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(First Section of the Tokyo Stock Exchange Code number: 2433)

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Non-Consolidated Billings of Hakuhodo Inc., Daiko Advertising Inc.
and Yomiko Advertising Inc. July 2020

Monthly billings of the company's three main advertising agencies (non-consolidated), all of which are subsidiaries of the company, were as follows;

(1) Billings by Type of Service for July 2020 (Single month)

(Millions of yen)

		July					
		FY2018	FY2019	FY2020	YoY comparisons		FY2020
				Results	Change	(%)	Share (%)
Hakuhodo	Newspapers	2,210	2,278	1,615	-663	-29.1%	4.1%
	Magazines	658	584	288	-296	-50.7%	0.7%
	Radio	605	591	475	-116	-19.6%	1.2%
	Television	25,089	25,587	18,253	-7,334	-28.7%	46.0%
	Subtotal	28,564	29,042	20,634	-8,408	-29.0%	52.0%
	Internet media	5,815	6,393	5,527	-866	-13.5%	13.9%
	Outdoor media	1,669	2,039	754	-1,285	-63.0%	1.9%
	Creative	7,216	7,705	5,902	-1,803	-23.4%	14.9%
	Marketing/Promotion	10,378	10,231	6,386	-3,845	-37.6%	16.1%
	Others	866	755	477	-278	-36.8%	1.2%
	Subtotal	25,946	27,125	19,047	-8,078	-29.8%	48.0%
	Total	54,511	56,168	39,681	-16,487	-29.4%	100.0%
Daiko	Newspapers	840	1,152	556	-596	-51.7%	8.1%
	Magazines	68	110	76	-34	-30.9%	1.1%
	Radio	157	145	97	-48	-33.1%	1.4%
	Television	4,510	4,878	3,375	-1,503	-30.8%	49.3%
	Subtotal	5,576	6,287	4,105	-2,182	-34.7%	60.0%
	Internet media	552	595	617	22	3.7%	9.0%
	Outdoor media	843	927	480	-447	-48.2%	7.0%
	Creative	1,094	1,022	635	-387	-37.9%	9.3%
	Marketing/Promotion	1,897	1,897	954	-943	-49.7%	13.9%
	Others	147	130	49	-81	-62.3%	0.7%
	Subtotal	4,535	4,572	2,737	-1,835	-40.1%	40.0%
	Total	10,112	10,859	6,842	-4,017	-37.0%	100.0%
Yomiko	Newspapers	267	647	132	-515	-79.6%	4.4%
	Magazines	111	52	25	-27	-51.9%	0.8%
	Radio	113	128	48	-80	-62.5%	1.6%
	Television	1,755	1,548	951	-597	-38.6%	31.3%
	Subtotal	2,247	2,377	1,156	-1,221	-51.4%	38.1%
	Internet media	270	611	435	-176	-28.8%	14.4%
	Outdoor media	245	386	121	-265	-68.7%	4.0%
	Creative	664	608	304	-304	-50.0%	10.0%
	Marketing/Promotion	1,899	1,855	877	-978	-52.7%	28.9%
	Others	152	143	138	-5	-3.5%	4.5%
	Subtotal	3,231	3,605	1,877	-1,728	-47.9%	61.9%
	Total	5,479	5,983	3,034	-2,949	-49.3%	100.0%

(2) Billings by Type of Service for July 2020 (Cumulative)

(Millions of yen)

		July (Cumulative)					
		FY2018	FY2019	FY2020	YoY comparisons		FY2020
				Results	Change	(%)	Share (%)
H a k u h o o	Newspapers	8,386	8,358	5,412	-2,946	-35.2%	3.5%
	Magazines	2,850	2,758	1,463	-1,295	-47.0%	0.9%
	Radio	2,187	2,337	1,871	-466	-19.9%	1.2%
	Television	100,994	101,813	68,660	-33,153	-32.6%	44.1%
	Subtotal	114,418	115,268	77,409	-37,859	-32.8%	49.7%
	Internet media	25,607	28,843	25,842	-3,001	-10.4%	16.6%
	Outdoor media	6,853	7,071	3,828	-3,243	-45.9%	2.5%
	Creative	30,384	29,374	22,333	-7,041	-24.0%	14.3%
	Marketing/Promotion	42,530	41,475	24,419	-17,056	-41.1%	15.7%
	Others	3,580	4,058	1,987	-2,071	-51.0%	1.3%
	Subtotal	108,956	110,822	78,410	-32,412	-29.2%	50.3%
	Total	223,374	226,090	155,819	-70,271	-31.1%	100.0%
D a i k o	Newspapers	3,548	3,645	2,200	-1,445	-39.6%	7.7%
	Magazines	350	391	206	-185	-47.3%	0.7%
	Radio	673	717	400	-317	-44.2%	1.4%
	Television	17,813	18,152	14,031	-4,121	-22.7%	49.0%
	Subtotal	22,386	22,907	16,839	-6,068	-26.5%	58.8%
	Internet media	2,497	2,570	2,705	135	5.3%	9.4%
	Outdoor media	3,066	3,010	2,154	-856	-28.4%	7.5%
	Creative	3,563	3,758	2,555	-1,203	-32.0%	8.9%
	Marketing/Promotion	7,118	5,934	4,166	-1,768	-29.8%	14.5%
	Others	476	462	241	-221	-47.8%	0.8%
	Subtotal	16,722	15,735	11,822	-3,913	-24.9%	41.2%
	Total	39,109	38,642	28,662	-9,980	-25.8%	100.0%
Y o m i k o	Newspapers	1,479	1,537	461	-1,076	-70.0%	3.6%
	Magazines	536	286	114	-172	-60.1%	0.9%
	Radio	338	496	179	-317	-63.9%	1.4%
	Television	6,953	6,496	4,629	-1,867	-28.7%	35.7%
	Subtotal	9,307	8,816	5,386	-3,430	-38.9%	41.5%
	Internet media	1,461	2,160	1,994	-166	-7.7%	15.4%
	Outdoor media	996	1,075	483	-592	-55.1%	3.7%
	Creative	2,547	2,338	1,346	-992	-42.4%	10.4%
	Marketing/Promotion	5,647	6,174	3,020	-3,154	-51.1%	23.3%
	Others	814	865	736	-129	-14.9%	5.7%
	Subtotal	11,467	12,615	7,581	-5,034	-39.9%	58.5%
	Total	20,775	21,431	12,967	-8,464	-39.5%	100.0%

(2) Major Changes (Largest Increases and Decreases) for July 2020

	July		Cumulative	
	Major Changed		Major Changed	
	Largest Increases	Largest Decreases	Largest Increases	Largest Decreases
Hakuhodo	Real estate/Housing facilities	Automobiles/Related products	Pharmaceuticals/Medical supplies	Automobiles/Related products
	Publishing	Beverages/Cigarettes/Luxury foods		Transportation/Leisure
		Cosmetics/Toiletries		Cosmetics/Toiletries
Daiko	Apparel/Accessories	Beverages/Cigarettes/Luxury foods	Restaurant/Services	Beverages/Cigarettes/Luxury foods
	Energy/Material/Machinery	Finance/Insurance	Apparel/Accessories	Finance/Insurance
	Home electric appliances/AV equipment	Foodstuffs	Real estate/Housing facilities	Foodstuffs
Yomiko	Beverages/Cigarettes/Luxury foods	Government/Organizations	Information/Communications	Real estate/Housing facilities
	Precision machinery/Office supplies	Energy/Material/Machinery	Publishing	Government/Organizations
	Pharmaceuticals/Medical supplies	Real estate/Housing facilities	Apparel/Accessories	Transportation/Leisure

※ For each set of figures, the total may not match the sum because figures are rounded down to the nearest million yen.

※ Billings include the following advertising services.

“Newspapers”, “Magazines”, “Radio” and “Television” are the total expenses for placement of domestic and export advertising.

“Television” includes advertising expenses for CS/BS media related.

“Internet media” are the transactions for placement of advertising spots on the Internet and cell phones. However, transactions concerned with creating and producing advertisements for the Internet and cell phones are included in “Creative”.

“Outdoor media” is the total of space charge and production billings involving outdoor advertising, train and other transportation advertising, insertions and other advertising media.

“Creative” includes billings for creating and producing advertisements for newspapers, magazines, radio, television and the Internet, including contract money for advertising performers.

“Marketing/promotion” includes transactions concerned with consulting, planning and surveys in the marketing, communication and brand management domains, and other consulting, planning and implementation transactions in such areas as sales promotion, special events, public relations and customer relationship management.

“Others” includes transactions concerned with sports, entertainment and other similar content.

※ Figures in this Monthly Billings Report are based on the monthly billings of the company's three main advertising agencies and have not been audited by an independent auditor. Accordingly, there may be discrepancies between these figures and the company's Consolidated Financial Results.