RECMA Overall Activity Rankings 2011 – *June 2013*

RECMA Inc New York - • *RECMA* Manila • *RECMA* London • *RECMA* SA Paris - anne@recma.com www.recma.com – June28, 2013

Table 1- 42-Russia Overall Activity 2012

by local agency brand

RANK 2012	Industry shares 2012	Agency brands part of the networks / Media branches Independents / non-part of the networks	(A) OVERALL Activity 2012 rounded USD M	(B) OVERALL Activity 2011 rounded USD M	(C) Growth rate 12/11 % rounded	(D&E) STAFF 2012	STAFF 2011	(F= A/D) Ratio OA/ Staff 2012
1	8,6%	**OMD Optimum Media** / *OMD OM Gr*	793	702	13%	232	220	3,4
2	8,0%	**Vizeum** / *Dentsu Aegis Network*	735	588	25%	190	160	3,9
3	8,0%	**Havas Media (ex-MPG)** / *ADV / Havas Media*	734	637	15%	190	180	3,9
4	7,2%	**Starcom** / *Publicis Media*	659	599	10%	175	105	3,8
5	6,3%	**ZenithOptimedia** / *Publicis Media*	583	524	11%	170	170	3,4
6	6,1%	**Initiative** / *ADV / Mediabrands*	557	412	35%	180	145	3,1
7	5,8%	**MEC** / *GroupM*	536	536	0%	231	182	2,3
8	5,6%	**MediaCom** / *GroupM*	511	453	13%	173	171	3,0
9	5,5%	**Carat** / *Dentsu Aegis Network*	506	405	25%	140	110	3,6
10	5,2%	**MediaVest** / *Publicis Media*	478	367	30%	130	100	3,7
11	5,1%	**Mindshare** / *GroupM*	472	378	25%	185	203	2,6
12	4,2%	**Maxus** / *GroupM*	389	409	-5%	152	153	2,6
13	3,2%	**Dentsu Smart** / *Dentsu Aegis Network*	290	251	15%	85	60	3,4
14	3,0%	**UM** / *ADV/ Mediabrands*	280	280	0%	130	115	2,2
15	2,8%	**Media Instinct** / *OMD MD/PHD Gr*	256	197	30%	124	95	2,1
16	2,4%	**OMD Media Direction** / *OMD MD/PHD Gr*	217	161	35%	166	110	1,3
17	2,3%	**OMD AMS** / *OMD OM Gr*	211	187	13%	114	110	1,9
18	2,3%	**Arena MagicBox** / *ADV / Havas Media*	209	200	5%	100	82	2,1
19	2,1%	**AdO'Clock** / *Dentsu Aegis Network*	194	150	30%	85	62	2,3
20	1,5%	**PHD** / *OMD MD/PHD Gr*	141	113	25%	85	78	1,7
21	1,4%	**LBL Comm.** / *independent*	125	106	18%	65	45	1,9
22	1,3%	**Starlink** / *Publicis Media*	118	104	14%	75	70	1,6
23	1,2%	**Media First** / *independent*	108	74	45%	50	30	2,2
24	1,0%	**OMD Mediaplan** / *OMD OM Gr*	95	84	13%	63	60	1,5
-	100%	**Total 24 brands** Media agency industry according to RECMA	9 198	7 915	16%	3 290	2 816	2,8

For detailed explanation per agency see T3

1- Russia (media agency industry billings) growth rate 2012 vs 2011 of +16% to be compared to 2011 vs 2010 = + 21%

2- Russia (media agency industry staff) growth rate 2012 vs 2011 of +17% to be compared to 2011 vs 2010 = + 21%

3- growth 2012 vs 2011 in billings (+ 16%) in line with staff (+16%)

4- ratio billlings/ Staff 2,8 in 2012 versus 2,7 in 2011 = same ratio

5- overall billings 2011 of €m 7 929 restated €m 7 915 (current edition).

6- Ratio Billings / staff by agency : average 2,8 (Lowest OMD MediaPlan : 1,5 ; Starlink : 1,6)
Highest rates Vizeum (GM, Evalar) : 3,9 ; Havas Media (Danone, Reckitt Benckiser) : 3,9 ; Starcom (Kraft, Novartis) : 3,8

7- Growth rates see Table 3 : significant gaps between agencies (from -5% to +45%) to be compared as well to the size of the agencies.

8- Structure of billings between buying billings and digital/ diversified services : not available in the global report. See domestic report.

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Table 2- 42-Russia Overall Activity 2012

by Network and Group of Networks

RANK 2012	Industry shares 2012	Media Networks incl. agency brands	(A) OVERALL Activity 2012 rounded USDM	(B) OVERALL Activity 2011 rounded USDM	(C) Growth rate 12/11 % rounded	(D&E) STAFF 2012	(D&E) STAFF 2011	(F= A/D) Ratio OA/ Staff 2012
1	17,5%	**OMD** / *OMG*	1 573	1 331	18%	699	595	2,3
2	14,0%	**Starcom MediaVest** / *Publicis Media*	1 255	1 070	17%	380	275	3,3
3	10,5%	**Havas Media** */ ADV/ Havas Media Gr*	944	837	13%	290	262	3,3
4	8,2%	**Vizeum** / *Dentsu Aegis Network*	735	588	25%	190	160	3,9
5	6,5%	**ZenithOptimedia** / *Publicis Media*	583	524	11%	170	170	3,4
6	6,2%	**Initiative** */ ADV/ Mediabrands*	557	412	35%	180	145	3,1
7	6,0%	**MEC** / *GroupM*	536	536	0%	231	182	2,3
8	5,7%	**MediaCom** / *GroupM*	511	453	13%	173	171	3,0
9	5,6%	**Carat** / *Dentsu Aegis Network*	506	405	25%	140	110	3,6
10	5,3%	**Mindshare** / *GroupM*	472	378	25%	185	203	2,6
11	4,3%	**Maxus / GroupM**	389	409	-5%	152	153	2,6
12	3,2%	**Dentsu Smart** */ Dentsu Aegis Network*	290	251	15%	85	60	3,4
13	3,1%	**UM** */ ADV/ Mediabrands*	280	280	0%	130	115	2,2
14	2,2%	**AdO'Clock** / *Dentsu Aegis Network*	194	150	30%	85	62	2,3
15	1,6%	**PHD** / *OMG*	141	113	25%	85	78	1,7
-	100%	**Total Networks** studied by RECMA	8 966	7 735	16%	3 175	2 741	2,8
		LBL Comm. / independent	125	106	18%	65	45	1,9
		Media First / independent	108	74	45%	50	30	2,2

RANK 2012	Industry shares 2012	Media Branches (Group of Networks)	(A) OVERALL Activity 2012 rounded USDM	(B) OVERALL Activity 2011 rounded USDM	(C) Growth rate 12/11 % rounded	(D&E) STAFF 2012	(D&E) STAFF 2011	(F= A/D) Ratio OA/ Staff 2012
1	21%	**GroupM**	1 908	1 775	8%	741	709	2,6
2	21%	**Publicis Media**	1 838	1 594	15%	550	445	3,3
3	19%	**Dentsu Aegis Network**	1 725	1 394	24%	500	392	3,5
4	19%	**Omnicom Media Group**	1 714	1 444	19%	784	673	2,2
5	11%	**Havas Media Gr.**	944	837	13%	290	262	3,3
6	9%	**Mediabrands**	836	691	21%	310	260	2,7
-	100%	**Total Groups** studied by RECMA	8 966	7 735	16%	3 175	2 741	2,8

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Table 3- 42-Russia Growth rates 2012

Methodology: agencies are ranked according to their decreasing growth rate (CJ). When *RECMA* did not retain the declared growth rate (column CF), see comments based on the client list growth y-on-y (blue CH) and the staff number growth (BA).

CE	CJ	CF	(CG)	CH	-	BA	CI	CM	BK	BJ	BL	
Agency / *Group*	*RECMA* Overall activity growth 2012	Declared growth in 2012 %	External Source: growth in %	*RECMA* Client list tradi billings growth %	gap between declared growth and client list tradi billings in pts	Staff growth in %	declared Staff growth in absolute value /	total agency staff	ratio overall activity per head	OAB Overall Activity 2012	Overall activity RANK 2012	see com-ments
Media First / *Independent*	45%	60%	//	45%	15	40%	20	50	2,2	108	23	*
Initiative / *ADV / Mediabrands*	35%	35%	//	42%	7	19%	35	180	3,1	557	6	
OMD Media Direction / *OMD MD/PHD Gr*	35%	69%	//	34%	35	34%	56	166	1,3	217	16	*
AdO'Clock / *Dentsu Aegis Network*	30%	36%	//	25%	11	27%	23	85	2,3	194	19	*
Media Instinct / *OMD MD/PHD Gr*	30%	54%	//	30%	24	23%	29	124	2,1	256	15	*
MediaVest / *Publicis Media*	30%	29%	//	29%	0	23%	30	130	3,7	478	10	
Carat / *Dentsu Aegis Network*	25%	34%	//	34%	0	21%	30	140	3,6	506	9	*
Vizeum / *Dentsu Aegis Network*	25%	25%	//	20%	5	16%	30	190	3,9	735	2	
PHD / *OMD MD/PHD Gr*	25%	24%	//	24%	0	8%	7	85	1,7	141	20	
Mindshare / *GroupM*	25%	24%	//	24%	0	-10%	-18	185	2,6	472	11	
LBL Comm. / *Independent*	18%	18%	//	18%	0	31%	20	65	1,9	125	21	
Dentsu Smart / *Dentsu Aegis Network*	15%	15%	//	15%	0	29%	25	85	3,4	290	13	
Havas Media / *ADV / Havas Media*	15%	15%	//	15%	0	5%	10	190	3,9	734	3	
Starlink / *Publicis Media*	14%	14%	//	24%	10	7%	5	75	1,6	118	22	
MediaCom / *GroupM*	13%	13%	//	19%	6	1%	2	173	3,0	511	8	
OMD AMS / *OMD OM Gr*	13%	13%	//	13%	0	4%	4	114	1,9	211	17	
OMD Mediaplan / *OMD OM Gr*	13%	13%	//	13%	0	5%	3	63	1,5	95	24	
OMD Optimum Media / *OMD OM Gr*	13%	13%	//	10%	3	5%	12	232	3,4	793	1	
ZenithOptimedia / *Publicis Media*	11%	11%	//	10%	1	0%	-	170	3,4	583	5	
Starcom / *Publicis Media*	10%	10%	//	5%	5	40%	70	175	3,8	659	4	
Arena MagicBox / *ADV / Havas Media*	5%	5%	//	19%	14	18%	18	100	2,1	209	18	
UM / *ADV/ Mediabrands*	0%	0%	//	6%	6	12%	15	130	2,2	280	14	
MEC / *GroupM*	0%	12%	//	-15%	27	21%	49	231	2,3	536	7	*
Maxus / *GroupM*	-5%	-25%	//	-15%	n.a.	-1%	-1	152	2,6	389	12	*
Average	15%					16%	474	3 290	2,8			

Traditionnal Media Volume

ZO Forecasts : +13,2 %

GroupM Forecasts : +12%

* Comments by agency on growth rate when *RECMA* estimates are different from declarations

Media First / *Independent*	Declared growth rate of 60%. Client list value growth of 45%.RECMA applied a final estimation of +45% which is the strongest growth on the Russian market 2012 vs 2011. No feedback from the agency in regards with the client list yet.
OMD Media Direction / *OMD MD/PHD Gr*	Declared growth rate of 69% not consistent with client list 35% and staff increase of 35%. Hence a final estimation of +35%. Moreover RECMA impacts the new business billings won at the end of 2012 (October to December) for 2013.
Media Instinct / *OMD MD/PHD Gr*	Declared growth rate of 54% not consistent with client list billing growth of 30% and staff increase of 23%. RECMA applied a final estimation of +30%
AdO'Clock / *Dentsu Aegis Network*	Declared growth rate of 36% not consistent with client list 25% and staff increase of 27%. Hence an estimate of +30% No feedback from the agency in regards with the client list yet.
Carat / *Dentsu Aegis Network*	Declared growth rate of 34% not consistent with client list 15% and staff increase of 21%. Hence a RECMA final estimate of +15% No feedback from the agency in regards with the client list yet.
MEC / *GroupM*	Declared growth rate of 12% not consistent with client list -15%. The gap between the two estimation is mostly due to the methodology applied. RECMA impacts the new business billings won at the end of 2012 (october to December) for 2013. No feedback from the agency in regards with the client list yet.
Maxus / *GroupM*	No Declared growth rate. Client list value decreased of -15%. Hence an estimate of -5% Overall activity No feedback from the agency in regards with the client list yet.