



# 2018 HOLDING COMPANY M&A LEAGUE

## GLOBAL

October 2018

YTD Deal Value (US\$m) **28,167**  
YTD Deal Count **378**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$m)	NO. OF DEALS
1	1	Adobe	Marketo	4750	1
2	2	Alibaba	Focus Media	2200	1
3	3	IPG	Cappuccino, Acxiom Marketing Solutions, That Lot, ARC Public Relations	2050	4
4	4	AT&T	AppNexus	1600	1
5	5	Insight Venture Partners	Episerver	1160	1
6	6	Salesforce	Datorama, Rebel	858	2
7	11	Dentsu	Whitespace, Shuttl, Amicus Digital, Aaron Lloyd, Branded Ltd, MSTF Partners, B2B International, Pixel Labs Inc., Namics, uBiome, Septeni	684	23
8	7	Perficient Digital	Stone Temple Consulting	679	1
9	9	Accenture	Mackevision, Meredith Xcelerated Marketing (MXM), HO Communication, designaffairs, New Content	609	5
10	8	Omnicom	United Digital Group's media and performance marketing business, Levo Digital, Credera	558	6
11	15	CapGemini	LiquidHub, Adaptive Lab, June 21, Doing	550	4
12	12	WPP	Map Project Office, Madhouse (India), Gorilla Group, Hirshorn-Zuckerman Design Group, 2Sales, Emark, Soulsight, Autumn Worldwide	464	15
13	10	KKR	Global Sports Commerce (GSC), Sellbytel	430	2
14	13	Abry Partners	Screenvision Media	380	1
15	-	Ipsos	GfK's custom research business (four global divisions), Market Pulse International, Four divisions of GfK Research, Synthesio	353	4

### 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

October 2018

YTD Deal Value (US\$m) **19,524**  
YTD Deal Count **208**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$m)	NO. OF DEALS
1	1	Adobe	Marketo	4750	1
2	2	IPG	Axiom Marketing Solutions	2000	1
3	3	AT&T	AppNexus	1600	1
4	4	Insight Venture Partners	Episerver	1160	1
5	5	Salesforce	Datorama, Rebel	858	2
6	6	Perficient Digital	Stone Temple Consulting	679	1
7	7	Abry Partners	Screenvision Media	380	1
8	8	Omnicom	Snow Companies, Credera	353	2
9	9	CapGemini	LiquidHub	303	1
10	10	Vista Equity Partners	Integral Ad Science, Spredfast	298	2
11	11	Southfield Capital	Match Marketing Group	280	1
12	-	WPP	Brad, Gorilla Group, Hirshorn-Zuckerman Design Group, 2Sales, Soulsight	247	5
13	12	Amdocs	Vubiquity	224	1
14	13	Evergage	MyBuys	224	1
15	14	Maven	Say Media	210	1

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# 2018 HOLDING COMPANY M&A LEAGUE

## EMEA

October 2018

YTD Deal Value (US\$m) **4,627**  
YTD Deal Count **106**

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$m)	NO. OF DEALS
1	1	<b>KKR</b>	Sellbytel	350	1
2	2	<b>S4 Capital</b>	MediaMonks	325	1
3	3	<b>Ocelot Partners</b>	Ocean Outdoor, Forrest Media	287	2
4	8	<b>Ipsos</b>	GfK's custom research business, Four divisions of GfK Research	254	2
5	4	<b>Accenture</b>	Mackevision, designaffairs	252	2
6	-	<b>CapGemini</b>	Adaptive Lab, June 21, Doing	246	3
7	-	<b>Dentsu</b>	Red8 Group, Red Communication, The Big Now, Whitespace, MSTF Partners, B2B International, Namics	240	7
8	5	<b>Omnicom</b>	Brain Group, United Digital Group's media and performance marketing business	154	2
9	6	<b>WPP</b>	BAR (Bomtempo, Anahory & Ralha), Mash Strategy Studio, Dooh.com, Universal Design Studio, Map Project Office, Emark	147	6
10	-	<b>Publicis Groupe</b>	Kindered Group, Xebia France	141	2
11	7	<b>Datawords</b>	Vanksen, 87seconds	133	2
12	-	<b>OSG Group Holdings</b>	Communis	124	1
13	-	<b>Brandwatch</b>	Crimson Hexagon	112	1
14	9	<b>Dept</b>	Yourposition, Factor-a	109	2
15	10	<b>The Fishawack Group of Companies</b>	Healthcircle Advertising	108	1

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# 2018 HOLDING COMPANY M&A LEAGUE

## ASIA PACIFIC

October 2018

YTD Deal Value (US\$m) **3,879**  
YTD Deal Count **58**

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, Branded Ltd, Septeni	279	7
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	14	WPP	The Glitch, Wunderman (South East Asia & Taiwan), Madhouse (India), Autumn Worldwide	69	4
9	8	Cognizant	Saasfocus	56	1
10	9	Hylink Group	Longfan Media	56	1
11	10	Hakuhodo	Square Communications, IdeasXMachina Advertising, Inc. (IXM)	55	2
12	11	Omnicom	Elsevier (Japan), Levo Digital	51	2
13	-	Ipsos	Market Pulse International	49	1
14	12	Freeman Company	Info Salons	49	1
15	13	Blackdot	Healthy Thinking Group (creative and digital operations)	49	1

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# 2018 HOLDING COMPANY M&A LEAGUE

## CHINA

October 2018

YTD Deal Value (US\$m) **2,714**  
YTD Deal Count **13**

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	10	AnyMind Group	Acqua Media	7	1

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# 2018 HOLDING COMPANY M&A LEAGUE

## LATAM

October 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	5	Marcus Thomas	Devs United	7	1

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