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Insights Leaders COVID-19 Roundtable

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Panelists

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Francesco D'Orazio, CEO, Pulsar

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Lenny Murphy: **The first question is what's changing in the industry as a result of the COVID-19 situation: business levels, shifts in methodologies, new client priorities?**
Autumn, let's start with you. What's your take?

Autumn McDonald: Well, first of all, we immediately saw earlier in Q1 something that I don't think any of us were surprised by and that was an immediate shift into more tech-enabled research methods and using more tech tools for day-to-day business and for conducting both quantitative and qualitative research.

The other thing we're seeing is that companies and nonprofits actually are really reevaluating their research investment. In some cases, that means that they're pulling back on spending. In other cases, it means that some organizations are choosing to spend more at this time. They see it as an opportunity for rich learning and in yet other cases, it is spending at the same level, but shifting to different types of work so it's paying a greater depth of understanding.

Lenny Murphy: Okay. Francesco, what about you?

Francesco D'Orazio: Well, I think it's true that we're seeing a shift towards more tech-enabled methodologies, but we haven't seen yet a selection in terms of the demand for insights or the consideration of insights and I think we're seeing brands hungrier than ever to get insights on their audience as behaviors are changing so fast and opinions and attitudes are changing really rapidly in a time of crisis and so people are getting really anxious about getting on top of that. So we got this sense of urgency which I was unexpected and so a lot of organizations are reaching out to understand what is going on and how perceptions are changing and that's positive and that's really exciting and interesting.

On the other hand, some brands in different verticals and industries are getting cold feet because they don't know how this is going to play out and I think we are at a stage where we feel there's an increased demand for insights to stay connected to the customer base at a time of isolation and crisis and so today is a delicate time where brands can really build solid relationships going forward and support their audience, but some organizations are on the fence trying to understand what is going to happen next and therefore, are kind of dilating the



pipeline a little bit if you like, postponing decisions by one or two weeks and see what happens.

Lenny Murphy: Yes. I'm hearing that as well. Andy is our resident client. Let's get your perspective on this.

Andy Smith: I can speak from an industry perspective, but personally, it's an interesting time to begin to research because consumer behavior is just different and a lot of it are differences that will not be permanent. Bread, two weeks shelf life and people are buying excess. So I know people are buying more than they normally world. They're storing it in ways they normally would not, and they're buying brands based on what's left not what they have passion for. So, to me, I think that's interesting.

The other is the Instacarts, the Walmart Jetsons of the world and how online, from a shopper focus is going to become even bigger. I'm looking at, from a fresh food perspective, those channels basically doubling their penetration. So, interesting times.

Lenny Murphy: Are you adopting methodologies as well, Andy?

Andy Smith: I wouldn't say adapting, postponing a lot. I don't feel comfortable doing product tests at the moment. It worries me. I know from a healthy food service business we hear an awful lot about consumers' concern about the people handling food, so don't feel comfortable sending product out for people to test. Obviously, we can't do focus groups now or get people in a group together, but even more automated methods. If your behavior is very different and I don't know if it's a behavior that's going to continue, I don't know what good it's going to do me right now to understand it fully.

Our exceptions, again, I mentioned the migration to online shopping, that will probably continue, that's worth understanding, but people buying my brands now, a good chunk of them are buying because it was a brand that was on the shelf and everything else was sold out.



Lenny Murphy: Interesting. So, Gregg, I know you've done a lot of thinking around this and what's your take?

Gregg Archibald: I think it's pretty consistent with everyone else. Autumn, you said you see some people pulling back but also, some people digging in to try and understand what this new thing is and I think that's pretty consistent with most of the brands that I've talked to over the course of the past week or two. We are seeing that a little bit based on industry. Travel and tourism just don't have any money right now, but some other ones do and I'm trying to get ahead of it.

One of the questions in this mix that Andy or Autumn or Francesco or whoever, are you seeing different types of work? Andy, you just mentioned that you're not comfortable doing new product development work right now and that makes perfect sense, but are you seeing more of a focus on brand, more of a focus on communications, attitude and usage? What are you seeing out there and that's generally what we are seeing?

Andy Smith: I would say it's interesting because I've had a lot of suppliers reach out to me, Hanto, Baci saying they're suspending a lot of work. So we've suspended a tracker, we've suspended all product testing with Baci. So a lot of tools just not available at the moment. That said, we're kind of lagging understanding of ecommerce and that's one of the areas I think is going to come out of this with a nice, hefty, ball pin penetration especially for those on the fresh food side. So we're spending a lot of effort now to both understand how to communicate in that channel. It's very different than an aisle. It's a virtual aisle and search is important. So a lot of it is coming up to speed on that path to purchase from an online perspective.

Francesco D'Orazio: I think from our perspective, we're seeing a lot of brand perceptions and reputation work coming in. There are a lot of people that are religious in understanding the long-term impact of the crisis and how it's kind of eating up the reputation that I think built before so we're getting quite a bit of influx of questions that come and yes, not a lot about understanding new products, innovations because obviously, those are based on behavior that might be temporary, but we'll also build behavioral science frameworks to understand



what kind of behaviors, given enough repetitions, are likely to stay after the crisis is over and so that's becoming a really interesting space.

As you were saying before, ecommerce is obviously a really interesting area where behaviors are changing, but also the lifestyle of working from home and what it means for spending for example. That will be something that is probably here to stay. So we might bring all of this in a larger project called The New Normal, which I can share a little bit more later.

Autumn McDonald: Gregg, from our standpoint, to answer your question, we're seeing a continued pool for both qualitative and quantitative work. So within that, we're really working very collaboratively with our clients to help them think through what types of work both in terms of qualitative and quantitative are appropriate and not appropriate at this time. On top of that, we're seeing even more pools for the work that we do as social scientists looking at how the current normal is affecting social and cultural dynamics. So we're seeing an increased pool for that as social scientists.

Lenny Murphy: Walker, you may arguably have kind of the catbird seat in your role at Kantar in being the resident futurist, if you will. What's your take?

J. Walker Smith: Well, catbird seat, that's a new one, Lenny. So, I'll have to try that one out with Kantar. I want to echo several things that have been said already and then just maybe add an additional thought or two.

So there are five things that I've jotted down here in front of me. So the first is I think the immediate reaction of clients was to try and slow things down to get a handle of what's happening. I think what they've quickly discovered is they actually need to speed things up because with all the uncertainty right now, they need more research than ever. There's probably never been a greater time for more research and more information over the past 10 or 12 years and we're beginning to see some of that coming to play. So that's the first thing.

The second thing is kind of interesting. We now have clients who are more interested in respondent engagement in the interview than ever before. They



never used to ask those questions about whether respondents were bored with this long tracking study and now, all of a sudden, they want to know if people are actually able to give good, reliable answers in the research. So they're asking slightly different questions about methodology things and that kind of relates to the third point I wanted to make which is there is a lot of impact in the supply chain going on now. So it's not just research companies that put projects in the field, it's all the fieldwork companies. They're having more difficulty actually getting work fielded. So even if we want to do it at the frontend, it's harder to do at the backend and that's a bigger impact of the way in which people are thinking about this and I think we realize it at the moment.

The fourth thing is more of a client perspective on the kinds of work that they're doing. So there is a lot of interest, as I've said a moment ago, in kind of drilling into the moment and finding out what's going on now. There is less interest at this point in time in trying to figure out where the future is headed. There's a lot of speculation about changed behaviors, changed habits, but not much thinking going on about changes in values, changes in the overall structure and dynamic of the marketplace. When airlines get going again, are they going to be more environmentally conscious? Are they going to think about their carbon footprint more? Are we going to rebuild an economy that has essentially been brought to a halt in the same way as before or are we going to take advantage of this as an opportunity to reboot it in a different direction? Clients are going to have to come to terms with those issues, but they haven't started doing that yet.

That's my fifth and final point: there is client interest in a lot of the things that are changing their operational dynamics. So it's new channels, as Andy was saying earlier, and it's the new dynamics of how products are handled or how research is handled. You're talking about in-home placement. We actually think that one of the big changes going forward is that hygiene is going to be a much more important element of how people think about and manage their lifestyles and that's going to include everything you buy from a third-party seller online to all of the stuff that's ambiguously sourced in a discount store, to the things that this research company you've never heard of might send you in the mail to try out and use in a research project. So a lot of impact on that that I think we'll see.



Lenny Murphy: That makes a lot of sense. James, I'll get to you in just one second. My wife and I were chatting this morning that we have now started wiping down every delivery that we have, all in the packaging. If you had asked me a week ago whether I would be wiping down products with Clorox wipes, I would've laughed you in the face like, "No. What the - that's idiotic."

J. Walker Smith: Well, I think packaging is one of the big opportunities going forward and it's something that we've never paid attention to in the past. I mean who really thinks about a package? Yes, a little bit but not a lot. Now, it's getting a lot of negative attention, but that's a huge opportunity because people are now thinking about it and I think brands are going to reorient their ideas around innovation in these kinds of ways.

Lenny Murphy: Yes. James, so you're kind of an earlier-stage tech-centered company so I expect that you have a unique perspective on this. So what are you seeing and experiencing?

James Norman: There's a lot going on. I'm out in San Francisco and so I kind of had a pulse on this whole thing well over a couple of weeks ago so we're kind of preparing. For market research around creative content, the whole paradigm has shifted because trying something new is difficult when you've been doing something the same way for 40 or 50 years and when you can no longer do an in-person focus group or you're limited in your ability to use certain technology because you're no longer on premises so you're not even in the club then you have to change the way that you capture insights and you have to look to someone who you at least have trust to do it. So for us, it's kind of changed the potential of our business in near-term.

I would say the one thing that I did not account for in my planning was the fact that content would cease to be created. So I didn't account for that and so that's led us to shift to doing more work around podcasts and looking at just the pulse of the market. It's like right now, we have a state of the media consumer tracker running every week and there are network subscribers to that and it's updated



on consumption and all that. So that's a new thing for us. We've never really focused our product in that way.

What I'm seeing from the clients, first thing is - just to give you anecdotally like a phone call, having a conversation with someone where I was ordering a product and I told him I needed it shipped by tomorrow because I would like it to reach my house before the end of the week, right? This person was confused by this request. I go further to say, "Well look, I just need it to leave your office before it's closed," and this person was laughing at me, "What are you talking about? We're not going to close." I was like, "You're not going to be at work next week so all I needed to know, is it going to get shipped?" So seeing the kind of void, the difference between those who are aware and not aware has been really interesting and so people in Hollywood have been a little bit flustered and not organized around what's happening because their content slate's in such flux and they're shifting home. They're just now, I'd say this week, having a clear mind to think about what are they going to do with their life now that their content slate is shifting and their typical methodology to getting information are disrupted. So that's kind of what I'm seeing from that aspect.

I forgot who just spoke before me, I liked the way that person was thinking around the shift in economy, the way things are going to be different after this. Hopefully, we're having focus on that because this is a generation defining moment. So I'm definitely an early millennial and so this is one of the top three events in my life. Before other people who are Gen Z and even younger, this is a defining moment for how they're going to play out the rest of their life as far as their environmental values go.

I would say from my industry standpoint, one thing I'm looking at, a big thing that people do is moviegoing and right now, two to three weeks ago, if you had walked in the office and told someone, "I have a good way to get movies day and day to streaming into the home to give consumers their experience," you'd be laughed at our office. You'll never be spoken to again. Now, I think gut reaction is, "Okay, get the movies here. Get them there, get them there," however they can get them. Not a well-thought-through process, no narrative given to the customer, but more importantly, this is a long-term situation that has to be



thought through because even if we go back to normal life in the next say 90 days, movie theaters are not going to be open for quite some time because that's just a large gathering of people and we're just going to be devoid of that at least till Thanksgiving time. So that's billions of dollars lost and I think in the meantime, there are going to be people building solutions around that that will fundamentally change the value proposition of a movie theater and where it plays a role in our economy moving forward.

So it's just like another example, when you say packaging will change, there will be a lot of innovation in packaging, there will be a lot of innovation in food delivery, though these are spaces where the innovation that happens over the next four months are going to change the way we live moving forward.

Lenny Murphy:

That's all good stuff, James, and it's a food segue into the other topics. I want to make sure that we cover one more thing before we get into I think the more interesting part of what comes next, which you definitely hit in that. So we'll start with you, James. **Any tips or best practices for how you as a leader and/or your company has adapted quickly?**

James Norman:

I would say lots of information is coming everyone's way about the current situation, even the same thing with this SBA loan stuff and all that, you're getting new information every day. So as a leader, I'm constantly trying to sift through that information and just organize it in a direct way that can be most useful to my team and to even some of my clients who might be running around too much to know exactly what's going on. So I'll say the clarification and cleansing of information and delivering it directly to everybody who is a direct report or is a direct relationship is one way.

Another way is just being helpful with working habits. You'll find that most people don't have a good ability to contact switch. This normally isn't something that you have to be able to do well when you're working in an office and you're working with the current structure in a place where your mind is set in a certain thing and you can't be interrupted, but now that you're at home, if you have a family, you are in trouble if you can't contact switch, right? Even as a single person, you can't stay at your computer 100% in a day because you're stuck in



your house and so you want to go do other things. So teaching people how to set definitive timelines to create certain achievements so they don't have to be perpetually in front of the computer is something that I've been spending time on.

Another thing is just kind of doing mental health checks and making sure people are doing different activities like diving into some research we've been doing real quick like people have increased a lot in certain activities. Obviously, television has been in the top three in terms of high increase in consumption, but something that has not necessarily increased or decreased is going to a gym, hiking. These activities that give you some sort of physical workout or mental space and those things will be important to people being in a proper mind state and being as productive as possible in the coming time.

I think right now we're probably seeing a decrease or a lull in these activities people should be doing for their body because it's a hard shift because they have to make the adjustment, but also, there's a certain portion of the population that is looking at these arbitrary deadlines as a time in which they're going to leave their home. So the first arbitrary deadline was April 1st. Now, it's April 30th. These deadlines don't mean anything. So I think when people's minds are able to shift away from the fact that there's some definitive end to the current situation and they adjust, they maybe will start seeing this to happen more naturally, but in the meantime, I'm trying to make sure my team at least is living a full life despite shelter in place.

Lenny Murphy: That's great, James. Thank you. Autumn, how about you? Tips for how you and/or the business is adapting in this rapidly changing situation?

Autumn McDonald: I can speak a little bit to how I've been addressing the team that I work with. Most of our team is actually located in New York City so this has been very much at the forefront of our minds and one of the things that has been really important is stressing that health comes first. Of course, business matters but making sure that all of us as individuals are staying healthy and prioritizing our health and well-being and that's a message that we're clearly conveying amongst each other on an ongoing basis.



Also, making sure that they've dedicated time in our meetings for each other to express our feelings. In fact, we recently had a business growth session and during that meeting, feelings were a dedicated agenda item. So making sure that there's an opportunity to do that and then also, allowing us as an organization to demonstrate social solidarity to the type of research that we're choosing to do. So for us, that means taking the time to collectively decide some of the research that we're going to do to understand the current normal as it relates to both behaviors as well as the cultural shift and that's one way that we can feel a sense of social solidarity with the broader public as researchers.

Lenny Murphy: That's good stuff. Walker, how about you?

J. Walker Smith: Well, a couple of quick things to add. Certainly, we're very much focused on trying to help people learn how to work from home. We have an internal chat system within Kantar, the Facebook system called Workplace. We dedicated a group to providing people tips on doing that. I've actually encouraged our account people to share those tips with our clients. I think trying to figure that out is something that everybody's trying to do, but there are two other things I'd mention. One, just internally, we are redeploying resources more than ever before, so just trying to adjust the balance of what we have for the needs at the moment. The second externally is being a voice of reassurance to clients. A lot of clients are staring down the barrel. I mean they are just, to mix metaphors, looking over the edge of a cliff into a deep, black void and this is the one thing that's different about this disruption. We've been through three big disruptions in the past 20 years: 9/11, 2008, and now this one. So it's not like disruptions are new, but disruptions are all different and so I think our role externally is to just reassure clients that there is a way to manage during this and that's something that we are doing a lot of now.

Lenny Murphy: Wow, that's great. Francesco, how about you? Tips?

Francesco D'Orazio: Well, yes. For us, one of the main changes we've done in terms of other business over IT is reallocating resources onto a pooled marketing drive and push marketing because nobody wants to be sold at this point in time. So it's about



creating value, putting it out there, and being useful, supportive, and appealing to people that are interested in what you do rather than just try and kind of open up conversation in a more traditional kind of loose way, if you like.

In terms of internal tips for the team, one thing that we spend time on is on creating new rituals. So new ways of establishing something recurring during the week at the same time that involves the same group of people and doing something together and gives them a bit of stability in the times of uncertainty and it gives them like an anchor for arranging their work life around recurring habits. So creating those new habits has been really essential for us to be able to run the team as I said because you answered it before.

Then the biggest plague of this working-from-home situation which was all benefits, but one of the biggest problems is that all the informal interactions which we're used to in a physical space that does not require booking a meeting or booking a time and a space for someone to interact, they kind of tend to go away unless you really force the thing to think hard about how can they replicate those kind of informal interactions without blocking someone's entire calendar in meeting sometimes to be taking five minutes, but once you're doing it online, it takes out an hour but you're discussing the same thing.

Lenny Murphy: Yes, right. Andy, how about you?

Andy Smith: The one thing I'm going to say is every business is different. Every business is going to be impacted differently by what's happening and I think know your business is probably the best advice because everyone's going to throw out solutions and mandates on, "Here's the new norm," but the new norm is just going to be different for everyone.

Probably we're in a moment right now where everything's been disrupted, but over the next couple of weeks, it's going to normalize and as researchers, we got to figure out which of those are going to be ongoing norm and which are going to go away as things get back to normal.



One of our big growth drivers has been Dave's Killer Bread. It's a \$6.00 loaf of bread. It's been growing double-digits the last couple of years, very successful. How is that going to do when a vast majority of the population is more concerned about their finances and their health during a pandemic? So it'll be interesting to see how habits and behaviors change and flux during the next couple of months.

It's interesting, in the grocery store the other day, obviously the cleaning section is wiped out with one exception: all the organic cleaners were still there and so apparently, when we definitely need to...

Lenny Murphy: Yes, poor chemicals.

Andy Smith: ...kill something, your priorities change. So it'll be interesting to see how this whole thing affects future behavior.

Lenny Murphy: That's interesting. Well, so that's a good segue. Gregg, you've been doing probably the most thinking of anybody that I know on what happens in the future so I'm going to tag you in as moderator for this last section as we talk about what comes next.

Gregg Archibald: Yes. Andy, that was a really good observation around all the organic cleaners still sitting on the shelf and Walker, you kind of referenced this as well when you were talking about changing values. We all know that we are going through - we're going to come out different on the other side of this thing. The question is really where people are going to be different, where's the culture going to shift, what consumer behaviors are going to be different and to what degree they are going to be different. So that has a significant impact on our industry, the kind of things that we undertake, how we think about even - Walker, you mentioned packaging.

So as we move, get on to the other side of this, **where do you guys see the role of research?** Where are the big opportunities going to be, and what are you going to do to position yourself as best you can on - and I don't even know what the



other side of this means, but I'm going to use that term anyway. How are you going to be in the best position you can on the other side of this?

Walker, why don't we start with you?

J. Walker Smith: Okay. Well, just a quick thought here to get the conversation going or I guess I should say two quick thoughts. One is one thing we do encourage people to do is to take a little bit of a breath. Every time you're in the middle of a disruption, it seems like the world is going to change forever and then you come out of it and a year later, it's kind of like a New Year's resolution. It's like things are back to normal. [Laughter] I could tell you the 9/11, I could tell you the 2008 story, none of the consensus forecasts during the middle of those disruptions turned out to be the case and so as we look at right now, it's useful just to say there are a lot of things that are imperative at the moment, but when we get back on track, I think we've got to be really careful about extrapolating what's going on with us now towards where we will be 18 months or two years from now. So that's just kind of a little bit of a caution.

Having said that, I don't disagree that there will be some impact on demand structures because there always is. It's just a question of what and how you recognize it. So I think the big need from a research standpoint will be resurveying the landscape of demand. These contours are going to change and I think all of the assumptions that are built into our current models about why consumers buy, what their needs are, where they look for things in the marketplace, all those things are going to need to be recalibrated and I think that's a big research opportunity here probably 18 months from now.

Gregg Archibald: Thank you, Walker. Andy, as you're thinking about what your needs are going to be three months, six months, say a year, what are you looking at?

Andy Smith: I'm going to echo what Walker was just saying and a plus for Autumn, but boy, if this is going to change culture, I'm thinking I want to go out and get an anthropologist and understand exactly what - the US American culture has changed and how that affects or how I can leverage that going forward.



Gregg Archibald: Francesco, what do you see six months, nine months? What do you think the demand is going to be and what are you doing to create a position in the space?

Francesco D'Orazio: Well, I think we're pretty optimistic in a sense like I shared with you that this is a crisis unlike many other crises, we're going to go back to normal at some point. There are going to be some changes to the way normal is going to look like when we come out of this crisis. I don't believe that we're going to be exactly in the same position that we were before, but I think there's too much emphasis on how this is going to revolutionize everything, which I think is distracting people from continuing to do a great job of what they're already great at. Assuming that everything will be revolutionized that it gets more - it's not a useful kind of lens right now, but talking the few things that are likely to be different when we come back and few perceptions and the values that are going to shift that's going to be really important.

For example, we see a lot of conversation on government spending. So government is one of our biggest clients across a bunch of different sectors in government and so the public discussing how surprising it is to see government spending going through the roof and ignoring the mantras of deficits and the parameters for a healthy economy that have been bombarded with for the last 10 years after the crisis, I think it's a big wakeup call for our people that understand that spending and strategy as a choice is not necessarily the fact of reality that we need to abide to. So people are starting to see the reality of what's possible with different eyes than the way they were looking at it before.

So those kinds of things are going to change a little bit in terms of values and so we came to understand what those are and see how they'll play out in six months then.

Gregg Archibald: I'm saving Autumn for last. So, James, what about you? What are you anticipating? How are you getting in position to benefit from the efforts?

James Norman: So I probably will speak a little stronger to this event. I think when you're East Coast-based and I was, 9/11 can have a little bit of a stronger weight on you. For the rest of the country, that was a moment in time and what people remember



did not affect their daily life and then you had the Recession, which again - I was making money in the Recession, shortened stocks. So for those who were purview to the game, it seemed bleak for people doing financial instruments, but it was a huge opportunity like in the moment every day for a number of people and most people who lost their retirement, they still had a job and they built a backup of retirement. I think a lot of people lost their homes in certain places and that was a big effect, but at large, that experience I think, it was pretty significant, but this is an experience that is the ultimate equalizer. So this is the first of its kind like I said in my light of time in the sense that it doesn't matter if your Oprah, it doesn't even matter if you're Donald Trump or whoever you are, you're in your home and your access to whatever you want, it's the limitations as anyone else in a sense. The only thing that's different is how nice your house is really and that's for you to know because you're in that house by yourself or with your family or whatever. So I think those social dynamics are going to have a massive impact on how businesses operate and how they interact with customers.

So think about social media like traditionally influencers and those people above, it's a game of aspiration. It's just like, "I'm here, you're not. Check me out." This is a constant game of, "Am I living the best life?" Right? But right now, no one's living the best life. There's a change in the way people are using social media and interacting with others and so that itself is having a massive impact on creative industries. So when you see people who would normally be acting or people who do music, who'd be normally performing and touring, these people are having a different level of interaction with fans and continuing to create more great music, great content, whatever they can do even though they're not able to be in their normal space and when someone gets into that routine over 60, 90, 120 days, it's going to change the way they operate even after this.

So I think brands, as they get more comfortable where they're at right now, they'll find ways to deliver messaging that is endearing but also helpful in the current situation, but is also accessible just like how the luxury brands act in this space and things of that nature. I think the definition of luxury and things of that nature will shift. What is a luxury? What is the thing I want will have shifted after this? So I think research will have to play a role in analyzing



consumer wants and needs and how their shopping habits and daily interactions will change definitely because of this. So I think that's the first thing.

Then as a company, we're constantly putting out - not constantly but I'd say monthly delivering a new product that would have otherwise not been looked at just by looking at what is something that could not be done right now based on the current situation and how can we optimize. One example would be enabling creative collaboration and sync in a remote fashion. This is not something that's directly related to us doing research, but in doing that, we're enabling creativeness but also in collecting data around the interaction. So this would be - yes.

Gregg Archibald: Okay. Autumn, a lot of the things that James just talked about seemed to be right in your wheelhouse. What do you anticipate coming out on the other side of this from the research industry perspective?

Autumn McDonald: So when I think about the future, I'd actually like to go back to something that Andy said because I think what Andy said about culture is really important as we look ahead because when we emerge from the current normal, there will be uniquely different ranges of new normal and I stress that because I don't think it's going to be one singular new normal. I think there's going to be polarity involved there that will vary based upon community and culture. So companies are really going to need to know how to navigate these different new normal(s) and this presents itself to me as a significant opportunity for social sciences and researchers to really empower companies within that an actual understanding regarding what will then be altered behaviors and culture because ultimately, culture is the foundation underlying our behaviors, underlying our values, underlying our beliefs. So I think this understanding of culture and cultural shifts will be key to marketplace success in the future.