

RECMA Overall Billings Rankings 2009 – September 2010

Copyright © 2010 RECMA Reports | All Rights Reserved | Content Cannot Be Reproduced Without Written Permission
 RECMA Inc New York • RECMA Manila • RECMA London • RECMA SA Paris • olivier@recma.com www.recma.com –Sept 6th - 2010- O

T1-42 **Russia** billings 2009 by agency brand

RANK 09	Industry Shares 2009	- Agency brands part of the networks / Media branches - Independents / non-part of the networks	(A)	(B)	(C)	(D&E)		(F)	(G)	(H)
			OVERALL billings 2009 (G+H) \$m	OVERALL billings 2008 \$m	growth 09/08 rounded	STAFF 2009/08		ratio billings /staff 2009 (A/D) \$m/ head	billings 2009 buying \$m RECMA client lists	billings 2009 diversified services \$m
1	8%	Vizeum / Aegis Media	496	472	+5%	65	60	7.6	416	80
2	7.9%	ZenithOptimedia / VivaKi	489	408	+20%	80	76	6.1	473	16
3	7.7%	Optimum Media OMD (incl. M2M) Optimum Media Gr / OMG	478	409	+17%	89	85	5.4	436	42
4	7.0%	Starcom / VivaKi	431	575	-25%	64	74	6.7	413	18
5	6.6%	MediaCom (incl. MC2) / GroupM	408	510	-20%	153	110	2.7	286	122
6	6.5%	Mindshare / GroupM	400	519	-23%	210	167	1.9	252	148
7	6.1%	MEC / GroupM	376	561	-33%	137	90	2.7	274	102
8	5.5%	MediaVest / VivaKi	339	342	-1%	74	74	4.6	325	14
9	5.3%	MPG / affiliated to ADV Group*	330	344	-4%	90	85	3.7	294	36
10	5.3%	Maxus / GroupM	327	250	+31%	100	53	3.3	293	34
11	5.1%	Initiative / affiliated to ADV Group*	314	476	-34%	90	98	3.5	274	40
12	4.2%	Carat (incl. buying for AdOclock) / Aegis Media	257	236	+9%	40	33	6.4	221	36
13	3.6%	Universal UM / affiliated to ADV Group*	220	206	+7%	95	85	2.3	172	48
14	3.4%	OMD Media Direction (incl. Media Instinct) OMD MD PHD Group / OMG	207	201	+3%	82	82	2.5	159	48
15	3.2%	Dentsu Smart (incl. RAVI Media) / SMART Comms.	195	336	-42%	42	42	4.6	157	38
16	3.1%	APR Media Services Optimum Media Gr/OMG	192	267	-28%	53	63	3.6	174	18
17	2.5%	Maxima / Maxima Communication Group	153	199	-23%	60	90	2.6	143	10
18	2.2%	Media Arts Group (incl. Strategist Media and FCB Media) / IPG Mediabrands	135	150	-10%	55	60	2.5	111	24
19	1.8%	PHD part of OMD MD PHD Group / OMG	112	107	+5%	48	48	2.3	88	24
20	1.5%	Arena MagicBox / affiliated to ADV Group* (acquisition of MagicBox by Havas Media in Dec.08)	94	98	-4%	64	64	1.5	82	12
21	1.1%	LBL Comms. / Independent	67	106	-37%	20	25	3.4	57	10
22=	0.9%	Mediaplan Optimum Media OMD Gr / OMG	53	96	-45%	27	19	2.0	49	4
22=	0.9%	Rapp Media Team Optimum Media OMD Gr / OMG	53	106	-50%	31	32	1.7	49	4
24	0.7%	Starlink / VivaKi *	45	65	-31%	38	52	1.2	43	2
-	100%	Total 24 agency brands Media agency industry according to RECMA	6 171	7 039	-12%	1 807	1 667	3.4	5 241	930

Russian advertising expenditure through TV, press, radio and outdoor contracted by 29% in 2009 to 181.1 billion rubles (\$6.2bn), according to AdIndex. The company partnered with TNS and ESPAR-Analitic to produce its annual rankings, using a methodology approved by the Russian Association of Communication Agencies.

*ADV Group is the strategic partner of Interpublic and Havas networks in Russia. ADV Group unites over 40 communications agencies, both independent and those representing two major international advertising holdings companies: Interpublic (Initiative & UM) and Havas (MPG & Arena MagicBox)

RECMA Overall Billings Rankings 2009 – September 2010

Copyright © 2010 RECMA Reports | All Rights Reserved | Content Cannot Be Reproduced Without Written Permission
 RECMA Inc New York • RECMA Manila • RECMA London • RECMA SA Paris • olivier@recma.com www.recma.com – Sept6 - 2010- O

T2-42 **Russia** billings 2009 by Group of networks

Owner groups	RANK 09	Industry Shares 2009	Organization media entities Media Networks incl. agency brands	(A= G+H) OVERALL billings 2009 US\$m	(B) OVERALL billings 2008 US\$m	(C) growth 09/08	(D & E) STAFF 2009/08	(F= A/D) ratio billings /staff 2009	(G) BUYING billings 2009 Client lists 2009 US\$m	(H) diversified services billings 2009
WPP plc	1	24.5%	GroupM	1 511	1 840	-18%	600 420	2.5	1 105	406
	9	5.3%	Maxus	327	250	+31%	100 53	3.3	293	34
	7	6.1%	MEC	376	561	-33%	137 90	2.7	274	102
	5	6.6%	MediaCom incl. MC2	408	510	-20%	153 110	2.7	286	122
	6	6.5%	Mindshare	400	519	-23%	210 167	1.9	252	148
Publicis SA	2	21.1%	VivaKi	1 304	1 390	-6%	256 276	5.1	1 254	50
	2	13.2%	Starcom MediaVest incl. StarLink	815	982	-17%	176 200	4.6	781	34
			of which MediaVest	339	342	-1%	74 74	4.6	325	14
	4	7.9%	ZenithOptimedia	489	408	+20%	80 76	6.1	473	16
Omnicom Inc.	3	17.7%	Omnicom Media omg	1 095	1 186	-8%	330 329	3.3	955	140
	1	15.9%	OMD Group incl. Optimum Media OMD, APR Media Services, Rapp Media Team, MediaPlan, M2M, OMD Media Direction, Media Instinct	983	1 079	-9%	364 363	2.7	867	116
	14	1.8%	PHD	112	107	+5%	48 48	2.3	88	24
Aegis plc	4	12.2%	Aegis Media	753	708	+6%	105 93	7.2	637	116
	11	4.2%	Carat	257	236	+9%	40 33	6.4	221	36
	3	8.0%	Vizeum	496	472	+5%	65 60	7.6	416	80
Interpublic Inc.	5	10.8%	Mediabrand s	669	832	-20%	185 183	3.6	557	112
	10	5.1%	Initiative	314	476	-34%	90 98	3.5	274	40
	12	3.6%	Universal UM	220	206	+7%	95 85	2.3	172	48
	13	2.2%	Media Arts Group (incl. Strategist Media and FCB Media)	135	150	-10%	55 60	2.5	111	24
Havas SA	6	6.9%	Havas Media	424	442	-4%	154 149	2.8	376	48
	15	1.5%	Arena MagicBox	94	98	-4%	64 64	1.5	82	12
	8	5.3%	MPG	330	344	-4%	90 85	3.7	294	36
Major independents (3)	-	6.7%	Dentsu Smart; Maxima; LBL Comms.	415	641	-35%	122 157	3.4	357	58
Russia		100%	Total media agency industry studied by RECMA	6 171	7 039	-12%	1 807 1 667	3.4	5 241	930

RECMA Overall Billings Rankings 2009 – September 2010

Copyright © 2010 RECMA Reports | All Rights Reserved | Content Cannot Be Reproduced Without Written Permission
 RECMA Inc New York • RECMA Manila • RECMA London • RECMA SA Paris • olivier@recma.com www.recma.com – Sept6 - 2010- O

T3-42 **Russia** billings 2009 by **BUYING** group

R A N K 09	Industry Shares 2009	<i>BUYING Groups</i>	BUYING billings 2009	BUYING billings 2008	Growth rate 09/08
		Media Networks incl. agency brands	US\$m	US\$m	
1	23.9%	VivaKi	1 254	1 334	-6%
	14.9%	Starcom MediaVest incl. <i>Starcom; MediaVest and StarLink</i>	781	939	-17%
	9%	ZenithOptimedia	473	395	+20%
2	21.1%	GroupM	1 105	1 317	-16%
	5.6%	Maxus	293	223	+31%
	5.2%	MEC	274	410	-33%
	5.5%	MediaCom incl. <i>MC2</i>	286	357	-20%
	4.8%	Mindshare	252	327	-23%
3	18.2%	Opera (Omnicom)	955	1 038	-8%
	13.5%	Optimum Media OMD Group incl. <i>Optimum Media OMD, APR Media Services, Rapp Media Team, MediaPlan, M2M,</i>	708	799	-11%
	4.6%	OMD MD PHD Group incl. <i>OMD Media Direction, Media Instinct</i>	247	239	+3%
4	15.7%	ADV Group	822	964	-15%
	1.6%	Arena MagicBox	82	85	-4%
	5.2%	Initiative	274	413	-34%
	5.6%	MPG	294	305	-4%
	3.3%	Universal UM	172	161	+7%
5	12.2%	Aegis Media	637	598	+7%
	4.2%	Carat incl. <i>AdOclock</i>	221	203	+9%
	7.9%	Vizeum	416	395	+5%
-	8.9%	<i>Dentsu Smart; Media Arts Group; Maxima; LBL Comms.</i>	468	668	-30%
-	100%	TOTAL 5 Buying Groups + 4 independent agencies	5 241	5 919	-12%