

NEWS RELEASE

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Dentsu Launches Global Rollout of "Culture For Growth" Program, Supporting Corporate Culture Transformation Efforts

— Supporting clients' global expansion and business growth through employee perception surveys in five overseas markets —

Dentsu Inc. (President & CEO: Takeshi Sano; Head Office: Tokyo) today announced the full–scale global rollout of "Culture For Growth"*1, a program unveiled in July 2024 that leverages proprietary tools and frameworks to support the transformation of corporate culture, which is recognized as an essential driver for clients' business growth. Leveraging insights cultivated through our domestic support services and dentsu's unique global network, through this program dentsu will work to support corporate culture transformation to create positive impact on our clients' overseas expansion and business growth at their international locations. Our approach is grounded in an understanding of the social, economic, and cultural context of each region, employee insights, and corporate needs.

In advance of the full-scale global rollout of the program surveys were implemented in five markets where the "Culture For Growth" program is due to be implemented (India, Taiwan, UK, US, Canada), with a view to understanding the situation relating to corporate transformation and the current realities of corporate culture ("Employee survey on perceptions concerning companies' corporate transformation efforts"*2 (hereafter "the survey", implementation period November 26-December 10, 2024). The survey targeted a total of 3,100 people between the ages of 20 and 59 working at companies on transformation initiatives. In this news release, we share the key findings of the survey.

1. Global rollout of "Culture For Growth"

In recent years, given the need to respond to shifting global conditions, digital transformation (DX), and sustainability imperatives, companies have been restructuring their business portfolios with a view to ensuring sustainable growth. As part of this trend, companies are enhancing their competitiveness and diversifying their revenue base through the establishment of local subsidiaries and the creation of new businesses in global markets. However, even when management attempts to implement transformation, challenges attributable to corporate culture-related issues have emerged, such as "inability to gain internal understanding and cooperation" and "inability to change employees' passive attitudes." As a result, corporate culture transformation has become a top-priority management agenda item for sustaining corporate growth.

Under the program, dentsu will incorporate the survey findings into our proprietary tools and frameworks that enable "Culture Diagnostics" and "Talent Diagnostics," developed as part of our



"Culture For Growth" initiative, with the aim of delivering locally adapted services. This will enable us to provide more sophisticated analysis and recommendations.

Furthermore, through discussions with clients and interviews conducted both internally and externally, we will provide comprehensive support from the formulation of policies and action plans through to their implementation.

2. Results of employee survey on perceptions concerning companies' corporate transformation efforts While "corporate culture" is a phrase that is often heard, it is perceived differently from various perspectives, including region-specific cultures, employees and work styles, business operations, and products and services. In the survey independently conducted in five overseas markets with the aim of contributing to corporate transformation, we focused on the relationship between corporate transformation and corporate culture, examining how employees perceive transformation initiatives. The key findings gained from the survey are detailed below.

◆ Key findings

1) "Digital transformation" and "Organizational transformation" are initiatives that are common to all markets. Other initiatives and projects tend to vary by market, with India focusing on "launch of a new business or division," whereas "material change in strategy" is a key initiative in Taiwan, and the markets of the UK, US and Canada look to focus on "culture change management." (Figure 1)

[Figure 1]
Q. Is your company currently undertaking any transformation projects? Please select all that apply.

						Uni		
	1 Digital to	ransformation 2 0	2 Organizational transformation 3 Launch of a new business or division					
4 Culture change management 5 Material change in strategy 6 Relo					looking at purpose, vision and mission			
	7 Other transformation							
Ind	dia	Taiv	wan UK		us c	anada		
1	81.7	1 6	4.8 1 62	2.4	48.6	¹ 57.2		
2	49.0	2 5	9.0 2 46	2	47.1	² 43.0		
3	43.9	3 4	4.5 3 21	1 3	23.1	3 20.3		
4	36.0	4 3	27.3 4 27	7 4	27.0	4 22.5		
5	40.7	5 5	5.3 5 16	.3 5	17. 3	5 16 .2		
6	40.7	6 4	8.0 6 25	6	25.9	6 21.8		
7	6.9	7 3	3.8 7 1 1	9 7	13.1	7 12.2		



2) Regarding factors that have influenced their corporate culture, "company's vision and purpose" was the most frequently selected across all markets. As the second most common factor, "learning and development" was cited in India and Canada, while "clear strategy to achieve vision" was identified in Taiwan (tied for first place), the UK and US. (Figure 2)

[Figure 2]

Q. What are the principal drivers of your company's "corporate culture"? Please select all that apply.

Unit:%

1 Company's vision and purpose	2 Clear strategy to achieve vision	3 Personality of executives
4 Company's history 5 Industr	y characteristics 6 Shared values an	nong employees
7 Clear expected behaviors from 6	employees 8 An aligned mindset ar	mong employees 9 Organizational structure
10 Routines and traditions 11	Ways of working 12 KPIs and perfe	ormance management
13 Incentives and compensation	14 Alignment on societal impact	15 Learning and development
16 Founder's spirit/philosophy	17 None of these apply	

India		T	aiwan	ι	JK	U	S	Canada	
1	17.0	1	12.3	1	20.4	1	18.9	1 17.7	
2	12.6	2	12.3	2	11.6	2	11.0	2 8.3	
3	3.4	3	6.3	3	3.3	3	5.0	3 5.0	
4	5.0	4	4.0	4	4.0	4	4.3	4 3.8	
5	3.0	5	3.3	5	2.4	5	3.7	5 3.0	
6	5.1	6	6.8	6	8.3	6	6.6	6 7.8	
7	3.4	7	4.5	7	2.6	7	3.0	7 3.7	
8	3.9	8	4.3	8	3.6	8	4.0	8 5.7	
9	7.3	9	3.3	9	5.3	9	6.3	9 7.8	
10	3.3	10	4.5	10	2.4	10	3.9	10 2.5	
11	7.4	11	6.3	11	8.4	11	3.9	11 7.5	
12	4.1	12	7.5	12	9.7	12	7.3	12 7.3	
13	5.0	13	10.3	13	2.9	13	6.7	13 4.7	
14	2.9	14	2.3	14	3.3	14	2.6	14 2.5	
15	12.7	15	7.5	15	9.0	15	7.7	¹⁵ 8.7	
16	3.6	16	4.5	16	2.3	16	4.3	16 2.2	
17	0.3	17	0.5	17	0.6	17	1.0	17 1.8	

3) Perceptions of a company's corporate culture vary by market. In terms of positive impressions, respondents in India most frequently selected "leadership has the trust of employees," while those in Taiwan chose "we support the learning, development and career growth of employees." In the US, UK and Canada, the most commonly selected response (tied) was "we have high standards for quality." [Figure 3]

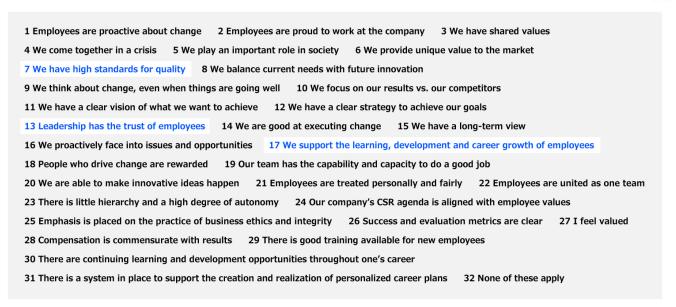


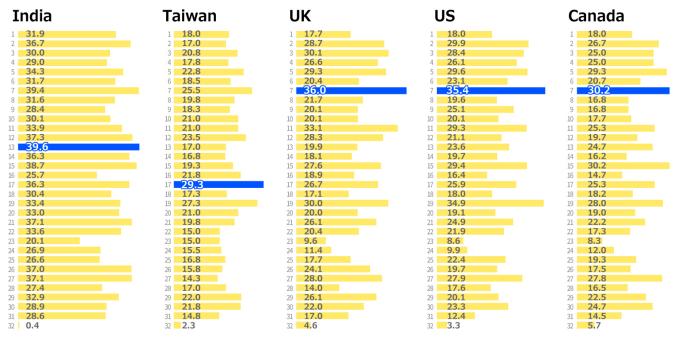
Conversely, regarding negative impressions, respondents in India most frequently selected "few employees have a growth mindset," those in Taiwan chose "divisions are siloed, with weak relationships," and those in the US, UK and Canada selected "decision-making processes are slow." [Figure 4]

[Figure 3]

Q. Current status of your company's corporate culture/what should be strengthened. Please select all that apply.

Unit:%







[Figure 4]

Q. Current status of your company's corporate culture / what should be reviewed in the future. Please select all that apply.

Unit:% 1 Employees are not very energetic 2 Workplace atmosphere is awkward/dull 3 Emphasis on individual results has led to weak relationships among employees 4 Employees are indifferent to each other 5 Many employees are overly cautious or conservative 6 Few employees have a growth mindset 7 There is too much top-down management 8 Divisions are siloed, with weak relationships 9 Decision-making processes are slow 10 Many longer-term employees are leaving the company 11 There is high turnover among new hires 12 Employees are often asked to do work that is not part of their jobs 13 Evaluation criteria are vague 14 Lack of training system in place, or tends to be neglected 15 The company is more focused on fixing the existing business than building for the future 16 The company is focused on starting new things, instead of fixing the existing business 17 None of these apply India Taiwan UK 1 18.0 1 25.3 2 18.7 19.8 15.6 3 25.3 20.3 10.7 28.3 17.3 13.1 4 29.7 27.8 20.9 6 34.1 27.5 21.1 30.9 28.5 22.3 15.7 30.5 16.4 9 27.1 9 32.7 28.0 10 23.0 10 19.0 10 24.9 11 28.1 11 28.5 11 25.3 12 12 27.0 12 25.3 23.9 13 24.9 13 23.0 13 12.7 14 19.9 14 27.3 14 20.6 15 30.3 15 17.0 15 12.7 29,4 20.8 17.7 17 9.7 17 6.0 17 15.1 US Canada 1 15.3 1 18.8 16.3 3 12.8 3 14.1 4 15.6 16.0 5 13.9 17.2 6 18.4 21.2 23.3 29.2 18.0 19.3 9 31.9 34.5 10 21.0 10 25.0 11 26.9 11 28.2 12 12 23.7 26.3 13 13 17.1 16.0 14 14 23.3 22.8 15 11.9 15 12.7 16 23.0 21.7



4) Regarding understanding, expectations, and perceived results of corporate transformation initiatives, India ranks highest, with approximately 50% responding "strongly agree" to each item and total positive responses exceeding 90%. In contrast, in Taiwan, the UK, US and Canada, "strongly agree" responses remain at approximately 40% in terms of understanding, 30% for expectations, and only 20% for perceived results, revealing differences in the degree to which transformation efforts have permeated. [Figure 5]

[Figure 5]

Q. To what extent do you agree with the following statements about the transformation project that your company is currently undertaking? Please select one choice below that best describes your feelings for each item.



[Notes]

- Composition ratios (%) in this survey are rounded to the second decimal place, so totals may not add up to exactly 100%.
- The names of countries and regions in this survey (listed by region/in Japanese alphabetical order) are provided solely for statistical or analytical convenience and in no way imply any political stance or viewpoint.



Since 2024, dentsu*3 has been fully promoting the global expansion of its Business Transformation (BX) services, which support clients' transformation and growth*4. Based on over a decade of experience and knowledge nurtured and built in Japan, this unique growth-oriented consulting service excels in the three core areas: business transformation, corporate transformation, and sustainability strategy. Seeking to address the various challenges being faced by our clients, dentsu will continue to advance strongly the global expansion of BX to deliver optimal solutions, combining its strengths in creativity, execution, and data and technology with a marketing-oriented perspective.

[Survey Overview]

- · Objective: To understand how employees perceive the company's corporate transformation efforts and the relationship between corporate transformation and corporate culture
- Target sample: Persons 20 to 59 years old, working in companies, engaged in any kind of transformation*5
- · Sample size: 3,100 respondents (India, Taiwan, UK, US, Canada)

Country/regio	Area	Company size	Sample size
n			
India	New Delhi	More than 1,000	200
		employees	
	Mumbai	More than 1,000	200
		employees	
	Kolkata, Chennai & Bengaluru	More than 250 employees	300
Taiwan	Region-wide	More than 50 employees	400
UK	Nationwide	More than 100 employees	700
US	Nationwide	More than 1,000	700
		employees	
Canada	Nationwide	More than 250 employees	600

· Survey method: Online survey

· Survey period: 26 November to 10 December 2024

· Survey institution: DENTSU MACROMILL INSIGHT, INC.

- *1 Announced on July 2, 2024. https://www.dentsu.co.jp/news/item-cms/b2024033-0702.pdf (Japanese only)
- *2 "Corporate culture" is defined as the mindset, behaviors, customs, work practices, and values that a company possesses, shaped by various factors such as the company's history, workforce characteristics, and corporate vision, etc.
- *3 The collective term for Dentsu Group Inc., a holding company, and its 720 consolidated subsidiaries in Japan and overseas.



*4 "Dentsu Expands Business Transformation (BX) Services Globally to Support Client Transformation" (June 18, 2024). https://www.group.dentsu.com/en/news/release/001227.html

*5 The target samples were selected from those who responded in the affirmative to at least one item in a preliminary survey question "Is your company/workplace engaged in transformation initiatives?"

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