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Insights Leaders COVID-19 Roundtable

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Panelists

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Lenny Murphy: The first area that we always explore is what's the state of play right now. **What are you hearing about the industry? How are things going in your own business?** So kind of a pulse check, if you will, on where things stand. Gary, arguably, your business touches most of the industry in some form or fashion, so why don't we start with you?

Gary Laben: Sure, thanks. Appreciate it, Lenny. So we started out the year ahead of the quarter a year ago and so we thought we were off to a pretty decent start as business was up over last year, and then as we all sheltered in place towards the latter part of this quarter and the world succumbed to the pandemic, obviously, things fell precipitously for us and of course the industry. We've seen tracking studies remain generally pretty steady. Ad hoc naturally has been down throughout here in the second quarter as businesses assess what they need to know about their customers, and frankly, also protect their own financial positions which has largely led to a lot of the downturn. We've interestingly found a demand for more full service as clients as the world moves to automation and programmatic, as we do that and clients have tried to deal with this pandemic, we've had to step up and provide the resources, the human capital in many cases for that. COVID-19-specific research has actually offset some of – well, it's actually offset all of the project postponement and cancellation that we've seen.

That's not to say that it's made up for the total loss in demands of corporates. When you think about entire industries particularly in travel and entertainment shutting down, you can't offset all of that. The last thing I'll say is interestingly with more people at home, we've seen higher participation rates in our studies not only online, but also what we call offline which is via voice on the phone. People are more willing to talk, more willing to talk to anyone I think at this point as we're all sequestered, and earlier, before a global reopening that I think we're sort of seeing around the world, we saw a significant increase in participation among the medical community, healthcare workers who weren't on the frontline, per se, but had to be sequestered because of elective procedures and those kinds of things, and more willing to participate. That's always been a very hard to engage and reach cohort group.



Lenny Murphy: That's interesting. There're a couple points you brought up that I want to get back to, but let's kind of get everybody else's pulse. Graham, so Gary's talking about this emotional component of people wanting to engage. What's Affectiva's perspective since you're the masters of emotion, if you will, from a technology standpoint?

Graham Page: Sure. I mean I think we've seen a variety of changes. I mean again, as Gary said, I think we had a very strong early quarter of this year or first quarter of this year, but then, obviously, we're impacted by the pandemic. I mean the interesting thing for us is the heart of our technology is a means of helping businesses understand people's emotional response through technology, so in a sense, what we do is, as you said, kind of increasingly relevant, but equally, there're some sectors of work that we do that have been impacted. We do a lot of advertising and development work and as ad budgets have been slashed, that volume's obviously decreased somewhat, but I think it's been quite variable by region. So we've seen a lot of the work in western markets not decline perhaps as much as you would think. We've seen a lot of work that's done face-to-face in Asian markets, for instance, really grind to a halt, as you would imagine.

So it's been quite a variable response, but similarly, we've seen some different opportunities emerge as well, so we've done a lot of work in the neuromarketing industry, a lot of businesses that would traditionally have invited people to a venue to do work and kind of use biometric sensors, now they can't do that anymore so we're obviously getting some interest from those sorts of businesses, and likewise with the explosion in online qual, again, we've seen a lot of interest in again how you can layer technology onto that online qual interview to understand more about how people are responding. So yes, it's been a mixed picture, some negatives there, but also some positives as well.

Lenny Murphy: Great. Simon, from kind of a strategy standpoint since you guys take that broader view, what are you seeing in here?

Simon Dannatt: Well, I'll echo what others have said. The first quarter was pretty much a storming quarter. I think it was probably our best quarter ever even with the last couple of weeks of downturn, and then obviously, those have sort of grind to a halt. They're just stuck, not knowing what to do, and from a more strategic point of view, I think



there was a big dip because there were a lot of people who thought this is just a short-term blip, we'll just put everything on hold for a little bit and then wait for normal life to resume. We've seen it start to climb back now where people are going, "Actually, this is not going to go straight back to being normal and we need to work out what life is like now," I mean what it's going to be like for a while, so we see brands – and I think it's reflected in research – turning back on again to do research, but also starting to think about, "Okay, how do we adjust what we're doing so that we are living in this world and we still have to sell products and services." Obviously, there are some industries that's really badly impacted from a financial point of view, but many now seem to be actually coming back with not exactly full force, but in that direction.

Lenny Murphy: Now, Thom, if we look at this dichotomy of Simon of more the strategy standpoint and Quantilope with more of the tech perspective, what are you seeing?

Thomas Fandrich: Yes, tech is having a lot of tail end right now, so the first quarter was also super strong for us as well, but we are not that concerned about our own business in the tech space. We're rather focusing on our clients and our users, how they cope with the situation right now and sitting together with them to figure out how tech can power actually the big corporates that we are working with and figure out what they need most, and what we learned from them, from all our heavy users, is that they need a combination of those tracking studies to really focus on the situation right now, having like a radar that keeps them up to date every morning, what's going on in their consumer's minds, and then on top of this radar, having little speedboats – we call it speedboats, those ad hoc studies that are very agile and quick – that they're going to send out as soon as they see something suspicion on their radar, right?

So for us, what we see as a pattern is that people really use the combination of those factors to those ad hoc studies or speedboats. I can piggyback on what Gary just mentioned here. The people really like the do-it-together approach right now. They love to get educated by people who maybe have a bit more experience with those digitized processes and agile processes, so we're really focused on helping our DIY users with a DIT approach right now to navigate together through those bumpy times.



Lenny Murphy: Now, Mel, arguably, you have the broadest view, so what are you hearing across the entire industry from your view from the Insights Association?

Melanie Courtright: Yes, so I mean it's definitely varied across country, across sector, method, mode, industry. There's the one side of the coin where it says that we were \$80 billion and now the new math says that we will lose about \$19 billion of that \$80 billion in 2020, so that's quite a loss for the overall size of the sector, but that loss is not equally distributed. It's around 25%, but in some sectors, it's 75% to 80%, and some sectors it's much less. We've talked about the industry impact, but also in-person is much harder hit than others; they've certainly moved to digital where they can, but then there's the other side. Some of the in-person face-to-face, even focus groups are starting to open back up. There're new guidelines about how to open up and they've done everything from change the door knobs on the doors to change the tables in the rooms and doing things at a hybrid mode where they'll bring 10 people in, but they'll be in 10 different rooms, digital and in person, so to speak. So it's a mixed bag and I'm proud of the industry. I think the industry is responding as well as it possibly can, but there are sectors of the industry that are being pretty hard hit.

Lenny Murphy: Yes, absolutely. So was just talk about dovetails, what we've been hearing, right? There was this initial – I call it the “Oh, crap” moment, the first two weeks where everybody just said, “Wait a minute, what's going on?” and everything kind of stopped and all of the reactions to that, and then a slow but steady reopening of wallets and spend and maybe more exciting potentially for the future is the idea that our industry is vital right now for our clients. They need to understand what's going on. There're so many unanswered questions on what's happening right now, these massive changes in consumer behavior and then the broader ones are which are going to stick. So are we seeing shifts that are long-term or are they just blips? All of those things are still there. That's exciting that the industry's been able to step up and I think you've all kind of echoed that. Gregg, do you have any follow-up or take on what we've heard from everybody?

Gregg Archibald: Yes. I actually want to pick up on something that Simon said kind of around the room, and Simon made the point that the doors aren't completely locked, the turtle



is starting to stick his head out of the shell. **What do you see as the kinds of questions that people are coming out and saying, “I need answers to these kinds of questions now”? Is that different than what it was in, let’s say, the beginning of February when no one had really heard of coronavirus or COVID-19?**

Simon Dannatt: Should I answer that?

Gregg Archibald: Yes, jump in.

Simon Dannatt: So I think a couple of things have changed. I mean while it was a great first quarter, it was largely business as usual and it was just the world as normal. I think the big change from our perspective that we’re seeing around clients, obviously, there’s a short-term need through the changing. Okay, we’ve got advertising. Maybe we don’t have advertising material that we can’t use anymore. How do we adjust it to make it work in an environment where people are being impacted in the way that they are, that real humans out there are suffering in many cases? How do we adjust that? That’s a short-term adjustment, but there’s a longer term which is more of a commercial big business looking at the world perspective which is, “Okay, this is happening and things are being impacted now and it’s likely to go on happening, including, obviously, there’s going to be a recession if we’re not in one already in most consumer markets for sure.” Many of them are asking questions about what is that going to look like for us to the end of this year? What is it going to look like for next year?

Clearly, there’s a big input from that from new research which they need, but there’s also – and I guess it speaks to do it together – a change in terms of we actually need to go back and look at anything we’ve got or had in the past which gives us any indication of what we should be expecting given previous downturns or impacts to particular pieces of business, and how do we marry that stuff up? How do we take the data from whatever corporate historical knowledge we have, whether that’s from tracking data or past recessions with the way people are deciding to behave into the future and tying that together? Because there is historical stuff, but no one’s really learned from the past things even though we know it happened, so now there’s a whole learning exercise happening, I think, so that’s a big change in the way the questions are getting asked.



Gregg Archibald: We've heard that a few times, particularly in comparison to the Great Recession which is kind of the most recent big event that might have some comparable components to it, and we've heard a number of people kind of looking at behavioral data and attitudinal data from those time periods, trying to get a sense of what the next six months or 12 months may bring.

Simon Dannatt: Yes, I mean this might sound shocking I guess on one level or not which is even if you – most corporate internal data only goes back 10 years, some cases less, so even the last recession or the last crisis that the world had is just beyond that, so many of the clients we're talking to don't actually really have any solid data, so having to go back and mine data from external sources in terms of spend patterns and things like that which do exist and trying to interpret that world even as close 10 years ago, 11 years ago if you go to 11 years ago, so I think the question marks they're asking are all about how do we take whatever we can take from data perspective and tie to behavioral things that are happening now and then what we see looking forward?

Lenny Murphy: Thom or Gary, since you guys see so many projects flowing through similar to Simon's question, whether you're seeing the change in the types of projects as well, the topics.

Gary Laben: We are, absolutely. I think that we're seeing initially now is brands trying to understand where they fit. Before, it was trying to measure oftentimes consumption and volume of that, and now it's almost prioritization. Where do I fit in the priority? Consumers have really just rethought their relationships with brands and what's important, and I think the question that exists in brands' minds is will this look like a typical financial sort of recession recovery or is this going to be different? Will people's preferences and priorities be forever changed as a result of this? What we have seen certainly in America is that the stimulus that the government provided has largely gone into people's bank accounts; they haven't gone out and spent it, and that's very typical of a financial recession, and then slowly, people loosen that. The question I think that brands are trying to understand is where do they fit in that process and what we're trying to do is help



them understand that and work, and that's different than what we might have seen, as Simon said, 10 years ago in a large financial recession.

Melanie Courtright: Yes. I mean you guys know we're spending a lot of time with brands in the virtual townhalls that we're holding and a lot of them are saying the same thing, that they don't have benchmarks, they don't have norms, everything. There's no comparison, there's nothing to compare this to. You go back 10 or 11 years and that was a recession, but it wasn't driven by a fear-based shelter-in-place pandemic that actually changes people's values and sort of core thinking. So there's research that says people have moved down the Maslow's hierarchy of needs and they're back into needing basics and they might come back up, but when will they come back up? We don't know because it's not just a financial recession. It's driven by something bigger that actually changes how people think about their needs, and so that's really different.

So what we've also seen them saying is they're looking for foresight research to understand that long-term value-based change, what's really going to change in people's minds, and then importantly, how do I message to that? How do I appear not tone-deaf and talk about a beer on a beach when you can't go to the beach and maybe that's not what you're seeking anymore because your value structure's changed? So they're really looking for that brand new research that says here's how to think about messaging to people based on the whole new world.

Graham Page: To build on that, I mean I think in talking to our partners and seeing some of the works that we've been doing, I think a lot of clients are absolutely grappling with the core question of what has changed and what will stick, and therefore, how relevant is my brand to the changes in value sets and how relevant is my messaging? I think there's some interesting perspective on work we did with Kantar who's one of our biggest partners, and that seems to suggest that in terms of just campaigns, people are not fundamentally changing the way they react to ads that don't reference the pandemic I think which is suggesting a certain underlying resilience to people's attitudes and brand relevance, but interestingly, the ads that they react least well to are the ones that kind of have hopeful, happy message, everything's going to be okay, we're going to be here for you.



I think for many people, brands don't have the right to say that or the relevance to say that, so it seems to be interesting that brands that have been doing well in messaging are the ones that are making a tangible difference and can say so were the ones that are essentially as relevant now as they always have been and the ones that have struggled and the ones that have kind of tried to build salience by getting a message out there, but not really saying anything other than it's all going to be okay.

Lenny Murphy: We've heard that as well. The backlash, we had two weeks ago and they were telling their clients, "Cut that. Stop with the 'We're all in this together.' We're done with that already."

Melanie Courtright: Message testing has never been more important because they have honestly no idea how something's going to be perceived in the minds of consumers who are a little bit figuring out how they feel even as they go along. So there'll be times when you think you've got it exactly right and then it hits the errors and it just falls super flat.

Lenny Murphy: We're the same way. We're toning out on those ads. We actually despise them, my wife and I, like I don't want to hear another one of these ads.

Melanie Courtright: It's such a question. How do you make them feel safe without making them constantly think about being safe? People are not built to think about feeling safe all the time. They want to be safe, but they don't want to have to proactively think about it all the time because that makes them feel unsafe. So you have to make them feel safe and loved without making them feel like they have to think about it and worry about it all the time, very delicate balance that can only be really gotten right if you do really good message testing.

Lenny Murphy: Simon, you've been trying to jump in. Go ahead.

Simon Dannatt: Oh, I was just going to totally agree with Melanie which is the importance of testing now cannot be overstated because the potential for total misreads from a consumer or a user or even a brand lover is enormous and you just don't know, and it's easy especially for some of the tools on this panel that people are using and can



use, and it's relatively easy to test. Arguably, now to test them, it was before. I mean Gary said participation rates were way up in many ways, so it's fast and easy and so the not to do is test it, although we have had some clients do just that.

Graham Page: Yes, we've seen the same. I think the interesting thing right now is I think a lot of clients initially went, "Oh no, I need to stop. There's no point in trying to test anything right now because everything's completely different," and now I think you're right and people are beginning to realize that now is absolutely the time to do this kind of work because you need to know how something's going to land and whether it'll land in the way you hope or expect.

Gary Laben: We didn't hear a word, as you would imagine in early April, from our travel and entertainment clients, and now in the backend of April and now in May, hotel chains and airlines are working with us again for that very reason. They need to really understand the messaging and what's important to their customer base. I think a number of them were understandably shell-shocked in terms of what to say and how to say it, particularly when demand is down 95% in some cases, but as people think about the new normal and reengaging in ways that at least they can reflect on and look typical for them, brands need to understand the consumers' perspectives on how to present their offerings in ways that are as attractive and, as Melanie said, safe, but not harping on that so that people are overly focused on that beyond the overall experience.

Lenny Murphy: Before we move into the next topic though, Thom, I just want to give you a chance to chime in on this little round.

Thomas Fandrich: Yes, maybe one last sentence on this topic, what has changed on the way, how are people doing research on the platform. Something we see that is super interesting is that there is a shift from a what-focused research, so what is working in terms of messaging and what is working in terms of why-focused research. So we can easily test what is working and what is not working and also in terms of messaging positioning, but why is it working or not? Why is this product or advertising positioned very well? This helps us to do at least a little bit of prediction on tomorrow or the day after tomorrow since prediction is pretty hard to do right now, but with the why in the background, it's easier to navigate through it



compared to a situation where you just have the what, and that is what we see people try to leverage behavioral methods like system one and implicit to better understand what is behind the associations of key driver analysis to better understand what are the levers that drove messaging, but that is very interesting to see the shift from what to why.

Melanie Courtright: That reminds me of one more point which is that there is a new world of empathy that is a new model of empathy that is developing. This is one of the first times when employers, employees, brands, consumers all went through something together, feeling the same thing. So we've heard brands say they want from "I see you, I understand you," to "I get you, I feel it too," and it's ushering in this new wave of empathy that we're predicting is going to make it into a lot of the brand models and messages that are going to shape some of the future.

Thomas Fandrich: Yes, and this is very interesting. One last point to piggyback on this. It is actually a bit counterintuitive, but this way of social distancing we live in at the moment with all the remote meetings on the other hand creates some closeness because we're all in this together. That is very interesting to see how this closeness develops between partners on the vendor side, but also on the corporate side as we're all in this together, so it reminded of this while listening to you.

Lenny Murphy: That's a good segue and we've heard that since we've all experienced it. That's why even though we're only recording the audio, we have our cameras on because it's good to see other people right now, just to make that connection. The segue is one of the lessons for you as leaders that has been a surprising thing that you've learned in terms of leading your companies, and we've heard empathy come up quite a bit. That's been something that leaders weren't really thinking about, per se, and now it's a core value. It's a core component. **So what surprising lesson have you learned?** Mel, since you kind of took us here, why don't you start us off?

Melanie Courtright: Well, I mean first I'll say I've had to learn a lot of lessons in the past five months. It's my first job as a CEO, it's my first time in the association world, it's my first time with a global pandemic, and so it was a lot all at once. I would say for me, people who know me know that I really like to connect with people, so learning how to do that virtually has been – it's innate for me to do it when I'm in person.



It's less innate for me to figure out ways to do that virtually. Just yesterday with our teams, we had a show-and-tell-and-drink, so everybody brings an object and everybody brings a drink and you talk about the object and why it's special to you. So we're figuring out ways to connect, but virtually. That has been the more empathetic side of what I've learned, but then on the more practical side of a CEO, I've learned to reforecast fast. [Laughter] We've done reforecasts several times already and then figure out, "Okay, it's shifting again and now where's the money coming in and where's the money going out? How do I control that and manage that?" So agile reforecasts.

Lenny Murphy: So empathy, agility and resiliency, right? Gary, I think you have the largest organization that you're tasked with, so what's your lesson?

Gary Laben: Yes, we've had about 5,000 people all around the world. We sit in physically in over 35 countries, about almost 60 offices, and I think the lesson for me has been that everyone's situation is different. We tend to sort of think about our employee population in groups, whether it's geography or functional area, but now when everyone is at home faced with the challenges of their job immersed with the complexity of their home situation, it's all different, right? So Person One has kids who are out of the household and they're able to accomplish and do things in a way that's different than Person B who might have the same role who's at the moment trying to homeschool while simultaneously be on a conference call. We've had to really understand and reflect on that as an organization and it helps us as we think about coming out of this, how much more bespoke we need and should be to address each of our employees' personal situations, whereas I think in the past, candidly, we wouldn't have done that. We might've said, "We're going to be doing this and if you're in this role and that, if you're in that role," and now it's no longer the case and it's no longer appropriate. Sadly, it probably took this pandemic to really tune us to that and it'll be better for the company as a whole, for sure.

Lenny Murphy: Very cool. Thank you for sharing that, that's an interesting take. Graham, how about you guys? I'm friends with Rhona on Facebook, so I've seen some of the changes that she's been trying to deal with as well, so yes.



Graham Page: Yes, I can talk about that. I mean I think it's been interesting for Affectiva. We've been a business that's kind of well adapted to virtual working for a while and a lot of the guys are based in Boston and Cairo, I'm based in the UK, so on a personal level, I think working remotely for quite a few months, but I think interestingly, the thing that struck me is almost the opposite of what you might expect. I think the people who have been used to being in an office more I think have perhaps missed it more than many might've expected. I think we hear a lot of discussion of this topic around everyone's going to be virtually working, it's still going to be fun, we'll be much better at it, it'll be a permanent change, and there will be some things that change forever, but I think what's really struck us is how much people are missing those casual conversations, the personal touch of actually being in a physical location with somebody and just bumping into somebody at the water cooler or at the coffee machine and saying, "Oh, I haven't seen you for ages. How are you doing?" and having that kind of moment.

I think that will be a persistent problem, so one of the things that we've just begun to do is have people volunteer to be randomly paired with somebody that they've not really spoken to before within the business. It may be somebody from Boston and someone from Cairo and have them just have a virtual meeting and connect and share those kinds of moments that they would normally talk about, what they're working on and their own situation if they want to. So almost kind of trying to create those little coincidences that you would normally have in a physical space, that I think is something we're just beginning, but I think will really help foster that connection because I think people have genuinely missed the physical connection, and although this stuff is great, video conferences are very powerful, I think people are still going to miss it and we need to really be cognizant of that as we emerge from this.

Lenny Murphy: Thom, lessons learned?

Thomas Fandrich: Yes, it's funny when I heard Graham speaking right now. It's completely the same over here. A startup environment is always very close, right? People laugh, spend time together even after work, and all this is gone now. Of course, it was not a big deal for us as a tech startup to shift to remote work. This is working very well, so just working together is pretty seamless, honestly, but we definitely miss the



human touch in our daily working lives because working together is not just meaning working together, but also spending time as humans together and we now try to reinstall and reinvent that human touch in our daily processes a bit, so we're having, for example, small wins meetings. On every Friday, the very last meeting we do as a company is a small wins meeting where every team presents the top three wins of the week to cheer and celebrate a bit together, and also one big learning, right?

So we're not talking just about the big wins, but also about the big learnings of the week, so what didn't go well to also make sure that the organizational learning is going on while we're not having the personal, let's say, conversation and time spent in the office. We also installed a remote kitchen channel on Slack where an always-on link is in there so everyone can enter the remote kitchen on Slack and spend time there, having a coffee chat together because our kitchen is gone now, but we have it back on Slack.

Gregg Archibald: I love that. I absolutely love that.

Lenny Murphy: Yes, absolutely. Simon, surprising lessons learned?

Simon Dannatt: Well, I mean all of the things that – I think I'm extremely lucky to be in a team which is highly empathetic and gelled together even though we're spread across the world too even before this started, so the change in terms of virtual and connectivity and people caring for each other and looking after each other in the company has been, as it always was, massive, I mean really, really important and it's held everything together. The change for me as a leader I think is the one thing I really noticed is people seem to need – I don't really have a good term for it, but instead of leadership in terms of painting a vision of the future and this is where we're all going and that sort of leadership has shifted to a leadership which is more about holding which is giving a substance to where we are and a shape to it so that people feel – I mean you don't necessarily know all the answers, but you can tell them this is where we're at and this is what we're doing about being here and giving them space both to deal with whatever personal issues and things that they have, but also space to feel secure and safe and supported.



I think that's a shift in the way you – I've had to move my mindset around the way you lead and I think that probably – I mean it's definitely working for us. I'm curious to see whether the other CEOs in the group sort of have any – whether they feel the same way about that. So I think it's called holding. It's just holding, so you have to do the holding. You have to hold a space for people so they feel safe and secure.

Lenny Murphy: Yes, definitely a sense of responsibility for the folks. They're not just employees, they're family. I've heard that consistently and we try to practice that in our own businesses, that these are people we work with every day, they depend on us and we need to ensure almost a parental type of scenario of, like we've done with the kids, "You're going to be okay. We don't know what everything's going to happen, but you're going to be okay." I mean we're committed to doing that. Does everybody else have that sense as well, that sense of responsibility of taking care of people as best we can?

Gary Laben: I mean at the end of the day, the company does have the responsibility to the employees, and in my perspective, it's about being as transparent and communicate as frequently as possible and deliver the bad news too, right? The bad news is usually – it's worse in our minds about how it's going to be received than it is once we communicate it, and it's because people are okay – humans are strong and they can accept that because it's a known. It's the unknown that we don't like, because once we have the known, we then at least can say, "Well, what are we going to do about it?" I think that the organizations do really well in these kinds of situations where they have frequent communication up and down on not only the positive, but also the negatives, the things – as Thom said, what are the lessons learned? The organizations I think respond very positively to those kinds of things because they feel informed, engaged and cared for in that regard.

Melanie Courtright: Yes, we're definitely seeing that both across my organization, but also our membership. They're looking to us for reassurance, that's what I call it. They need reassurance. They're looking for our perspective not only about how we're doing as a company, but how the industry is doing, how the world is evolving. They see us as people who oversee and have more line of sight into a broader set of topics than they have and they're looking for us to reassure them that the world is going



to be okay, much less that their job is going to be okay. So I talked about agile reforecasting. You can't do those kinds of reforecasts without involving your teams, so every time you do those, they start to get unsettled, so then we're having to go back and say, "Okay, the reforecast is done. Here's what we learned. It's still going to be okay." So there's a lot of task-based work that we're working on very quickly, but then there's a ton of time spent just telling them, reassuring them that things are going to be fine, that eventually, as a human race, as a people, as an industry, we will rebuild, reconnect, but they're looking for those fact-based database reassurance, not just platitude.

Lenny Murphy: Again, you're segueing really well, Melanie. So now's the fun part of the call because I shut up and pass it off the Gregg and everybody usually enjoys that far more. Gregg's going to guide the conversation about the future. Mel, you've provided that segue, that part that reassurance is we're going to be okay and what does that look like. So Gregg, take it away.

Gregg Archibald: Yes. Actually, that was a terrible setup, Lenny, because I'm going to change my question dramatically. I apologize for catching everyone off-guard, but we've talked about a number of different things that we see going on from the type of work, how the engagement is, empathy, and I've been in this industry now for probably as long or longer than most of you, and one of the things that I've heard over and over is Insights needs to figure out a way to get a seat at the table. Nod your head if you've heard that phrase, "get a seat at the table," more than once. This seems to be an opportunity right now for Insights to have more impact than we could've had six months ago because VPs of marketing are looking for new answers, operations are looking for new and different answers, brand managers are trying to figure out how consumers are shifting those values, what behaviors are going to stick around.

So what advice would you give based on your experience to help Insights take advantage of this opportunity to show the value that they can bring? Melanie, I know that you and I have had this conversation a year or two ago, a similar conversation, so what is your perspective given the shifting nature of questions, the importance of questions right now, and you brought together this idea of empathy as well. I'll just throw this out to you first.



Melanie Courtright: Well, so first I would say that as an \$80 billion industry, you don't get that big if you don't already have a voice. Insights does have a voice at the table. Is it a big enough voice? No. Do we always take advantage of the voice? No. Does every piece of our research have a strong enough voice? No, but we have a voice. So the companies that do well and have the strongest voices are the ones that make sure that their data doesn't stop at just being data. It moves all the way through to strategic decision-making for brands and there's never been a more important time for helping them with strategic decision than right now and helping them understand consumers because that's what should drive their strategic decision, understanding consumers, understanding their customers, understanding the market environment and their values. So as each of us do our research, we have to make sure we take it all the way to, "Okay, so what does this mean and what should a brand do with it for strategic decision-making?"

Gregg Archibald: Simon, this is an area of your focus as well, kind of the strategy and taking this through. What recommendations, thoughts do you have to create a stronger voice given the opportunity that we have in front of us today?

Simon Dannatt: It's very similar to Melanie's point which is we have to catch ourselves when our focus is on what we do and actually stop being about what we do. We have to be about answering the challenge or the question that the brands or the clients have which means if you catch yourself talking about the process you go through to answer a question more than you're talking about what the client should be doing with the answer you're getting or what they should listen to most or what they should understand that's different most and what they should do next, what their next action is, then we're making a mistake. It's all about this is what you should do, this is what you can do with what we're telling you, this is what we've seen that's different, this is what we expect to happen, and not about the process that we in the industry use to get to that. I think as an industry, we tend to talk about the process all the time and the clients right now don't care and arguably never did, and arguably even more importantly, probably should never have done because what they need is the answer, not how we got there. It's a bit like us. "Listen to us because we're going to teach how we are a surgeon while we're saving your life." The patient doesn't care, they just want to be saved.



Gregg Archibald: I've never heard that analogy, but I'm going to try and keep that one in the repertoire.

Simon Dannatt: I made it up on the spot, so please don't. I'm sure you can come up with a better one.

Gregg Archibald: I like it, I really do. Anyone else have some perspective to add to the question of using this need for knowledge and action steps to create a stronger voice?

Graham Page: I think we have to – as an industry, we've been getting here, but I think we have to continue to deliver it at a speed that makes what we say relevant. I think we've tended it to be because we want to get it done in the right way and occasionally show how clever we are in the way we answer the question, we haven't always acted with the speed that's necessary. I mean businesses have always needed to answer questions faster than we can deliver those answers and that's especially true right now. So I think being able to act quickly enough and, if need be, get it 80% right rather than 100% right but three times as long, I think that's where we need to be. We need to be okay with acting quickly enough and maintain therefore a relevance in what is a very fluid situation.

Gary Laben: Building on that, I would say, agreeing with the others who've gone before me, I think now is the time for us to really be bold with our insights. Two quick examples of that, we work with one of the largest hotel businesses in the world and during the pandemic, they kind of eliminated their insights group, and normally you'd say, "Well, I guess that's it for us." Well, we took our insights directly to the CEO because there was no insights group, and when the CEO saw the results in what we were doing, reversed the decision because they realized how valuable the data was and they'd had it all the time, just didn't know that it existed, so one example there.

The other, as we began the year, we tried to think each year about how we can give back to the industry or, even greater, to the world using our data in some way, shape or form. The circumstance as a result of the pandemic, we're using it now to predict COVID-19 hotspots by surveying about half a million people a day coming



into our studies to determine who may have symptoms and where they're located and what kinds of symptoms they have. So the idea that what we do is sort of limited to these areas that we've historically provided them, I think we just need to break our own mold and think broader than that and have the temerity and the confidence to know that what we do is vital in normal periods and even more vital today as we try to understand and make heads or tails with our current situation.

Melanie Courtright: I love that story about the hotel, Gary. We were talking last week on a call and we spoke about developing gaps in understanding consumers and there are brands that are understandably pulling back. One of our jobs as an industry and insights professional will be to say, "Alright, here are the gaps that you're developing in your understanding of consumers as a result of these choices," and just being bold and helping them understand that while it might feel like the right thing to do from a financial perspective, it is a long-term drop in connection to the market that will have a much longer impact than a few months of less spend on research. The gap that they will develop and us identifying those gaps for them is what will bring us back to the table.

Gregg Archibald: Fantastic. I'm sorry, go ahead, Thom.

Gary Laben: It's no different than would we have, during this pandemic, said, "Well, we just won't have our kids go to school. We'll just pick it up next year," right? Nobody thought for a minute of doing that and there're so many wonderful stories about people homeschooling and people trying to help their kids and the wonderful teachers and schools that have tried to do this because we look at that and say, "Well, of course we won't diminish the education that we have for our kids." Well, it's the same thing. It's education that we have for our grants.

Thomas Fandrich: One interesting pattern that I saw in the past two decades – and it's an interesting parallel and it's a discussion that we also see in economies right now – is this insourcing or this outsourcing trend, right? In the market research industry, we had a lot of outsourcing and it's just on the corporate side over the past two or three decades which led to least control, at least, about your insights, and now I think is the chance to rethink what we need to have under our own roof to act fast in times like this. I don't say you need to insource everything right now, but you



should rethink what core product, what core insights you need quickly and make sure that you have it available immediately as soon as you need it to keep the pace of marketing, right? So this needs to be the goal. We need to keep the pace of the marketing department with our market research people and we can do this by insourcing at least some of our insights we need and use solutions for that.

Gregg Archibald: So kind of knowledge at the speed of business. That's my new tagline. We're adopting that one, Lenny. Lenny, I'm going to turn it back over to you now.

Lenny Murphy: Thanks, Gregg. So I want to be conscious of time. This is a very active group and you guys have been fantastic, but I want to ask one more question, but I'm going to ask you to do it Tweet form, meaning really fast, kind of 140 characters or less in how you give the answer. **So if you had to make one prediction on something that we'll see in the next six months, what would that one prediction be?** It doesn't have to be held to the research industry; it could be anything. We're going to go in reverse order from how I see you, so Graham, your quick prediction for the future.

Graham Page: I would say that the technology that we're now using I think will inevitably remain in play to some degree when we're all back to whatever normal turns out to be, but I think what we will see is a much greater use of the technology that allows us to continue to make the connection in the way that we currently are. I think we all now know we need that extra human touch and any version of this sort of technology that allows that will I think do well in the future.

Lenny Murphy: Okay, Simon?

Simon Dannatt: I'm going to cheat and do two in my small number, so one because of Graham – I'd build on that. I think the understanding that really connecting with real people, not just inside our companies but also with our customers and our clients and our consumers and so on will stick and people will really recognize that when they don't know that, that's going to hurt them and still within count. The other thing that I think is going to happen in the next six months and I think we'll be seeing is going to be a real jump in people wanting to do innovation amongst our clients. I think that's going to be massive and counterintuitive, so innovation is going to



become a really big thing for people because they're trying to shape things for the future.

Lenny Murphy: Your lips to God's ears. Thom, prediction?

Thom: I think we're going to see a quantum leap in leveraging technology for market doing market research, and on top of that, we will see a very high thrust in remote work.

Lenny Murphy: Alright, Gary, you said be bold, so what's your bold prediction?

Gary Laben: Well, I'll give a less bold one a little bit. Counterintuitive in that we're apart, I predict that human engagement, getting us back together will still be a priority for all of us. We are beings that need to be together and this won't keep us apart; we'll figure out a way. Then the other one that sort of builds on Simon's perspective, I think that we'll take – ironically, as much as I said that we're not doing it now, we're going to start to take some real big risks. We're going to reinvent our business models because on a relative basis to what we've just gone through, that seems like a very easy and doable thing to do on a regular basis, and I think that we'll see that and that builds on the innovation I think that Simon referenced earlier.

Lenny Murphy: Okay, Mel?

Melanie Courtright: So my prediction is a swoosh-shaped recovery. People have been talking about a U-shaped recovery, a V-shaped recovery, a lazy V. When this all started, everybody said it's going to be a U-shaped recovery and I knew innately that that was way too optimistic. Then they said, "Okay, a V shape," and then they said, "Alright, the V is kind of laying on its side; now it's a lazy V." It's a swoosh-shaped recovery and that's because while there are, again, pockets of thriving and pockets of innovation, there are still big pockets that are going to have to not just restart, but rebuild. So I predict a swoosh-shaped recovery, but we will recover, we will rebuild, we will innovate. We will come out with some brand new products and some of the best marketing and advertising campaigns we've seen in years because it'll all come out of empathy and recovery, but we're all going to have to lean in and it's going to take us a little while to get there.