

**Term 2018.3 (Apr. 2017~Jun. 2017)
Outline of Accounts Settlement**



Analysis of present states and future prospects



**Fox Valley shop (Aurora, Illinois)
March 31, 2017 open!**

ROUND ONE Corporation

C.E.O. and President Masahiko Sugino

Tokyo Stock Exchange First Section

Code Number: 4680

August 8, 2017

Analysis of consolidated operating results ①

Apr. 2017~Jun. 2017 Actual [Year-on-year]



(Unit ¥bn) ※figures are rounded down to the nearest 10 million

① [Differ]

Japan: 1 shop opening, 8 shop closings, the USA: 6 shop openings

② [Ordinary income]

| Term 2017.3 1st Q Actual | | Ordinary income | ¥0.17bn |
|--------------------------|-----------------------------------------------------------------------------------------|-----------------|-----------|
| [Japan] | Increase in sales | | +¥0.15bn |
| | Decrease in foreign exchange loss (Non-operating exp.) | | +¥0.36bn |
| | Decrease in rent exp. (Due to shop closings in previous term) | | +¥0.14bn |
| | Decrease in utility exp. (Due to shop closings in previous term and others) | | +¥0.12bn |
| | Decrease in communication exp. (Due to Amusement communication machines sales decrease) | | +¥0.11bn |
| | Increase in advertising exp. (Due to TV commercial exp. increase) | | ¥(0.13)bn |
| | Increase in promotion exp. (Due to amusement merchandise exp. increase) | | ¥(0.10)bn |
| | Increase in personnel exp. (Due to working hours and hourly rate increase) | | ¥(0.09)bn |
| | Others | | +¥0.01bn |
| [The USA] | P/L (※Table below) | | +¥0.14bn |

| Term 2018.3 1st Q Actual | | Ordinary income | ¥0.88bn |
|--------------------------|--|-----------------|---------|
|--------------------------|--|-----------------|---------|

※[The USA P/L status]

| | Term 2017.3 1st Q Actual | Term 2018.3 1st Q Actual | Differ |
|-----------------|--------------------------|--------------------------|------------------|
| Sales | ¥1.45bn | ¥2.39bn | ¥0.93bn increase |
| Expenses | ¥1.46bn | ¥2.26bn | ¥0.79bn increase |
| Ordinary income | ¥(0.01)bn | ¥0.12bn | ¥0.14bn increase |

③ [Extraordinary income & loss breakdown]

Term 2017.3 1st Q Actual Extraordinary loss ¥(0.24)bn

| | | |
|---|--------------------------------------------|-----------|
| → | Loss on shops closings (4 shops) | ¥(0.16)bn |
| → | Loss on disaster (The Kumamoto Earthquake) | ¥(0.06)bn |
| → | Loss on disposal of fixed assets, etc. | ¥(0.02)bn |

Term 2018.3 1st Q Actual Extraordinary loss ¥(0.06)bn

| | | |
|---|----------------------------------------|-----------|
| → | Loss on disposal of fixed assets, etc. | ¥(0.06)bn |
|---|----------------------------------------|-----------|

| | | Unit | Term 2017.3 Actual (2016.4~2016.6) | Term 2018.3 Actual (2017.4~2017.6) | Differ |
|---------------|-----------------------------------------------|--------|------------------------------------|------------------------------------|--------|
| Shops | Total shops at the end of the term | Shop | 123 | 122 | ① (1) |
| | No. of months total shops operation | Month | 368 | 366 | (2) |
| P / L | Bowling | | 5.35 | 5.52 | +0.17 |
| | Amusement | | 9.41 | 10.03 | +0.61 |
| | Karaoke (including the USA shops other sales) | | 2.11 | 2.09 | (0.02) |
| | Spo-cha | | 2.67 | 2.95 | +0.27 |
| | Others | | 0.72 | 0.77 | +0.04 |
| | Total sales | | 20.28 | 21.37 | +1.09 |
| | Cost of sales | | 19.14 | 19.84 | +0.70 |
| | Gross margin | | 1.14 | 1.53 | +0.38 |
| | S.G.A. expenses | | 0.51 | 0.55 | +0.04 |
| | Operating income | | 0.63 | 0.97 | +0.34 |
| | Non-operating income & expenses | | (0.45) | (0.09) | +0.36 |
| | Ordinary income ② | | 0.17 | 0.88 | +0.70 |
| | Ordinary income margin | | 0.9% | 4.1% | +3.3% |
| | Extraordinary income & loss ③ | | (0.24) | (0.06) | +0.17 |
| | Net income before tax | | (0.07) | 0.81 | +0.88 |
| Corporate tax | | 0.02 | 0.46 | +0.43 | |
| Net income | | (0.10) | 0.35 | +0.45 | |

Analysis of consolidated operating results ②

Apr. 2017~Jun. 2017 Actual [Actual and Plan]



(Unit ¥bn) ※figures are rounded down to the nearest 10 million

| | | Unit | Term 2018.3 Plan (2017.4~2017.6) | Term 2018.3 Actual (2017.4~2017.6) | Differ |
|---------------|--------------------------------------------------|-------|-------------------------------------|---------------------------------------|--------|
| Shops | Total shops at the end of the term | Shop | 122 | 122 | — |
| | No. of months total shops operation | Month | 366 | 366 | — |
| P / L | Bowling | | 5.47 | 5.52 | +0.05 |
| | Amusement | | 10.15 | 10.03 | (0.12) |
| | Karaoke (including the USA shops other sales) | | 2.22 | 2.09 | (0.13) |
| | Spo-cha | | 2.74 | 2.95 | +0.20 |
| | Others | | 0.71 | 0.77 | +0.06 |
| | Total sales | | 21.31 | 21.37 | +0.06 |
| | Cost of sales | | 19.76 | 19.84 | +0.08 |
| | Gross margin | | 1.55 | 1.53 | (0.02) |
| | S.G.A. expenses | | 0.54 | 0.55 | +0.01 |
| | Operating income | | 1.01 | 0.97 | (0.03) |
| | Non-operating income & expenses | | (0.11) | (0.09) | +0.01 |
| | Ordinary income ① | | 0.90 | 0.88 | (0.02) |
| | Ordinary income margin | | 4.2% | 4.1% | (0.1)% |
| | Extraordinary income & loss | | (0.10) | ②(0.06) | +0.03 |
| | Net income before tax | | 0.80 | 0.81 | +0.01 |
| Corporate tax | | 0.47 | 0.46 | (0.00) | |
| Net income | | 0.33 | 0.35 | +0.02 | |

① [Differ]

| Term 2018.3 1st Q Plan | Ordinary income | ¥0.90bn |
|-----------------------------|--------------------------------------------------------------------------------------------|-----------|
| [Japan] | Increase in sales | +¥0.07bn |
| | Decrease in utility exp. (Due to electricity usage decrease) | +¥0.10bn |
| | Decrease in communication exp. (Due to Amusement communication machines sales decrease) | +¥0.09bn |
| | Increase in personnel exp. (Due to working hours and hourly rate increase) | ¥(0.16)bn |
| | Increase in repairing exp. | ¥(0.07)bn |
| | Others | +¥0.01bn |
| [The USA] | P/L (※Table below) | ¥(0.06)bn |
| Term 2018.3 1st Q Actual | Ordinary income | ¥0.88bn |

※[The USA P/L status]

| | Term 2018.3 1st Q Plan | Term 2018.3 1st Q Actual | Differ |
|-----------------|---------------------------|-----------------------------|-------------------------|
| Sales | ¥2.40bn | ¥2.39bn | ¥0.01bn decrease |
| Expenses | ¥2.21bn | ¥2.26bn | (Note) ¥0.05bn increase |
| Ordinary income | ¥0.19bn | ¥0.12bn | ¥0.06bn decrease |

(Note) Expenses increase breakdown
 ・Expenses carryforward for shop opening on July,1 ¥(0.02)bn
 ・Personnel expenses ¥(0.03)bn

② [Extraordinary income & loss breakdown]

| Term 2018.3 1st Q Actual | Extraordinary loss | ¥(0.06)bn |
|--------------------------|----------------------------------------|-----------|
| | Loss on disposal of fixed assets, etc. | ¥(0.06)bn |

Term 2018.3 Consolidated plan Shop openings and closings, P / L



No change since announcement on May 9, 2017 has been made.

※figures are rounded down to the nearest 10 million

| | Unit | Term 2017.3 Actual | | | Term 2018.3 Plan | | | Differ | | | |
|-------|--------------------------------------------------------------------------------|--------------------|-------|---------|------------------|-------|----------------------|--------------|--------|---------|-------|
| | | Consolidated | Japan | The USA | Consolidated | Japan | The USA ^③ | Consolidated | Japan | The USA | |
| Shops | Shop openings and closings ^① Please refer to pages 12, 13 and 15 | Shop | ±0 | (6) | +6 | +10 | +1 | +9 | +10 | +7 | +3 |
| | No. of total shops (at the end of term) | Shop | 122 | 107 | 15 | 132 | 108 | 24 | +10 | +1 | +9 |
| | (Break down) Own shops (land & building and building structure) | Shop | 24 | 24 | — | 24 | 24 | — | — | — | — |
| | Leased shops (interior structure only) | Shop | 98 | 83 | 15 | 108 | 84 | 24 | +10 | +1 | +9 |
| | No. of months total shops operation | Month | 1,452 | 1,322 | 130 | 1,498 | 1,289 | 209 | +46 | (33) | +79 |
| P/L | Bowling | ¥bn | 22.91 | 21.68 | 1.22 | 23.72 | 21.85 | 1.87 | +0.80 | +0.16 | +0.64 |
| | Amusement | ¥bn | 40.53 | 35.90 | 4.62 | 43.41 | 36.00 | 7.41 | +2.87 | +0.09 | +2.78 |
| | Karaoke (including the USA shops other sales) | ¥bn | 9.13 | 7.73 | 1.39 | 9.77 | 7.65 | 2.12 | +0.63 | (0.08) | +0.72 |
| | Spo-cha | ¥bn | 12.27 | 12.27 | — | 12.40 | 12.40 | — | +0.12 | +0.12 | — |
| | Others | ¥bn | 2.92 | 2.92 | — | 2.90 | 2.90 | — | (0.02) | (0.02) | — |
| | Total sales | ¥bn | 87.77 | 80.52 | 7.25 | 92.20 | 80.80 | 11.40 | +4.42 | +0.27 | +4.14 |
| | Operating income | ¥bn | 6.68 | 6.18 | 0.49 | 7.17 | 6.40 | 0.77 | +0.48 | +0.21 | +0.27 |
| | Ordinary income | ¥bn | 5.85 | 5.41 | 0.44 | 6.70 | 6.00 | 0.70 | +0.84 | +0.58 | +0.25 |
| | Ordinary income margin | % | 6.7% | 6.7% | 6.1% | 7.3% | 7.4% | 6.1% | +0.6% | +0.7% | +0.0% |
| | Net income ^② | ¥bn | 2.73 | 2.85 | (0.11) | 3.60 | 3.47 | 0.13 | +0.86 | +0.61 | +0.24 |

(Note) ^①Term 2017.3 Actual: Shop openings (2 shops in Japan, 6 shops in the USA), shop closings (8 shops in Japan)
Term 2018.3 Plan: Shop openings (1 shop in Japan, 9 shops in the USA)

^② Net income calculation formula:

[Term 2017.3 Actual] Ordinary income ¥5.85bn – Impairment loss ¥1.90bn※1 – Loss on disposal of amusement substrates, etc. ¥0.36bn – Corporate tax ¥0.85bn = Net income ¥2.73bn.

※1: including impairment loss of 11 shops (10 shops in Japan ¥1.59bn, 1 shop in the USA ¥0.3bn), loss on shops closings (8 shops in Japan ¥0.42bn)

[Term 2018.3 Plan] Ordinary income ¥6.70bn – Impairment loss ¥1.30bn※2 – Loss on disposal of amusement substrates, etc. ¥0.40bn – Corporate tax ¥1.40bn = Net income ¥3.60bn.

※2: including estimated impairment loss of 8 shops (7 shops in Japan ¥0.9bn, 1 shop in the USA ¥0.4bn)

^③ In calculation of the USA Plan exchange rate \$1 = ¥110 is used.

Japan Sales and Year-on-year existing shop sales (Actual and plan)



Japan sales Actual and plan

Please refer to page 12 and 15 for the number of shops
※figures are rounded down to the nearest 10 million

| | Unit | 1st Q | | | | 2nd Q | 1st Q~2nd Q | 3rd Q | 4th Q | 3rd Q~4th Q | Term |
|-----------------------------------------------------------|------|---------|--------|--------|-------|-------|-------------|-------|-------|-------------|-------|
| | | Plan | Actual | Differ | Plan | Plan | Plan | Plan | Plan | Plan | |
| | | Bowling | ¥bn | 5.08 | 5.13 | +0.04 | 5.26 | 10.35 | 4.74 | 6.75 | 11.50 |
| Amusement | ¥bn | 8.59 | 8.48 | (0.11) | 9.50 | 18.10 | 8.25 | 9.64 | 17.90 | 36.00 | |
| Karaoke | ¥bn | 1.77 | 1.72 | (0.05) | 1.97 | 3.75 | 1.80 | 2.09 | 3.90 | 7.65 | |
| Spo-cha | ¥bn | 2.74 | 2.95 | +0.20 | 3.20 | 5.95 | 2.51 | 3.93 | 6.45 | 12.40 | |
| Others | ¥bn | 0.71 | 0.70 | (0.01) | 0.73 | 1.45 | 0.67 | 0.77 | 1.45 | 2.90 | |
| Total sales | ¥bn | 18.91 | 18.98 | +0.07 | 20.68 | 39.60 | 17.99 | 23.20 | 41.20 | 80.80 | |
| No. of total shops in Japan (at the end of every term) | | 107 | 107 | — | 107 | 107 | 108 | 108 | 108 | 108 | |

Japan year-on-year existing shop sales Actual and plan

※figures are rounded to the nearest 1st decimal

| | Unit | 1st Q | | | | 2nd Q | 1st Q~2nd Q | 3rd Q | 4th Q | 3rd Q~4th Q | Term |
|--------------------------------------------------------------|------|---------|--------|--------|-------|-------|-------------|-------|-------|-------------|------|
| | | Plan | Actual | Differ | Plan | Plan | Plan | Plan | Plan | Plan | |
| | | Bowling | % | +4.0 | +5.0 | +1.0 | +2.8 | +3.4 | (0.5) | +1.5 | +0.7 |
| Amusement | % | +2.2 | +0.6 | (1.6) | (0.3) | +0.9 | (1.3) | +1.2 | +0.1 | +0.5 | |
| Karaoke | % | +1.1 | (2.0) | (3.1) | +1.9 | +1.5 | (0.6) | +0.5 | +0.0 | +0.7 | |
| Spo-cha | % | +1.6 | +9.4 | +7.8 | +1.4 | +1.5 | (1.3) | +1.2 | +0.2 | +0.8 | |
| Others | % | +2.2 | +0.6 | (1.6) | +1.7 | +2.0 | (0.3) | +0.2 | +0.0 | +1.0 | |
| Total sales | % | +2.5 | +2.8 | +0.3 | +1.0 | +1.7 | (1.0) | +1.2 | +0.2 | +1.0 | |
| Number of Sat/Sun/Hol vs pre year | Days | (1) | (1) | — | ±0 | (1) | (1) | +1 | ±0 | (1) | |
| No. of existing shops in Japan (at the end of every term) | | 106 | 106 | — | 106 | 106 | 107 | 107 | 107 | 107 | |

The USA Sales and Year-on-year existing shop sales (Actual and plan)



The USA sales Actual and plan

Please refer to page 12, 13 and 15 for the number of shops
※figures are rounded down to the nearest 10 million

| | Unit | 1st Q | | | | 2nd Q | 1st Q~2nd Q | 3rd Q | | | Term |
|-------------------------------------------------------------|------|-------|--------|----------|------|-------|-------------|-------|------|-------|------|
| | | Plan | Actual | Differ | Plan | Plan | Plan | Plan | Plan | | |
| | | | | | | | | | | 3rd Q | |
| Bowling | ¥bn | 0.39 | 0.39 | +0.00 | 0.41 | 0.81 | 0.44 | 0.61 | 1.06 | 1.87 | |
| Amusement | ¥bn | 1.55 | 1.54 | (0.00) | 1.67 | 3.23 | 1.62 | 2.55 | 4.18 | 7.41 | |
| Karaoke, etc. ※① | ¥bn | 0.45 | 0.44 | (0.00) | 0.45 | 0.91 | 0.51 | 0.69 | 1.21 | 2.12 | |
| Total sales | ¥bn | 2.40 | 2.39 | ※②(0.01) | 2.54 | 4.95 | 2.58 | 3.86 | 6.45 | 11.40 | |
| No. of total shops in the USA (at the end of every term) | | 15 | 15 | — | 16 | 16 | 18 | 24 | 24 | 24 | |

[Note] In calculation of sales plan exchange rate \$1 = ¥110.00 is used, in calculation of sales actual exchange rate \$1 = ¥111.08 is used.

※① Karaoke sales is mostly food & beverage sales.

※② Differ is existing shops sales increase ¥0.12bn and new shops sales decrease ¥0.14bn.

The USA year-on-year existing shop sales Actual and plan

※figures are rounded to the nearest 1st decimal

| | Unit | 1st Q | | | | 2nd Q | 1st Q~2nd Q | 3rd Q | | | Term |
|----------------------------------------------------------------|------|-------|--------|--------|-------|-------|-------------|-------|-------|-------|------|
| | | Plan | Actual | Differ | Plan | Plan | Plan | Plan | Plan | | |
| | | | | | | | | | | 3rd Q | |
| Bowling | % | (0.8) | +3.5 | +4.3 | (1.4) | (1.1) | (2.0) | (1.1) | (1.5) | (1.3) | |
| Amusement | % | (2.0) | +6.9 | +8.9 | (3.6) | (2.9) | (4.4) | (0.8) | (2.3) | (2.6) | |
| Karaoke, etc. ※ | % | +3.8 | +5.7 | +1.9 | +6.3 | +5.1 | +2.5 | +1.4 | +1.9 | +3.2 | |
| Total sales | % | (0.7) | +6.6 | +7.3 | (1.5) | (1.1) | (2.6) | (0.4) | (1.3) | (1.2) | |
| No. of existing shops in the USA (at the end of every term) | | 10 | 10 | — | 11 | 11 | 11 | 13 | 13 | 13 | |

[Note] In calculation of sales plan exchange rate \$1 = ¥110.00 is used, in calculation of sales actual exchange rate \$1 = ¥111.08 is used.

※ Karaoke etc. sales is mostly food & beverage sales.

Term 2018.3 Quarterly consolidated Actual and plan



Plan announced on May 9, 2017

(Unit ¥bn) ※figures are rounded down to the nearest 10 million

| | | | | | | | | | Term |
|---------------------------------|--------|--------|--------|--------|-------------|--------|--------|-------------|--------|
| | 1st Q | | | 2nd Q | 1st Q~2nd Q | 3rd Q | 4th Q | 3rd Q~4th Q | |
| | Plan | Actual | Differ | Plan | Plan | Plan | Plan | Plan | |
| Total sales | 21.31 | 21.37 | +0.06 | 23.23 | 44.55 | 20.58 | 27.06 | 47.65 | 92.20 |
| Cost of sales | 19.76 | 19.84 | +0.08 | 20.35 | 40.12 | 20.63 | 22.06 | 42.69 | 82.82 |
| Gross margin | 1.55 | 1.53 | (0.02) | 2.87 | 4.42 | (0.05) | 5.00 | 4.95 | 9.38 |
| S.G.A. expenses | 0.54 | 0.55 | +0.01 | 0.55 | 1.09 | 0.56 | 0.54 | 1.11 | 2.21 |
| Operating income | 1.01 | 0.97 | (0.03) | 2.32 | 3.33 | (0.62) | 4.45 | 3.83 | 7.17 |
| Non-operating income & expenses | (0.11) | (0.09) | +0.01 | (0.12) | (0.23) | (0.13) | (0.10) | (0.23) | (0.47) |
| Ordinary income | 0.90 | 0.88 | (0.02) | 2.19 | 3.10 | (0.75) | 4.35 | 3.60 | 6.70 |
| Ordinary income margin | 4.2% | 4.1% | (0.1)% | 9.5% | 7.0% | (3.7)% | 16.1% | 7.6% | 7.3% |
| Extraordinary income & loss | (0.10) | (0.06) | +0.03 | (0.10) | (0.20) | (0.10) | (1.40) | (1.50) | (1.70) |
| Net income before tax | 0.80 | 0.81 | +0.01 | 2.09 | 2.90 | (0.85) | 2.95 | 2.10 | 5.00 |
| Corporate tax | 0.47 | 0.46 | (0.00) | 0.65 | 1.12 | (0.12) | 0.40 | 0.28 | 1.40 |
| Net income (by Quarter) | 0.33 | 0.35 | +0.02 | 1.44 | 1.78 | (0.73) | 2.55 | 1.82 | 3.60 |

Term 2018.3 Consolidated plan Cash flow



No change since announcement on May 9, 2017 has been made.

※figures are rounded down to the nearest 10 million

| | | Unit | Term 2017.3 Actual | Term 2018.3 Plan |
|-----------------------------------------|----------------------------------------------------------------------------------------|---------------|--------------------|------------------|
| Cash | Net income | ¥bn | 2.73 | 3.60 |
| | Income tax adjustment ① (provision / payment / refund / refund receivable in total) | ¥bn | +1.19 | +1.56 |
| | Non-cash loss (impairment loss, etc.) | ¥bn | +2.27 | +1.70 |
| | Dividend | ¥bn | (1.90) | (1.90) |
| | Depreciation (excluded lease depreciation) ② | ¥bn | +3.76 | +4.13 |
| | Simplified cash flow | ¥bn | +8.05 | +9.09 |
| | Equipment investment (excluded finance lease)③ | ¥bn | (5.12) | (6.70) |
| | Expenditure for security deposit | ¥bn | +0.52 | +0.20 |
| | Increase in cash due to sale of existing shops④ | ¥bn | +1.46 | — |
| | Simplified free cash flow | ¥bn | +4.91 | +2.59 |
| | Cash reserve | ¥bn | 20.19 | 19.79 |
| | Interest-bearing liabilities | ¥bn | 16.44 | 13.44 |
| Net interest-bearing liabilities | ¥bn | (3.75) | (6.35) | |

(Note) **Term 2017.3 Actual:**

- ① Breakdown of income tax adjustment +¥1.19bn
◆ Provision+¥0.85bn, refund +¥0.34bn
- ② Breakdown of depreciation···Japan: ¥2.87bn / The USA: ¥0.88bn
- ③ Breakdown of equipment investment +¥5.12bn
◆ New shops: ¥3.82bn (Japan: 2 shops / ¥0.65bn, the USA: 6 shops / ¥3.16bn)
◆ Existing shops: ¥1.30bn (Japan: ¥1.24bn, the USA: ¥0.06bn) remodeling, etc.
- ④ Sale-and-leaseback of 2 shops is implemented in Term 2017.3.

Term 2018.3 Plan:

- ① Breakdown of income tax adjustment +¥1.56bn
◆ Provision+¥1.40bn, payment +¥0.16bn
- ② Breakdown of depreciation···Japan: ¥2.70bn / The USA: ¥1.43bn
- ③ Breakdown of equipment investment +¥6.70bn
◆ New shops: ¥4.70bn (Japan: 1 shop / ¥0.40bn, the USA: 9 shops / ¥4.30bn)
◆ Existing shops: ¥2.00bn (Japan: ¥1.95bn, the USA: ¥0.05bn) remodeling, etc.

Trend in P/L status



Trend in P / L (Consolidated)

No change since announcement on May 9, 2017 has been made.

(Figures below indicated are ignored)

| Term | 2009.3 | 2010.3 | 2011.3 | 2012.3 | 2013.3 | 2014.3 | 2015.3 | 2016.3 | 2017.3 | 2018.3 Plan |
|---------------------------------|---------|---------|-----------|---------|---------|-----------|----------|---------|---------|-------------|
| No. of shops at the end of term | 94 | 105 | 109 | 110 | 113 | 114 | 118 | 122 | 122 | 132 |
| Total sales | ¥77.9bn | ¥82.1bn | ¥84.3bn | ¥89.5bn | ¥85.9bn | ¥84.2bn | ¥83.9bn | ¥83.5bn | ¥87.7bn | ¥92.2bn |
| Operating income | ¥13.6bn | ¥12.0bn | ¥11.4bn | ¥16.0bn | ¥11.5bn | ¥10.0bn | ¥6.6bn | ¥6.3bn | ¥6.6bn | ¥7.1bn |
| Ordinary income | ¥9.7bn | ¥7.8bn | ¥6.9bn | ¥11.4bn | ¥8.2bn | ¥7.8bn | ¥6.1bn | ¥5.4bn | ¥5.8bn | ¥6.7bn |
| Ordinary income margin | 12.6% | 9.6% | 8.2% | 12.8% | 9.6% | 9.3% | 7.3% | 6.5% | 6.7% | 7.3% |
| Net income | ¥3.9bn | ¥3.3bn | ¥(12.6)bn | ¥2.7bn | ¥0.6bn | ¥(19.7)bn | ¥(4.5)bn | ¥0.4bn | ¥2.7bn | ¥3.6bn |

Trend in P / L (Japan)

| Term | 2009.3 | 2010.3 | 2011.3 | 2012.3 | 2013.3 | 2014.3 | 2015.3 | 2016.3 | 2017.3 | 2018.3 Plan |
|---------------------------------|---------|---------|-----------|---------|---------|-----------|----------|---------|---------|-------------|
| No. of shops at the end of term | 94 | 105 | 108 | 109 | 111 | 111 | 113 | 113 | 107 | 108 |
| Total sales | ¥77.9bn | ¥82.1bn | ¥83.9bn | ¥89.0bn | ¥85.1bn | ¥82.9bn | ¥81.9bn | ¥78.3bn | ¥80.5bn | ¥80.8bn |
| Operating income | ¥13.6bn | ¥12.0bn | ¥11.4bn | ¥16.0bn | ¥11.5bn | ¥10.0bn | ¥6.7bn | ¥6.0bn | ¥6.1bn | ¥6.4bn |
| Ordinary income | ¥9.7bn | ¥7.8bn | ¥7.0bn | ¥11.4bn | ¥8.2bn | ¥7.8bn | ¥6.2bn | ¥5.1bn | ¥5.4bn | ¥6.0bn |
| Ordinary income margin | 12.6% | 9.6% | 8.3% | 12.8% | 9.7% | 9.4% | 7.6% | 6.6% | 6.7% | 7.4% |
| Net income | ¥3.9bn | ¥3.3bn | ¥(12.5)bn | ¥2.7bn | ¥0.6bn | ¥(19.6)bn | ¥(4.4)bn | ¥0.2bn | ¥2.8bn | ¥3.4bn |

Trend in P / L (The USA)

| Term | 2009.3 | 2010.3 | 2011.3 | 2012.3 | 2013.3 | 2014.3 | 2015.3 | 2016.3 | 2017.3 | 2018.3 Plan |
|---------------------------------|--------|--------|----------|--------|----------|----------|----------|--------|----------|-------------|
| No. of shops at the end of term | | | 1 | 1 | 2 | 3 | 5 | 9 | 15 | 24 |
| Total sales | | | ¥0.3bn | ¥0.5bn | ¥0.7bn | ¥1.2bn | ¥1.9bn | ¥5.1bn | ¥7.2bn | ¥11.4bn |
| Operating income | | | ¥(0.0)bn | ¥0.0bn | ¥0.0bn | ¥(0.0)bn | ¥(0.0)bn | ¥0.2bn | ¥0.4bn | ¥0.7bn |
| Ordinary income | | | ¥(0.0)bn | ¥0.0bn | ¥(0.0)bn | ¥(0.0)bn | ¥(0.0)bn | ¥0.2bn | ¥0.4bn | ¥0.7bn |
| Ordinary income margin | | | — | 2.6% | — | — | — | 4.7% | 6.1% | 6.1% |
| Net income | | | ¥(0.0)bn | ¥0.0bn | ¥(0.0)bn | ¥(0.0)bn | ¥(0.0)bn | ¥0.2bn | ¥(0.1)bn | ¥0.1bn |

Trend in year-on-year existing shop sales (Japan)



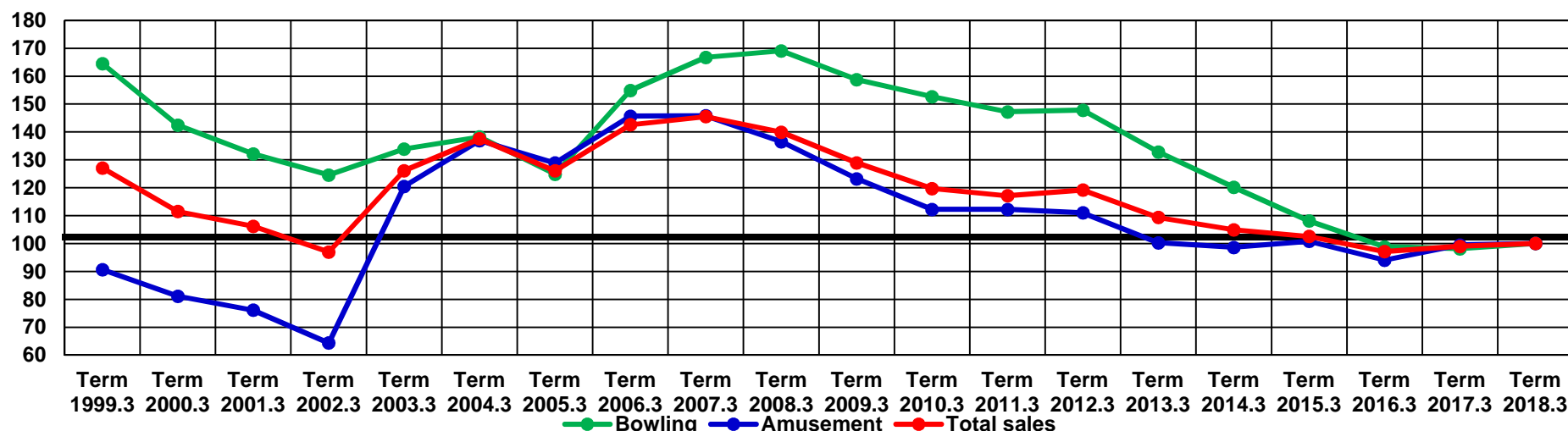
No change since announcement on May 9, 2017 has been made.

(Unit: %)

| Term | 1999.3 | 2000.3 | 2001.3 | 2002.3 | 2003.3 | 2004.3 | 2005.3 | 2006.3 | 2007.3 | 2008.3 | 2009.3 | 2010.3 | 2011.3 | 2012.3 | 2013.3 | 2014.3 | 2015.3 | 2016.3 | 2017.3 | 2018.3 Plan |
|-----------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------------|
| Bowling | (0.5) | (10.2) | (7.8) | (6.1) | +7.0 | +3.1 | (10.7) | +19.4 | +7.1 | +1.4 | (6.5) | (4.0) | (3.7) | +0.4 | (11.3) | (10.5) | (11.2) | (9.4) | (0.7) | +1.9 |
| Amusement | (5.2) | (6.3) | (6.6) | (18.3) | +46.6 | +12.0 | (6.2) | +11.5 | +0.1 | (6.8) | (10.8) | (9.8) | +0.0 | (1.1) | (10.7) | (1.7) | +2.2 | (7.2) | +5.5 | +0.5 |
| Karaoke | - | - | - | - | - | - | - | (4.5) | +4.0 | (1.2) | (7.3) | (13.1) | +3.4 | +15.8 | (3.7) | (1.8) | +0.4 | (7.4) | +0.6 | +0.7 |
| Spo-cha | - | - | - | - | - | - | - | - | - | (16.1) | (9.8) | (9.2) | (4.5) | +7.5 | +0.2 | +5.1 | +3.7 | +5.0 | (2.5) | +0.8 |
| Others | (2.5) | +13.9 | +37.3 | +7.8 | +21.5 | +13.7 | (14.3) | (11.3) | (9.2) | +13.2 | +11.4 | (3.9) | (14.5) | +1.3 | (6.6) | (9.9) | (1.8) | +9.9 | +1.2 | +1.0 |
| Total sales | (2.5) | (7.6) | (5.0) | (9.5) | +23.1 | +8.3 | (9.1) | +11.6 | +2.0 | (4.0) | (8.5) | (7.7) | (2.2) | +1.7 | (9.0) | (4.2) | (2.3) | (5.6) | +1.9 | +1.0 |
| No. of existing shops | 6 | 10 | 19 | 25 | 38 | 39 | 40 | 46 | 57 | 69 | 79 | 89 | 104 | 106 | 108 | 111 | 111 | 112 | 105 | 107 |

(Unit: %)

Trend in year-on-year existing shop sales Japan (Term 2018.3 is 100 basis)



[Note] Karaoke sales for term 2001.3~2005.3 are included to "Others".

[Note] The USA shops are excluded.

Trend in assets, etc. (consolidated)



No change since announcement on May 9, 2017 has been made.

(Figures below indicated measurement unit are ignored)

| Term | 2009.3 | 2010.3 | 2011.3 | 2012.3 | 2013.3 | 2014.3 | 2015.3 | 2016.3 | 2017.3 | 2018.3 Plan |
|----------------------------------------------------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------------|
| Total assets | ¥216.0bn | ¥251.2bn | ¥252.1bn | ¥228.2bn | ¥206.2bn | ¥127.1bn | ¥111.5bn | ¥104.5bn | ¥101.7bn | ¥101.6bn |
| Net assets | ¥72.3bn | ¥85.6bn | ¥79.0bn | ¥79.8bn | ¥78.7bn | ¥57.5bn | ¥51.6bn | ¥49.7bn | ¥50.8bn | ¥52.5bn |
| Net assets ratio | 33.5% | 34.1% | 31.3% | 35.0% | 38.2% | 45.3% | 46.3% | 47.6% | 50.0% | 51.7% |
| Cash reserve | ¥21.5bn | ¥30.8bn | ¥22.7bn | ¥29.4bn | ¥25.3bn | ¥25.1bn | ¥27.7bn | ¥23.1bn | ¥20.1bn | ¥19.7bn |
| Interest-bearing liabilities | ¥117.9bn | ¥138.8bn | ¥136.1bn | ¥110.9bn | ¥90.2bn | ¥36.8bn | ¥27.0bn | ¥22.8bn | ¥16.4bn | ¥13.4bn |
| Guarantee debts ① | ¥41.9bn | ¥31.8bn | ¥8.2bn | — | — | — | — | — | — | — |
| Net interest-bearing liabilities ② | ¥138.3bn | ¥139.8bn | ¥121.6bn | ¥81.4bn | ¥64.9bn | ¥11.6bn | ¥(0.6)bn | ¥(0.3)bn | ¥(3.7)bn | ¥(6.3)bn |
| Lease liabilities | ¥27.1bn | ¥25.9bn | ¥28.4bn | ¥27.3bn | ¥24.6bn | ¥19.6bn | ¥16.3bn | ¥16.0bn | ¥17.9bn | ¥19.1bn |
| Net interests-bearing liabilities ③ including balance lease liabilities | ¥165.4bn | ¥165.8bn | ¥150.1bn | ¥108.8bn | ¥89.5bn | ¥31.2bn | ¥15.6bn | ¥15.6bn | ¥14.2bn | ¥12.8bn |
| New lease contract amount | ¥14.5bn | ¥12.2bn | ¥13.7bn | ¥10.6bn | ¥9.1bn | ¥8.1bn | ¥7.1bn | ¥8.8bn | ¥10.9bn | ¥10.5bn |

(Note) ① Guarantee debts...loans made by subsidiaries during development periods for which ROUND ONE Corporation is jointly and severally liable. These loans will be repaid after shop openings, etc. and guarantee debts will eliminate. However, these loans are classified as interest-bearing liabilities because they are switched to long-term loans.

② "Net interest-bearing liabilities"...("Interest-bearing liabilities" + "Guarantee debts") – "Cash reserve".

③ "Net interest-bearing liabilities including balance lease liabilities"..."Net interest-bearing liabilities" + "Lease liabilities".

※ The lease above indicates finance lease for amusement machines and karaoke machines.

Measures taken for existing shops



◆Price revision (price raise) implementation (starting May 1, 2017)◆

- Bowling: 2 Games package fee ¥50 raise, All you can bowl fee ¥90 raise
- Karaoke: Room fee ¥30 raise, Free time fee ¥60 raise
- Spo-cha: all fees ¥100 raise
(May differ according to shop, member rank, age and time zone)

◆Events implementation◆

- Giveaway of original straps using popular "Golden Bomber" image (Visual kei "air" band) involved in TV commercial (only to the groups of 8 or more bowling, karaoke, spo-cha users)
- Cash-back to event achievers (¥1,000)
Bowling: Same score 7 times challenge, Perfect score 300 challenge
Karaoke: Match score digits challenge
- Free campaign
Bowling & Karaoke: every elementary school age or under child accompanied by one fee-paying adult plays for free

◆Bowling New custom bowling balls for kids on sale◆

- Speed-oriented and spin-oriented kids bowling balls on sale
(To increase family visitors repeat rate)

◆"Bowling for Health" lessons (Bringing up 150 league bowlers in every shop)◆

- 150 bowlers in every shop×104 shops=16 thousand bowlers is a target
(At the present time 14 thousand bowlers)

◆Installment of new amusement machines◆

- [UFO CATCHER TRIPLE] (SEGA) planned to be installed by the end of November

◆Larger screen monitors installation in karaoke rooms◆

- All of room monitors replacement (42 inches ⇒ 65 inches)

◆Spo-sha Airpolin introduction in all shops with Spo-cha area◆

- Introduced in 31 shops at the present time, planned to be installed in all shops with Spo-cha area by the end of November



【Custom bowling balls for kids】



【UFO CATCHER TRIPLE】



【Airpolin】

New shops scheduled



New shop openings planned in term 2018.3

(The USA: 10 or more shop openings per year is a target)

| | Opening date | Nation | Shop name / region | Shop type | Operating floor area |
|----|---------------------|---------|-----------------------------------------------------------------|--------------------------------------------------|----------------------|
| 1 | July 2017 (opened) | The USA | Broadway / Hicksville, New York | Standard, Roadside (Within mega shopping center) | 50,604sq. ft. |
| 2 | September 2017 | Japan | (Tentative name) Kichijoji / Musashino, Tokyo | Standard, Station front | 71,601sq. ft. |
| 3 | Late September 2017 | The USA | (Tentative name) Crystal Run Galleria / Middletown, New York | Standard, Roadside (Within mega shopping center) | 46,085sq.ft. |
| 4 | Late October 2017 | The USA | (Tentative name) Great Lakes Crossings / Auburn Hills, Michigan | Standard, Roadside (Within mega shopping center) | 51,743sq.ft. |
| 5 | Autumn 2017 | The USA | (Tentative name) Northwoods / Peoria, Illinois | Standard, Roadside (Within mega shopping center) | 58,825sq.ft. |
| 6 | Winter 2018 | The USA | (Tentative name) Four Seasons / Greensboro, North Carolina | Standard, Roadside (Within mega shopping center) | 61,708sq.ft. |
| 7 | Spring 2018 | The USA | (Tentative name) South Towne Center / Sandy, Utah | Standard, Roadside (Within mega shopping center) | 47,900sq. ft. |
| 8 | Spring 2018 | The USA | (Tentative name) Maine Mall / Portland, Maine | Standard, Roadside (Within mega shopping center) | 44,056sq.ft. |
| 9 | Spring 2018 | The USA | (Tentative name) Millcreek Mall / Erie, Pennsylvania | Standard, Roadside (Within mega shopping center) | 50,747sq.ft. |
| 10 | Spring 2018 | The USA | (Tentative name) Great Lakes Mall / Mentor, Ohio | Standard, Roadside (Within mega shopping center) | 50,996sq.ft. |

New shop openings planned in term 2019.3 and after

| | Opening date | Nation | Shop name / region | Shop type | Operating floor area |
|---|--------------|---------|--------------------------------------------------------------|--------------------------------------------------|----------------------|
| 1 | Spring 2018 | The USA | (Tentative name) Coronado Center / Albuquerque, New Mexico | Standard, Roadside (Within mega shopping center) | 48,505sq.ft. |
| 2 | Summer 2018 | The USA | (Tentative name) Square One / Saugus, Massachusetts | Standard, Roadside (Within mega shopping center) | 44,590sq.ft. |
| 3 | Summer 2018 | The USA | (Tentative name) North Riverside / North Riverside, Illinois | Standard, Roadside (Within mega shopping center) | 45,836sq.ft. |
| 4 | Summer 2019 | The USA | (Tentative name) Promenade Temecula / Temecula, California | Standard, Roadside (Within mega shopping center) | 50,071sq.ft. |

Existing shops and principles of conditions for future shops openings in the USA



[Operating 16 shops as of the end of July, 2017]

| | Opening date | Shop name / region | Shop type | Operating floor area | Classification by profitability |
|----|----------------|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|----------------------|---------------------------------|
| 1 | August 2010 | Puente Hills / Los Angeles, California | Standard, Roadside (In Puente Hills Mall) http://www.puentehills-mall.com/ | 60,000sq.ft. | High profitability shop |
| 2 | September 2012 | Moreno Valley / Riverside, California | Standard, Roadside (In Moreno Valley Mall) http://www.morenovalleymall.com/ | 44,448sq.ft. | Average profitability shop |
| 3 | August 2013 | Lakewood / Lakewood, California | Standard, Roadside (In Lakewood Center Mall) http://www.shoplakewoodcenter.com/ | 43,523sq.ft. | High profitability shop |
| 4 | October 2014 | Stratford / Chicago, Illinois | Standard, Roadside (In Stratford Square Mall) http://www.stratfordmall.com/ | 39,893sq.ft. | Low profitability shop |
| 5 | December 2014 | Arlington Parks / Arlington, Texas | Standard, Roadside (In The Parks at Arlington) http://www.theparksatarlington.com/ | 64,911sq.ft. | Average profitability shop |
| 6 | May 2015 | Mainplace / Santa Ana, California | Standard, Roadside (In Westfield Mainplace) http://www.shopmainplacemall.com/ | 40,676sq.ft. | High profitability shop |
| 7 | July 2015 | Southcenter / Seattle, Washington | Standard Roadside (In Westfield Southcenter) http://www.westfield.com/southcenter/ | 41,672sq.ft. | Average profitability shop |
| 8 | September 2015 | Eastridge / San Jose, California | Standard Roadside (In Eastridge Shopping Center) http://www.eastridgecenter.com/ | 52,064sq. ft. | Average profitability shop |
| 9 | December 2015 | Silver City / Taunton, Massachusetts ✘ | Standard Roadside (In Silver City Galleria) http://www.silvercitygalleria.com/ | 64,697sq. ft. | Low profitability shop |
| 10 | May 2016 | Grapevine Mills / Dallas, Texas ✘ | Standard Roadside (In Grapevine Mills) http://www.simon.com/mall/grapevine-mills/ | 81,316sq.ft. | Average profitability shop |
| 11 | August 2016 | Sunvalley / Concord, California | Standard Roadside (In Sunvalley Shopping Center) http://www.shopsunvalley.com/ | 47,295sq. ft. | High profitability shop |
| 12 | December 2016 | Exton / Exton, Pennsylvania | Standard Roadside (In Exton Square Mall) https://www.extonsquare.com/ | 59,537sq.ft. | Average profitability shop |
| 13 | January 2017 | Southwest Plaza / Littleton, Colorado | Standard Roadside (In Southwest Plaza Mall) https://www.southwestplaza.com/ | 66,085sq. ft. | Average profitability shop |
| 14 | March 2017 | Stonecrest / Lithonia, Georgia | Standard Roadside (In The Mall At Stonecrest) http://www.mallatstonecrest.com/ | 50,533sq.ft. | High profitability shop |
| 15 | March 2017 | Fox Valley / Aurora, Illinois | Standard Roadside (In Fox Valley Mall) http://www.shopfoxvalleymall.com/ | 51,708sq.ft. | Average profitability shop |
| 16 | July 2017 | Broadway / Hicksville, New York | Standard Roadside (Broadway Commons Center) http://atbroadwaycommons.com/ | 50,604sq.ft. | High profitability shop |

Classification by color in the table on the next page refers to “High”, “Average” and “Low” profitability shop. Classification by color is updated once a year during settlement of accounts.

✘ Kids Play Zone is operated in some areas. Opened in Grapevine Mills in October, 2016 and in Silver City in March, 2017.

Existing shops and principles of conditions for future shops openings in the USA



[Principles of conditions for future shops openings]

No change since announcement on May 9, 2017 has been made.

| | |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Expansion candidates | Opening in large shopping malls throughout the USA (There are approximately 900 malls that apply to our conditions) |
| Operating floor area | 42,000sq.ft.~64,000sq.ft. |
| Demographics | Over 150,000 within 5 miles, Over 400,000 within 10 miles |
| Target customers | Shopping mall customers (young adults at night, mainly college students) / Projected male – female rate is 50 - 50 |
| Avg. spending / customer | About \$14 |
| Sales share | Amusement 60%, Bowling 18%, Food & beverage 17%, Karaoke (excluding Food & Beverage) 2%, Other 3% |
| Investment amount | About \$6 million Breakdown: Facility related \$2.4 million, Amusement machines \$2.2 million, Other facilities (bowling, etc.) \$1.0 million, Opening expenses \$0.4 million |
| Lease fee conditions | Amusement machines depreciation in 3 years, Other facilities (Bowling) depreciation in 7 years ⇒ after 4th year lease fees become less which helps the profitability |

[Present state: facility investment and budget for different operating floor area] (Note 1)

※ Figures are updated once a year during settlement of accounts

| Classification by profitability | | High profitability shop | Average profitability shop (Note2) | Low profitability shop |
|---------------------------------|-----------------------------------|-------------------------|------------------------------------|------------------------|
| Investment amount | Initial investment amount | \$6.00mn | \$6.00mn | \$5.50mn |
| Year budget | Total sales | \$7.30mn | \$5.95mn | \$3.60mn |
| | Operating income (1st year) | \$1.10mn | \$0.20mn | \$(0.70)mn |
| | Operating income (2nd~3rd year) | \$1.50mn | \$0.55mn | \$(0.35)mn |
| | Operating income (4th year~) | \$2.00mn | \$1.00mn | \$0.10mn |
| | Operating income rate (4th year~) | 27.4% | 16.8% | 2.8% |

(Note 1) Operating income includes opening expenses occurred in initial year. Except head office expenses.

(Note 2) Average profitability shop figures are average of all shops.

Statistical snapshot of shops



Trend in number of shops

| Japan | ~Term 2008.3 | Term 2009.3 | Term 2010.3 | Term 2011.3 | Term 2012.3 | Term 2013.3 | Term 2014.3 | Term 2015.3 | Term 2016.3 | Term 2017.3 | Term 2018.3 |
|---------------------------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| No. of shop openings | 88 | 13 | 11 | 3 | 1 | 3 | — | 2 | 1 | 2 | 1 |
| No. of shop closings | ※ 5 | ※ 2 | — | — | — | ※ 1 | — | — | ※ 1 | ※ 8 | — |
| No. of shops at the end of term | 83 | 94 | 105 | 108 | 109 | 111 | 111 | 113 | 113 | 107 | 108 |

| The USA | ~Term 2008.3 | Term 2009.3 | Term 2010.3 | Term 2011.3 | Term 2012.3 | Term 2013.3 | Term 2014.3 | Term 2015.3 | Term 2016.3 | Term 2017.3 | Term 2018.3 |
|---------------------------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| No. of shop openings | — | — | — | 1 | — | 1 | 1 | 2 | 4 | 6 | 9 |
| No. of shop closings | — | — | — | — | — | — | — | — | — | — | — |
| No. of shops at the end of term | — | — | — | 1 | 1 | 2 | 3 | 5 | 9 | 15 | 24 |

| Consolidated | ~Term 2008.3 | Term 2009.3 | Term 2010.3 | Term 2011.3 | Term 2012.3 | Term 2013.3 | Term 2014.3 | Term 2015.3 | Term 2016.3 | Term 2017.3 | Term 2018.3 |
|---------------------------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| No. of shops at the end of term | 83 | 94 | 105 | 109 | 110 | 113 | 114 | 118 | 122 | 122 | 132 |

(Note) ※ Reason for closure of 17 shops (expiration of contract periods: 7 shops, removing intra-company competition: 6 shops, construction of new large shops in the neighborhood: 2 shops, reconstruction: 1 shop, closure of trial shop (trial period about 2 years): 1 shop).

Japan 107 shops (at the end of June 2017) Number of shops breakdown

(Note) All the USA shops are standard roadside type, leased shops only.

| Shops by shop type | | | | No. of shops at the end of term |
|--------------------|----------|----------|----------|---------------------------------|
| Standard | | Stadium | | |
| Downtown | Roadside | Downtown | Roadside | |
| 10 | 50 | 1 | 46 | 107 |

| Shops by ownership | | No. of shops at the end of term |
|--------------------|-----------|---------------------------------|
| Leased shops | Own shops | |
| 83 | 24 | 107 |

(Note) Own shops include 8 shops with owning right for land & building, and 16 shops with owning right for building with tenants.

Consolidated 122 shops (at the end of June 2017) Number of shops breakdown

| Area | Japan | | | | | | | The USA | Total |
|--------------|-------------------|-----------------------|-------|---------------|--------|-------------------|------------------|---------|--------|
| | Hokkaido / Tohoku | Hokuriku / Koshinetsu | Kanto | Chubu / Tokai | Kansai | Chugoku / Shikoku | Kyushu / Okinawa | | |
| No. of shops | 11 | 4 | 32 | 12 | 29 | 8 | 11 | 15 | 122 |
| Share | 9.0% | 3.3% | 26.2% | 9.8% | 23.8% | 6.6% | 9.0% | 12.3% | 100.0% |

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docomo, Soft Bank, au

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