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Insights Leaders COVID-19 Roundtable

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Panelists

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Lenny Murphy: We have four basic questions that we're attempting to cover, so let's start with the first one and that is **what's changing in the industry as a result of COVID-19?** That could be business level, shifts in methodologies, new client priorities, etcetera. Tiffany, let's actually start with you because you're on the frontlines in thinking about branding and advertising, etcetera. So what are you hearing?

Tiffany Johnson: So what I'm hearing is it's going one of two ways, right? We have some advertisers I've seen who are pulling back right now, not doing any advertising, halting everything that they're doing, and then we have some who are full force, all in on their advertising. These are really two different theories that I've seen in the marketplace so far which is with everything happening, it doesn't make sense for our brand to continue advertising because we're losing money, because we can't possibly keep up with this. And I see that a lot in things like the travel industry, restaurant industries, but what I see is also the companies that are leaning into this are the companies who are like Diageo brands, liquor stores. Any kind of those kinds of brands, they're leaning a little bit more into advertising. I've also seen a lot of automakers as well very tentatively have more support advertising, and then what I've actually seen in the data world specifically is any company that has data that could potentially be helpful to tracking COVID, I've seen they've ramped up, they've leaned into that, so in some areas we are busier than ever, and in other areas, we are seeing declines. It really depends on your industry.

Lenny Murphy: Interesting. Quick question though. I've noticed that all of the ads all seem to be carbon copies of each other that I'm seeing. "We're in this together. We've got your back. We're all here." **Is there any concern that you're hearing of folks just losing their identity because – and even a backlash?** My wife sees it's depressing to see those ads. So anything like that that you're hearing, Tiffany, just out of curiosity?

Tiffany Johnson: Yes, we've already seen that because everybody has adopted the same messaging over and over again that we've already caused consumers to tune out because of it, and I've seen some research already that shows – like Ford had a team, "We're a team player" messaging. That was fairly effective. Budweiser also had some ads that were fairly effective. I've seen some research around that there's levels of



effectiveness, but the same messaging over and over again is already causing consumer wear; they're tuning out already.

Mike Stevens: Yes, actually, there's a video compilation online that just splices together all of the different cons that have come out and they're kind of identical, the way they're shot, the music, the tone and everything. It's just a car crash of creativity, but I guess people have scaled back their in-house creatives and spending less with their agencies, so maybe they don't have as much creative talent to fall back on at the moment.

Lenny Murphy: Yes. Well, Mike, let's list some of that for a second, especially since you're very attuned particularly to the technology-enabled and startup community. What are you picking up from changes in that group?

Mike Stevens: I think from I guess the use or the types of research that are being done, the things that are being used extensively, Kristof's business, if people have an existing community, they're getting very good value out of that because of its effectiveness and cost, so there's a lot of work going on to talk to existing customers. If people have data, like Tiffany says, being able to really look into analytics, being able to look at behavioral data, there're a lot more signals I think that are going to become available with people as they transition their behavior online. Online qualitative research as well is really booming. Everybody else that speak into that space is flat out with projects. It may be a bit of a bump with people transitioning from offline to online, but I think some of these things are here to stay, that's for sure. I mean the other things are a little bit self-generating which is, obviously, tracking surveys about COVID-19. From the industry, it seems to be the reflective response for a lot of us has been to try and understand what's going on with a continuous survey. Employee engagement stuff as well is really – a lot of platforms are giving away their tech in the hope that it sticks after the flood recedes, so a lot of that stuff is happening.

Lenny Murphy: Yes, that seems to be a consistent trend from what we've been hearing. So speaking of data – oh, go ahead.



Patricio Pagani: Yes, Lenny, I was going to add that we've seen around regions, especially in the developing world, a lot of sunseting of trackers which I know it's one of the backbones of our research industry. Many of them have temporarily been put on hold, some of those in LATAM, in Africa, in some countries in Asia, just because they were still continuing to beat down door to door, and obviously, that's not possible in the current day, but even those that were being done online have been temporarily put on hold which is causing a bit of a breakdown in the industry because there're a lot of small and not-so-small agencies that rely heavily on those trackers for cash value. So we've seen a lot of that and it's likely to be a trend that goes up. Some big corporates have just stopped their tracker until end of the year altogether. So just to pick up on something that Tiffany said, we're seeing quite a lot of activity on the other side which is clients not being able to ingest data from trackers, spending more time on their own data, so trying to get more out of the data they are already having and not usually getting too much out of. So their internal analytics, we've seen a spike on that around the world.

Lenny Murphy: Okay, **Alex, since you're also in that world of housing and leveraging data, are you seeing the same thing that Patricio and Tiffany are talking about?**

Alex Gelman: Yes, we're definitely seeing changes. Some trackers we're seeing added to, so some clients are responding and saying, "This monthly tracker should now become weekly," in some cases even daily just because the market is changing so fast they need to understand, whereas other clients are saying, "This tracker is now meaningless. Let's suspend it because this tracker is an annual tracker that always takes place between April and June," and frankly, the results in April to June 2020 make no sense, so people are suspending it. So we're seeing both reactions, but we have gotten new studies loaded into our system that are new trackers. The caution we have there – and while we're seeing a boom in business because of people loading these new trackers, the caution we have there is trackers are pretty delayed, so by the time you launch a new tracker, get the sample, do the analysis, the market is choosing so gosh-darn fast that is it actually meaningful?

I mean if you look back to the 2001 recession, the way people felt on September 12th was very different than the way they felt six months later. September 12th, people are panicking; six months later, they settled into a new normal. So I think we're



probably past the panic zone which happened about three to four weeks ago, but things are still changing fast, so we're actually recommending that people use data they already have, look at their history, and while this is a unique world event in history, there are similarities. It's not completely different than elements of the 2008 recession, it's not completely different to what we saw from SARS and MERS 10 years ago. So as opposed to loading new data, we're actually encouraging people to look at their existing data and find patterns because the timeline to get new data in is often very, very long.

Lenny Murphy: Okay, now, Kristof, the...

Gregg Archibald: Let me jump in, Lenny. Sorry to interrupt. Alex, are you seeing anything different in terms of those that are moving to weekly or daily trackers versus those that are suspending by industry or any other cohort?

Alex Gelman: I don't think we can see a giant trend that's saying this industry is adding data, this industry is cutting. It's probably more idiosyncratic client by client based on the type of tracker it was. I don't have a general theme there. Those are just idiosyncratic.

Patricio Pagani: Gregg, I do have a slight industry affected perspective. The oil and gas industry has been very hard-hit and they have been pulling back at least in the regions that I have clients there. They have been pulling back on tracking and any activity in general. In Argentina, we work with the largest oil and gas manufacturer and their sales have gone to 10% of the same period last year – 10%, so they're pretty much shutdown. And the restaurant industry has been similarly affected, the Big Macs of this world. In the region of LATAM, they've seen a similar 90-95% reduction on their sales, so pretty much all non-critical activity has been shut down, not just research, but everything.

Alex Gelman: I can add the auto perspective which is while auto sales will certainly be down this year, autos are in a fortunate position in that there will be pent-up demand on the other side of this, whereas travel and restaurant, that demand just evaporated. If your lease expires this month, when you start, you will need a new car, so I will say our auto clients – and we work with every major auto globally – they're all looking



to the other end of this. I mean certainly, they will feel pain, but they can't stop their research because they know that people will buy cars because leases continue to expire. So auto is looking through to the end of this even though it's going to be a painful year.

Lenny Murphy: Kristof, since you're the only full-service agency consultancy on the line, I'd like to get your perspective on this as well.

Kristof De Wulf: Yes, thanks. Maybe in order to understand how the industry's going to change, what we did right after immediately the crisis hit is we set up a range of CMI roundtables with global heads of CMI from Unilever, Volvo, TUI, Danone, McDonald's, Henkel, Ferrero, so we had them all in a call similar to this one to better understand their context, to better understand their challenges and the way they responded to it. So I'm going to give you a little bit of a flavor of what that conversation was all about. Initially, by the way, we were supposed to host that session in Alba, Italy, real life at the headquarters of where Ferrero kicked it off, but that's obviously not possible. It would've been great in May in Italy, but it was just a call like this. What came out of that conversation, it's kind of a paradox. I don't think ever we've seen a time where there's such a fertile ground for research to thrive, guidelines in the right direction. There's so much change around us happening in such a short timeframe, and at the same time, there's maybe too much change and it's holding clients back from doing research, especially the kind of research they're used to doing, and some of that especially more ad hoc.

I would say more strategic foundational research has been kicked out quite immediately because it doesn't represent a stable kind of representative context that all those brands need to have to build, for example, a strategic segmentation on the back of that. So a lot of the ad hoc strategic work has been pushed into the future somewhere undefined to pick up once we settle into something, whether we call it the new normal or something else. We kind of now help our clients to – we kind of chop it up in three phases. I know it's very simplistic, but at the same time, it's also what we are doing as an agency. It's pause, it's play, and it's fast-forward, and for us, pause is really getting a better grip on the situation, understanding what's actually happening, and when it comes to that, what came out of that roundtable was the fact that a lot of the stakeholders, our clients are



bombarded with all kinds of COVID-19 trackers, predictions, consultative reports, and they play back at us that most of them don't really provide the level of detail and insight they need to really get enough concrete answers on the table to serve as their internal stakeholders.

So what most of them are looking for - and it might be going back to data that is sitting there as we just spoke about - as I say, we're looking for more granular, deep, contextual bottom-up insights day-by-day, week-by-week, into how consumers are adjusting their lives, then of course, deriving the short, the mid and the long-term impact on their categories and brands from that. So that's I think the main takeaway from our conversation, is pushing back all the strategic work and really getting up close and personal with consumers to understand the unfolding new reality and to service all the internal stakeholders with so many different questions being thrown at them. That's what we definitely learned from our conversation.

Lenny Murphy: Yes, I think that definitely jives. So before we get to the next question, anybody who has a perspective, are you beginning to see a loosening up or more spend? Does somebody have a perspective on that?

Patricio Pagani: Not really, to be honest. Just finishing where I left it, in the sense that we - of course, we had the first panicking stage. I think we're after that now. We've settled into something new, but still highly risky and highly undefined as to how everything will play out. A lot of people say we will see an extreme digital acceleration, for example, in the market. I think we're seeing a bit of that, but at the same time, I think it's also, to some extent, dangerous because every agency is jumping on digital right now. Some of them have a lot of experience, others don't, so probably clients might go back definitely to offline if they have a bad experience when it comes to the digital experience, so it's a bit hard to read. I think what we definitely see as a whole on our business for this fiscal year, we see a drop of around 5% in topline, but also sales is not yet to the same level as it should be, so I think we'll stay in this slowdown I think for a couple of weeks or months to come, at least. Some of our clients are also telling us, "We're looking at beginning of 2021." That's a more pessimistic perspective, but I think we're not out of the rough period yet. I think it will last for a longer time.



Lenny Murphy: Okay, thank you for sharing.

Alex Gelman: What we're seeing is not so much an increase or a decrease, but more so a change in the type of spend. Someone earlier mentioned that online qual is booming. That's because you can't do face-to-face focus groups right now. Because we're mainly focused on quantitative data, on the one hand we are seeing an increase, we're seeing people do these COVID-related trackers. We're a digital company, and so we're seeing people want to move to digital, and on the other hand, people are scrutinizing budgets and anything that was nice to have is being cut. I'm on the board of a CAPI software company. They also have CAWI software and we can see people moving their budgets from CAPI to CAWI, so what's going to be interesting to see when we're on the other side of this thing is how much of this was temporary and how much of this is permanent. The people that moved from focus groups to online qual, was that a bump for these three months and will return to focus groups when we're done? Or if this lasts for a year, 18 months, would this become permanent?

So the nice thing about the research industry is people need to – these brands need to do the research, so we don't think that there's – they might be temporary cost-cutting, but research needs to stay. People need to understand their customers. It's going to accelerate the winners and losers. Probably trends that we've already been seeing for the last five years are just going to rapidly accelerate and change some of them.

Lenny Murphy: Okay, thanks, Alex. I want to ask one more question before I move into what I think may be more interesting, what comes next, and that is what is the one most useful tip that you can share as a leader that you have learned through all of this? Actually, let's start – Kristof, I think you probably have the largest organization here, so let's go back and start with you.

Kristof De Wulf: Yes, maybe one thing or maybe two I can share. I think one is what we are doing since this crisis is here is I have a personal live webinar addressed to the whole company, one in the Asian time zone and one in the European time zone every week, every Friday, to give an update to all of our coworkers on how we're



handling the crisis. It just takes 15 minutes. I think it's really highly appreciated by the people and it's also kind of a reflection of our corporate values to be open, forward-thinking, and also to have group thinking over individual thinking. So, we cover a lot of items in that talk. We have a weekly what we call Current Ta in which we cover either burning topics or we share group or individual hacks on how we human beings, coworkers can deal in the current situation. So I think that's definitely something – communication I think is really key. There's so much insecurity, people will get into completely radical new contexts, so they need clear messages, but also to understand that we are still very much in control of things despite the fact that there's so much uncertainty around us.

So I think that's definitely one tip that I would share and probably everyone is I think doing that, is communicate as much as you can and communicate as transparent as you can. That also includes the more negative messages on cost measures we're taking as an organization because it's part of protecting the business for the longer run. Of course, we're relatively fortunate to be a 100% digital native agency on the one hand. Secondly, the majority of our business is long-term communities and most of the lights are still on on those communities, be it at a lower pace of – let's say lower volume of activity, but of course, we're fortunate, having built our business around that business model because, of course, we're relatively less impacted versus some other agencies, but I think that's the biggest change I would say. We travel around the world and need to meet and greet people which is taking so much time, and this way, there's a much higher frequency of listening and sharing knowledge and information with all of our people around the world.

Lenny Murphy: That's great. Tiffany, especially since you're in New York, **what's the one thing that you have learned here within Wunderman Thompson and even for yourself?**

Tiffany Johnson: Absolutely. I think the one thing that I would say especially in times like this is be flexible. We are a big fan of long-term planning, so it's very corporate, but what we've found is that in a time like this, if you can shift quickly and shift your strategy quickly, then now's the time to reassess. As the Facebook philosophy, the Zuckerberg philosophy, move quickly, break things, and yes, we're going to break



a few things along the way, but right now is not the time to say, “Oh no, we should just hold to the same plan. We have this long-term plan in place.” Yes, you still need that, but now is really the time to reassess how the market is shifting, and it’s shifting much more quickly than most people can really fathom. So if you think about things like travel is down 96%, air travel specifically because we have a client that focuses on air travel, so the first thing that we can suggest to them and recommend is we have to shift strategy immediately, not just strategy a month from now, not just strategy three months from now. What can we do now to refocus you, and taking advantage of these opportunities quickly and being flexible in how your approaching them is really the key to success right now, I think.

Lenny Murphy: Okay, very cool. Mike?

Mike Stevens: Yes, I guess there’s a couple of related things for me. It’s the privilege of getting older. You start to have more appreciation for the fact that these things do pass. I think as Alex was talking about, 9/11, and we might forget that a lot of people who are working with us now don’t have that quite as fresh in the memory, but in the same way that we’re giving people two meters distance on the pavement and looking at face masks and feeling insecure, we were looking at backpacks on the subway and we had all those same kind of fears 15, 20 years ago, and it passes. I think a bit of long-term perspective is good, but balancing that with not over – huge expectations of a V-shaped recovery, because it’s not going to be that and things are going to be different. So the opportunity to learn I think is an important one now while things are in the strange – we’re between the panic and the recovery. How long this lasts we don’t know, but there’s a lot of opportunity for people to brush up skills, to develop into new areas, and I think it’s – there was a graphic somebody shared about why it’s so hard to do right now and it was the Maslow’s hierarchy of needs saying, actually, you’re feeling down here which is down this physiological and shelter thing and you want to be up at the top around the self-actualization for all this learning stuff. Hopefully, people are going to get towards the top again soon where they feel they can actually start building some knowledge and skills because things are going to be different in the recovery.



Lenny Murphy: Interesting. Alex and Patricio, you want to wrap us up before we dive into the future state?

Alex Gelman: I'll just add one. I agree with everything that's been said, so I just one for leaders is focus on cash. Typically, we have recurring contracts. I typically never even think about cash. It's just cash comes in and cash comes out. We plan for it, but this is an extreme time. Most market research departments are big Fortune 500 companies. Those are the ones with the big budgets and if they try to extend their payables, that could really hurt our market research suppliers. So, if you have not been - my suggestion to all agencies, smaller technology focus on cash, you should be able to pay cash on a daily basis. It is an extreme time.

Lenny Murphy: Right there with you. I check my bank account every morning. Patricio, yes, lessons learned?

Patricio Pagani: Yes, lessons learned, I think like what everyone has said in terms of cash, flexibility, etcetera, what I have been picking up which to me was unexpected and new is a lot more – I don't want to say interference, but a lot more states or governments enforcing things that in the past they have been so out of their scope, and that has started in the last two months to create, we think, a new norm. How that will reshape each country and the world I think is one of the most interesting things that is going to evolve through the rest of the year. What's the role of state governments in the crisis and coming out of the crisis because of the blend between health and economy and the paradox that different companies are talking about and how much important it is to help and how much important it is to give to the economy and you cannot really look at them separately. I think to me, that was the big difference of this crisis versus the previous ones, and what's going to happen I think remains to be seen.

Lenny Murphy: Yes. Well, I don't want to step on Gregg's toes here, but the implications to data privacy on this as well which I know, Tiffany, is near and dear to your heart, so Gregg, I'm going to tag you in to take us into the future.

Gregg Archibald: Thanks for the transition, Lenny. Anyway, I want to recap a few things very quickly before we move on. We've talked about the implications on industries,



we've talked about travel and food and liquor and oil and gas and auto. We've also talked about some business issues. Kristof brought up the fact that a lot of the foundational work that was planned is now being put on hold. We've talked about methodologies using more existing data, the digital component of the methodology shift and tracking and a number of things. So now I want to take that framework and say let's put a point in time out there and call it the other side, and that is a really poor description because it infers that we're all going to be finding good and back to normal, and it's not going to be. **So what does the insights industry look like – and I'm just going to pick a number – 12 months from now? What does it look like in terms of the client needs? What does it look like in terms of methodologies and what does it look like for your business?** So those are the three things: client needs, methodologist and your business. Let's just start with Alex.

Alex Gelman:

Sure. So as I said, I think insights market research still needs to be done, and in fact, 2020, 2021, 2022, it's going to be more critical than the last five years because the last five years were consistent growth years and consumer sentiment didn't change that dramatically. So the overall industry, our client needs, the need for our business and industry exists; it's just going to be a switch in priorities. I think, Gregg, it's hard to answer your question because it requires I think understanding when we'll be through to the other side. If we get out of this magically in three weeks which we're not going to, I don't know if it means much. These were temporary blips and people might return to normal, but if this is 12, 18 months, what happens to online focus groups when CMOs get very used to online qual? So it really depends on the time and how much behaviors change and whether those are temporary or permanent, and I'm not going to take a stand on how long this thing is going to last because I'm just not smart enough to do so.

From an mTab perspective, we'll be fine. In fact, we stand to benefit. We're a digital BI platform providing mission-critical data. We deal with quantitative data. We're seeing a lot of our market research partners response rates go up because people are sitting at home and they're bored, and so we're seeing survey response rates and completion rates much higher than they traditionally have been. So our business actually will do fine or actually well through this, but there will be some real major losers as a result.



Gregg Archibald: Okay, and for whoever I'll pick next – I've already chosen one – we're going to magically put the number 12 months on this, and the reason that I'm magically putting the number 12 months is hopefully there'll be a vaccine and there seems to be a lot of people that think that the vaccine will be the tipping point. So that's the reason for the magical and I have no more knowledge than that. Tiffany, what about you? **How do you think the client needs are going to be shifting and the tools that you're using and the impact on the business?**

Tiffany Johnson: I think that everybody will be eager to get back to what life as normal used to be, but I also see that there are going to still be industries that are going to take a lot longer to recover. I talk a lot about the travel industry because I've done a lot of research in this particular industry for a few clients and historically, what we've seen is that travel has a longer recovery curve, as one example, but I think also what's going to happen as a result of this, because this was not just a few weeks, this is something that has lasted for months, we could also see a second wave of COVID, so in that circumstance, I see that there could be some pretty substantial shifts for clients to start to rethink the way that they're budgeting, the way that they're approaching marketing. If they should start taking things in-house, so cost-cutting measures – and I've seen a lot of, just in general in the industry, reassessing right now. What is it they actually need? What can they take in-house and what do they want to keep with agencies? So I think that this will actually have some pretty significant long-term impact. We'll get back to normal as quickly as possible. Agencies will still be relevant, research will still be crucial, but I see that it is going to still have more of a shift long term.

Gregg Archibald: Thank you. Kristof, what's your perspective particularly around client needs? Because you brought up the fact that you had this meeting where one of the things that came out from it was the fact that foundational work will be delayed until there's some stability.

Kristof De Wulf: Yes, I think looking at this crisis, of course, we can take a very negative perspective and it's all dreadful and it will drag along for ages and we want to get out of this situation as soon as possible, which is why we sometimes call it an exit strategy. I think we should rather call it an entry strategy into a new chapter and building a



new model, to the question you raised. So when it comes to the client relationship, I think we've been all part of this now unique global experiment in digital transformation with many of us having experienced specific benefits and building new habits that we hopefully might not want to let go of. I mean so many different examples. When it comes to the agency-client relationship, I think it can have really big changes. It can also be, of course, a case that we move to normal life before COVID maybe also sooner than we think, but one example here might be – just one big concrete example is workshoping. Of course, we're all used as a full-service agency to go to the client, to visit a client, to have a one or two-day strategic working session, but we've now of course all been accelerating our learning curve on virtual workshops.

The feedback we get from most clients is that, for example, Mars Foods just recently worked with us on this and had a virtual workshop with very positive feedback on the practice of digital workshoping with outcomes that were better than anything they had achieved in the past. So I think if we rewire some of the things that we have been doing based on this global experiment we're all part of now and we make some of those changes structurally, I think it can be such a better place for all of us, not just agencies but clients altogether where we simply work together in a probably closer way than we have before with a bit more preparation, with a bit more asynchronous collaboration and not just all in a workshop when we get out and then we start our next business day and we forget about the workshop. So I think let's be hopeful and positive about what this might bring, so that would be my take on the client perspective.

On methodologies maybe, I think all of this is going to – I expect it to give an extra boost to the adoption of DIY which might, on the one hand, result in less full-service work for more classic agencies to be executed. At the same time, you might have a different hypothesis where some clients might be dismantling some of their internal teams because there're fixed costs that they might need to cut now and they might use agencies, the more agile way of working together, and I think as pointed out before, redefine what research they really need, what is the need-to-have versus the nice-to-have, so I think that's going to be – that definitely triggers a lot of new thoughts on what is critical. On a final note for us as an agency, I think I'm looking forward to reinitiating the discussions we were having



with potential partners that might join our group in the context of our buy-and-build strategy. Of course, that's been put on hold for now until further notice, but I'm really looking forward when things calm down or go back a bit more to normal that we can start discussing again and start building the future together.

Gregg Archibald: I just want to add a little bit to your comment about the agency-client relationship. One of the things that we've seen a number of different ways is agencies being a bit more proactive in coming to their clients about issues that they think might be important instead of waiting for the client to call them with an issue or whatever that might be or the regular check-ins, and that seems to be appreciated and projects are reflected in that. So I think you're right, I think that there will be a rethinking of that relationship, and hopefully, we'll come out on the better side of that and be a little bit more integrated. Thank you for bringing that up. Mike, let's turn to you.

Mike Stevens: Yes, I'm a little bit once bitten, twice shy about bold predictions because when this thing struck, I was in the final stage of editing an e-book which was 10 Trends for Insight Over the Next Decade and it was a prediction. It was actually a partnership; it's a sponsored piece of work with a client and we both agreed this was a really idiotic time to publish that piece of work, so who knows if it'll ever see the light of day, but things change. [Laughter] So I think the client need thing, I mean I'm with Tiffany. I think there's going to be a lot more dramatic disruption in certain industries than – yes, we're all looking forward to this coming back, but I think things are going to change quite substantially in a lot of areas and it's going to be a while before they can – okay, 12, 18 months for a vaccine, but to be honest, even just the basics of international travel, New Zealand and Australia are going to get back on their feet quickly. They're not going to want to let loads of people in without substantial screening.

The mechanics of international business are going to change quite substantially. I'm a lot less rosy about the auto industry and the airline industry than I think a couple of others on the call. I think some big sectors are going to struggle which will be creative destruction, there'll be a lot of opportunity that that represents, but for me in the InSites space, I think there's a lot of activity which will mhwewe and will stick. There's a lot of technologies and a lot of new methods that have



been around for a while, and actually more push on the supply end of things than really adopted heavily on InSites of things, and I think now this will be a tipping point in adoption of some of these new tools, things that are AI-powered for language analytics, for visual analytics, say about people killing tracking studies and when they come back and they go, “Actually, we don’t really miss that data because we found good enough substitutes in Google Search data or in analysis of what’s happening online.”

So I think there’s a lot of shift that will accelerate now away from the asking question dynamic that underpins a lot of agency business models and is going to go into analysis of other data sources, and that has skills implications, it has staffing, it has where work gets done. I think it’ll challenge a lot of agency business models and I think we’ll end up with a much more fragmented relationship between clients, agencies, in-house teams, freelancers, gig workers, people working in much more of a fragmented ecosystem than we have historically. So having said I’m not going to make any predictions. I’ve probably thrown a bunch at the wall there, but I think a lot of this stuff is going to be a bit - to be honest.

Gregg Archibald: Well, you did make a few predictions in spite of yourself. Okay, so Patricio, let’s turn to you for this question, the client needs and methods and your business.

Patricio Pagani: Yes, thanks, Gregg. I was thinking I could give a perspective from the point of view of a new norm for our clients. I sit on three crisis boards for big corporates, so within this work, trying to align what these corporates are thinking the new normal is going to be a year from now, we picked on five big themes. The first one is around distancing, in all forms of distancing is here to stay. So, we’re going to have to get used to the concept of social distancing in different shapes. That will imply the second trend that we identified across industries which is a structural change in consumer behavior which is – and I agree with what Mark was saying. It’s going to fundamentally affect a number of industries – travel, hospitality, etcetera. A few clients have been talking and playing the efficiency game because of having to smarten their operations, and I think that will get – I don’t know how to say it. Well, it will continue next year, so we are going to see an increased efficiency gain on the client side that is likely going to impact on our businesses.



I've mentioned a stronger government intervention. I think we're going to see that in different countries, in different shapes.

The fifth one is around digital transformation and that has been talked to already. I think the acceleration of digital that this crisis is imposing will have a nice side-effect in terms of clients' readiness to accept some solutions that we've been discussing and talking about for a while which now they will be faced with these new more digital reality and realize it's actually possible and doable, so I think the final point, this imposed digital transformation could present really nice opportunities for those of us that are in that space and we need to bring the new stuff to clients.

Gregg Archibald: Okay, so those are some very big issues all across the board, particularly consumer behavior because it relates to all of those things, the distancing and the efficiency and the digitalization, whether it be within research or whether it be within e-commerce. Thanks for tackling or congratulations to you for tackling such big issues. Lenny, I'm going to turn it back over to you now.

Lenny Murphy: Thanks, Gregg. Actually, I want to follow up on one more question. We're kind of at the top of the time that we wanted, but I think this is important because the first time that we've touched on these big topics, Patricio, that you brought up, the implications of social distancing and trust and data, and I want to say we had to - Tiffany being here because this is an area of particular focus for her. One thing that we keep looking at and talk with other clients, particularly focus group facilities, how do you make facilities safe again? **How do you have consumers feel like they can venture out, whether that is a focus group facility, a restaurant, an entertainment venue, a movie theater, a plane, whatever the case may be?** The way to do that primarily is going to be via implementing technologies - infrared thermometers and facial coding, etcetera, which means we're going to be collecting more and more data from more and more consumers in ways that really kind of throw data privacy to the winds right now.

So we'd like to just do a quick roundtable and start with Tiffany on the things that we need to be careful of as researchers since we have always positioned ourselves as the protectors of consumer data, anonymity, etcetera, while we also know that



there're new data sources that are going to be emerging that could be useful to our clients. **How do we manage through this brave new world of lots of new data, some of which may actually fly in the face of our traditional values as an industry?** So real quick, Tiffany, your take?

Tiffany Johnson: Yes, and I've been very well-behaved with this on this call because I could talk about this for hours. So very simply, I think it's going to come down to choice. I am highly concerned about the kind of data that is being collected and suggested that we collect, everything from temperatures to contact tracing on your phones to even scans of your face so that way we know who you are and if you have a fever or where you've been. I think if I'm going to keep it very simple for here, it's got to be choice. We really need to give consumers the choice to understand what data they're sharing, give them the choice to say, "I do not feel comfortable sharing this data," or "Yes, I do feel comfortable sharing this data," and the choice to say, "I don't want my data used for these applications, but I'm okay with them being used for these applications" so that again, it comes down a lot to choice.

It's also why – of course, Lenny, you're well aware of this, that I recently joined the advisory board of Veriglif, a company that offers choice, right? So it gives you the choice to say, "Hey, what kind of information is being collected on me? Am I okay with that?" I believe in the future of this. I believe that if you give people the option to hand over their data and you're transparent and you give them the option to really, truly own what data's being shared, then they will trust you more and you will have more accurate data and better opportunity to use that data as well. That's the simplest way that I can explain this in a few minutes.

Lenny Murphy: Thanks. I wasn't looking for a plug, but thank you.

Tiffany Johnson: Oh, because it's the reason, I think it's the future where we're headed.

Lenny Murphy: Well, it's an interesting question, so I'm wondering – again, a quick roundtable, Mike, since you're so plugged into the digital world, what's your take on this aspect of things, the tradeoff of data and security?



Mike Stevens: I think it's terrifying, to be honest. Yes, we're all living under fear of a deadly virus and health needs to be the priority, so some of the niceties about individual impairment previously may need to be sacrificed in the short-term, but the agents who grab these kinds of intrusions, as in corporations and government, don't tend to give them back easily once they've been adopted and I think that's one thing. I think the future to me looks a lot like an alternative between China and South Korea. You've got very exhaustive contact tracing and very intrusive, actually, data collection in South Korea, but with a very robust democratic framework around it. Actually, culturally, I think more of a group responsibility attitude – actually, that's deeper into Asian cultures than we tend to have in Europe and North America, but the alternative model, the Chinese model, very autocratic, very invasive. When you think you can easily swap has somebody been in contact with somebody who's been ill to has somebody been in contact with somebody who's subversive or has an opinion we don't like, that I find absolutely frightening, so it's not a future that I'm relishing, to be honest.

Lenny Murphy: Alright, Kristof, where is the heart of the EU. I've heard the GDPR has actually been relaxed right now.

Kristof De Wulf: Well, I'm not specifically aware about that, but of course, GDPR is here and it's here to stay, and I think in all possible circumstances, we should think about how we can keep ourselves to those rules and not accepting maybe that there's kind of a tradeoff to be made between giving up privacy and getting relevance from sharing personal data. I think both can be combined. That being said, I think personally that there's a large share of consumers that really don't care that much, or in other words, maybe they don't care how much you know until they know how much you care. It's all about are you giving relevance? Are you giving something back? Do people see value as an exchange for what you're getting? But I think in all of that, I think we should strive to challenge ourselves in how we can still comply to all the GDPR regulations and get the job done. I think it's a matter of trying to do both at the same time.

Lenny Murphy: Okay, thank you. Alex, and then Patricio, and then we'll wrap up. Alex, your take?



Alex Gelman: Yes, I don't think I have any more to add than what's been said by this group. Certainly, we're seeing things relax a bit now, but that's because we're all focused on a health pandemic right now, and so we can't relax everything just because it's a health pandemic because 18 months from now, four years from now, there could be a cybersecurity pandemic. This could be a virus, not a living virus, but a virus on our IT systems that hacks, or it's going to be a hacker thing. So we can't just react to the here and now. Of course, we need to be thinking about that, but these data protection rules are put in place for a reason because the next pandemic could be a cybersecurity threat. We can't overreact to this.

Lenny Murphy: Okay, and then back to you, Patricio. I know you've done an awful lot of thinking on these topics and you kind of started my train of thought, so we'll wrap with you.

Patricio Pagani: Yes, I think I mentioned a couple times already stronger government intervention and Mike was saying that we perhaps will be debating between two paradigms, the China and the Singapore, and I'll throw in Israel there in the mix which is a slight twist from the previous two. I think we're seeing some interesting things that have come out of the big players. I was positively surprised to hear about the initiative that Apple and Google are running in terms of making a joint API for contact tracking. I think if that's properly structured, that's one of the good things that will come out of this pandemic. The initiative, I've studied that a lot; it's based out of the Singapore model for contact tracking and it has governments at the heart of how the system is run, so what Google and Apple are doing is they're just providing the deck for the GDPR-compliant version of identifying who you've been in contact, but it's all consented, and the government is - it's an API of two governments, it cannot be used privately, and the governments are in charge in the country of how the contacting of people that had been exposed will work.

I've been reading and I don't know if it's in place already, but they're definitely considering it seriously that the whole of Europe, the 27 countries are looking at adopting that protocol as the contact tracking protocol across the European Union. I think that's a great initiative. I think we're going to be probably having to deal with this issue of privacy and sharing information to someone that we can also control to do things right. So it's probably not going to be just Europe; it's



going to be, eventually, the world that has to come up with a protocol of how some parts of our private data which can only be used for health tracking can be administered by governments so they don't need to impose stronger measures, which is what – where we kind of be. I like to say if some countries had smarter contact tracking tools, perhaps we wouldn't need to have such strong social distancing, but we just don't. Right now, we were not prepared.

So I think we're going to move into the space where we're going to have to agree to some norms and ways of doing things across countries because this is clearly not a country-specific issue. Again, I'm positive about the initiatives from Google and Apple. So the fact that they're thinking about this and they're thinking about giving the instrument to governments to make it compliant is a good thing.