

Overall Activity billings 2008

with the percentage of Diversified Services out of Overall billings

Rank 08	Media agency networks / Groups	Overall Activity billings		Diversified Services				Buying billings		
		industry shares	definitive 2008 US\$m	definitive 2008 US\$m	D.S. Staff number	Rank 08	% Diversified Services	definitive 2008 US\$m	Rank 08	industry shares
1	OMD Group / Omnicom Media Group	17.5	1 304	282	94	2	22%	1 022	2	15.4
2	Starcom MediaVest Group / VivaKi	15.8	1 174	117	39	5	10%	1 057	1	15.9
3	Mindshare / GroupM	9.5	707	291	97	1	41%	416	6	6.3
4	Vizeum / Aegis Media	8.2	608	135	45	4	22%	473	3	7.1
5	MediaCom / GroupM	7.9	586	141	47	3	24%	445	4	6.7
6	Mediaedge:cia / GroupM	7.0	524	87	29	6=	17%	437	5	6.6
7	Initiative / Mediabrands	6.3	472	54	18	10	11%	418	7	6.3
8	ZenithOptimedia / VivaKi	5.6	415	42	14	11	10%	373	8	5.6
9	MPG / Havas Media	5.3	394	18	6	14	5%	376	9	5.7
10	Dentsu-Smart / Dentsu	5.0	369	69	23	8	19%	300	11	4.5
11	Maxus / GroupM	3.8	285	39	13	12	14%	246	13	3.7
12	Carat / Aegis Media	3.4	251	57	19	9	23%	194	16	2.9
13 =	Universal UM / Mediabrands	2.8	209	27	9	13	13%	182	17	2.7
13 =	PHD / Omnicom Media Group	2.0	146	21	7	6=	14%	125	18	1.9
TOTAL 13 Networks + 1 major independent		100	7 444	1 380	460	-	19%	6 064	-	91.3

A-The Buying billings definitive 2008 are based on the agency client lists 2008 established by RECMA

B-The Diversified Services billings methodology is based on staff number multiplied by a ratio of **US\$ 3m / head**
 The Group's partners are counted for a third of their staff number (see table T31)

C-the Overall Activity billings figures result from the sum of the Diversified Services billings + Buying billings

by Group of networks

Rank 08	Groups / media organization entities	Overall Activity		Diversified Services				Buying billings		
		industry shares	definitive 2008 US\$m	definitive 2008 US\$m	D.S. Staff number	Rank 08	% Diversified Services	definitive 2008 US\$m	Rank 08	industry shares
1	GroupM	28.2	2 102	558	186	1	27%	1 544	1	23.3
2	Publicis / VivaKi	21.4	1 589	159	53	4	10%	1 430	2	21.5
3	Omnicom Media Gr / OMG	19.5	1 450	303	101	2	21%	1 147	3	17.3
4	Aegis Media	11.6	859	192	64	3	22%	667	4	10.0
5	Interpublic / Mediabrands	9.1	681	81	27	5	12%	600	5	9.0
6	Havas Media	5.3	394	18	6	6	5%	376	6	5.7

RECMA Global Billings Rankings Definitive 2008 – July 2009

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Buying billings 2008 by Agency BRAND

RANK 08	Market Shares 2008	- Agency brands part of the networks with an unified management / Media branches - Independents / non-part of the networks	definitive 2008 US\$m	definitive 2007 US\$m restated	definitive 2006 US\$m restated	STAFF 2008
1	6,0%	Starcom / VivaKi	642	534	458	58
2	4,4%	Vizeum / Aegis Media	473	278	179	60
3	4,1%	Mediaedge:cia / GroupM	437	324	237	90
4	3,9%	Initiative / Mediabrands	418	277	277	98
5	3,9%	Mindshare / GroupM	416	217	181	167
6	3,6%	Optimum Media OMD / OMG (incl. M2M)	386	263	207	85
7	3,5%	MPG / Havas Media (incl. Arena)	376	286	133	85
8	3,5%	ZenithOptimedia / VivaKi	373	244	180	60
9	3,4%	MediaCom / GroupM	360	147	91	83
10	3,1%	MediaVest / VivaKi	338	271	245	62
11	2,8%	Dentsu-Smart / Dentsu Inc.	300	263	195	42
12	2,7%	APR Media Services part of Optimum Media OMD Gr / OMG	288	212	143	63
13	2,3%	Maxus / GroupM	246	221	178	53
14	2,0%	OMD Media Direction part of OMD MD PHD Gr / OMG (incl. Media Instinct)	220	166	183	82
15	1,8%	Carat / Aegis Media	194	115	99	33
16	1,7%	Universal UM / Mediabrands	182	145	149	41
17	1,6%	Maxima / Maxima Communication Group *	171	-	-	90
18	1,2%	PHD part of OMD MD PHD Gr / OMG	125	82	63	48
19	0,9%	LBL Communication Group / LBL Communication Gr. *	95	-	-	73
20	0,8%	MC2 part of MediaCom Gr / GroupM	85	71	90	27
21	0,7%	Medialect / Medialect	80	65	65	35
22	0,7%	Media First / Twiga Group	78	60	57	15
23	0,7%	Starlink / VivaKi *	77	-	-	52
24	0,6%	Rapp Media Team part of Optimum Media OMD Gr / OMG	66	47	41	32
25	0,6%	Mediaplan part of Optimum Media OMD Gr / OMG	63	35	19	19
26	0,6%	Sovero Media part of Columbus Media Intl *	60	-	-	82
27	0,4%	Sorec Media / Sorec Group	44	44	44	48
28	0,4%	Movie / Movie*	41	-	-	46
29	-	Media Arts Group / Media Art Group *	Nc	-	-	-
A	62%	Total 29 agency brands Media agency industry according to RECMA	6 633	4 367	3 514	1 729
B	38%	Other independents / in-house	4 103	4 590	3 140	
	100%	TOTAL Russia ad spending (in traditional media)	10 736	8 957	6 654	

* Included for the first time in the RECMA ranking

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Buying billings 2008 by GROUP of Networks

Owner groups	Rank 2008	Media agency industry shares 2008 *	Organization media entities Media Networks incl. agency brands (non part of the networks in red)	definitive 2008 US\$m	definitive 2007 US\$m restated	definitive 2006 US\$m restated	STAFF 2008
WPP plc	1	23,3%	GroupM	1 544	980	777	420
	13	3,7%	Maxus	246	221	178	53
	4	6,7%	MediaCom incl. MC2	445	218	181	110
	5	6,6%	Mediaedge:cia	437	324	237	90
	6	6,3%	Mindshare	416	217	181	167
Publicis SA	2	22,0%	VivaKi	1 430	1 049	883	232
	1	15,9%	Starcom MediaVest SMG incl. Starcom, MediaVest and Starlink	1 057	805	703	172
	8	5,6%	ZenithOptimedia	373	244	180	60
Omnicom Inc.	3	17,3%	Omnicom Media Group (OMG)	1 147	805	656	377
	2	15,4%	OMD incl. Optimum Media OMD, OMD Media Direction, APR Media Services, Rapp Media Team, Mediaplan, M2M	1 022	723	593	329
	18	1,9%	PHD	125	82	63	48
Aegis plc	4	10,1%	Aegis Media	667	393	278	93
	16	2,9%	Carat	194	115	99	33
	3	7,1%	Vizeum	473	278	179	60
Interpublic Inc.	5	9,0%	Mediabrand	600	422	426	139
	7	6,3%	Initiative	418	277	277	98
	17	2,7%	Universal UM	182	145	149	41
Havas SA	6	5,7%	Havas Media	376	286	133	85
	-	-	Arena (launched in 08 - included in MPG)	-	-	-	-
	9	5,7%	MPG incl. Arena	376	286	133	85
Major Independents	-	13,1%	Dentsu-Smart, Maxima, LBL Communication Group, Medialect, Media First, Sovero Media, Sorec Media, Movie	869	432	360	
Russia	-	100%	Total media agency industry studied by RECMA	6 633	4 367	3 513	

* The **Media agency industry shares** are based on the total buying billings' figure aggregating all the agency brands included in the RECMA ranking. Hence, the ad spending handled by small independent agencies, media departments of creative agencies or in-house are not taken into account in this study.