



2018 HOLDING COMPANY M&A LEAGUE

GLOBAL

September 2018

YTD Deal Value (US\$m) **25,892**
YTD Deal Count **327**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$m)	NO. OF DEALS
1	-	Adobe	Marketo	4750	1
2	2	Alibaba	Focus Media	2200	1
3	1	IPG	Cappuccino, Acxiom Marketing Solutions, That Lot, ARC Public Relations	2050	4
4	3	AT&T	AppNexus	1600	1
5	-	Insight Venture Partners	Episerver	1160	1
6	4	Salesforce	Datorama	850	1
7	5	Perficient Digital	Stone Temple Consulting	679	1
8	6	Omnicom	Brain Group, Snow Companies, Elsevier (Japan), United Digital Group's media and performance marketing business, Levo Digital, Credera	558	6
9	7	Accenture	Mackevision, Meredith Xcelerated Marketing (MXM), HO Communication, designaffairs	487	4
10	8	KKR	Global Sports Commerce (GSC), Sellbytel	430	2
11	9	Dentsu	Red Communication, White Label MKT, The Big Now, Klip Desk, Global Mind, Whitespace, Shuttl, Amicus Digital, Aaron Lloyd	429	16
12	15	WPP	Map Project Office, Universal Design Studio, Dooh.com, Gorilla Group, Hirshorn-Zuckerman Design Group, Madhouse (India), 2Sales, Emark	384	13
13	10	Abry Partners	Screenvision Media	380	1
14	11	S4 Capital	MediaMonks	325	1
15	12	CapGemini	LiquidHub, Adaptive Lab	322	2

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.



2018 HOLDING COMPANY M&A LEAGUE

NORTH AMERICA

September 2018

YTD Deal Value (US\$m) **18,583**

YTD Deal Count **182**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$m)	NO. OF DEALS
1	-	Adobe	Marketo	4750	1
2	1	IPG	Acxiom Marketing Solutions	2000	1
3	2	AT&T	AppNexus	1600	1
4	-	Insight Venture Partners	Episerver	1160	1
5	3	Salesforce	Datorama	850	1
6	4	Perficient Digital	Stone Temple Consulting	679	1
7	5	Abry Partners	Screenvision Media	380	1
8	6	Omnicom	Snow Companies, Credera	353	2
9	7	CapGemini	LiquidHub	303	1
10	-	Vista Equity Partners	Integral Ad Science, Spredfast	298	2
11	8	Southfield Capital	Match Marketing Group	280	1
12	9	Amdocs	Vubiquity	224	1
13	10	Evergage	MyBuys	224	1
14	11	Maven	Say Media	210	1
15	12	Accenture	Meredith Xcelerated Marketing (MXM)	210	1

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2018 HOLDING COMPANY M&A LEAGUE

EMEA

September 2018

YTD Deal Value (US\$m) **3,504**
YTD Deal Count **88**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$M)	NO. OF DEALS
1	1	KKR	Sellbytel	350	1
2	2	S4 Capital	MediaMonks	325	1
3	3	Ocelot Partners	Ocean Outdoor, Forrest Media	287	2
4	4	Accenture	Mackevision, designaffairs	252	2
5	5	Omnicom	Brain Group, United Digital Group's media and performance marketing business	154	2
6	11	WPP	BAR (Bomtempo, Anahory & Ralha), Mash Strategy Studio, Map Project Office, Universal Design Studio, Dooh.com, Emark	147	6
7	6	Datawords	Vanksen, 87seconds	133	2
8	7	Ipsos	GfK's custom research business	114	1
9	8	Dept	Yourposition, Factor-a	109	2
10	9	The Fishawack Group of Companies	Healthcircle Advertising	108	1
11	-	Advent International	Taylor James	91	1
12	10	Inspired Thinking Group	Connect	84	1
13	12	Meltwater	DataSift	77	1
14	13	MMGY Global	Grifco, Hills Balfour, Ophir PR	74	3
15	14	Next Fifteen Communications	Brandwidth Group	69	1

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2018 HOLDING COMPANY M&A LEAGUE

ASIA PACIFIC

September 2018

YTD Deal Value (US\$m) **3,678**
YTD Deal Count **51**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$m)	NO. OF DEALS
1	1	Alibaba	Focus Media	2200	1
2	2	Dentsu	Data Artist, Klip Desk, Shuttl, Amicus Digital, Aaron Lloyd	216	5
3	3	Suzhou Jinfu New Material	Gong He Sheng Shi ("共和盛世")	156	1
4	4	Trimantium GrowthOps	Asia Pacific Digital (APD)	112	1
5	5	Whole Easy Technology ("众应互联")	hdt Media ("天图广告")	105	1
6	6	KKR	Global Sports Commerce (GSC)	80	1
7	7	Nantong Metalforming Equipment Co.	Guangzhou Yunshi Advertising Co. ("广州云视广告有限公司")	74	1
8	8	Cognizant	Saasfocus	56	1
9	9	Hylink Group	Longfan Media	56	1
10	10	Hakuhodo	Square Communications, IdeasXMachina Advertising, Inc. (IXM)	55	2
11	11	Omnicom	Elsevier (Japan), Levo Digital	51	2
12	12	Freeman Company	Info Salons	49	1
13	13	Blackdot	Healthy Thinking Group (creative and digital operations)	49	1
14	14	WPP	The Glitch, Wunderman (South East Asia & Taiwan), Madhouse (India)	45	3
15	15	ITWP Acquisitions	KuRunData	36	1

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2018 HOLDING COMPANY M&A LEAGUE

CHINA

September 2018

YTD Deal Value (US\$m) **2,712**
YTD Deal Count **12**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$m)	NO. OF DEALS
1	1	Alibaba	Focus Media	2200	1
2	2	Suzhou Jinfu New Material	Gong He Sheng Shi ("共和盛世")	156	1
3	3	Whole Easy Technology ("众应互联")	hdt Media ("天图广告")	105	1
4	4	Nantong Metalforming Equipment Co.	Guangzhou Yunshi Advertising Co. ("广州云视广告有限公司")	74	1
5	5	Hylink Group ("华扬联众")	Longfan Media ("龙帆传媒")	56	1
6	6	ITWP Acquisitions	KuRunData	36	1
7	7	Farfetch	CuriosityChina	35	1
8	8	Accenture	HO Communication ("伙传播")	25	1
9	9	Sharing Economy International	Touch Media Interactive (HK)	7	1
10	-	AnyMind Group	Acqua Media	7	1

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2018 HOLDING COMPANY M&A LEAGUE

LATAM

September 2018

YTD Deal Value (US\$m)	128
YTD Deal Count	6

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	2	Dentsu	White Label MKT, Global Mind	30	2
3	3	Publicis Groupe	One Digital	28	1
4	4	Conversica	Intelligens.ai	28	1
5	-	Marcus Thomas	Devs United	7	1

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