

RECMA Global Billings Rankings 2011 – July 2012

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42-Russia **billings 2011** Methodology

RECMA source & Methodology	Buying billings 2011 are sourced from TNS data and are based on detailed client lists. Overall billings Growth rate 2011/2010 declaration from HQ of each network.
Correction coefficients (discount rates) applied to Buying billings	<ul style="list-style-type: none"> • 3 largest Advertisers in TV L'Oréal,Mars and P&G: -55% on TV & -20% on other media • Other Advertisers: -40% on TV & -20% on other media
Particularities	Forecasts estimate the growth rate related to the ad spends 2011 vs. 2010 around +20 %.
Currency exchange rate	in US\$

Structure of the industry players & determination of the agency brands / sub-brands

RECMA defines an agency brand as a local agency having its own identity, management team, client list and services offerings.

Owner groups / media branch	Networks (13)	Local agency brands (18)	Sub-brands (11) (in traditional media)
WPP / GroupM	Maxus	Maxus	
	MediaCom	MediaCom	MC2
	MEC	MEC	
	Mindshare	Mindshare	
Publicis / VivaKi	Starcom MediaVest Group	Starcom MediaVest Starlink	
	ZenithOptimedia	ZenithOptimedia	
Omnicom / OMG	OMD PHD	OMD OM Group (1)	OMD Optimum Media OMD AMS OMD Mediaplan
		OMD MD/PHD Group	OMD Media Direction Media Instinct PHD
Aegis / Aegis Media	Carat	Carat	
	Vizeum	Vizeum	
	Ad'Oclock	Ad'Oclock	
Interpublic / Mediabrands ADV Group (2)	Initiative	Initiative	
	Universal UM	Universal UM	
Havas / Havas Media ADV Group	MPG	MPG	
	Arena	Arena MagicBox	
INDEPENDENTS / NON-PART OF THE NETWORKS			
Dentsu Inc (3)	Dentsu	Dentsu-Smart	Deni
Sovero Group	part of Columbus Media Intl (4)	Sovero Media	
LBL Comm. Group		LBL Comm. Group	
Twiga comm. Group		Media First	
Media Arts Group		Media Arts Group	The Startegists Media
			FCB Media

(1) Part of OPera which is the Omnicom buying group including an independent agency in Russia

(2)ADV Group is a local buying group

(3)Dentsu is a Japanese group part of the worldwide Top 5 Communication Group

(4)Columbus Media Intl. is an international affiliation of independent media agencies

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Table 1- **42-Russia billings 2011** by agency brand

R A N K 2011	Industry shares 2011	Agency brands part of the networks /Media branches Independents / non-part of the networks	(A= G+H)	(B)	(C)	(D&E)		(F= A/D)	(G)	(H)
			OVERALL Billings 2011 rounded	OVERALL Billings 2010 rounded	Growth rate 11/10 % rounded	STAFF		Ratio Billings/ Staff 2011	Client Lists BUYING Billings 2011	Share of SPECIALIZE D Resources Services 2011
			USD	USD	USD	2011	2010	USD	%	
1	9,0%	OMD Optimum Media / OMD OM Gr	702	505	39%	220	180	3,2	608	14%
2	7,7%	Starcom / VivaKi	599	540	11%	210	184	2,9	535	11%
3	7,5%	Vizeum / Aegis Media	588	560	5%	180	150	3,3	424	28%
4	6,9%	MEC / GroupM	536	510	5%	182	172	2,9	415	22%
5	6,7%	ZenithOptimedia / VivaKi	524	570	-8%	170	160	3,1	445	15%
6	6,5%	MPG / ADV / Havas Media	505	330	53%	183	125	2,8	438	13%
7	5,8%	MediaCom / GroupM	453	365	24%	171	171	2,6	330	27%
8	5,4%	Carat / Aegis Media	420	350	20%	110	90	3,8	299	29%
9	5,3%	Initiative / ADV / Mediabrands	412	280	47%	145	95	2,8	340	17%
10	5,2%	Maxus / GroupM	409	409	0%	153	150	2,7	355	13%
11	4,8%	Mindshare / GroupM	378	344	10%	203	204	1,9	248	35%
12	4,7%	MediaVest / VivaKi	367	340	8%	100	90	3,7	319	13%
13	4,6%	OMD Media Direction incl Media Instinct / OMD MD/PHD Gr	358	221	62%	205	150	1,7	292	18%
14	3,6%	UM / ADV / Mediabrands	280	215	30%	115	90	2,4	195	30%
15	3,2%	Dentsu Smart / SMART Comms .	251	244	3%	60	50	4,2	221	11%
16	2,6%	Arena MagicBox / ADV / Havas Media	200	119	68%	82	64	2,4	172	14%
17	2,4%	OMD AMS / OMD OM Gr	187	127	47%	110	75	1,7	148	19%
18	1,9%	Ad O'Clock / Aegis Media	150	110	36%	62	50	2,4	84	45%
19	1,4%	PHD / OMD MD/PHD Gr	113	115	-2%	78	48	1,4	72	37%
20	1,4%	LBL Comm. / LBL Comm. Group	106	82	29%	45	40	2,4	100	12%
21	1,3%	Starlink / VivaKi	104	49	x2	70	37	1,5	95	7%
22	1,1%	Mediaplan / OMD OM Gr	84	70	20%	60	40	1,4	59	25%
23	1,0%	Media First / TWIGA Comm.	74	72	3%	30	25	2,5	64	10%
	100%	Total 23 brands Media agency industry according to RECMA	7 798	6 527	19%	2 944	2 440	2,6	6 258	20%

For detailed explanation per agency see Technical notes on following page.

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Table 1- **42-Russia billings 2011** by agency brand

Technical notes per agency:

RANK	NETWORK Agency	Declared growth in %	External Sources growth in %	Clients List growth in %	Staff growth in absolute value	RECMA d/e growth Overall	Comments
1	OMD Optimum Media / OMD OM Gr	47%	NA	39%	40	39%	Win of big Wim-Bill-Dann in mid 2011 + Gazprom jan2011
2	Starcom / VivaKi	11%	NA	13%	30	11%	
3	Vizeum / Aegis Media	0%	NA	1%	30	5%	20% because high increase in Spec Res staff
4	MEC / GroupM	5%	NA	4%	10	5%	
5	ZenithOptimedia / VivaKi	-8%	NA	-8%	10	-8%	
6	MPG / ADV / Havas Media	85%	NA	53%	58	53%	Won of big Danone,Heineken and Unimilk in end 2010
7	MediaCom / GroupM	24%	NA	24%	0	24%	
8	Carat / Aegis Media	17%	NA	17%	20	20%	20% because high increase in Spec Res staff
9	Initiative / ADV / Mediabrands	47%	NA	49%	50	47%	Won of big Kalina part of Unilever / Beeline / Euroset in dec 2010
10	Maxus / GroupM	0%	NA	1%	3	0%	
11	Mindshare / GroupM	10%	NA	18%	-1	10%	
12	MediaVest / VivaKi	8%	NA	8%	6	8%	
13	OMD Media Direction <i>incl</i> Media Instinct / OMD MD/PHD Gr	62%	NA	64%	55	62%	Win of MTS planning, Mitsubishi, Life Group
14	UM / ADV/ Mediabrands	30%	NA	33%	25	30%	
15	Dentsu Smart / SMART Comms.	-	NA	3%	10	3%	
4	Arena MagicBox / ADV / Havas Media	68%	NA	69%	18	68%	Major increase of budget from Henkel (TV)
17	OMD AMS / OMD OM Gr	47%	NA	63%	35	47%	Win of L'Etoile (tv) in end 2010
18	AdO'Clock / Aegis Media	36%	NA	38%	12	36%	multiple significant local wins since the beginning of 2010
19	PHD / OMD MD/PHD Gr	-2%	NA	-1%	30	-2%	
20	LBL Comm.	ND	NA	29%	5	29%	
21	Starlink / VivaKi	112%	NA	112%	33	112%	Win of Orimi Trade, Detskiy Mir and Life group
22	Mediaplan / OMD OM Gr	47%	NA	20%	20	20%	
5	Media First	ND	NA	3%	5	3%	

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Table 2- **42-Russia billings 2011** by Group of Media Agencies

Owner groups	RANK 2011	Industry shares 2011	Organization media entities Media Networks incl. agency brands (non part of the networks in blue)	(A= G+H)	(B)	(C)	(D&E)		(F= A/D)	(G)	(H)
				OVERALL Billings 2011 rounded USD	OVERALL Billings 2010 rounded USD	Growth rate 11/10 % rounded USD	STAFF		Ratio Billings/ Staff 2011	BUYING Billings 2011 USD	Share of SPECIALIZED Resources Services 2011 %
							2011	2010			
WPP plc	1	22,8%	GroupM	1 775	1 628	9%	709	697	2,5	1 348	24%
	10	5,2%	Maxus	409	409	0%	153	150	2,7	355	13%
	4	6,9%	MEC	536	510	5%	182	172	2,9	415	22%
	7	5,8%	MediaCom	453	365	24%	171	171	2,6	330	27%
	11	4,8%	Mindshare	378	344	10%	203	204	1,9	248	35%
Publicis SA	2	20,5%	VivaKi	1 595	1 499	6%	550	471	2,9	1 394	13%
	2	7,7%	Starcom	599	540	11%	210	184	2,9	535	11%
	12	4,7%	MediaVest	367	340	8%	100	90	3,7	319	13%
	21	1,3%	Starlink	104	49	112%	70	37	1,5	95	7%
	5	6,7%	ZenithOptimedia	524	570	-8%	170	160	3,1	445	15%
Omnicom Inc.	3	18,5%	Omnicom Media OMG	1 443	1 038	39%	673	493	2,1	1 179	18%
	1	9,0%	OMD Optimum Media / OMD OM Gr	702	505	39%	220	180	3,2	608	14%
	17	2,4%	OMD AMS / OMD OM Gr	187	127	47%	110	75	1,7	148	19%
	22	1,1%	Mediaplan / OMD OM Gr	84	70	20%	60	40	1,4	59	25%
	13	4,6%	OMD Media Direction incl Media Instinct	358	221	62%	205	150	1,7	292	18%
	19	1,4%	PHD / OMD MD/PHD Gr	113	115	-2%	78	48	1,4	72	37%
Aegis plc	4	14,8%	Aegis Media	1 158	1 020	13%	352	290	3,3	807	30%
	8	5,4%	Carat	420	350	20%	110	90	3,8	299	29%
	3	7,5%	Vizeum	588	560	5%	180	150	3,3	424	28%
	18	1,9%	AdO'Clock	150	110	36%	62	50	2,4	84	45%
Havas SA	5	9,0%	Havas Media / ADV Group	705	449	57%	265	189	2,7	610	13%
	16	2,6%	Arena MagicBox	200	119	68%	82	64	2,4	172	14%
	6	6,5%	MPG	505	330	53%	183	125	2,8	438	13%
Interpublic Inc.	6	8,9%	Mediabrand / ADV Group	691	495	40%	260	185	2,7	535	23%
	14	3,6%	UM	280	215	30%	115	90	2,4	195	30%
	9	5,3%	Initiative	412	280	47%	145	95	2,8	340	17%
Major independents	15	3,2%	Dentsu Smart / SMART Comms.	251	244	3%	60	50	4,2	221	11%
	20	1,4%	LBL Comm.	106	82	29%	45	40	2,4	100	12%
	23	1,0%	Media First / TWIGA Comm.	74	72	3%	30	25	2,5	64	10%
RUSSIA	-	100%	by RECMA	7 798	6 527	19%	2 944	2 440	2,6	6 258	20%

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Table 2b- **42-Russia billings 2011** by Local Groups of Media Agencies

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Publicis SA	2	20,5%	VivaKi	1 595	1 499	6%	550	471	2,9	1 394	13%
	2	7,7%	Starcom	599	540	11%	210	184	2,9	535	11%
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	5	6,7%	ZenithOptimedia	524	570	-8%	170	160	3,1	445	15%
Omnicom Inc.	3	18,5%	Omnicom Media OMG	1 443	1 038	39%	673	493	2,1	1 179	18%
	1	9,0%	OMD Optimum Media / OMD OM Gr	702	505	39%	220	180	3,2	608	14%
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	13	4,6%	OMD Media Direction incl Media Instinct / OMD MD/PHD Gr	358	221	62%	205	150	1,7	292	18%
	19	1,4%	PHD / OMD MD/PHD Gr	113	115	-2%	78	48	1,4	72	37%
ADV Group	4	17,9%	ADV Group	1 396	944	48%	525	374	2,7	1 145	18%
	16	2,6%	Arena MagicBox / Havas Media	200	119	68%	82	64	2,4	172	14%
	6	6,5%	MPG / Havas Media	505	330	53%	183	125	2,8	438	13%
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	18	1,9%	AdO'Clock	150	110	36%	62	50	2,4	84	45%
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	20	1,4%	LBL Comm.	106	82	29%	45	40	2,4	100	12%
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