

R3 is a leader in global, regional and local consulting on improving the effectiveness and efficiency of marketers and their agencies. We work with nine of the world's top twenty marketers including Coca-Cola, Unilever, AB InBev, MasterCard, Mercedes Benz, Johnson & Johnson, Samsung and Kimberly Clark.

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Q3 2018 R3VIEW

Welcome to the Q3 2018 R3VIEW, our regular quarterly report on the marketing communications industry. In this issue, we look at the biggest stories in the industry, our analysis of key industry events, CMOs and Agency Execs on the move, along with the Q3 M&A and New Business League results.

THE BIGGEST STORIES

TRANSPARENCY STILL PROBLEMATIC IN PROGRAMMATIC, STATES R3 REPORT

Despite the maturity in programmatic, the lack of transparency in the field is still a [major pain point](#) for advertisers. This has led to many marketers contemplating taking the function in-house, in an attempt to regain some control over their ad spend and increase transparency. Of the US\$63.4 billion that brands spent on programmatic in 2017, as little as 27% made it to working media, according to a recent WARC report. Up to 12% of those dollars were lost to ad fraud, and an astounding 55% fell victim to the so-called "tech tax" that is applied at each stage of a programmatic buy. Our latest white paper outlines the complexities of the programmatic value chain, identifies which global marketers are making headway in the fight for greater transparency, and provides six steps that CMOs can use when deciding which programmatic model is right for their marketing operation and overall business goals, as well as how to set it up for long-term success.

See the full white paper [here](#).

WPP HAS A TUMULTUOUS Q3

Q3 of this year saw a new leader take the helm of the world's largest agency holding group. Mark Read – who joined WPP right out of college, and then re-joined in 2002 after several stints elsewhere – has been selected to lead the firm during a tumultuous time. WPP recently suffered a high profile loss in the form of a significant portion of the Ford business. They did retain part of the business (media, production, CRM and digital); however, the loss is still great for the company. According to a [Campaign article](#), WPP had about 3,500 people working on Ford around the world and revenue from the account was about \$700 million. Read also decided to [consolidate](#) some of the ad giant's major properties to keep pace with the industry's digital shift – merging Y&R and VML into one shop. Mark Read's first several months at the helm have certainly been challenging, it will be interesting to see how leads WPP through this tough time.

For more on Mark Read's appointment, click [here](#).

MILLENNIAL MOMS IN ASIA CHOOSE CONVENIENCE OVER QUALITY

Millennial moms in Asia are more connected to brands on social channels than those who don't have children, a [recent R3 white paper](#) has found, and marketers shouldn't use broad stereotypes when targeting the demographic. As of 2017, Millennial parents make up 56.6% of all parents to children under 18 in Asia with internet access. The Asian Millennial Mother has become an extremely important demographic to marketers, particularly because they disproportionately control the family's purse strings as the key decision makers in many purchase decisions. Yet, most of the available research about Millennial Moms is still focused mainly on the US audience. Our most recent white paper identifies the four characteristics of the Asian Millennial Mother, and how these characteristics can help marketers connect with this demographic in an effective way.

Learn more [here](#).

REPORT FINDS 36% INCREASE IN NEW BUSINESS THIS YEAR, DRIVEN BY AGENCY REVIEWS

According to a [report](#) released by R3 at the beginning of Q3, new business revenue is up 36% so far in 2018. The report tallied an increase from \$691 million in the first half of 2017 to \$1.09 billion in the first half of this year due to a total of 3,401 agency new business wins from over 700 agencies globally, according to R3, up 3% from the first half of 2017. Creative new business revenue saw an increase of 57%, with a 5% increase in total new business wins. This was largely driven by activity in the US, where revenue for new creative wins is up 88% compared to the same period in 2017. For media, new business revenue was up 11%, with total new business wins up just 0.3%. In the US, new business revenue for media was up 70% compared to the first half of 2017.

To see the full report, click [here](#).

To see New Business trends in APAC, click [here](#).

THE FBI ENTERS THE MEDIA REBATE INVESTIGATION

According to a story that the [WSJ](#) broke in late September, the feds are getting ready to come knocking. On Oct. 10, the Association of National Advertising sent a letter to its members sharing that the Federal Bureau of Investigation had contacted the ANA's outside counsel Reed Smith LLP about assisting with its investigation into US media buying practices. Agency execs are speculating that the scope of the investigation will go beyond just rebates, covering tax evasion and commercial fraud as well in some cases. R3 Principal, [Greg Paull](#), asserted that the US isn't the only market that should be concerned. He said, *"Unlike the K2 report, the FBI's remit for this work is global. They will be looking at agency holding groups on a worldwide basis – so Asia is very much part of their remit...the reality is that in Asia, rebates are actually far more prevalent than in the US."*

To learn more, see Greg's full article [here](#).

MARKETING CPG HIGHLIGHTS

R3 recently sponsored a Mediapost event called Marketing CPG: The Conference. The event sought to explore the upheaval underway in the CPG category, caused by the rise of direct-to-consumer brands, digital advertising and e-commerce. Here are the key takeaways from the event:



CPG MARKETERS ARE INCREASINGLY IN-HOUSING CAPABILITIES, PARTNERSHIPS, TECHNOLOGY

CPG marketers are increasing investment in internal digital capabilities. For example, Bayer built a digital center of excellence, staffed by people who had hands-on experience executing campaigns. Their team is tasked with elevating Digital across brands and establishing best practices in collaboration with their agency partners (e.g. KPI frameworks, strategy, content for digital business reviews, performance reporting, etc...). At the same time, smaller Bayer brands that can't afford to test also benefit from shared learnings and common frameworks.

Agencies still play a critical role, especially in communications planning, research, insights, creative and media buying, while they've established direct partnerships with major media players (i.e. Google, Amazon, FB, Spotify, etc...). Much to the agencies' dismay, these companies are increasingly taking a seat at the table alongside agencies, discussing strategy, tactics, creative ideas and performance optimization. This

has also led to concerns over data ownership, and diminished trust in agencies.

Some brands are moving everything in house to combat these issues. One example would be Chobani, who moved all ad tech contracts in-house to take back control of their data, improve transparency of costs and have autonomy over partner selection.



DIRECT-TO-CONSUMER (D2C) MOVES CPG MEDIA MIX FURTHER DOWN THE FUNNEL

CPG brands are embracing performance media channels and rethinking the role of e-commerce in their overall strategies. Their focus is shifting to driving trials and first time usage, as well as growing their first-party data pool for remarketing and audience insights. They are increasingly using the channel to drive sales to retail (online and brick and mortar).

On the other hand, D2C brands like Harry's and Hello Fresh are expanding to retail to find new customers. To succeed, these companies must move from a "if we can't track it, we won't do it," mindset and embrace some ambiguity in sales-to-marketing attribution.



FACEBOOK AND AMAZON – A LOVE, HATE RELATIONSHIP

Most marketers agree – Facebook sucks. The caveat is that it works, so advertisers keep spending. Facebook delivers reach with flexible ad formats, making it cost effective, responsive and measurable. Facebook account teams proactively help brands glean insights from campaign data and make optimization recommendations.

Amazon is a portal to millions of potential customers in a brand safe environment; however, they don't share granular data with marketers, making it impossible to conduct like-for-like performance analysis against other channels. Another major issue for brands is that they cannibalize brand sales by promoting their own products. The overall consensus for CPG marketers is that Amazon is a necessary evil, and that brands should proceed with caution.

GLOBAL CMO CONTRIBUTORS MAKING HEADLINES AROUND THE WORLD

The latest book from R3's Principals and Co-Founders, Greg Paull and Shufen Goh, features interviews from 18 CMOs of leading global brands. *Global CMO: Best Practice in Marketing Effectiveness & Efficiency Around the World* explores the most important challenges facing marketers today, including tech & data, the changing agency model, and how to become "future fit." In this issue of the Q3 Review, we are highlighting the recent achievements of three of the book's contributors.



MEREDITH VERDONE CMO, BANK OF AMERICA

Global CMO contributor [Meredith Verdone](#) took the stage during Advertising Week to discuss personalization, data and privacy. On a panel with fellow book contributor, [Raja Rajamannar](#) of Mastercard, Verdone asserted that there is *"so much fake news, people don't know whom to trust, so Bank of America's messaging is following a swing back for experts."* The panelists highlighted other key challenges, including data and privacy issues, and Verdone said that *"You need to make it part of your strategy instead of worrying that you are going to get caught."* Bank of America is looking towards connected offline experiences with online interactions, and despite the fact that it might be *"a little creepy,"* Verdone believes that consumers are ready to embrace extreme personalization in the way brands are marketing to them.

To read more about the panel, click [here](#).



JENNIFER BREITHAUPT GLOBAL CONSUMER CMO, CITI

Citibank's business success was recently profiled in a CNBC article, and Global CMO contributor [Jennifer Breithaupt](#) discussed the role that marketing plays in that success. Citi is leveraging new technology to acquire customers and better serve existing ones, deploying artificial intelligence (AI) to help it get better ideas for its advertising and reach audiences more accurately. It is using a piece of YouTube software called Director Mix to create different versions of their ads, based on their location, their browsing history and many other data points. *"We're creating thousands of different versions*

of these ads, where it's just changing based on a small nuance and it allows us to put those ads to serve (online)," said Breithaupt. The article goes on to talk about how Citi incorporates music and popular artists into their marketing strategy, and how the finance giant will leverage Publicis Groupe's AI, Marcel, going forward.

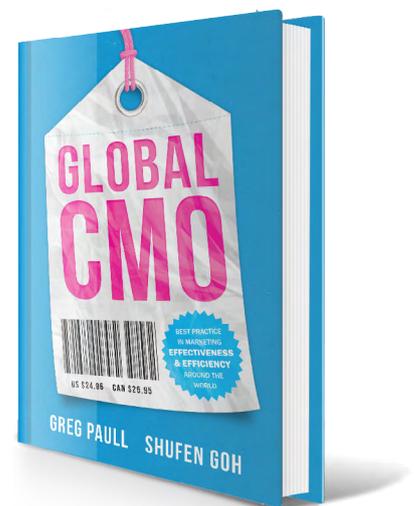
To read the full article, click [here](#).



SYL SALLER CMO, DIAGEO

Global CMO contributor [Syl Saller](#) was recently interviewed by Forbes during Cannes to discuss how the drinks business has to respond to – and ultimately drive - what happens in culture. As the marketing leader for the largest premium drinks company in the world (operating in over 180 countries with 200 brands), Saller asserts that marketing has to bring an “*amazing craft*” to the table, but that doesn’t mean that she views marketing through the data vs. creativity lens. In fact, she says that those two things are completely compatible. She goes on to discuss the importance of gender portrayal in marketing, and how marketing can normalize gender equality by consciously promoting it in all of their communications.

To watch the full interview, click [here](#).



90 DAYS OF M&A

At the end of Q3, Adobe made their first appearance on the Global M&A League table, knocking IPG out of the number one spot after purchasing cloud-based platform for B2B marketing engagement Marketo for an estimated \$4.5 billion. Alibaba remained in second place off the back of their Focus Media acquisition, while IPG dropped into third. Another newcomer on the latest table is Insight Venture Partners, a private equity firm who recently acquired digital content management platform Episerver.

TOTAL DEAL VALUE (\$MN)	25,892
TOTAL DEAL COUNT	327

2018 HOLDING COMPANY M&A LEAGUE

Global / Q3 2018

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL SALES VALUE (US\$M)	NUMBER OF DEALS
1	-	Adobe	Marketo	4,750	1
2	2	Alibaba	Focus Media	2,200	1
3	1	IPG	Cappuccino, Acxiom Marketing Solutions, That Lot, ARC Public Relations	2,050	4
4	3	AT&T	AppNexus	1,600	1
5	-	Insight Venture Partners	Episerver	1,160	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

NEW BUSINESS LEAGUE

At the end of Q3, Publicis remains in first place on our Global Creative New Business League table. Their recent wins include both the Nike China and the Cathay Pacific Global business. Leo Burnett is still in second place, and McCann WorldGroup has moved up from fifth into third place after winning Opel Europe. The biggest move of the year comes from BBDO. After winning the Ford Global creative business, they moved up from 272 into fourth place. Over on the media table, Mediacom remains in first place, with Initiative moving into second. Hearts & Science moved up from fourth place off the back their recent WarnerMedia Group win in the US.

2018 CREATIVE AGENCIES NEW BUSINESS LEAGUE

Global /Q3 2018

RANK THIS MONTH	RANK LAST MONTH	AGENCY	RECENT WINS	ESTIMATED YTDWIN REVENUE (USD \$ M)	RECENT LOSSES	ESTIMATED YTD WIN REVENUE (USD \$ M)	NUMBER OF WINS
1	1	Publicis	Huarun Painting China, Nike China, Cathay Pacific Global, Nestle US	183.9	The Home Depot Canada	180.0	160
2	2	Leo Burnett	Jacobs Coffee China, Buick China, Anchor Electricals India, Samsung Electronics visual display Global	161.3	KEI Industries India Retainer	157.6	225
3	5	McCann WorldGroup	Opel Europe, Magnet Kitchens UK, Columbia Sports-wears Global, Banco do Brasil Brazil	139.8	Cathay Pacific Global	124.6	259
4	272	BBDO	Ford Global, O2 Germany, Bayer US, Asda UK, Dunkin' Donuts US	311.1	Daimler	104.8	117
5	3	J Walter Thompson	Property Finder Asia Pacific, Swisse Australia, Multiplus LATAM, Ministry of Community & Information APAC	151.4	Shell Global	104.4	392
6	4	Ogilvy	Chelsea Football Club APAC Singapore, KEI Industries India Retainer, Rolls-Royce UK, ITC - Wills Lifestyle India	105.2	Modelo, Corona Light US	99.8	297
7	6	Havas Worldwide	E. LECLERC France, Hain Daniel brands UK, Altria France, Rite Aid US	105.2	Rolls-Royce UK	84.9	134
8	7	Saatchi & Saatchi	Paradise Island US, Cathay Pacific APAC, New World China Property China	86.3	Asda UK	72.9	58
9	11\17	VMLY&R	Amtrak US, Puma China, DuPont Electronic Materials US, Danon Oikos US, Driscoll's US	67.5	Menulog Australia	61.4	106
10	8	R/GA	British Land UK, Eurosport London, Sem Parar Brazil, FIBA World Cup China	52.6		52.6	45
11	9	MullenLowe Group	Co-operative Bank UK, Pharmeasy India, Modern Bread India, ITC India	50.4	Aldeas Infantiles SOS Bolivia	49.4	29
12=	12	Isobar	Siamnuwat Thailand, Marks & Spencer (M&S) India, Colorbar India, Wired Global	48.7		48.7	235
12=	10	Wieden & Kennedy	Tinder US, Bud Light (Social) US, Converse Global	39.0		39.0	8
14	13	FCB	Gomes de Costa Brasil, The Home Depot Canada, Cruzeiro do Sul Educacional Brasil, Kimberly Clark Global	36.9	Volkswagen New Zealand	35.0	40
15	14	TBWA	McCafé US, Together UK, Du Middle East, Bluebird Bio US	42.6	Oroton Australia	33.2	35
16	15	Dentsu	Mazhavil Manorama India, Geojit Financial Services India, Subway Singapore, Land Transport Authority Singapore	29.8	HP Japan Project	28.5	141
17	18	GS&P	BMW US, Ram Trucks US	21.0		21.0	2
18=	19	GSD&M	Pizza Hut US, Jack Link's US, Harry's shave care US	24.3	John Deere US	19.5	3
18=	21	Digitas	Huawei China China Project, Clinique China Project, Senoko Singapore Project	17.6		17.6	52
20	20	The Martin Agency	Wizards of the Coast US, Kohl's US, Sling TV US, The Magic Brand US	17.5	Target US	17.5	5
						1,615.9	3,050

2018 MEDIA AGENCIES NEW BUSINESS LEAGUE

Global / Q3 2018

RANK THIS MONTH	RANK LAST MONTH	AGENCY	RECENT WINS	ESTIMATED YTD WIN REVENUE (USD \$ M)	RECENT LOSSES	ESTIMATED OVERALL YTD REVENUE (USD \$ M)	NUMBER OF WINS
1	1	MediaCom	Amtrak US, Hilton Hotels & Resorts Global, Sony US, Mars Global	227.4	GSK Asia Pacific	182.3	156
2	3	Initiative	Officeworks Australia, AIDA Cruises Germany, LV= UK, Canada Goose Global	78.7	Pandora Italy	71.2	97
3	4	Hearts & Science	WarnerMedia group US, P&G Fabric Care N.America, Amgen US	83.8	Alzeihmers Research UK	68.6	8
4	5	Havas Media	Carrefour Europe, Pizza Papa Johns US, China Telecom China, Telefónica UK	84.0	LVMH NA	60.3	163
5	6	OMD	Department for Work and Pensions UK, McDonald's China, Flight Centre Canada, Kayak Hong Kong	90.8	Intel Global	59.5	231
6	2	Publicis Media	GlaxoSmithKline Global, Cathay Pacific Global	59.0	JALA	55.5	3
7	7	Dentsu Aegis Network	Intel Global, United Airlines Global, LVMH NA, Heineken, Vrumona Netherlands	47.3		47.3	39
8	8	Spark Foundry	Mondelez MENA & APAC, Lenovo Global, Macy's US	69.1	Bloomin' Brands US	44.3	17
9	9	Blue 449	T-Mobile US, PZ Cussons ANZ, Spark Networks Australia	42.7	Sony Pictures TV UK	40.9	8
10	11	PHD	Unilever South Africa, Hong Kong Jockey Club Hong Kong, VF Corporation EMEA, MegaMex USA	72.4	GlaxoSmithKline Global	40.7	241
11	10	Omnicom Media Group	Daimler Global, Tata Motors Passenger Vehicles	40.5		40.5	2
12	12	dentsu X	LVMH US, AESIO France, Dairy Queen Canada, Coolwinks.com India	45.6	Honda Vietnam Project	30.4	141
13	13	Universal McCann	Village House Japan, Blue AVIVA Hong Kong, Nestlé Australia	33.9	Cathay Global	24.4	55
14	14	Zenith	GSK Asia Pacific, Nestle SE Asia, Coty APAC, HDFC Life India, Nestle Skin Health India	27.7	Amway China	23.6	36
15	15	MullenLowe MediaHub	Bloomin' Brands US, Dropbox Global Global, Athena Healthcare US, Century 21 US	20.3	7-Eleven Philippines	20.1	30
16	16	Essence	T-Mobile US, Tigerair Australia, T-Mobile US Digital Media	20.2		19.7	2
17	17	Wieden & Kennedy	KFC US, League of Legends US	13.8		13.8	2
18	18	Horizon Media	Northwestern Mutuak US, Burlington Stores US, TriHonda dealers US	19.5	DR.OETKER Russia	13.4	5
19	19	WPP (Team Energy)	BP Global	10.0		10.0	1
20	20	Vizeum	EGAT - project Thailand, Dentiste Thailand Project, Bertram Chemical (1982) Ltd. Thailand project, WWF UK	14.3	Pernod Ricard South Africa	9.7	101
						876.8	1,956

HOLDING COMPANY NEW BUSINESS LEAGUE

WPP had a rough Q3, and our most recent Holding Company New Business League shows that they dropped from first place down into fourth after a series of high profile account losses. Publicis Groupe has moved into first place and has 619 wins under their belt so far. Their creative agencies are performing well this year, with Publicis and Leo Burnett coming in first and second place on the Agency New Business League, respectively. Interpublic moved up to into second place with 567 wins to date.

2018 NEW BUSINESS LEAGUE HOLDING GROUP RANKING

Global / Q3 2018

RANK THIS QUARTER	RANK LAST QUARTER	HOLDING GROUP	ESTIMATED CREATIVE YTD REVENUE	ESTIMATED MEDIA YTD REVENUE (USD \$M)	ESTIMATED OVERALL YTD REVENUE (USD \$M)	AS % OF 2016 REVENUE	NUMBER OF WINS
1	2	Publicis Groupe	432.5	182.8	615.3	5.0%	619
2	3	Interpublic	263.3	117.4	380.8	4.8%	567
3	4	Omnicom	137.4	207.4	344.8	2.2%	859
4	1	WPP	105.8	172.9	278.7	1.4%	1,305
5	5	Dentsu	88.8	101.1	189.8	2.2%	857
6	6	Havas	84.9	64.5	149.4	5.3%	300
7	7	MDC	2.1	-2.0	0.1	0.0%	21
					1,959	2.8%	4,528

CMOS ON THE MOVE



BARBARA MESSING - WALMART, CMO US

Barbara Messing, former chief marketing officer of TripAdvisor, is set to take on the same role at Walmart. She replaces Tony Rogers, who left his post as marketing head earlier this year to join Sam's Club - which is owned by Walmart - as chief member officer. While Messing was CMO at TripAdvisor, she was part of a team that led its transition from a media-only site into a trip-booking e-commerce player. Prior to TripAdvisor, she held several roles at Hotwire - another online travel booking site.



PEDRO EARP - AB INBEV, CMO

AB InBev has tapped a new global CMO, Pedro Earp, who will assume the role from Miguel Patricio, who will serve as the company's chief of special global projects. Earp, currently chief disruptive growth officer, will now not only be the company's global CMO but he will also be the Head of ZX Ventures. ZX Ventures is a venture capital team backed by AB InBev that will continue to be an independent entity to "remain ahead of the curve, stay agile and invest in new products and experiences to address emerging consumer needs." Prior to joining Ab InBev, Earp worked as the Head of Mergers and Acquisitions for Brazilian brewing company, Ambev.



ANTONIO LUCIO - FACEBOOK, CMO

Antonio Lucio, global chief marketing and communications officer at tech giant HP, is leaving the tech giant to take on the same role at Facebook. Lucio spent more than three years with HP following its split from The Hewlett Packard Corporation. During his tenure, he was perhaps best known as an outspoken advocate for diversity. Prior to HP, Lucio held several senior marketing roles at both Visa and PepsiCo. He began his marketing career more than 30 years ago with P&G. In his new role at Facebook, he will be a part of the COO Sheryl Sandberg's leadership team.



VINAYAK HEGDE - AIRBNB, VP GLOBAL GROWTH & PERFORMANCE MARKETING

Airbnb has appointed Vinayak Hegde as lead of 'global growth marketing and traffic platform' as well as handle all marketing activities for its Homes division. Hegde's role is within Airbnb's Homes business, which is separate from marketing. The chief marketing officer, a role still vacant since the departure of Jonathan Mildenhall nearly a year ago, is currently filled by chief executive officer Brian Chesky, who is acting CMO. Hegde has close to two decades of marketing experience at Amazon and more recently, at Groupon, where he was the e-commerce company's senior vice president and global CMO.



JENNY CAMPBELL - TINDER, CMO

Tinder recently announced that Jenny Campbell has joined the company as Chief Marketing Officer. With more than 20 years of marketing experience, both in-house at Nike and in leadership roles at 72andSunny and Wieden + Kennedy, Jenny has a proven track record shaping brand, marketing, and advertising strategies. Jenny joins Tinder from 72andSunny, where she served as Managing Director, of the Los Angeles office and worked with leading international brands, including: Adidas, Uber, Activision, Starbucks, eBay, UGG and Stubhub among others. Prior to 72andSunny, Jenny was a Global Brand Director at Nike for various areas including Nike+ Member Services, NikeFuelband and Nike+ Running.



REBECCA MESSINA - UBER, CMO

Uber has announced that Rebecca Messina has been named its global chief marketer. Messina held the same role for Beam Suntory, the home of whiskey brands Jim Beam and Makers' Mark, Pinnacle vodka and Courvoisier cognac for two years. Prior to that, Messina spent over 22 years at Coca-Cola, where she was most recently its senior vice president, marketing and innovation for ventures and emerging brands. She served in a number of different marketing leadership roles across the company, both in the US and internationally. In her new role, Messina has been tasked with uniting the ridesharing service's marketing teams to coalesce brand messaging and support the company's growth going forward.



SHANNON PRUITT - THE HONEST CO., CMO

The Honest Company has named Shannon Pruitt as their new CMO. Pruitt served as president of Dentsu's content agency The Story Lab in her prior role, accumulating a wealth of experience in the realms of integrated, omni-channel marketing, brand-building and brand story creation. These skills are highly prized by Pruitt's new bosses, who include co-founders Jessica Alba and Chris Gavigan, as they seek to improve their brand marketing, creative, content and marketing communications. Pruitt's previous roles include stints on both the agency and brand side for companies including Brand Arc, Warner Bros, Agility Studios and Mastercard.



TIM ELLIS - NFL, CMO

Tim Ellis has recently been named the CMO for the National Football League, where he succeeds Dawn Hudson, who stepped down earlier this year. Most recently, he was the chief marketing officer at Activision for the past seven years. His previous roles include Head of Marketing at Volkswagen America and Global Communications Director for Volvo. In his new role, Ellis will head up the organization's "research, content development, consumer engagement, advertising, promotions, marketing operations and branding" efforts.



ELIZABETH BRADY - ALLSTATE, EVP CHIEF MARKETING, INNOVATION & CORPORATE RELATIONS OFFICER

Elizabeth Brady has been named the Executive Vice President and Chief Marketing, Innovation and Corporate Relations Officer for Allstate. Prior to joining Allstate, Elizabeth was Senior Vice President, Global Brand Management, at Kohler Co., where she led marketing and communications across four businesses and 33 brands worldwide. She has also held senior leadership positions on the agency side at both Publicis and BBDO. In her new role, she is responsible for leading marketing for all the corporation's brands, as well as enterprise innovation efforts, internal and external communication and corporate philanthropy.



ALESSANDRO DE PESTEL - UNDER ARMOUR, CMO

Under Armour has hired a new executive to lead its global marketing efforts as the company competes with rivals Nike and Adidas. Alessandro de Pestel recently joined the athletic wear brand as chief marketing officer. Prior to joining Under Armour, de Pestel held senior marketing roles for several fashion brands, including Tommy Hilfiger, Calvin Klein, Christian Dior, Omega, Fila and Swatch. Moving forward, de Pestel will be based in Baltimore reporting to president and COO Patrik Frisk.

AGENCY LEADERSHIP MOVEMENT



MARK READ - WPP, CEO

Mark Read, long tipped as successor to WPP's Martin Sorrell, is now CEO of the industry's largest advertising holding company. He will also serve as an executive director on the company's board. The appointment is effective immediately. In a statement issued by WPP Chairman Roberto Quarta, he stated the board had gone through a rigorous selection process to land on Read. "That process, alongside Mark's wise and effective stewardship of the business in the last few months, left us with no doubt that he is the right leader for this company, and we are delighted to announce the Board's unanimous decision to appoint him as Chief Executive Officer of WPP." With the move, Read will oversee 130,000 people working with clients in 112 countries.



LIZ PARADISE - BRIGHT RED, CHIEF CREATIVE OFFICER

The Omnicom integrated agency Bright Red hired Liz Paradise as its first chief creative officer. Paradise most recently served as director, creative for Disney's Yellow Shoes studios in Orlando. Before that she spent over 25 years at McKinney, where she most recently served as executive vice president, executive creative director, leading work for clients including Nationwide Insurance, Audi, Royal Caribbean, NASDAQ and EAS Sports Nutrition. She began her career as a copywriter with The Martin Agency prior to joining McKinney.



FABIO SEIDL - VELOCITY, EXECUTIVE CREATIVE DIRECTOR

The recently-launched Omnicom integrated agency, Velocity, has hired Fabio Seidl as executive creative director. Seidl comes to Velocity from VML New York, where he spent the past year serving as executive creative director, working across the office's client roster, including on the agency's recent "#NotATarget" campaign for the United Nations and "Real Time Exception Spotting" for New Balance. Before joining VML he spent two years as a group creative director with 360i, where he worked with clients including Coca-Cola, Absolut Vodka, YouTube, Canon, Chevron, Fischer-Price, Nestlé, The Reeve Foundation and NBC Universal. Prior to, that he spent a couple years with Leo Burnett Chicago as senior vice president, executive creative director.



ROBYN FREYE - MDC PARTNERS, SVP, STRATEGIC GROWTH

MDC Partners welcomed Robyn Freye to its marketing and business development team as senior vice president, focusing on growth in the U.S. market. Freye arrives from consultancy The Burnett Collective, where she focused on agency search and review, global roster consolidation, agency compensation, scope of work modeling and operational enhancements as vice president. Prior to joining The Burnett Collective in 2016, she spent three years at R/GA as vice president, managing director, business development. In her new role, Freye will be based on the West Coast and tasked with driving new client engagement and fueling new business efforts, reporting to U.S. chief marketing officer Ryan Linder.



JAMES HARRIS - MINDSHARE, GLOBAL CHIEF STRATEGY OFFICER

Mindshare, under WPP's media arm GroupM, has hired former Carat global digital and data chief James Harris as its global chief strategy officer. During Harris' time at Carat, he oversaw the agency network's digital capabilities and drove digital strategy and solutions for its global roster. Previously, he was AOL's international head of agencies, and IPG Mediabrands managing director of digital services. Harris is known for being the founder or co-founder of a number of agencies, including both iProspect (at the time, called Diffiniti) and Mediacom North. Dell, Coca-Cola, Diageo, General Motors and Mastercard were among the global clients he has worked with in his 25-year career.



GUILLERMO VEGA - SAATCHI & SAATCHI, CHIEF CREATIVE OFFICER

Saatchi & Saatchi has named former 72andSunny New York executive creative director Guillermo Vega as its new chief creative officer (CCO) in London. In addition to leading the growth of 72andSunny New York, he also set up Wieden+Kennedy São Paulo where he spent three-and-a-half years as executive creative director. He also had a stint as regional creative director of Y&R in New York where he oversaw the business's work in Latin America. In his new role, Vega will report to chief executive Magnus Djaba and global chief creative officer Kate Stanners, while joining the management team in London alongside chief operating officer Sam Hawkey, chief strategy officer Richard Huntington and managing director Larissa Vince.



TOM SCHARPF - LEO BURNETT, EVP, SAMSUNG BUSINESS

Leo Burnett has named Tom Scharpf executive vice president, executive creative director for the Samsung business. Scharpf has been partnered with Kieran Ots, and has been asked to focus primarily on mobile and brand work. Prior to joining the shop, he started his career at Fallon in Minneapolis before joining Venables Bell & Partners in 2006 as an associate creative director. He also spent time as a freelancer for agencies including BBH, Chiat\Day, David & Goliath and DDB, among others.



KASHA CACY - ENGINE GROUP, CEO

Engine Group has named Kasha Cacy as its new global chief executive officer, joining from IPG agency network UM. Cacy, who was US chief executive of UM, will be based in the agency's New York headquarters, where she will report to Paul Caine, its executive chair. Caine said of Cacy, who spent a decade at her previous company where she was most recently responsible for the running of its five offices across the US: "Her talent, drive and vision will be tremendous assets as we enter an exciting time for the company and our clients. Kasha has deep expertise across media, data, marketing and consulting. She will be key in leading Engine as we build upon our differentiated offering of data, insights, content, distribution and technology, with the goal of helping our brand, publisher and agency partners succeed in driving business growth."



LUIS SILVA DIAS - FCB GLOBAL, CEO

FCB Global has announced the promotion of Luis Silva Dias to chief executive of FCB International. The division of FCB was launched in 2013 to oversee growth and output of its operations in 62 markets, crossing Latin America, Europe, and Asia. Silva Dias, who had held the title of FCB International chief creative, has been part of this effort since joining in 2000. As a creative director in FCB Portugal, he was elevated to president and chief executive in 2005, then was named chief creative for Europe and the Middle East in 2008. Silva Dias joined FCB International in 2014, and was considered the lead architect of the agency's global rebrand.



SCOTT DONATON - DIGITAS, CHIEF CREATIVE AND CONTENT OFFICER

Publicis-owned Digitas has promoted Scott Donaton to global chief creative and content officer, under a new united 'Connected Creative' capability, which the company says is a "collaborative approach to solve brand challenges." Donaton joined Digitas in 2015 as its chief content officer and launched, and still leads, Digitas Studios, which develops custom-content initiatives, strategies and business models for clients. Prior to joining, he was previously with IPG Mediabrands, Entertainment Weekly and Ad Age, where he wrote the book, Madison & Vine. In his new role, Donaton will report into Digitas' global brand president Michael Kahn.

ABOUT R3

OUR REASON FOR BEING

In a word, we are about transformation. R3 was set up in 2002 in response to an increasing need from marketers to enhance their return on marketing, media and agency investments, and to improve efficiency and effectiveness.

We want to help CMOs make marketing accountable.

OUR BACKGROUND

We've worked with more than one hundred companies on global, regional and local assignments to drive efficiency and effectiveness.

We have talent based in the US, Asia Pacific and Europe and partners in LATAM and Africa.

Through global work for Samsung, Coca-Cola, Johnson & Johnson, Visa, Unilever, and others, we have developed robust benchmarks and process targets for more than 70 countries.



WHAT WE DO

We are an independent transformation consultancy hired by CMOs to make their marketing more measurable and accountable to business impact.



HOW WE DO IT

- We invest in the best talent, bringing in senior leaders from marketing, agency, and analytic backgrounds.
- We're independent. Because we're not your marketing team or agencies, we're empowered to be honest and transparent.
- We use external benchmarks. We have proprietary data pool to inform our in-depth analysis.
- Since 2002, we've interviewed more than 2,000 marketers about their agency relations.
- Since 2006, we've spoken to more than 80,000 consumers in China's top-twenty cities and continue to do so every three months.
- We have co-developed software to measure agency and media performance.
- Each month, we exclusively track over 500 agency new business wins, as well as 100's of deals in the marketing M&A space.
- We have insight into global best practice. We work with companies who want to do best-in-class marketing across diverse categories and geographies.
- We authored the book "Global CMO" about marketers leading Digital Transformation around the world.
- We maintain an ongoing database of media costs for key markets.

DRIVING
TRANSFORMATION FOR
MARKETERS AND THEIR
AGENCIES

RETURN ON AGENCIES

We help marketers find, pay and keep the best possible agency relationships – covering Creative, Media, PR, Digital, Social, Performance, Event, Promotions and CRM.

We take the lead on improving the Integration process through proprietary software and consulting.

RETURN ON MEDIA

We offer professional analysis of the media process, planning and buying with proprietary benchmarks and tools to set and measure performance.

We conduct financial audits to validate and benchmark transparency.

RETURN ON INVESTMENT

Using a bespoke and proprietary methodology, we help benchmark and provide insights into how your digital strategies perform in your category and across categories.

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