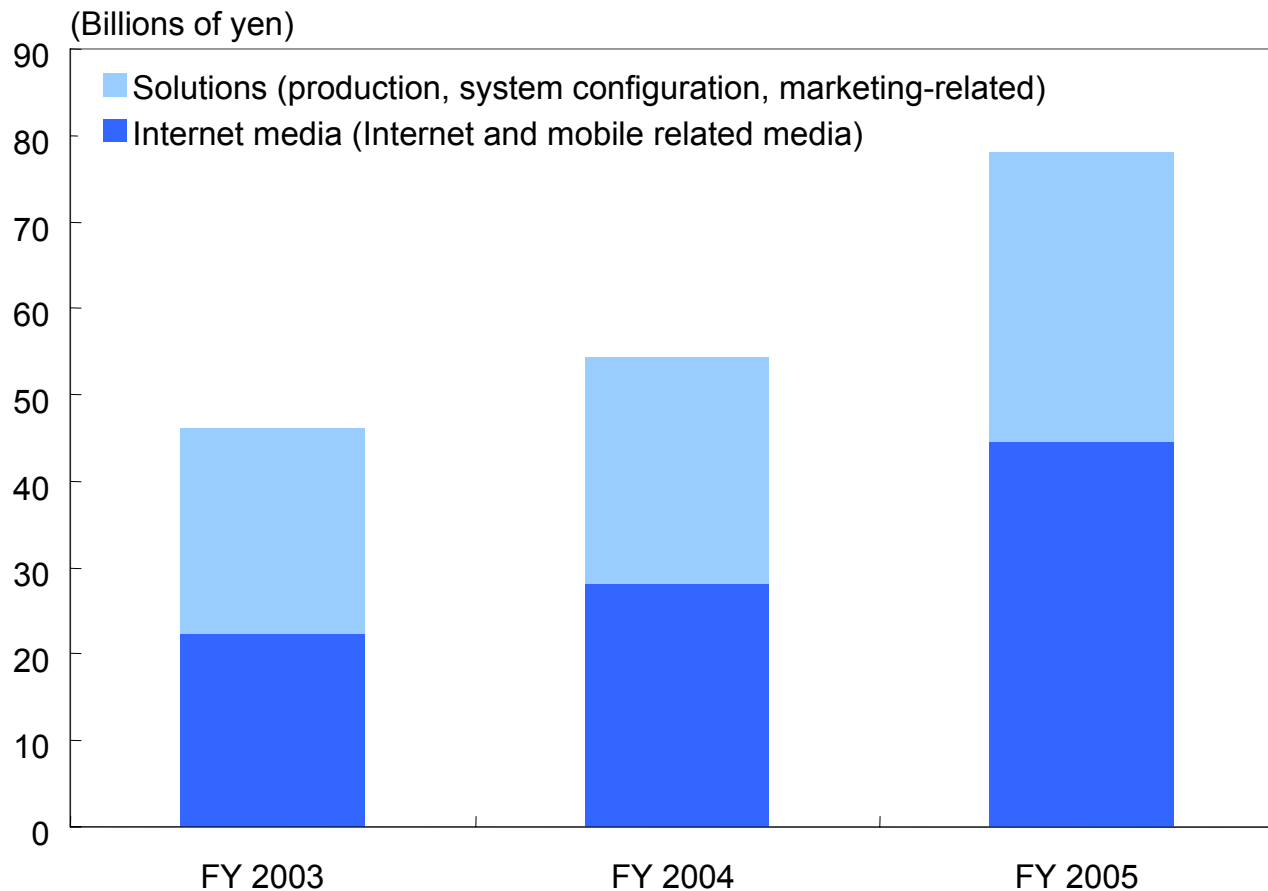
Logos displayed in Campaign production include: dentsu DENTSU e-LINK INC., opt e-marketing company, dentsu DIGITAL PALETTE INC., CROSS WIND, and Drill DENTSU TEC INC.

**Marketing services**

Logos displayed in Marketing services include: Dentsu eMarketing One (株式会社 電通イーマーケティングワン), WUNDERMAN DENTSU, interloics (interloics inc.), netprice, ECASH, IT Solution Innovator is7d (株式会社 電通インターネットサービス), MEMBERS, and dentsu DENTSU RESEARCH INC.

# The Dentsu Group's Growing Interactive Business

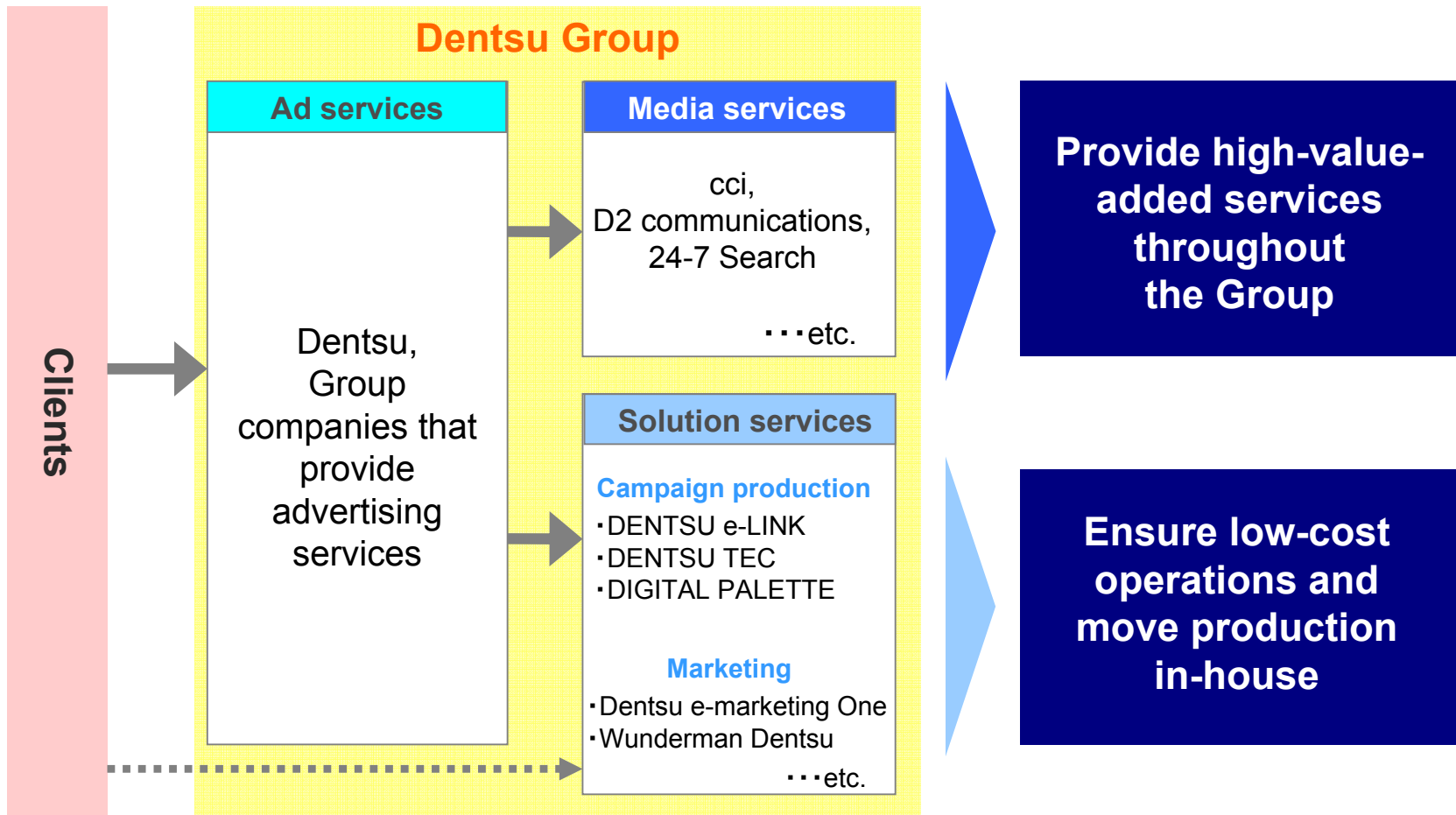
## Dentsu Group Net Sales from Interactive Business



Note: These figures are simple totals of net sales from external customers of Group companies.

# The Dentsu Group's Interactive Business to Generate High Added Value

## Dentsu Group's Interactive Business Service Structure



# Internet Expansion Driving Changes in Ad Business Structure

## Flow of Activity in the Internet Media Business

