

Company name: Hakuhodo DY Holdings Inc.

Representative director: Masayuki Mizushima, President

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

Inquiries: Atsushi Yoshino, Executive Manager, Investor Relations Div.

Tel: +81-(3) 6441-9033

Non-Consolidated Billings of Hakuhodo Inc., Daiko Advertising Inc.
and Yomiko Advertising Inc. November 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 November 2020 (Single month)

(Millions of yen)

		November					
		FY2018	FY2019	FY2020	YoY comparisons		FY2020
				Results	Change	(%)	Share (%)
Hakuhodo	Newspapers	2,436	2,178	2,136	-42	-1.9%	3.8%
	Magazines	1,105	1,130	535	-595	-52.7%	1.0%
	Radio	599	567	510	-57	-10.1%	0.9%
	Television	28,646	28,338	25,021	-3,317	-11.7%	45.0%
	Subtotal	32,788	32,213	28,205	-4,008	-12.4%	50.8%
	Internet media	6,696	6,739	8,454	1,715	25.4%	15.2%
	Outdoor media	1,689	2,049	1,177	-872	-42.6%	2.1%
	Creative	8,554	9,124	8,488	-636	-7.0%	15.3%
	Marketing/Promotion	13,821	12,995	8,196	-4,799	-36.9%	14.8%
	Others	1,195	1,969	1,034	-935	-47.5%	1.9%
	Subtotal	31,957	32,878	27,350	-5,528	-16.8%	49.2%
	Total	64,745	65,092	55,556	-9,536	-14.7%	100.0%
Daiko	Newspapers	1,014	690	750	60	8.7%	9.2%
	Magazines	85	95	58	-37	-38.9%	0.7%
	Radio	147	127	103	-24	-18.9%	1.3%
	Television	4,611	4,813	3,711	-1,102	-22.9%	45.5%
	Subtotal	5,859	5,727	4,623	-1,104	-19.3%	56.7%
	Internet media	539	901	640	-261	-29.0%	7.8%
	Outdoor media	624	656	580	-76	-11.6%	7.1%
	Creative	876	755	1,006	251	33.2%	12.3%
	Marketing/Promotion	1,598	1,378	1,273	-105	-7.6%	15.6%
	Others	119	91	36	-55	-60.4%	0.5%
	Subtotal	3,758	3,782	3,537	-245	-6.5%	43.3%
	Total	9,617	9,509	8,161	-1,348	-14.2%	100.0%
Yomiko	Newspapers	289	299	376	77	25.8%	8.4%
	Magazines	84	114	46	-68	-59.6%	1.0%
	Radio	116	106	90	-16	-15.1%	2.0%
	Television	1,839	1,536	1,424	-112	-7.3%	31.6%
	Subtotal	2,330	2,056	1,938	-118	-5.7%	43.1%
	Internet media	255	504	560	56	11.1%	12.5%
	Outdoor media	287	203	150	-53	-26.1%	3.3%
	Creative	482	484	513	29	6.0%	11.4%
	Marketing/Promotion	1,757	1,769	1,198	-571	-32.3%	26.6%
	Others	354	212	140	-72	-34.0%	3.1%
	Subtotal	3,138	3,174	2,563	-611	-19.3%	56.9%
	Total	5,469	5,230	4,502	-728	-13.9%	100.0%

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

(Millions of yen)

		November (Cumulative)					
		FY2018	FY2019	FY2020	YoY comparisons		FY2020
				Results	Change	(%)	Share (%)
H a k u h o d o	Newspapers	17,767	16,838	13,240	-3,598	-21.4%	3.8%
	Magazines	6,918	6,688	3,597	-3,091	-46.2%	1.0%
	Radio	4,512	4,677	3,895	-782	-16.7%	1.1%
	Television	203,062	195,396	151,549	-43,847	-22.4%	43.1%
	Subtotal	232,260	223,601	172,283	-51,318	-23.0%	49.0%
	Internet media	51,350	56,392	54,772	-1,620	-2.9%	15.6%
	Outdoor media	13,176	13,973	8,026	-5,947	-42.6%	2.3%
	Creative	64,583	64,832	54,931	-9,901	-15.3%	15.6%
	Marketing/Promotion	92,475	92,345	57,228	-35,117	-38.0%	16.3%
	Others	7,678	8,695	4,586	-4,109	-47.3%	1.3%
	Subtotal	229,264	236,239	179,545	-56,694	-24.0%	51.0%
	Total	461,525	459,841	351,829	-108,012	-23.5%	100.0%
D a i k o	Newspapers	7,152	6,736	5,038	-1,698	-25.2%	8.5%
	Magazines	850	837	419	-418	-49.9%	0.7%
	Radio	1,264	1,350	814	-536	-39.7%	1.4%
	Television	35,013	36,797	28,599	-8,198	-22.3%	48.0%
	Subtotal	44,280	45,722	34,871	-10,851	-23.7%	58.6%
	Internet media	4,768	5,226	5,243	17	0.3%	8.8%
	Outdoor media	5,164	5,247	4,141	-1,106	-21.1%	7.0%
	Creative	7,384	7,598	6,369	-1,229	-16.2%	10.7%
	Marketing/Promotion	13,070	11,585	8,566	-3,019	-26.1%	14.4%
	Others	989	1,285	341	-944	-73.5%	0.6%
	Subtotal	31,377	30,944	24,662	-6,282	-20.3%	41.4%
	Total	75,658	76,666	59,534	-17,132	-22.3%	100.0%
Y o m i k o	Newspapers	2,835	2,841	1,509	-1,332	-46.9%	5.1%
	Magazines	884	621	257	-364	-58.6%	0.9%
	Radio	749	941	480	-461	-49.0%	1.6%
	Television	14,927	13,743	9,598	-4,145	-30.2%	32.2%
	Subtotal	19,397	18,148	11,845	-6,303	-34.7%	39.8%
	Internet media	2,808	4,326	3,942	-384	-8.9%	13.2%
	Outdoor media	2,106	1,951	1,011	-940	-48.2%	3.4%
	Creative	4,774	4,561	3,603	-958	-21.0%	12.1%
	Marketing/Promotion	13,229	12,846	8,001	-4,845	-37.7%	26.9%
	Others	1,949	1,978	1,380	-598	-30.2%	4.6%
	Subtotal	24,869	25,665	17,939	-7,726	-30.1%	60.2%
	Total	44,266	43,813	29,785	-14,028	-32.0%	100.0%

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

	November		Cumulative	
	Major Changed		Major Changed	
	Largest Increases	Largest Decreases	Largest Increases	Largest Decreases
Hakuhodo	Finance/Insurance	Automobiles/Related products		Automobiles/Related products
	Games/Sporting goods/Hobby supplies	Transportation/Leisure		Transportation/Leisure
	Home electric appliances/AV equipment	Pharmaceuticals/Medical supplies		Cosmetics/Toiletries
Daiko	Beverages/Cigarettes/Luxury foods	Finance/Insurance	Apparel/Accessories	Finance/Insurance
	Distribution/Retailing	Transportation/Leisure	Energy/Material/Machinery	Transportation/Leisure
	Foodstuffs	Games/Sporting goods/Hobby supplies		Foodstuffs
Yomiko	Transportation/Leisure	Automobiles/Related products	Apparel/Accessories	Real estate/Housing facilities
	Government/Organizations	Games/Sporting goods/Hobby supplies	Education/Medical services/Religion	Energy/Material/Machinery
	Distribution/Retailing	Energy/Material/Machinery	Home electric appliances/AV equipment	Government/Organizations

※ 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.