



# 2018 HOLDING COMPANY M&A LEAGUE

## GLOBAL

July 2018

YTD Deal Value (US\$mn) **17,564**  
YTD Deal Count **247**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$M)	NO. OF DEALS
1	-	<b>IPG</b>	Cappuccino, Acxiom Marketing Solutions, That Lot, ARC Public Relations	2350	4
2	-	<b>Alibaba</b>	Focus Media	2200	1
3	1	<b>AT&amp;T</b>	AppNexus	1600	1
4	-	<b>Salesforce</b>	Datorama	850	1
5	-	<b>Perficient Digital</b>	Stone Temple Consulting	679	1
6	2	<b>Accenture</b>	Mackevision, Meredith Xcelerated Marketing (MXM), HO Communication, designaffairs	487	4
7	-	<b>KKR</b>	Global Sports Commerce (GSC), Sellbytel	430	2
8	3	<b>Abry Partners</b>	Screenvision Media	380	1
9	6	<b>Dentsu</b>	HelloWorld, Data Artist, Character, Red8 Group, Cheddar, Array, M8, Red Communication, White Label MKT, The Big Now, Klip Desk, Global Mind, Whitespace, Shuttl	373	14
10	-	<b>S4 Capital</b>	MediaMonks	325	1
11	4	<b>CapGemini</b>	LiquidHub, Adaptive Lab	322	2
12	5	<b>Ocelot Partners</b>	Ocean Outdoor, Forrest Media	287	2
13	-	<b>Southfield Capital</b>	Match Marketing Group	280	1
14	10	<b>Omnicom</b>	Brain Group, Snow Companies, Elsevier (Japan)	274	3
15	7	<b>Amdocs</b>	Vubiquity	224	1

### METHODOLOGY

To compile this table, R3 reviews all public sources for M&A news across all marketing and media sectors on a monthly basis. 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).



# 2018 HOLDING COMPANY M&A LEAGUE

## NORTH AMERICA

July 2018

YTD Deal Value (US\$m) **11,221**

YTD Deal Count **130**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$m)	NO. OF DEALS
1	-	<b>IPG</b>	Acxiom Marketing Solutions	2300	1
2	1	<b>AT&amp;T</b>	AppNexus	1600	1
3	-	<b>Salesforce</b>	Datorama	850	1
4	-	<b>Perficient Digital</b>	Stone Temple Consulting	679	1
5	2	<b>Abry Partners</b>	Screenvision Media	380	1
6	3	<b>CapGemini</b>	LiquidHub	303	1
7	-	<b>Southfield Capital</b>	Match Marketing Group	280	1
9	5	<b>Evergage</b>	MyBuys	224	1
8	4	<b>Amdocs</b>	Vubiquity	224	1
10	6	<b>Accenture</b>	Meredith Xcelerated Marketing (MXM)	210	1
11	7	<b>Endeavor</b>	160over90, Influential	208	2
12	8	<b>Omnicom</b>	Snow Companies	185	1
13	9	<b>Terminus</b>	BrightFunnel	168	1
14	10	<b>Cars.com</b>	Dealer Inspire & Launch Digital Marketing	165	1
15	11	<b>Vista Equity Partners</b>	Integral Ad Science	126	1

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# 2018 HOLDING COMPANY M&A LEAGUE

## EMEA

July 2018

YTD Deal Value (US\$mn) **2,870**  
YTD Deal Count **71**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$M)	NO. OF DEALS
1	-	<b>KKR</b>	Sellbytel	350	1
2	-	<b>S4 Capital</b>	MediaMonks	325	1
3	1	<b>Ocelot Partners</b>	Ocean Outdoor, Forrest Media	287	2
4	2	<b>Accenture</b>	Mackevision, designaffairs	252	2
5	-	<b>Datawords</b>	Vanksen, 87seconds	133	2
6	3	<b>Dept</b>	Yourposition, Factor-a	109	2
7	-	<b>The Fishawack Group of Companies</b>	Healthcircle Advertising	108	1
8	4	<b>WPP</b>	BAR (Bomtempo, Anahory & Ralha), Mash Strategy Studio, Map Project Office, Universal Design Studio, Dooh.com	77	5
9	5	<b>Meltwater</b>	DataSift	77	1
10	-	<b>Omnicom</b>	Brain Group	70	1
11	6	<b>Next Fifteen Communications</b>	Brandwidth Group	69	1
12	7	<b>Ogury</b>	Adincube	63	1
13	8	<b>Dentsu</b>	Red8 Group, Red Communication, The Big Now, Whitespace	62	4
14	9	<b>Bonnier</b>	Southerly	56	1
15	10	<b>Falcon.io</b>	Komfo	56	1

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# 2018 HOLDING COMPANY M&A LEAGUE

## ASIA PACIFIC

July 2018

YTD Deal Value (US\$m) **3,380**  
YTD Deal Count **42**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$m)	NO. OF DEALS
1	–	<b>Alibaba</b>	Focus Media	2200	1
2	8	<b>Dentsu</b>	Data Artist, Klip Desk, Shuttl	160	3
3	1	<b>Suzhou Jinfu New Material</b>	Gong He Sheng Shi ("共和盛世")	156	1
4	–	<b>Whole Easy Technology</b> ("众应互联")	hdt Media ("天图广告")	105	1
5	2	<b>KKR</b>	Global Sports Commerce (GSC)	80	1
6	3	<b>Nantong Metalforming Equipment Co.</b>	Guangzhou Yunshi Advertising Co. ("广州云视广告有限公司")	74	1
7	4	<b>Hylink Group</b>	Longfan Media	56	1
8	5	<b>Hakuhodo</b>	Square Communications, IdeasXMachina Advertising, Inc. (IXM)	55	2
9	6	<b>Freeman Company</b>	Info Salons	49	1
10	7	<b>Blackdot</b>	Healthy Thinking Group (creative and digital operations)	49	1
11	9	<b>ITWP Acquisitions</b>	KuRunData	36	1
12	–	<b>Farfetch</b>	CuriosityChina	35	1
13	10	<b>Artefact</b>	NetBooster Asia (incl. 8 Matic)	34	1
14	11	<b>Accenture</b>	HO Communication	25	1
15	12	<b>M&amp;C Saatchi</b>	Scarecrow Communications	21	1

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# 2018 HOLDING COMPANY M&A LEAGUE

## CHINA

July 2018

YTD Deal Value (US\$mn) **2,705**  
YTD Deal Count **11**

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1	-	<b>Alibaba</b>	Focus Media	2200	1
2	1	<b>Suzhou Jinfu New Material</b>	Gong He Sheng Shi ("共和盛世")	156	1
3	-	<b>Whole Easy Technology</b> ("众应互联")	hdt Media ("天图广告")	105	1
4	2	<b>Nantong Metalforming Equipment Co.</b>	Guangzhou Yunshi Advertising Co. ("广州云视广告有限公司")	74	1
5	3	<b>Hylink Group</b> ("华扬联众")	Longfan Media ("龙帆传媒")	56	1
6	4	<b>ITWP Acquisitions</b>	KuRunData	36	1
7	-	<b>Farfetch</b>	CuriosityChina	35	1
8	5	<b>Accenture</b>	HO Communication ("伙传播")	25	1
9	6	<b>Sharing Economy International</b>	Touch Media Interactive (HK)	7	1
10	7	<b>NEP Group</b>	Avollusion	7	1

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# 2018 HOLDING COMPANY M&A LEAGUE

## LATAM

July 2018

YTD Deal Value (US\$mn)	93
YTD Deal Count	4

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$M)	NO. OF DEALS
1	1	IPG	Cappuccino	35	1
2	3	Dentsu	White Label MKT, Global Mind	30	2
3	2	Conversica	Intelligens.ai	28	1

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