# R3 WORLDWIDE

## QUARTERLY BAROMETER

**KOL ENGAGEMENT EQUATION**
Getting the social influencer equation right.

**BETTER VOICE**
Natural language processing takes it up a level.

**ARTIFICIAL INTELLIGENCE**
More integration into campaigns.

**EMOTION**
Helpfulness and authenticity will combat relationships lost through tech and automation.

**CONTENT FOR CONTENT'S SAKES**
Volume without purpose is clutter.

**VIDEO ADS LONGER THAN 6 SECONDS**
We're swiping to the next soundbite.

**WEBSITE ANALYTICS**
Repeat: it's conversion, not impressions.

**TEXT OPTMIZATION**
Engagement is in mixed media formats

# Q4 2018 R3VIEW

## WELCOME TO THE Q4 2018 R3VIEW, R3'S QUARTERLY REPORT ON THE MARKETING COMMUNICATIONS INDUSTRY

You could look back and say that 2018 was a year that was cathartic for some and downright uncomfortable for others. The biggest sign for where things are headed in 2019 has been in a changing of the guard, from martech-dominated M&A activity, to mergers of traditional creative agencies and their more robust, younger data-driven counterparts.

To navigate this developing landscape, it pays to be informed. In this issue, we've included directions being taken by global CMOs, and sharing some highlights from our recent research that might be helpful to you. If you'd like to receive copies of our more extensive reports, do get in touch with one of our consultants.

Within this report:
- The Biggest Stories
- CMO Directions
- Latest Data, Research
- M&A and New Business League
- Marketers on the Move
- Agency Leadership

# THE BIGGEST STORIES

## ALL IN THE FAMILY: ALPHA EATS BETA



Wunderman Thompson, VMLY&R. Looking at the mega-marriages between traditional advertising networks and digital agencies last year, let's note that the mergers were between data and creative, not data and media, and it's data that contributed the heftier dowry. Creative needs the personalization of technology and digital needs creative to uphold the traditional practice of brand building. As WPP chief executive officer Mark Read pronounced, clients are unable to articulate their desires, but everyone wants growth.

## IT'S A MAD, MAD, MADTECH WORLD
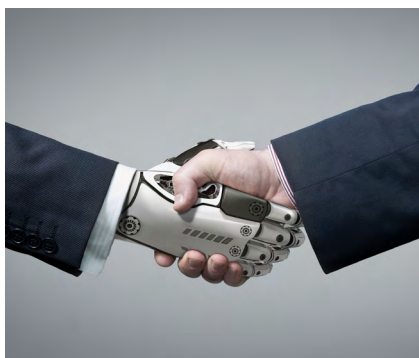


There's no better term to describe the buying frenzy that marks the convergence of martech and adtech than "Madtech." The past year has truly been a hive of activity for martech giants such as Salesforce, Oracle and Adobe, who have been busy acquiring adtech providers with the intent of building tools that enable advertisers to collect, analyze and augment data from both online and offline channels. Success will bode well for achieving some kind of unified measurement.

Read more in our M&A recap.

## AMAZON MAKES ITS MOVE ON MADISON AVENUE



After a protracted courting process, Amazon announced in November that it had selected Long Island City - just across the river from Midtown Manhattan - as one of two new locations for its headquarters. With a model that eschews agencies for direct-to-brand relationships, Amazon's proximity to Madison Avenue will cause some discomfort. Clients will be a stone's throw away from the centre of this "buying universe" and there are plenty of opportunities for agency talent. The question is "will they?"

Read more about the move.

## IN-HOUSING: NO LONGER 'WHY' BUT 'HOW'

It's not yet a case of "everyone's doing it" but it does seem that more marketers are reporting some kind of in-house function or are at least of the opinion that there are benefits. And though in-housing seems to be more prevalent in fields like programmatic as a result of concerns around transparency offered by media agencies, the in-housing trend is extending its reach. The main challenges for marketers continue to be talent and building competent in-house teams.

For two-sides of this story, read what media agencies and marketers have to say.

# CMO DIRECTIONS

## CROSS-CHANNEL MEASUREMENT, MEET PEOPLE-BASED MARKETING

Wasn't advertising always "people-based"? Well, never as much as it will be tomorrow. A concept only made possible by advances in cross-channel measurement tools, people-based marketing enables brands to centre campaigns around individual consumers and reach "real, live people" wherever they are, as opposed to targeting broad swaths of undefined users.

### THE NUMBERS

A study by Gartner found more than 90% of marketers struggle to seamlessly connect more than three channels on the buyer journey.

### BENEFITS OF CROSS-CHANNEL MEASUREMENT

Funnel analysis: See which channels, or combination of channels, provide the highest returns.

Channel relationship analysis: Increase your understanding on the relationship between each of your marketing channels.

Predictive modelling: Understand the impact of your marketing on actual revenue generated and how your marketing mix fits into the path to conversion.

### CMO RESPONSE

"On the organization-wide macro level, it is important to track the digitization of existing business models, including supply chain, customer service, operations and marketing.

On the micro marketing level, measuring the success of each channel on the consumer journey, as well as assessing individual campaigns relies on having their own metrics to know what is working and what isn't."

Raja Rajamannar
CMO, Mastercard

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*I think impressions are just empty calories most of the time... There's no stickiness. There's no sort of sense of 'I want to be here,' no sense of intent, high value tasks, or engaging in content.*

**Linda Boff**
CMO, GE

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*We believe that content quality is the new measure of value in the realm of influencer marketing.*

**Peter Nowlan**
CMO, Four Seasons

---

*We saw that 38 percent of people that went to a live event where a brand has participated were more likely to visit your website. If they're going to your website, you've got them. Now you have to hook them, and hopefully, they prefer you and it turns into loyalty and then into recurrent revenue.*

**Jennifer Breithaupt**
Global Consumer CMO, Citi

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*For more on technology and the CMO*

GLOBAL CMO

BEST PRACTICE IN MARKETING EFFECTIVENESS & EFFICIENCY AROUND THE WORLD

US $24.95  CAN $29.95

GREG PAULL  SHUFEN GOH
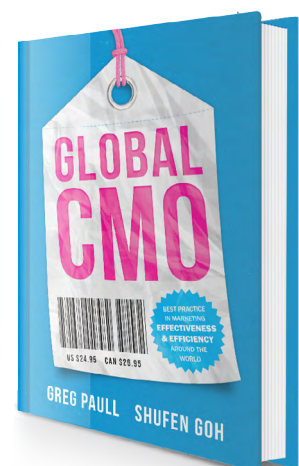
# Q4 R3SOURCE

## FROM R3 RESEARCH, REPORTS, WHITE PAPERS AND EVENTS

## COLLECTING DATA IS A CHALLENGE, BUT SO IS APPLYING IT TO FUTURE MARKETING



CMOs agree that collecting and integrating relevant data from internal and external sources, and managing and optimizing the use of databases for future marketing remain a challenge.

> " *...the greatest challenge for us is that the data is so fragmented across all departments that it is hard to integrate, and that makes it hard for us to see clearly who the consumers actually are.* "

**R3 CMO Transformation Roundtable**
Shanghai & Beijing

## ESPORTS

**GAME DEVELOPER FEES = 11%**
**SPONSORSHIP REVENUE = 40%**



Money made by league owners from eSports sponsorships significantly exceeds the cost of game development.

**Ready Player One -**
**Why eSports will eat Sports**

## 41% OF MARKETERS PLAN TO TAKE GREATER CONTROL OF THEIR PROGRAMMATIC AD SPEND

...revealed a recent survey by the WFA. Many advertisers think that agencies have struggled to adapt to programmatic buying and are attracted to the quicker response times and levels of control over data that in-housing provides.

**Transparency in the Programmatic Supply Chain, White Paper**



MEASURING THE EFFECTIVENESS **OF CELEBRITY & TV** SPONSORSHIPS IN CHINA

an **R3** WORLDWIDE *White Paper*

## CHINA'S CELEBRITY INFLUENCE POWER INDEX

By using external data from Baidu Index, Weibo Follower and Toutiao, R3 has created a unique methodology that indexes levels of "celebrity power" amongst top Chinese KOLs. With some KOLs working with twenty brands or more, and offering variable efficiency and value for money, the rankings can be used by marketers to make better decisions about investment.

**Measuring the Effectiveness Of Celebrity & TV Sponsorships In China**

# 90 DAYS OF M&A

$33bn of M&A activity in 2018 marked a 144% increase in spend on the previous year, with significant amounts being spent by more diverse buyers as they look to create bigger tech and data stacks to build stickier client relationships. In comparison, agency holding companies looked to play wide, spending less on a higher volume of acquisitions across a more diverse portfolio, mixing digital, creative, PR and media.

| TOTAL DEAL VALUE ($MN) | 32,849 |
|---|---|
| TOTAL DEAL COUNT | 465 |

## 2018 HOLDING COMPANY M&A LEAGUE
### Global / Q4 2018

| RANK THIS MONTH | RANK LAST MONTH | HOLDING GROUP | RECENT ACQUISITIONS | TOTAL SALES VALUE (US$M) | NUMBER OF DEALS |
|---|---|---|---|---|---|
| 1 | 1 | Adobe | Marketo | 4,750 | 1 |
| 2 | 2 | Alibaba | Focus Media | 2,200 | 1 |
| 3 | 3 | IPG | Cappuccino, Acxiom Marketing Solutions, That Lot, ARC Public Relations, Hurrah Productions | 2,070 | 5 |
| 4 | 4 | AT&T | AppNexus | 1,600 | 1 |
| 5 | 6 | Accenture | HO Communication, designaffairs, New Content, Kolle Rebbe, Kaplan, Enaxis Consulting, PrimeQ, Knowledgent, Adaptly | 1,232 | 11 |
| 6 | 5 | Insight Venture Partners | Episerver | 1,160 | 1 |
| 7 | 8 | Dentsu | Pixel Labs Inc., Namics, uBiome, Septeni, Perform Group, Clear Labs, Videobeat, Digital Evolution Group (DEG), Fractal Ink Design Studio | 970 | 28 |
| 8 | 7 | Salesforce | Datorama, Rebel | 858 | 2 |
| 9 | 9 | Perficient Digital | Stone Temple Consulting | 679 | 1 |
| 10 | 10 | Omnicom | Brain Group, Snow Companies, Elsevier (Japan), United Digital Group's media and performance marketing business, Levo Digital, Credera | 558 | 6 |
| 11 | 11 | CapGemini | LiquidHub, Adaptive Lab, June 21, Doing | 550 | 4 |
| 12 | - | Publicis Groupe | Soft Computing, Xebia France, Kindered Group, One Digital, Payer Sciences, FRONTSIDE, Ecosys | 482 | 7 |
| 13 | - | S4 Capital | MediaMonks, MightyHive | 475 | 2 |
| 14 | 12 | WPP | Map Project Office, Madhouse (India), Gorilla Group, Hirshorn-Zuckerman Design Group, 2Sales, Emark, Soulsight, Autumn Worldwide | 464 | 15 |
| 15 | 13 | KKR | Global Sports Commerce (GSC), Sellbytel | 430 | 2 |

# NEW BUSINESS LEAGUE

Agency business being put into review in 2018 contributed to a 7.5% increase in global new business revenue. However, the number of wins decreased 5.5% YoY. This is mirrored on the creative side, which experienced a 2.4% increase in new business revenue in 2018 on 10% fewer wins. On the media side, new business revenue increased 18.4% ($931m in 2017 and $1,1b in 2018) on a 2.3% increase in number of wins.

## 2018 CREATIVE AGENCIES NEW BUSINESS LEAGUE
### Global /Q4 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 | Nestle_NIN Lab 2019 SoW China, Adidas China, Weigang Dairy China, Dr. Oetker India, Huarun Painting China | 203.8 | CIB China | 199.8 | 200 |
| 2 | 2 | Leo Burnett | Welspun Group India, Wingstop Inc. US, Butlin's UK, Hainan Airlines China, Samsung GMC Korea | 167.0 | KEI Industries India Retainer | 163.3 | 251 |
| 3 | 3 | J Walter Thompson | Unilever Citra Global Pitch Thailand Global AOR, Midea Washing Machine Asia Pacific, Vitasoy Asia Pacific, Mazda NA, United Health Group NA | 200.3 | Kellogg's India | 151.4 | 555 |
| 4 | 7 | Isobar | Siamnuwat Thailand, Marks & Spencer (M&S) India, Colorbar India, Wired Global | 131.0 | | 131.0 | 567 |
| 5 | 4 | McCann WorldGroup | Shoe Carnival US, TOSHIBA China, APP Paper Product China, Yinji Holiday Resort China, Opel Europe | 147.1 | Choice Hotels US | 127.3 | 311 |
| 6 | 5 | Ogilvy | Country Crock US, Go-Jek Singapore, Costa Coffee UK, Fangte - Rebranding and brand consulting China | 122.7 | Babylon GP UK | 117.1 | 351 |
| 7 | 6 | Goodby Silverstein & Partners | Pepsi US, BMW US, Liberty Mutual US | 109.3 | | 109.3 | 9 |
| 8 | 8 | Saatchi & Saatchi | Siemens Home Appliances Asia Pacific, Yili Guliduo China, Macro (Kitchen Utensils) China, Yili Baby Milk China, Atlantic US | 95.6 | Emirates Air Hongkong | 82.2 | 80 |
| 9 | 10 | VMLY&R | Nature's Bounty US, Think Conveyancing Australia, The Nature's Bounty Co. US, Thrivent Mutual Funds US, Amart Australia | 86.9 | Russell Stover US | 80.2 | 136 |
| 10 | 9 | R/GA | Eurosport Europe, Home Depot Décor US, Georgia-Pacific Quilted Northern US, British Land UK | 75.7 | Bubly US Project | 68.7 | 62 |
| 11 | 11 | Havas Worldwide | E. LECLERC France, Hain Daniel brands UK, Altria France, Rite Aid US | 105.2 | Liberty Mutual US | 64.9 | 134 |
| 12 | 12 | BBDO | AmBev Brazil, Ford Global, O2 Germany, Bayer US, Asda UK | 312.1 | Tourism Australia Global | 52.8 | 118 |
| 13 | 18 | Digitas | Mercedes-Benz China Project, Nutrilite US, Huawei China China Project, Clinique China Project | 50.2 | | 50.2 | 69 |
| 14 | 13 | MullenLowe Group | Uber UK, Co-operative Bank UK, Pharmeasy India, Modern Bread India, ITC India | 50.8 | Aldeas Infantiles SOS Bolivia | 49.8 | 30 |
| 15 | 14 | FCB | Grupo Modelo Mexico, Continental Italia Italy, Home Depot Canada, Samsung New Zealand, QED Therapeutics (Oncology) US | 46.3 | Volkswagen New Zealand | 44.3 | 53 |
| 16 | 15 | Wieden & Kennedy | Tinder US, Bud Light (Social) US, Converse Global | 39.0 | | 39.0 | 8 |
| 17 | 16 | Dentsu | Mazhavil Manorama India, Geojit Financial Services India, Subway Singapore, Land Transport Authority Singapore | 29.8 | TCP Thailand Project | 28.2 | 141 |
| 18 | 17 | TBWA | Robinhood US, Pfizer Centrum US, Supercuts US, David Lloyd Clubs UK, Dissan Group Canada | 50.9 | BJC - Dozo Snack Thailand Project | 27.5 | 41 |
| 19 | 19 | MXM | United Healthcare US, Vraylar US, Amgen US Project, Abbott Labs US Project | 20.0 | | 20.0 | 16 |
| 20 | 21 | The Red House | Revlon | 20.0 | | 20.0 | 1 |
| | | | | | | **2,045.7** | **4,328** |

# 2018 MEDIA AGENCIES NEW BUSINESS LEAGUE
## Global / Q4 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 | Coca-Cola UK & Ireland, Lloyds Banking Group UK, Amtrak US, Hilton Hotels & Resorts Global, Sony US, Mars Global | 236.2 | Seat (Møller Mobility) Norway | 189.0 | 159 |
| 2 | 2 | OMD | Henkel Russia, Shuanghui China, Lenta Russia, McDonald's Netherlands, Daimler Global | 204.6 | PetSmart US | 162.6 | 321 |
| 3 | 4 | Havas Media | Reckitt Benckiser Global, KIA India India, Lactalis Global, Hugo Boss Global, Puma Global | 123.0 | LVMH NA | 99.3 | 213 |
| 4 | 3 | Initiative | FairFX UK, Kneipp Germany, Shark Ninja Germany, Aida Crusies Germany, Liverpool Victoria UK | 90.1 | Arby's US | 73.2 | 146 |
| 5 | 5 | Hearts & Science | WarnerMedia group US, P&G Fabric Care N.America, Amgen US | 84.3 | Alzeihmers Research UK | 67.6 | 9 |
| 6 | 6 | Publicis Media | GlaxoSmithKline Global, Cathay Pacific Global | 73.0 | Delta Air Lines Global | 66.8 | 3 |
| 7 | 7 | Starcom | Fiat Chrysler US, Coca Cola LATAM | 108.4 | OLA New Zealand | 56.9 | 44 |
| 8 | 8 | Dentsu Aegis Network | The Co-operative Group UK, Intel Global, United Airlines Global, LVMH NA, Heineken | 57.4 | Sodastream Switzerland | 55.8 | 92 |
| 9 | 9 | Spark Foundry | Lenovo / Motorola Asia Pacific, AVON China, Saputo (Murray Goulburn) Australia, General Beverage Thailand, Mondelez MENA & APAC | 74.3 | Rémy Cointreau Czech | 49.3 | 25 |
| 10 | 12 | dentsu X | Drivezy India, LVMH US, AESIO France, Dairy Queen Canada, Coolwinks.com India | 60.3 | Thai Glico Co Thailand | 42.9 | 189 |
| 11 | 10 | PHD | Delta Air Lines Global, Chauffeur Privé France, Stepstone Germany, Frizbiz France, Daimler Belgium | 84.3 | Scotch Thailand | 41.2 | 294 |
| 12 | 11 | Blue 449 | T-Mobile US, PZ Cussons ANZ, Spark Networks Australia | 42.7 | OYSTER adv. Agency Greece | 35.6 | 8 |
| 13 | 13 | Zenith | Arby's US, Luxottica Australia, Mailchimp US, Lactalis Australia, Ralph Lauren APAC | 37.4 | Shuanghui China | 29.8 | 58 |
| 14 | 23 | Carat | SIG Government France, Mondelez Europe, WA Government Australia, Microsoft Global | 155.7 | REWE Czech | 27.1 | 258 |
| 15 | 22 | Vizeum | MYOB ANZ, Beiersdorf Italy, Cosmetique Asia Philippines, EGAT - project Thailand, Dentiste Thailand Project | 29.7 | Sodastream Norway | 25.1 | 138 |
| 16 | 15 | MullenLowe MediaHub | Dropbox US, The Co-operative Bank UK, Prospa ANZ, Bloomin' Brands US, Dropbox Global Global | 22.7 | MCT Berhad Malaysia | 22.4 | 36 |
| 17 | 16 | Essence | Airtel India, T-Mobile US, Tigerair Australia, T-Mobile US Digital Media | 21.2 | | 20.7 | 3 |
| 18 | 17 | Wavemaker | OLA New Zealand, Heathrow airport UK, New Balance China, Mitsubishi Motors Australia, Huawei India | 94.2 | Beiersdorf Italy | 17.5 | 170 |
| 19 | 14 | Mindshare | Red Bull UK, BP Global, Newell Brands US, Buffalo Wild Wings US, Unilever India AOR (Digital) | 86.2 | AIA Thailand | 15.8 | 214 |
| 20 | 18 | Wieden & Kennedy | KFC US, League of Legends US | 13.8 | | 13.8 | 2 |
| | | | | | | 1,102.9 | 2,619 |

# HOLDING COMPANY NEW BUSINESS LEAGUE

Publicis Groupe led the way for the year with $736m in growth, representing 6% of their 2017 revenue. Their success was driven by strong performances from Publicis, who won Mercedes-Benz's global creative business, Saatchi & Saatchi's win of Campbell's Soup and P&G's North American Fabric Care account and Leo Burnett awarded Samsung's visual display business in July. On the media side, Publicis Media and Starcom rank third and fourth on the top ten global media wins, with Spark Foundry in sixth place. For WPP, despite their internal changes, they added $579m from 1,626 wins. Havas also performed well, increasing by 6% ($168m).

## 2018 NEW BUSINESS LEAGUE HOLDING GROUP RANKING
### Global / Q4 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 2017 REVENUE | NUMBER OF WINS |
|---|---|---|---|---|---|---|---|
| 1 | 1 | Publicis Groupe | 494.4 | 242.0 | 736.4 | 6.0% | 764 |
| 2 | 4 | WPP | 363.8 | 215.3 | 579.1 | 2.8% | 1,626 |
| 3 | 3 | Omnicom | 68.0 | 272.5 | 340.5 | 2.1% | 818 |
| 4 | 5 | Dentsu | 171.5 | 154.8 | 326.3 | 3.8% | 1,403 |
| 5 | 2 | Interpublic | 238.9 | 62.6 | 301.5 | 3.8% | 666 |
| 6 | 6 | Havas | 64.9 | 103.6 | 168.5 | 6.0% | 350 |
| 7 | | Accenture | 50.7 | 0.0 | 50.7 | N/A | 24 |
| 8 | 7 | MDC | -10.2 | -8.3 | -18.5 | -1.2% | 21 |
| | | | | | 2,434 | 3.5% | 5,648 |

# MARKETERS ON THE MOVE

### GAIL HORWOOD
**CMO, KELLOGG NORTH AMERICA**
PREVIOUSLY: JOHNSON & JOHNSON

In 2010, Horwood said "Social is the new search" and it is this gift of foresight that gives her the ability to monetize digital content. An early champion of digital, Horwood comes from a publishing background, having worked for Time Inc. and Condé Nast, extending to a specialization in e-commerce.

### RYAN MALONE
**CMO, SARAH LEE FROZEN BAKERY**
PREVIOUSLY: MCCAIN FOODS USA

Malone's career is built in the food industry, bringing more than 25 years' experience at companies including Kellogg's, Kraft Foods, Kronos Foods and Pepsi-Cola. Most likely to take a strategic approach to grow across multiple channels and within specialized segments.

### HILDA TINGLE
**GLOBAL HEAD OF DIGITAL MARKETING BNP PARIBAS ASSET MANAGEMENT**
PREVIOUSLY: J.P. MORGAN

A JWT alumni, Tingle started her career in advertising and direct marketing in Hong Kong before rising in the ranks leading marketing initiatives at J.P. Morgan. The newly-created role at BNPPAM sees Tingle oversee websites, social media and digital campaigns. She has an analytical mind and has a love of taking things apart and putting them back together.

### INÉS URES
**CMO, DELIVEROO**
PREVIOUSLY: TREATWELL

Ures knows her data, having worked with online marketplaces and holding a Masters in mathematics and industrial engineering. Expect Ures to work with an entrepreneurial mind set, bringing her startup investment and mentorship experience to the role driving growth and developing "selection and innovation" in the food delivery business.

### ROD MANLEY
**CMO, BURBERRY**
PREVIOUSLY: CALVIN KLEIN

Manley brings communications experience in the luxury industry to help Burberry further define its brand and, one suspects, manage any PR fallouts around the way. Previously EVP of Global Communications at Calvin Klein, Manley replaces his sister (yes, you read right) in the hot seat at the British fashion house.

### STACEY GRIER
**CMO, THE CLOROX COMPANY**
PREVIOUSLY: THE CLOROX COMPANY

Grier made the move from agency to client-side in 2016 and hasn't looked back. After 20 years at DDB San Francisco, she developed a career at Clorox and has quickly raised in the ranks, bringing her passion for creating engaged and performing teams. Grier studied Social Psychology and culture won't be far off her radar.

### CARLA HASSAN
**CHIEF BRAND OFFICER, CITI**
PREVIOUSLY: TOYS "R" US

Making an industry leap from PepsiCo to Toys "R" Us in 2017, Hassan now joins investment banking company Citi to work on global consumer marketing and with institutional businesses. Hassan will be doing what she does best, bringing together global and local. She is a part of Lunch Partners, an investment group comprised mainly of marketing executives.

### SCOTT MOORE
**CMO, WYNN RESORTS**
PREVIOUSLY: AUGEO

Onmi-channel customer engagement is Moore's area of interest and we can expect to see him to be bullish on data as a strong part of his decision-making process, whether it's loyalty programs or customer experience design. A Fallon alumni, Moore has worked at Best Buy as CMO, as well as served as President at mobile consultancy M32 Partners.

## ALLISON JOHNSON
**CMO, PAYPAL**
PREVIOUSLY: WEST

PayPal has brought back the CMO, hiring Johnson, who is very much at home in world of tech, having been at Apple, HP, Netscape and IBM. It's not just a global audience that Johnson will be marketing to, her job will include shaping PayPal's role and establishing its visibility in the rapidly changing fintech ecosystem.

## ROGER MADER
**CMO (INTERIM), SUBWAY**
PREVIOUSLY: AMPERSAND

Mader might not be the most obvious choice to hold the fort at Subway while the company looks for a suitable candidate, but as a private marketing consultant employed by the sandwich chain in 2014/2015, he knows the business and was integral to Subway's transformation efforts and strategic planning at that time.

## VINEET MEHRA
**WALGREENS BOOTS ALLIANCE**
PREVIOUSLY: ANCESTRY

A seasoned marketer who has made genetic testing one of Amazon's best-selling products through breakthrough advertising, Mehra is looking to using technology to create a "customer-led omni-channel" offering in pharmacy and retail. Retail is a familiar space for Mehra, who previously worked at Procter & Gamble, General Mills, Novartis, Avon and Johnson & Johnson.

# I'VE ALWAYS BEEN CURIOUS. FRANKLY, I AM EXCITED ABOUT WHAT I DON'T KNOW...

## DAVID TIMM
**CHIEF MARKETING CAPABILITY OFFICER**
**YUM! BRANDS**

"...Digital transformation is the reason that I'm excited because I feel that, after many years of being an expert in traditional marketing, there's this new complementary space. It's great to be learning so much at this stage in my career. Before I started this journey, I spent time with Google, Facebook, and CMOs who are operating in e-commerce environments. [I got involved in] academics, and reading books, and just trying to understand this world so that I could lead in a space that's not where my experience lies. What motivates me is that I can see there's a real opportunity here, and I feel as though I'm growing in the process."

FROM 'THE EIGHT ACTIONS OF A FUTURE FIT CMO'
GLOBAL CMO: BEST PRACTICE IN MARKETING EFFECTIVENESS & EFFICIENCY AROUND THE WORLD

# AGENCY LEADERSHIP MOVEMENT

### RONALD NG
**GLOBAL CCO, DENTSU ISOBAR**
PREVIOUSLY: DIGITAS

In this newly created global role, Ng will work with the network's technology, strategy, delivery and new business teams, and oversee creative direction and development in 45 markets. He comes from a similar role at Digitas, which he joined in 2015, and has worked at BBDO in Singapore, New York and Malaysia.

### BRET LEECE
**GLOBAL CHIEF DATA & INNOVATION OFFICER, HAVAS GROUP MEDIA**
PREVIOUSLY: DENTSU AEGIS NETWORK

Leece has held a series of c-suite roles in his career, most recently as president at DAN before joining Havas Group Media in a new role that sees him responsible for data sourcing, overall data governance, audience planning and commercialization.

### KARINA WILSHER
**GLOBAL CCO, ANOMALY**
PREVIOUSLY: ANOMALY

Having worked at Anomaly since 2010, and previously with Fallon, Wilsher is outspoken about cultural and gender diversity, as well entrepreneurship. Having served as COO since 2017, Wilsher takes on her new role as Carl Johnson transitions into chairman for the MDC Partners agency group.

### ST. JOHN WALSHE
**CEO AMERICAS, BBDO**
PREVIOUSLY: BDDO

Walshe started at BBDO in 1997 as an account executive on M&M's and was most recently managing director in Europe before taking on his new role. He has led the global Mars account for 13 years and is known for his ability to pick talent and manage big teams while driving award-winning creative work.

### AGNES FISHER
**PRESIDENT, THE&PARTNERSHIP, NY**
PREVIOUSLY: DROGA5

Former executive group director, Fisher oversees client and business operations in New York at the WPP-backed The&Partnership. In her almost twenty-year career in advertising, she has worked with The New York Times, JP Morgan Chase and Absolut at agencies like Droga5, TBWA\Chiat\Day, Anomaly and Publicis.

### LYNN LEWIS
**CEO, UM U.S.**
PREVIOUSLY: UM

Previously UM's East Coast regional president and global CMO, Lewis has been with the agency since 2003. Described as a "pioneer" and "strategic thinker" she is best known for helping to craft the data-driven, moments-based planning tool, and dedicated shop, J3, for Johnson & Johnson in 2011.

### LAURENT EZEKIEL
**CHIEF MARKETING & GROWTH OFFICER, WPP**
PREVIOUSLY: PUBLICIS GROUPE

Ezekiel joins WPP in a newly created role with a focus on working on business development. Ezekiel, most recently co-president of Digitas North America and president of international, has been a visible figure in major pitches and global client relationships, which is in line with WPP CEO's Mark Read's priorities.

### KATE MACNEVIN
**GLOBAL CEO, MRM/MCCANN**
PREVIOUSLY: MRM/MCCANN

McNevin has reached the top thanks to double-digit growth, awards and a series of new business wins, including Honeywell, L'Oréal and Hitachi. She has also implemented new ways of working within the MRM network, using techniques such as crowd-sourced ideas to quickly solve client's business problems.

# ABOUT R3

## OUR REASON FOR BEING

In a word, we are about transformation. R3 was established 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 pools 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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