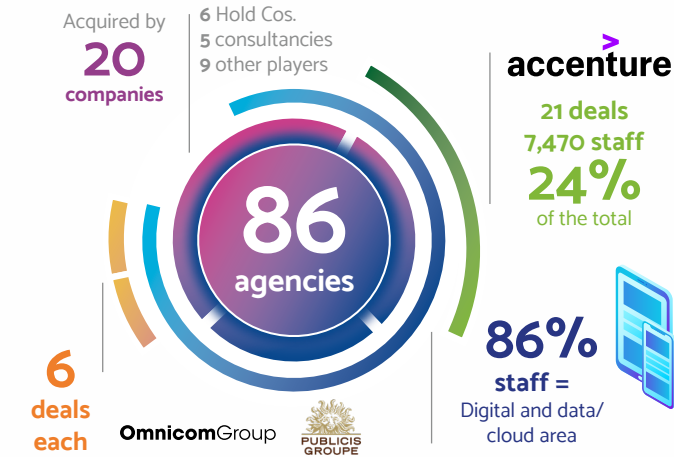
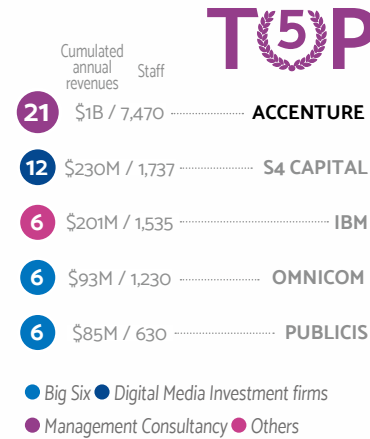
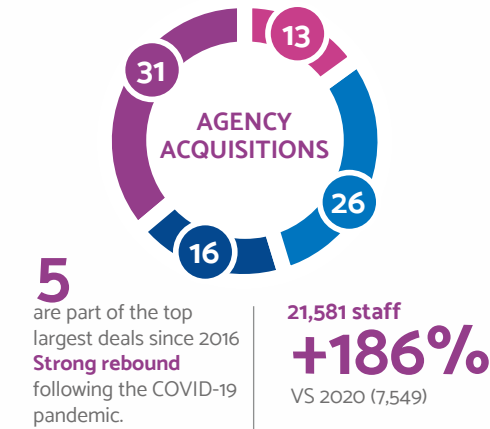


MARCOM AGENCY ACQUISITIONS IN 2021

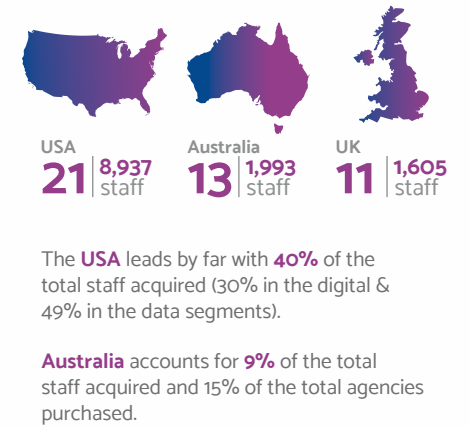
Key takeaways on agency acquisition deals



Acquisitions by the numbers in 2021

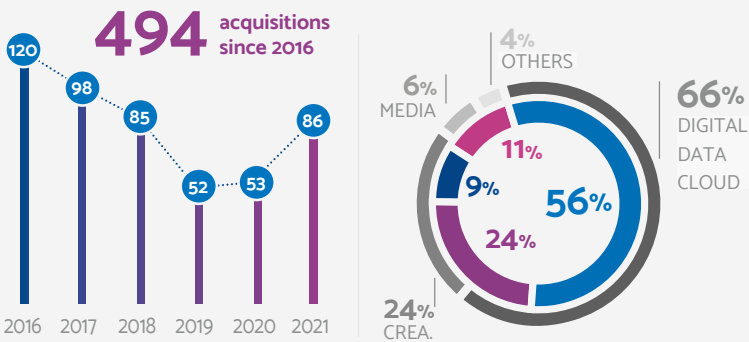


Top 3 targeted countries



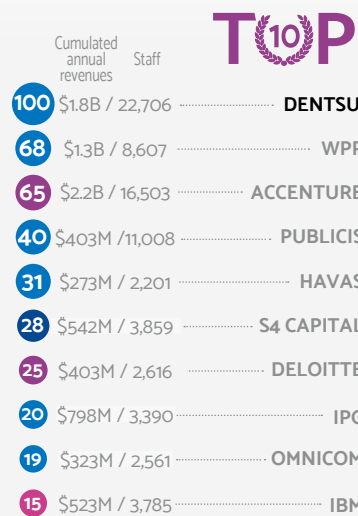
MARCOM AGENCY ACQUISITIONS 2016-2021

Acquisitions by the numbers



The digital/data segment weighs **6 times more than creative** in terms of total staff acquired and **4 times more** than the creative segment in terms of total accumulated annual revenues.

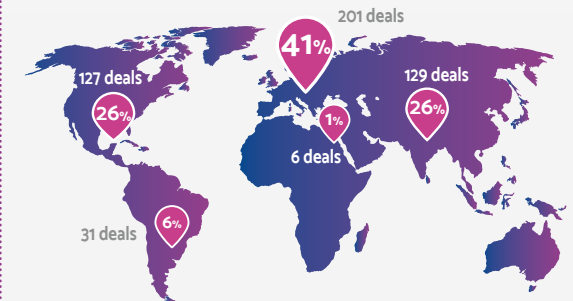
● Big Six ● Digital Media Investment firms ● Management Consultancy ● Others



Top deals since 2016
(in terms of staff)

-
- MERKLE > DENTSU 2016**
8,760 / \$436M / USA / Digital
 - EPSILON > PUBLICIS 2019**
8,000 / \$2,200M / USA / Data
 - NUMERATOR > BAIN CAPITAL 2021**
2,400 / \$340M / USA / Data
 - ACXIOM > IPG 2018**
2,100 / \$657M / USA / Data
 - LIQUIDHUB > CAPGEMINI 2018**
1,600 / \$200M / USA / Data
 - IMAGINEA > ACCENTURE 2021**
1,350 / \$110M / India / Data
 - NOVETTA > ACCENTURE 2021**
1,300 / \$335M / USA / Data
 - EMPIRED > CAPGEMINI 2021**
1,100 / \$120M / Australia / Data
 - MADRAS GLOBAL > DELOITTE 2021**
1,000 / \$250M / USA / Creative

Most targeted geographic zones since 2016



Europe has been the most dynamic zone, concentrating 41% of the deals since 2016, representing a total of 201 acquisitions, more than 26,000 staff (27% out of the total) and 29% of annual revenues (\$3.1B out of \$10.9B).

At a country level, looking at the past six years, **the U.S. remains the leader with 23% of the total deals recorded** (#113), representing \$5.1B of accumulated annual revenues (47% of the total) and 42,400 employees (44%).