

RECMA Overall Activity Rankings 2013 – June 2014

Copyright © 2014 RECMA Reports | All Rights Reserved | Content Cannot Be Reproduced Without Written Permission

RECMA Inc New York • RECMA London • RECMA SA Paris • RECMA Perth • RECMA Bangkok - anne@recma.com - www.recma.com – June 4, 2014 Ann

Table 1- **42-Russia Overall Activity 2013**
by local agency brand

R A N K 2013	Industry shares 2013	Agency brands part of the networks / Media branches Independents / non-part of the networks	(A)	(B)	(C)	(D&E)		(F= A/D)
			OVERALL Activity 2013 rounded USD Mo	OVERALL Activity 2012 rounded USD Mo	Growth rate 13/12 % rounded	STAFF		Ratio OA/ Staff 2013
						2013	2012	
1	7,7%	OMD Optimum Media / OMD OM Gr / OMG	768	680	13%	274	232	2,8
2	7,2%	Carat / Dentsu Aegis	717	481	49%	162	140	4,4
3=	6,6%	MEC / GroupM	665	482	38%	265	231	2,5
3=	6,6%	Starcom / Publicis	663	556	19%	185	175	3,6
3=	6,6%	ZenithOptimedia / Publicis	659	549	20%	198	170	3,3
6	5,6%	Havas Media / ADV / Havas	561	524	7%	241	190	2,3
7	5,5%	OMD Media Direction / OMD MD-PHD Gr / OMG	556	341	63%	243	166	2,3
8	5,4%	Media Instinct / OMD OMD Gr / OMG	540	409	32%	183	124	3,0
9	5,3%	Vizeum / Dentsu Aegis	529	557	-5%	171	190	3,1
10	4,9%	MediaCom / GroupM	493	433	14%	176	173	2,8
11	4,4%	Initiative / ADV / Mediabrands	443	370	20%	224	180	2,0
12	4,3%	MediaVest / Publicis	431	410	5%	140	130	3,1
13	3,5%	Mindshare / GroupM	353	290	22%	185	185	1,9
14	3,1%	OMD AMS / OMD OM Gr / OMG	316	227	39%	119	114	2,7
15	2,8%	Dentsu Smart / Dentsu Aegis	279	300	-7%	100	85	2,8
16	2,6%	AdO'Clock / Dentsu Aegis	257	182	41%	107	85	2,4
17	2,5%	Maxus / GroupM	250	281	-11%	111	152	2,3
18=	2,1%	PHD / OMD MD-PHD Gr / OMG	214	93	130%	153	85	1,4
18=	2,1%	UM / ADV / Mediabrands	213	161	32%	165	130	1,3
20	2,1%	Starlink / SMG / Publicis	206	165	25%	87	75	2,4
21	1,7%	Media Net / Independent	174	149	17%	107	na	1,6
22	1,5%	Media First / Independent	153	113	35%	55	50	2,8
23	1,4%	LBL Comm. / Independent	144	109	32%	62	65	2,3
24	1,4%	Arena MagicBox / ADV / Havas	141	105	35%	135	100	1,0
25	1,1%	Mediaplan / OMD OM Gr / OMG	115	92	25%	74	63	1,6
26	0,8%	Media Arts / Independent	83	66	25%	90	na	0,9
27	0,7%	Immedia / Independent	68	56	22%	140	na	0,5
28	0,3%	Hidalgo / Independent	31	24	32%	50	na	0,6
-	100%	Total 28 brands Media agency industry according to RECMA	10 021	8 203	22%	4 202	3 290	2,4

For detailed explanation per agency see following page and table T3

Table 1- 42-Russia Overall Activity 2013 by local agency brand

- 1- Russia (media agency industry billings) growth rate 2013 vs 2012 of +22% to be compared to 2012 vs 2011 = +18%
- 2- Russia (media agency industry staff) growth rate 2013 vs 2012 of +14% to be compared to 2012 vs 2011 = +16%
- 3- Growth 2013 vs 2012 in billings (+22%) two times higher than the staff growth (+14%).
- 4- Ratio billings/ Staff 2,4 in 2013 versus 2,9 in 2012 = slight decrease
- 5- Overall billings 2012 of \$m 9 525 restated to \$m 8 203
- 6- Ratio Billings / staff by agency: average 2,4. Lowest Immedia : 0,5 to highest Carat 4,4.
- 7- Growth rates see Table 3 : significant gaps between agencies (from -11% to +130%) to be compared as well to the size of the agencies.
- 8- Structure of billings between buying billings and digital/ diversified services : see Table3.

RECMA Overall Activity Rankings 2013 – June 2014

Copyright © 2014 RECMA Reports | All Rights Reserved | Content Cannot Be Reproduced Without Written Permission

RECMA Inc New York • RECMA London • RECMA SA Paris • RECMA Perth • RECMA Bangkok - anne@recma.com - www.recma.com - July 29, 2014 Ann

Table 2- **42-Russia Overall Activity 2013**
by Network and Group of Networks

RANK 2013	Industry shares 2013	Media Networks incl. agency brands & other media entities	(A)	(B)	(C)	(D&E)		(F= A/D)
			OVERALL Activity 2013 rounded USD Mo	OVERALL Activity 2012 rounded USD Mo	Growth rate 13/12 % rounded	STAFF		Ratio OA/ Staff 2013
						2013	2012	
1	24,5%	OMD / OMG Omnicom *	2 295	1 749	31%	893	699	2,6
2	13,9%	Starcom MediaVest SMG / Publicis SMG	1 300	1 131	15%	412	380	3,2
3	7,7%	Carat / Dentsu Aegis	717	481	49%	162	140	4,4
4	7,5%	Havas Media / Havas	702	629	12%	376	290	1,9
5	7,1%	MEC / GroupM	665	482	38%	265	231	2,5
6	7,0%	ZenithOptimedia / Publicis ZO	659	549	20%	198	170	3,3
7	5,6%	Vizeum / Dentsu Aegis	529	557	-5%	171	190	3,1
8	5,3%	MediaCom / GroupM	493	433	14%	176	173	2,8
9	4,7%	Initiative / Mediabrands	443	370	20%	224	180	2,0
10	3,8%	Mindshare / GroupM	353	290	22%	185	185	1,9
11	3,0%	Dentsu Media / Dentsu Aegis	279	300	-7%	100	85	2,8
12	2,7%	AdO'Clock / Dentsu Aegis	257	182	41%	107	85	2,4
13	2,7%	Maxus / GroupM	250	281	-11%	111	152	2,3
14	2,3%	PHD / OMG Omnicom	214	93	130%	153	85	1,4
15	2,3%	UM / Mediabrands	213	161	32%	165	130	1,3
-	100%	Total Networks studied by RECMA	9 368	7 686	22%	3 698	3 175	2,5
-	-	Media Net / Independent	174	149	17%	107	na	1,6
-	-	Media First / Independent	153	113	35%	55	50	2,8
-	-	LBL Comm. / Independent	144	109	32%	62	65	2,3
-	-	Media Arts / Independent	83	66	25%	90	na	0,9
-	-	Immedia / Independent	68	56	22%	140	na	0,5
-	-	Hidalgo / Independent	31	24	32%	50	na	0,6

* Locally, Optimum Media OMD and OMD Media Direction are two separate networks in Russia. They are not linked and have separate ownership.

Optimum Media OMD is the OMD network representative. OMD Media Direction is in the competitive group called OMD MD/PHD and belongs to BBDO group.

RANK 2013	Industry shares 2013	Media Branches (Group of Networks)	(A)	(B)	(C)	(D&E)		(F= A/D)
			OVERALL Activity 2013 rounded USD Mo	OVERALL Activity 2012 rounded USD Mo	Growth rate 13/12 % rounded	STAFF		Ratio OA/ Staff 2013
						2013	2012	
1	27%	Omnicom Media Group	2 509	1 842	36%	1 046	784	2,4
2	21%	Publicis	1 959	1 680	17%	610	550	3,2
3	19%	Dentsu Aegis	1 781	1 520	17%	540	500	3,3
4	19%	GroupM	1 761	1 485	19%	737	741	2,4
5	7%	Havas	702	629	12%	376	290	1,9
6	7%	Mediabrands	656	531	24%	389	310	1,7
-	100%	Total Groups studied by RECMA	9 368	7 686	22%	3 698	3 175	2,5
-	-	Media Net / Independent	174	149	17%	107	na	1,6
-	-	Media First / Independent	153	113	35%	55	50	2,8
-	-	LBL Comm. / Independent	144	109	32%	62	65	2,3
-	-	Media Arts / Independent	83	66	25%	90	na	0,9
-	-	Immedia / Independent	68	56	22%	140	na	0,5
-	-	Hidalgo / Independent	31	24	32%	50	na	0,6