

# 2015 HOLDING COMPANY M&A LEAGUE

OCTOBER

## GLOBAL

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL SALES VALUE (US\$M)	NO. OF DEALS
1	1	WPP	Essence Global, ManvsMachine UK, OptimizeRx US, Alphabet Consulting India, Six Degrees PR UK	1,198	29
2	2	LEO Group	Wan Sheng Wei Ye China, Mi Age China	480	2
3	6	Havas	CSA & Intervalles FullSix France, River-orchid Vietnam	444	7
4	4	Dentsu	Sensai US, ZoneFranchise France, Fountainhead India, Pontomobi Brazil	356	21
5	3	Providence Equity	Clarion Events UK	336	1
6	5	Publicis Groupe	PDI's CSO US, The Creative Council Group (TCC) South Africa, 2DataFish Australia	255	10
7	7	GMIC	Bluedoor Digital China, Shengguangxianfeng (省广先锋) China, JntMedia China	141	3
8	8	Montgomery Group	AidEx UK	84	1
9	9	BlueFocus	Jiemian China, Domob China, Madhouse China	70	4
10	10	Simei	Aidekangsai (爱德康赛) China	54	1
11	11	Clarion	Urban Expositions US	32	1
12	12	Accenture	PacificLink China HK	28	1
13	13	Tarsus	PAINWeek US	28	1
14	14	DC Thomson	ShortList Media UK	27	1
15	15	Liantronics	Airmedia China	25	1
				3,557	84

### METHODOLOGY

R3 monthly reviews all public sources for M&A news across all marketing and media sectors in compiling this table. The complete table covers all individual acquisitions, more than can be featured in this summary report.

R3 applies a consistent multiplier to the estimated revenue of all agencies acquired, based on the reported percentage required.

Regardless of earn out terms, R3 assumes full sale amount of acquisitions at time of sale.

For more details, write to [greg@rthree.com](mailto:greg@rthree.com).

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## ASIA PACIFIC

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL SALES VALUE (US\$M)	NO. OF DEALS
1	1	LEO Group	Wan Sheng Wei Ye China, Mi Age China	480	2
2	2	GMIC	Bluedoor Digital China, Shengguangxianfeng (省广先锋) China, JntMedia China	141	3
3	3	Dentsu	Fountainhead India, Mangham Gaxiola Singapore, Flexmedia Thailand	97	7
4	4	Publicis Groupe	2DataFish Australia, Match Media Australia	78	2
5	5	BlueFocus	Jiemian China, Domob China, Madhouse China	70	4
6	6	Havas	Riverorchid Thailand	56	1
7	7	Simei	Aidekangsai (爱德康赛)	54	1
8	8	WPP	Alphabet Consulting India, nudeJEH Thailand, Rapid Media Service Australia	39	7
9	9	Accenture	PacificLink China HK	28	1
10	10	Liantronics	Airmedia China	25	1
11	11	Serviceplan	Aquarius Asia HongKong	21	1
12	12	Ruder Finn	Kyodo Public Relations China	8	1
13	13	Adfactors	Yorke Communications India	5	1
14	14	Ipinyou	Retail Solutions China	4	1
15	15	Spearhead	No acquisition	0	0
				1,105	33

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USA

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL SALES VALUE (US\$M)	NO. OF DEALS
1	1	WPP	OptimizeRx, SET Creative, Refinery29	392	6
2	3	Publicis Groupe	PDI's CSO, Domani, Expedient	69	3
3	2	Dentsu	Sensai, Atheletes First, Forbes Consulting Group	56	3
4	4	Clarion	Urban Expositions US	32	1
5	5	Tarsus	PAINWeek US	28	1
6	6	Informa	Dwell on Design	28	1
7	7	HCB	Topin & Associates US	21	1
8	8	Interpublic	Samba TV	18	1
9	9	R2integrated	Make Me Social	11	1
10	10	Penton	iNET Interactive	11	1
11=	11=	Havas	No acquisition	0	0
11=	11=	BlueFocus	No acquisition	0	0
11=	11=	Hakuhodo	No acquisition	0	0
11=	11=	McCann Worldgroup	No acquisition	0	0
11=	11=	Omnicom	No acquisition	0	0
				623	16

## METHODOLOGY

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## CHINA

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1	1	LEO Group	Wan Sheng Wei Ye, Mi Age	480	2
2	2	GMIC	Bluedoor Digital China, Shengguangxianfeng (省广先锋) China, JntMedia China	141	3
3	3	BlueFocus	Domob, Madhouse, Jianfei Tech	70	4
4	4	Simei	Aidekangsai (爱德康赛)	54	1
5	5	Accenture	PacificLink China HK	28	1
6	6	Liantronics	Airmedia	25	1
7	7	Serviceplan	Aquarius Asia HongKong	21	1
8	8	WPP	Maixunbytes, Paipai	13	2
9	9	Ruder Finn	Kyodo Public Relations	8	1
10	10	Ipinyou	Retail Solutions	4	1
11=	11=	Dentsu	No acquisition	0	0
11=	11=	Publicis Groupe	No acquisition	0	0
11=	11=	Adfactors	No acquisition	0	0
11=	11=	HLBN	No acquisition	0	0
11=	11=	Spearhead	No acquisition	0	0
				843	17

### METHODOLOGY

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## BRICS

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL SALES VALUE (US\$M)	NO. OF DEALS
1	1	LEO Group	Wan Sheng Wei Ye China, Mi Age China	480	2
2	2	GMIC	Bluedoor Digital China, Shengguangxianfeng (省广先锋) China, JntMedia China	141	3
3	4	WPP	Alphabet Consulting India, Ideal Group Brazil, Jüssi Brazil	79	5
4	5	BlueFocus	Domob China, Madhouse China , Jianfei Tech China	70	4
5	6	Simei	Aidekangsai (爱德康赛)	54	1
6	10	Dentsu	Pontomobi Brazil, Fountainhead India, WATConsult India	32	4
7	7	Accenture	PacificLink China HK	28	1
8	8	Liantronics	Airmedia China	25	1
9	9	Serviceplan	Aquarius Asia HongKong	21	1
10	3	Publicis Groupe	The Creative Council Group (TCC) South Africa, Epic Communications South Africa	17.15	2
11	11	Ruder Finn	Kyodo Public Relations China	8	1
12	12	Adfactors	Yorke Communications India	5	1
13	13	Ipinyou	Retail Solutions China	4	1
14=	14=	HLBN	No acquisition	0	0
14=	14=	Spearhead	No acquisition	0	0
				964	27

### METHODOLOGY

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## 2015 HOLDING COMPANY M&A NEW WINS

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ACQUIRER	ACQUIREE (REGION)
WPP - Cohn & Wolfe	Six Degrees PR UK
WPP - Cohn & Wolfe	Alphabet Consulting India
WPP - Grey Healthcare Group	OptimizeRx Minnesota
Havas - Havas	CSA na
Havas - Havas	Intervalles France
Dentsu - Dentsu Aegis Network	Pontomobi Brazil
Dentsu - Dentsu Aegis Network	Fountainhead India
Dentsu - Dentsu Aegis Network	ZoneFranch France
Dentsu - Dentsu Ventures Investment	Sensai US
WPP - Landor	ManvsMachine UK
Publicis - Publicis Healthcare Communications Group	PDI's CSO US
WPP - GroupM	Essence UK