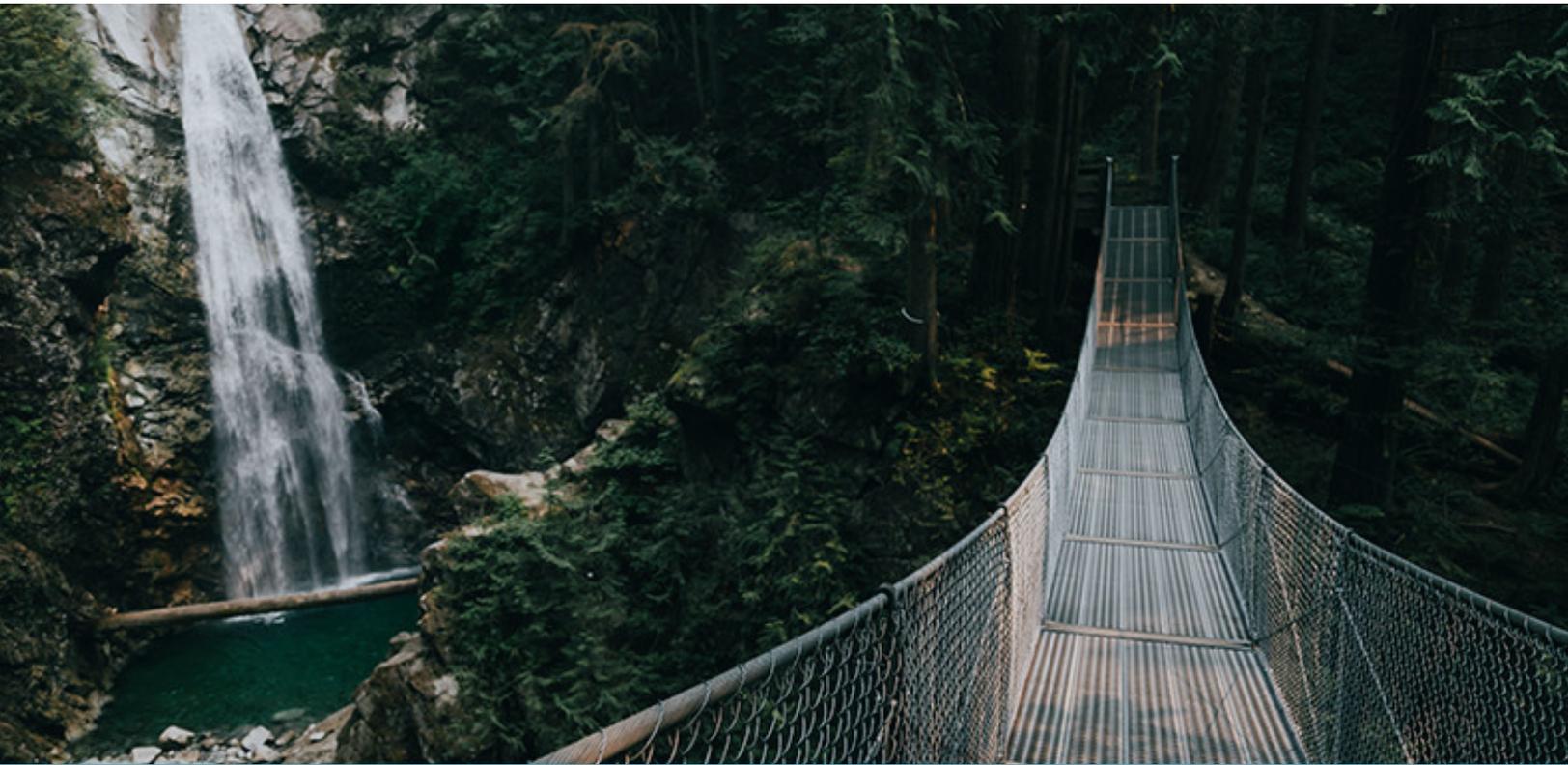


Agency/Marketer Response to COVID-19

A Look-Forward Survey Report



RSW/US
New Business Solutions for Marketing Agencies

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Introduction

ABOUT US

This study was commissioned by RSW/US. RSW/US is an outsourced lead generation/business development firm that exclusively services marketing service firms (of all sizes and types). RSW/US works with over 50 agencies across the U.S., operating as their outsourced sales and marketing team. RSW was founded in 2005.



In 2010, RSW started RSW/AgencySearch. To-date, RSW/AgencySearch has managed over 40 searches for marketers across a range of different categories, helping them find better agencies. The RSW/AgencySearch model is unique to the industry.

The exposure to the agency and the marketer world has armed RSW/US with perspective unmatched in the industry. This perspective is woven throughout this, and every survey report.

To learn more about RSW/US, visit www.rswus.com.

To learn more about RSW/AgencySearch, visit www.rswagencysearch.com.

Introduction

ABOUT THE REPORT

Senior-level Marketers and Marketing Agency executives completed the "Agency/Marketer Response to COVID-19 Survey" from March 20-24th, 2020. The purpose of the survey was to glean insights relative to marketer and agency perspective during the COVID-19 outbreak.

Our hope is the key findings and implications from this study are of value as both marketers and agencies attempt to navigate the unknown factors inherent to our current business landscape.

The agency sample came from our RSW/AgencySearch database of over 5,000 marketing service companies in the U.S. and Canada ranging in size from under \$5M in capitalized billings to over \$100M.

The disciplines of each Agency included full-service advertising, digital, PR, and marketing consultancies, to name a few examples.

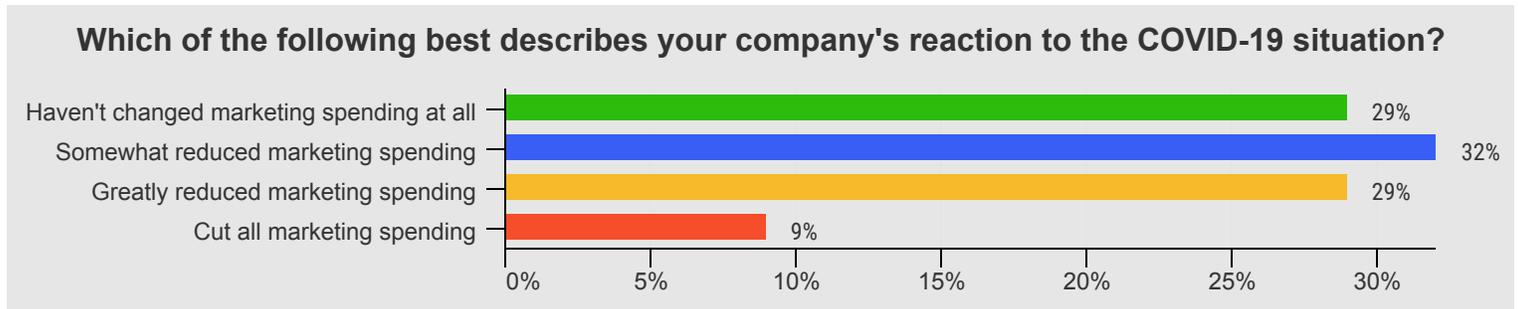
The marketer sample came from our RSW/US database of 50,000 marketing decision-maker contacts. Company size, location, and category varied.

If you would like to reproduce any of our findings in any format whatsoever, please give either Mark Sneider or Lee McKnight a call (513-559-3101/3111) or email us at mark@rswus.com / lee@rswus.com.

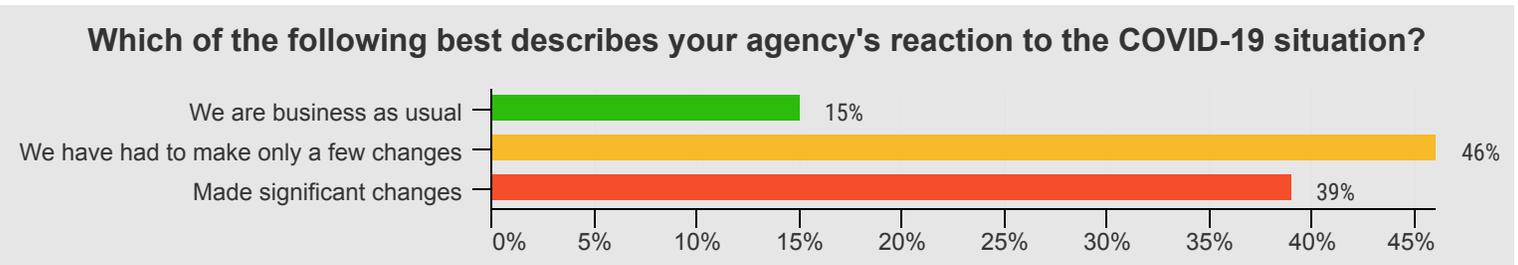
I. Immediate Impact

Spending and Overall Business Impact

61% of Marketers have only somewhat reduced, or not changed marketing spending at all...



...while 39% of agencies say they've had to make rather significant overall changes to their business.



Implications

Opportunities still exist for agencies which is good news, but agencies are also seeing projects pause and budgets freeze and have had to make some painful changes.

Ideally, the stimulus will help agencies and marketers shore up their weakest areas.

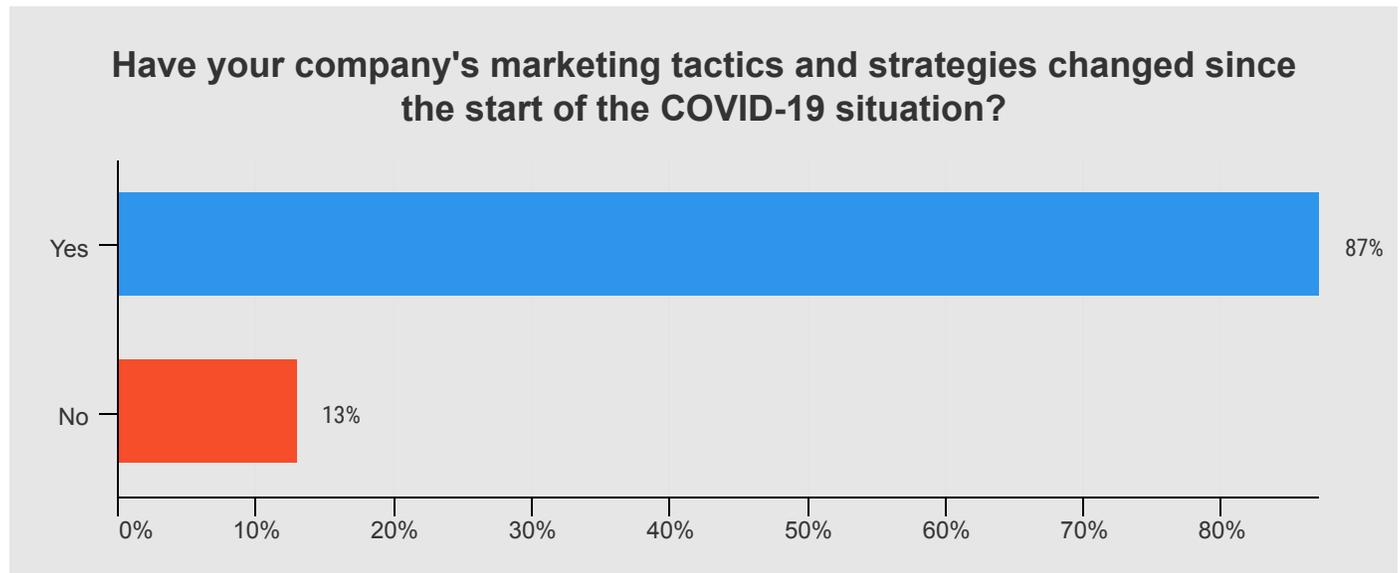
An excellent resource for agencies is on AMI's site here: [COVID-19 – agency survival tools](#).

From a new business standpoint, many prospects aren't paused, but even if they are, you still have an opportunity to show expertise, thought leadership and empathy, which will better position your firm when that prospect does need help.

Ongoing awareness of your agency should always be part of a new business strategy, regardless of circumstances, but it's critically important now. Those marketers who are on pause need to see your agency will be ready to help plan and execute projects and campaigns when social distancing starts to ease. (More on this later in the report as well.)

Changing Marketing Tactics

87% of marketers say they've changed marketing tactics.



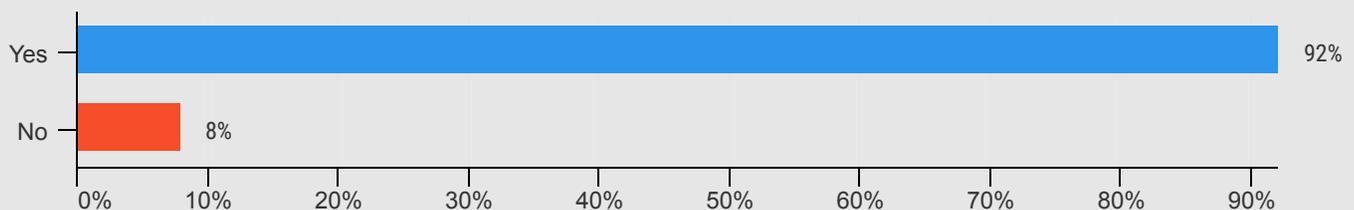
Highlights from marketer open-ended comments relative to what changes they've made:

- "We are still trying to wrap our heads around the situation"
- "We've pulled back brand efforts and are focusing on boosting social posts that provide information on the COVID-19 situation and how to make the best of it."
- "More active with direct email to 400K opt ins and social to update consumers of service changes."
- "Introduced recognition of the situation in social platforms"
- "We closed our lobbies so we are promoting online and mobile options for banking."
- "We have pulled out of all of our trade show events for 2020. That money can now be spent on digital marketing."
- "Business development meetings and interviews to win a project are happening virtually"

Changing Marketing Tactics, cont'd

92% of agencies have seen clients' approach to marketing/advertising change.

Do you expect (or have you seen) your clients' approach to marketing/advertising change as a result of this situation?



Highlights from agency open-ended comments relative to what changes agencies have seen their client make:

- *"Messaging needs to be much more relevant and sensitive given the climate."*
- *"Agriculture sectors doing well. America is still producing food. On the food side, those serving retail (grocery) are going like gangbusters. Those serving foodservice/restaurant are in a very difficult situation."*
- *"Changing their message to be more of a partner vs selling"*
- *"My clients build software that supports services delivered via the Internet, so the WFH and remote learning surges are causing them to do more, not less."*
- *"More conservative, messaging being driven by corporate communication executives, lawyers, etc. rather than brand, marketing team"*
- *"Destination Entertainment clients have completely pulled back - our focus for them is planning around event cancellations and venue closures but also planning for reopening. Our healthcare clients are full steam ahead."*
- *"I think our B2B clients will rethink the value of trade shows (less) and will increase the value of digital communications (virtual trade shows, webinars, etc.)"*
- *"Less accepting of hype. Higher need for understanding of current needs, not at all self-serving but in sincere support of true intention. Dangerous time to be hyping or at all disingenuous. An important reset."*
- *"Some clients are looking to plan ahead and innovate against massive changes in their industry; some clients are adapting their brand strategy to better resonate with consumer mindset; other clients are halting brand work due to sever economic impact in their business"*

Changing Marketing Tactics, cont'd

Implications

With marketers and agencies so closely aligned on this question, it's readily apparent that marketers are trying to figure out the best way to get through this – both now, and in the longer-term.

This open-ended marketer comment probably represents how most of us are feeling:

"We are still trying to wrap our heads around the situation."

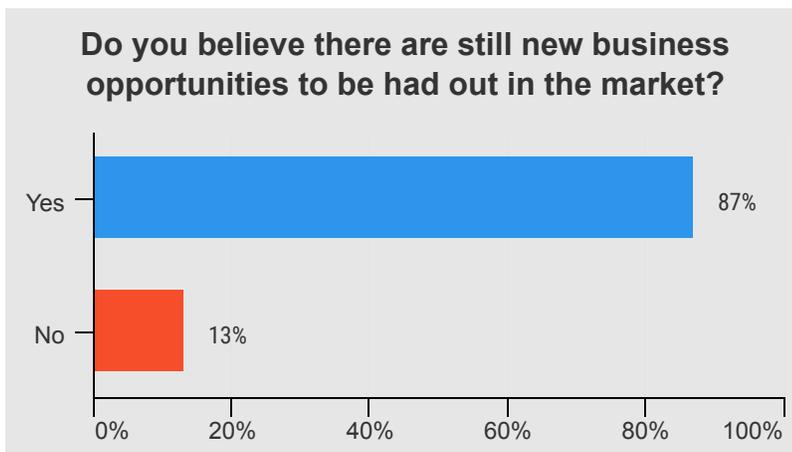
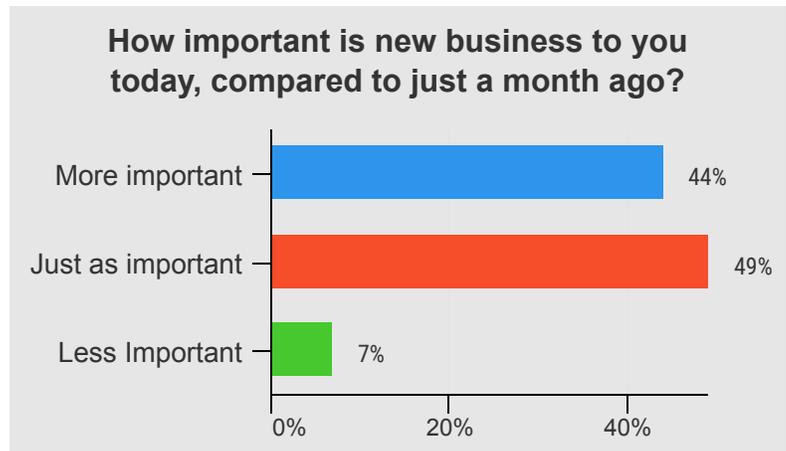
It's a prime opportunity to help them with calm direction and expertise.

Each vertical will have new challenges, and your firm will probably have to change tactics as well, but those that remain flexible and focused on solving these new challenges will find opportunity.

It's important for agencies to start formulating plans for their clients around the future. This will need to be done with tact depending on ever-changing circumstances, but if you can show your clients and your prospects that you're in proactive, planning mode, that will go a long way.

Impact On Agency New Business

93% of agencies believe new business is just as, or more important today, compared to a month ago...



...and 87% feel there are still new business opportunities to be had out in the market.

Implications

Two positive takeaways here for agencies, understanding that new business development was hard even before we entered this unforeseen business climate.

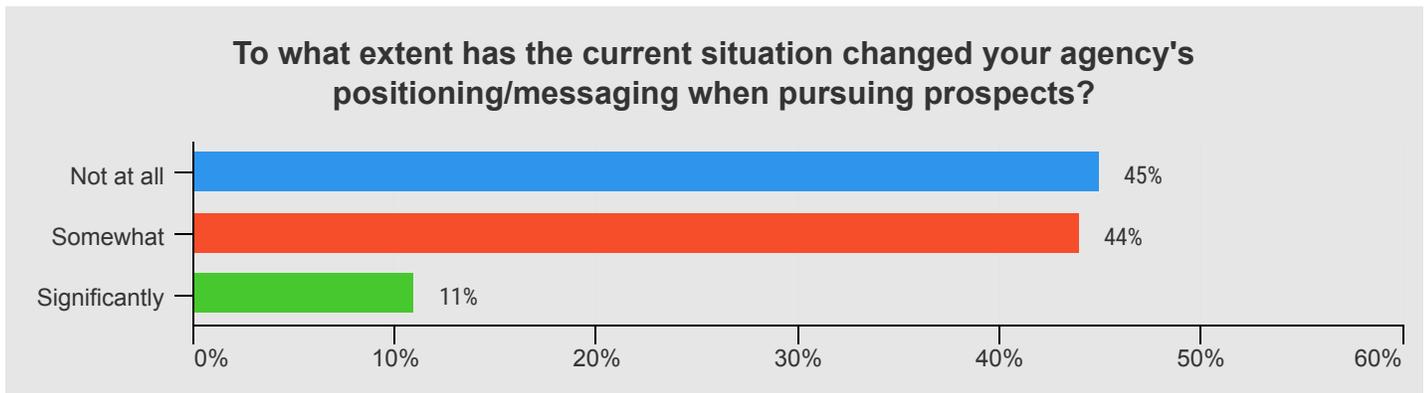
Great that agencies recognize the need for a new business strategy, but they can't pay lip service to the notion. Agencies have to act, and pursue it as best they can now.

We have a resource to help agencies that are looking for ways to help drive new business, it's called 3 Takeaways, a video series dedicated to all things agency new business-you can see every episode [here](#).

Most important now, as you probably do have some downtime, is to look at your site, your case studies and your overall new business structure, so you're ready to hit the ground running in the next month or so.

Impact On Agency New Business, cont'd

55% of agencies have somewhat or significantly changed their positioning.



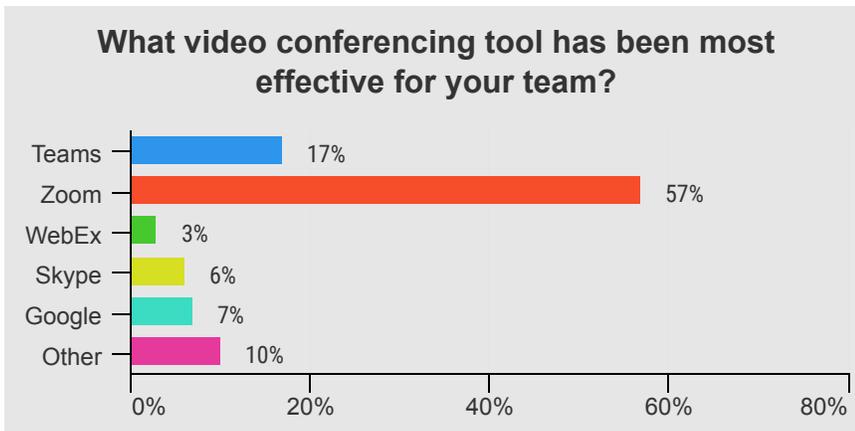
Implications

As other results in this report have shown, agencies will have to make changes and remain as flexible as they can, and that could mean modifying positioning; however, agencies racing after toilet paper and hand sanitizer brands, for example, that have never worked in those spaces before, will most likely come off, worst case, as desperate, and minimally, appear to jump on a bandwagon of insincerity.

But now is the time to look at the vertical/verticals you have the most expertise in, and look at other verticals tangential to those, that you could expand into. If your expertise relates to those, now is the time to prepare.

Impact On Agency New Business, cont'd

With the prominence of video conferencing as we work from home, we asked which tool is most effective for agencies.



Top 3

1. **Zoom - 57%**
2. **Teams - 17%**
3. **Other* - 10%**

**GoToMeeting, Blujeans and Slack mentioned most.*

Implications

With records being set for the amount of video conferencing happening in a day, any agency without one of these platforms in their arsenal is woefully behind the curve.

And the positive news: most, if not all, have a free version. Certain time and participant limits apply in some cases, but now is the time to make sure you make use of one of these platforms.

Most Often Client Requests of Agencies

We asked agencies, "Outside of spending requests, what is the most common request clients are making right now?"

Highlights from agency open-ended comments relative to this question:

- *"From smaller clients, we're seeing more knee-jerk type reactions, but that's to be expected. They don't have the luxury of standing still, they have to produce, and with that comes a lot of testing new things. Our focus is to calm them - get them to think as rationally as possible. Not to act out of desperation"*
- *"Asking what are our other clients doing now."*
- *"Most common request so far is changing social & web content to apply to alternate product/service delivery"*
- *"Strategy/opinions on timing for pitching and promoting non-corona related products/services."*
- *"Lots of questions about 'tone of message'"*
- *"How do we stay in touch with our customers and what value can we bring them, even if they can't buy right now."*
- *"Speed up digital work. Last minute requests that are being caused by the virus."*
- *"New strategy to address the changing course of business and need to communicate to customers, employees and the business community"*
- *"Most leaders (the top 188) have no clue what to do."*

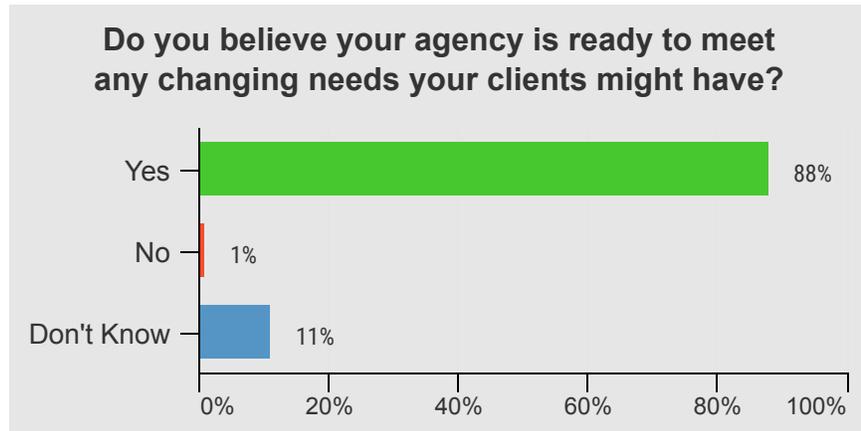
Implications

From these comments, it's clear clients, and prospects, absolutely have needs, questions, and problems agencies can solve. Along with the normal work agencies do, they also need to assuage client fears and share what challenges they're helping solve for other clients. While it's added pressure amidst an extremely stressful time, it will pay benefits in the short and long term.

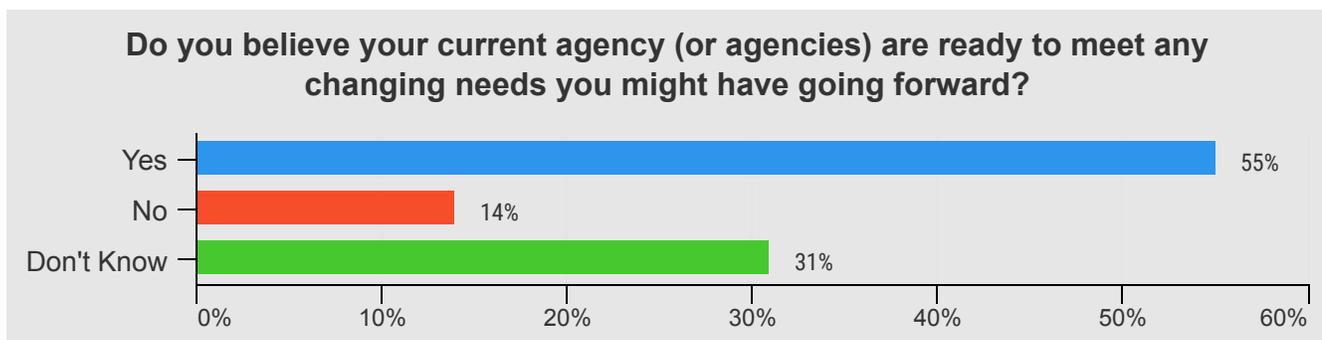
II. Looking Ahead

Navigating Changing Needs

When asked, **88%** of agencies said they're ready to meet any changing needs clients might have.



We asked marketers if they believed their current agency (or agencies) are ready to meet changing needs going forward?



Implications

Positive to see a large majority of agencies are confident they can handle changing client needs, but agencies should pay attention to how marketers are feeling here.

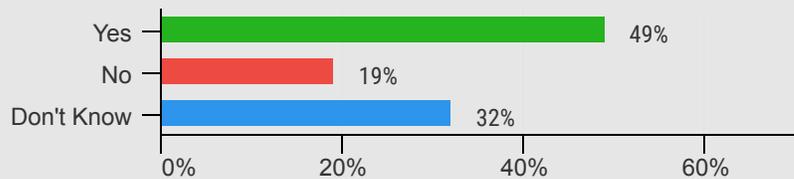
14% of marketers don't feel their firm can handle changes, but more concerning, 31% don't know. Now is the time to communicate very clearly, and specifically, to your clients and to prospects that you are well-prepared to handle existing and changing needs.

We touched on this earlier in the report, but to reiterate, now is the time to bring ideas, creative thinking, and a consultative approach to your clients, and translate that to prospects as well.

The Immediate Future

49% of Marketers expect their approach to look different once we come out of this.

Do you expect your company's marketing approach to look different once we come out of this situation?



Highlights from agency open-ended comments relative to what they think their approach will look like when we come out of this situation:

- *"We will increase spending again on originally planned tactics but also put money toward recognizing all those who helped during this pandemic"*
- *"It would be less reactive, more deliberate, refocused back on our core message about who we are and what we offer."*
- *"Less emphasis on big tradeshows. I don't ever want to shake hands with hundreds of people a day again!"*
- *"I expect that we will focus on convenience service adoption rather than the rapid introduction of new products"*
- *"We will definitely amp up our marketing presence once this is over"*
- *"Experiential will be smaller groups, more intimate, respecting social distancing. Because we sell high-end products, we will concentrate on features that are unique for our products. We will focus on permission marketing ... people like me buy products like this."*
- *"90% digital"*

Implications

While we're surrounded by uncertainty now, we will come out of this, and as this stat shows, many clients and prospects will change in fundamental ways.

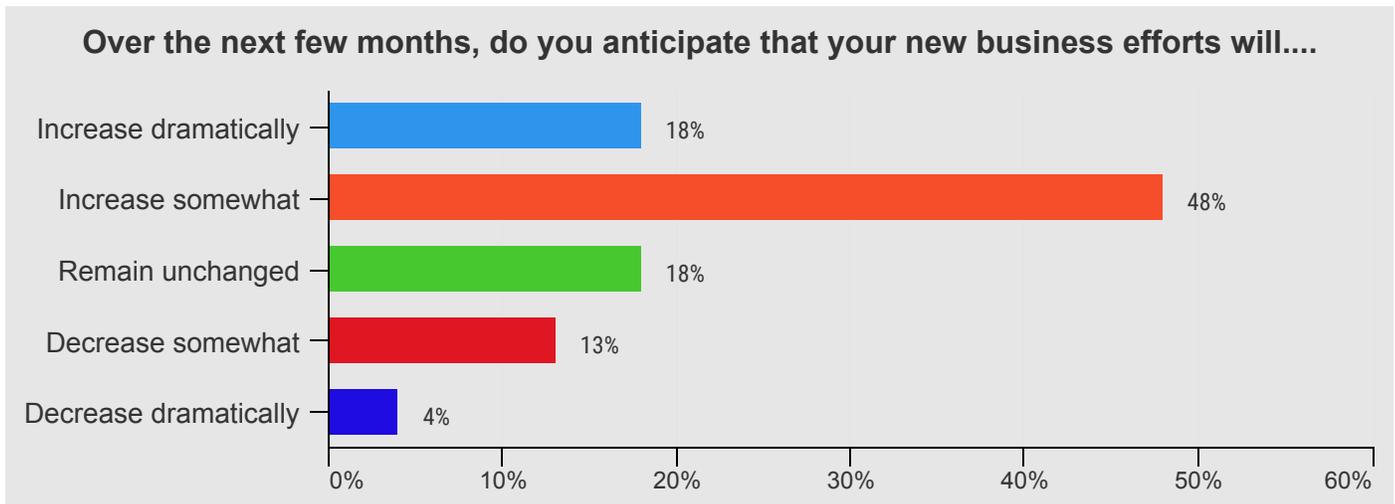
That may mean you're no longer a fit for a given client, but it also means opportunity when marketers look for a change.

As we've discussed throughout this report, flexibility will be key. And for small to mid-sized agencies, that will be an easier adjustment than their larger counterparts.

The way you solved a particular challenge for a client may not be the same way you've handled it up till now, but it's a real opportunity to show your clients and prospects how you can adjust and find a different way to solve it, all under your roof.

The Immediate Future, cont'd

66% of agencies anticipate new business efforts will increase somewhat to dramatically in the next few months.



Implications

Another positive, and although the reality is uncertain, agencies will literally have no choice but to increase new business efforts in the coming months.

The key is to start planning now, and don't take on more than you can handle initially.

Conclusion

We won't get into how uncertain the times are, as we're all well aware of what we're going through.

What's important now is action. Show leadership, to your clients, prospects and employees.

While you don't want to convey false hope, be naïve, or make claims not based on facts, doom and gloom doesn't help absolve the situation either.

Strike a positive tone, as we will get out of this.

These are steps to take to help you now:

- 1) Take advantage of the resources out there to help your new business program, we've listed some of them in links in this report.
- 2) Don't wait to try and take advantage of stimulus options for your agency, call your banker now.
- 3) Make a new business plan. In our past reports, agencies that said they didn't have a new business methodology have been as high as 66%. Don't be one of those agencies.
- 4) Make sure you're communicating with your employees, as everyone, for the most part, is working from home.

And finally, in the following pages are addendums containing all the open-ended responses from those questions asking for them.

Thank you and stay safe.



Addendum i: Marketer Responses

Please briefly describe how your marketing tactics/strategies have changed since the start of the COVID-19 situation.

**Note: All responses are copied and pasted verbatim. None of the responses have been proofed for grammar or spelling.*

	Responses
1	<i>Discontinued a range of outreach activities for now. Changed tone of remaining from commercial to informational/supportive.</i>
2	<i>carry out only</i>
3	<i>Suspended all digital/social paid advertising.</i>
4	<i>We've pulled back brand efforts and are focusing on boosting social posts that provide information on the COVID-19 situation and how to make the best of it.</i>
5	<i>Marketing not a significant area of focus or importance to this Company</i>
6	<i>More focus on providing COVID-19 related content and less on image and awareness of our brand and services</i>
7	<i>Big emphasis on Telemedicine.</i>
8	<i>More active with direct email to 400K opt ins and social to update consumers of service changes.</i>
9	<i>Pushing digital capabilities, quick turnaround, and ability to operate remotely</i>
10	<i>Focus on how we are adapting to this rapidly changing situation by converting our educational program into a remote-learning program in a matter of weeks.</i>
11	<i>We are still trying to wrap our heads around the situation</i>
12	<i>Techniques have been softened due to the nature of our members being involved in responding to healthcare requirements.</i>
13	<i>We need not market, as we have cut all outpatient services and limited access to the facility.</i>
14	<i>More online, more generic, less local</i>
15	<i>introduced recognition of the situation in social platforms</i>
16	<i>No in-person events, moving almost everything online</i>
17	<i>Pulled back on all physical (direct mail, promo items) and in-person (trade shows and events) marketing tactics.</i>
18	<i>Customer notifications including, social media, email, onhold are all directed to what we are doing to safe guard our staff and customers. Also, we closed our lobbies so we are promoting online and mobile options for banking.</i>
19	<i>We have implemented a market-based plan in response to COVID-19, and are exploring more grassroots ways to engage with our audience in addition to what we typically do.</i>
20	<i>Changing our messaging</i>
21	<i>we cancelled going to SXSW before SXSW was cancelled.</i>
22	<i>Cancellation of trade events in favor of virtual events.</i>
23	<i>no tradeshow, no events at all. product delays effect product launch plans as well</i>
24	<i>Initially in late January, we increased our spend as we saw PACE slowing for future months (March, April and May). We put together a multichannel campaign with a very compelling offer. As we moved through February we shift the focus to the domestic market. As the news continued to worsen we are now focusing on soft messaging, no promotional offers and promoting brand awareness for the future bookings.</i>

Please briefly describe how your marketing tactics/strategies have changed since the start of the COVID-19 situation.

*Note: All responses are copied and pasted verbatim. None of the responses have been proofed for grammar or spelling.

	Response
25	More webinars, generating more online content for us to use in meetings.
26	We are doing a push to sell online
27	We are doing online advertising for online classes
28	We have cut Google advertising, we have shot two short 10 second commercials for a blitz to advertise video chat and telephone consultations.
29	No more outreach events.
30	Suspended all general branding or other content marketing. Only promoting COVID-19 content.
31	My sector is being crushed. The main focus right now is to deliver messaging that's relevant while still continuing to deliver on our mission. All of this set against the backdrop of a lack of acknowledgment or discussion about the impact of the current situation on the nonprofit sector.
32	Halted most newspaper advertising and shifted to mobile/online messaging
33	Reassuring customers of the safety of their money. Temporary closing of lobbies. Special loan programs related to COVID-19
34	We are marketing assurance and the services within the products that can help achieve social distancing, improve convenience and provide access to necessary banking.
35	We have pulled out of all of our trade show events for 2020. That money can now be spent on digital marketing.
36	Lowered spend 20 percent - changed ad content.
37	Investing only in essential tactics
38	Focus on best products and services for these times
39	Shifted focus of messaging away from marketing/sales toward community and support.
40	We are cutting down on print and trade show spending
41	Manage demand as much as possible, don't sound tone deaf to what is going on, media relations is king right now, conserve resources, meaning \$\$\$.
42	Our communications have shifted to crisis mode and messaging is focused on "We are still here for you" in addition to normal messaging. We have upped emails and pushing people to using our online resources rather than using printed materials.
43	We have removed all trade shows from our schedule for the first half of the year.
44	Have incorporated COVID19 messaging into plan.
45	At the present time we are only using our marketing team and resources to promote awareness of our response to the COVID-19 situation and ways for our customers to continue banking, we are not doing anything to promote sales related products or services.
46	Cutting back on elective spending and seeing where this situation goes.
47	Focus has been on information giving instead of sales/marketing. Crisis management at center stage.
48	more about empathy and a serious nature

Please briefly describe how your marketing tactics/strategies have changed since the start of the COVID-19 situation.

**Note: All responses are copied and pasted verbatim. None of the responses have been proofed for grammar or spelling.*

	Response
49	<i>Focusing on the outbreak and how to we are preparing and adjusting. More marketing to spur business growth in a very uncertain sector.</i>
50	<i>Pulling back from commercial offers and doing more brand presentation. All experiential is canceled/postponed. A great deal of customer contact is 1-to-1 ... salespeople calling customers directly.</i>
51	<i>My company does marketing for other businesses. We are moving to more of a support position at this time, and trying to promote the idea of more human-centric marketing.</i>
52	<i>Moving more toward social media, in a reassuring way.</i>
53	<i>redirected marketing from primarily lead generation to messages of support to existing customers - finding resources to help them navigate their new reality</i>
54	<i>Wee have discontinued all "ad marketing" in digital and print publications. Our only marketing spend at this time is in SCO and ad words.</i>
55	<i>cash is king</i>
56	<i>Planned campaign is on hold</i>
57	<i>Video and digital content creation and delivery is now our focus.</i>
58	<i>Business development meetings and interviews to win a project are happening virtually</i>
59	<i>We've sent more messaging surrounding the COVID-19 pandemic.</i>

Briefly describe how you expect your marketing approach to look different once we come out of this situation.

*Note: All responses are copied and pasted verbatim. None of the responses have been proofed for grammar or spelling.

	Response
1	<i>Challenge will be to accelerate growth without taking the pandemic lightly or ignoring its impacts</i>
2	<i>Don't know as of yet.</i>
3	<i>We will increase spending again on originally planned tactics but also put money toward recognizing all those who helped during this pandemic</i>
4	<i>More people focused</i>
5	<i>I think in person events, like tradeshow, are going to be completely different after this.</i>
6	<i>Emphasis on inbound online/virtual marketing programs</i>
7	<i>It would be less reactive, more deliberate, refocused back on our core message about who we are and what we offer.</i>
8	<i>We think the recognition of the value of awareness and indirect messaging will be more accepted.</i>
9	<i>Less emphasis on big tradeshow. I don't ever want to shake hands with hundreds of people a day again!</i>
10	<i>Yet to be determined!</i>
11	<i>I expect our spending to be cut and even our department</i>
12	<i>We will combine print and online advertising for online and in-person classes</i>
13	<i>We will be extremely limited due to cash flow shortages. It will be like we are a baby law firm starting all over.</i>
14	<i>I expect that we will focus on convenience service adoption rather than the rapid introduction of new products</i>
15	<i>Not sure. That's the stress of this all. The unknown.</i>
16	<i>Look to have special events to assist customers with their financial needs</i>
17	<i>We will have a smaller staff and offer less services until the economy rebounds.</i>
18	<i>Better focus on data focused decision making.</i>
19	<i>We will definitely amp up our marketing presence once this is over</i>
20	<i>We will probably keep some of the new strategies that we needed to implement if we find they proved successful.</i>
21	<i>Budget will be decreased. More strategy around what we're doing for the community.</i>
22	<i>Lowered spending for a time to assess.</i>
23	<i>More altruistic focus.</i>
24	<i>Experiential will be smaller groups, more intimate, respecting social distancing. Because we sell high-end products, we will concentrate on features that are unique for our products. We will focus on permission marketing ... people like me buy products like this.</i>
25	<i>Maintain the support and human-centric orientation, but ramp up our own marketing efforts.</i>
26	<i>I'd expect more digital lead gen as some other sources are slower to ramp up.</i>
27	<i>Not sure</i>
28	<i>That is difficult to say until we see the full impact of what this virus effect has on our future</i>
29	<i>90% digital</i>

Why do you feel your agency (or agencies) might not be ready to meet the changing needs you may have moving forward?

**Note: All responses are copied and pasted verbatim. None of the responses have been proofed for grammar or spelling.*

	Response
1	<i>we are going to need a lot of leeway on what we can do selling alcohol out the front door or what it takes to get tourism back.</i>
2	<i>Understanding the significant loss of revenues for an unknown period of time.</i>
3	<i>We currently are doing work internally and are learning through this process so we should be stronger when we emerge from this.</i>
4	<i>We do not use "an agency"</i>
5	<i>People are just scared to show up to doctor's offices and urgent care centers.</i>
6	<i>We see what's in front of us and the implications that has for what's coming over the horizon</i>
7	<i>It's new to all of us, and we have to move fast, and we have to keep expenses low. This just seems like do-it-yourself time. Getting information our quick and dirty is just easier to do inhouse as long as you have at least basic video, web and social media skillsets inhouse.</i>
8	<i>Have not been pleased with results of last two campaigns with current agency, so seems unlikely</i>
9	<i>We don't currently work with an agency. We don't have budget to do so and I don't think that will change regardless of the virus. We do everything in-house with a small team.</i>
10	<i>they are all mTF</i>
11	<i>A lot of unknowns at this point - hard to assess.</i>
12	<i>We do not work with an ad agency. All marketing is created in-house.</i>
13	<i>Don't have an agency: In house marketing needs more experience doing virtual events.</i>
14	<i>They are very responsive and have amazing ideas and energy</i>
15	<i>Changing environment, and the rules change. We all have to be ready for the new normal.</i>
16	<i>the future is uncertain in every regard</i>
17	<i>The hospital will be impacted by a significant decrease in funding.</i>
18	<i>because they are small and responsive to what we need OR they are industry specific and are in touch with the latest trends and best practices</i>
19	<i>Agency on retainer has shown that they bring little value to crisis communications.</i>
20	<i>Lack of funding and lack of precedent, and lack of capacity.</i>
21	<i>They are very good at what they do</i>
22	<i>I don't think anyone knows where we are going to end up or how to address the current situation. A lot of teams have crises management in place but not on this scale.</i>
23	<i>Our company can't even follow the governor's Stay at Home orders and are forcing all employees - regardless off capacity to be able to telecommute - to report to the office. They are not willing to innovate even on the lowest levels.</i>
24	<i>This is new to everyone and there will be a learning curve, but the people we work with are smart and adaptable.</i>
25	<i>Kind of a blindside hit; future uncertainty. How do you know what to plan for?</i>
26	<i>The only way I can respond to his questions to discuss my marketing colleagues. And while worried, I feel they are ready to meet the challenge.</i>
27	<i>We are fully-equipped to win in these changing times. We are adapting to the new normal, and are seeking opportunities to prove ourselves.</i>
28	<i>Entrenched in the same old process. Reluctant to change</i>
29	<i>We have an in house marketing department. Currently on idle.</i>

Addendum ii: Agency Responses

Aside from any spending changes, briefly describe how (or you expect) your client's marketing approach will look different.

*Note: All responses are copied and pasted verbatim. None of the responses have been proofed for grammar or spelling.

	Response
1	<i>One client, an international trade show, had to postpone one of their events (bi-annual, April & Oct) and may end up canceling it altogether. If it goes on in June - the postponement date - it will be scaled back to 3 days instead of 5 and will focus on bringing in regional traffic. And, all in-person gatherings (e.g. parties, events, sessions, etc.) of more than 50 people will be prohibited. If it gets cancelled, the overall marketing spend will drop with the focus away from reg/attendance outreach to value-based outreach (e.g. collaborating w/ partners to create value-based opps, such as Zoom panels, discs, and content)</i>
2	<i>Messaging needs to be much more relevant and sensitive given the climate.</i>
3	<i>Agriculture sectors doing well. America is still producing food. On the food side, those serving retail (grocery) are going like gangbusters. Those serving foodservice/restaurant are in a very difficult situation.</i>
4	<i>Wider range of needs. Need to pivot from traditional message to more timely message.</i>
5	<i>Messaging has changed with all clients.</i>
6	<i>Aside from decreased spending, they are changing their message to be more of a partner vs selling.</i>
7	<i>Our main client sells OTC products mostly in brick-and-mortar retailers and they do not have their own e-commerce solution. They are looking to push people to buy their products via Amazon and retailer websites.</i>
8	<i>Not sure yet</i>
9	<i>The main thing is the reduction in ad expenditures during this situation. And they are too busy or closed so they aren't interested in advertising right now.</i>
10	<i>accelerate move to digital marketing and eCommerce</i>
11	<i>A few in related industries have stopped work, others appear to be waiting it out, some have expressed a desire to ramp up but have not pulled the trigger.</i>
12	<i>Banks adjusting to online & drive-thru only banking QSRs changing to pick-up and delivery Senior Living can't give tours to potential residents (budgets moving to post-crisis)</i>
13	<i>Tradeshows are now online. More online outreach.</i>
14	<i>some clients are cancelling or postponing marketing campaigns.</i>
15	<i>We expect a slowdown in new business and a tightening of budgets across the board.</i>
16	<i>Postponing project or cancelling all together</i>
17	<i>In a pandemic, many clients are not thinking about starting ideation/innovation projects. Rightly so, but it still takes a toll.</i>
18	<i>My clients build software that supports services delivered via the Internet, so the WFH and remote learning surges are causing them to do more, not less.</i>
19	<i>We will not know how we are going to adjust as it will depend on how long this goes on.</i>
20	<i>Workly remotely, flexibility with staff needs, more online conferences</i>
21	<i>revising plans to meet change in demand trends</i>
22	<i>More conservative, messaging being driven by corporate communication executives, lawyers, etc rather than brand, marketing team</i>

Aside from any spending changes, briefly describe how (or you expect) your client's marketing approach will look different.

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	Response
23	<i>We are working remotely as most of our clients are; public events are cancelled and we are planning/implementing virtual public meetings.</i>
24	<i>We expect budgets to be cut in general. Some businesses will actually benefit from Covid-19, some are getting crushed. We're thankful that we have great diversity in our client list.</i>
25	<i>unknown</i>
26	<i>Destination Entertainment clients have completely pulled back - our focus for them is planning</i>
27	<i>around event cancellations and venue closures but also planning for reopening. Our healthcare clients are full steam ahead. However, our focus is modifying strategies and messaging where needed. High sensitivity around appearing tone deaf to the current reality of CV19. New business around specific COVID19 healthcare initiatives</i>
28	<i>Messaging and timing has become very important. When people are preoccupied with their well-being, how do you sell, literally, anything without being offensive?</i>
29	<i>I think our B2B clients will rethink the value of trade shows (less) and will increase the value of digital communications (virtual trade shows, webinars, etc)</i>
30	<i>Media expenditures on pause and some of our client's facilities have been temporarily shut down (e.g., casinos).</i>
31	<i>Having to deal with the operational impact of call center intake and WFH staffing needs to handle non digital traffic. Changes to Conversion management tactics to be deal with Social distancing</i>
32	<i>We are changing up their media mix to match what's getting the most media consumption, Asking for bonus for clients who continue with BAU for their media plans and we have asked them to change up their messages to match the current climate.</i>
33	<i>More digital campaigns.</i>
34	<i>More contingency planning.</i>
35	<i>Less accepting of hype. Higher need for understanding of current needs, not at all self-serving but in sincere support of true intention. Dangerous time to be hyping or at al disingenuous. An important reset.</i>
36	<i>They are adjusting to their closures and lost of business which will impact creative and marketing budgets.</i>
37	<i>Our clients are moving toward making sure they have a virtual component in all of their communications and marketing - far beyond this immediate pandemic - it is an element that will live on in their planning and consideration moving forward.</i>
38	<i>Shift in digital strategy, move from production of product for food service to retail, and pull back from account-specific brand platforms. We've had 2 smaller family-owned clients suspend marketing efforts until the pandemic has passed.</i>
39	<i>changing messaging, pushing media to later in the year...and we are working with a handful to be more strategic and position for growth, capitalize while others are in a holding pattern</i>
40	<i>Ceased all marketing for travel industry</i>
41	<i>In addition to crisis services, we have seen an uptick in demand for video and graphic design for social media content. Pitching reporters is out of the question with so many of them on COVID-19 story deadlines and not much else being relevant. So our clients need to find other ways to stay in front of their audiences.</i>
42	<i>TBD but we expect them to invest more on customers directly vs paid media</i>
43	<i>Some degree of caution has set in. Clients are still at work but no new projects.</i>
44	<i>I hope they will not cut back, primarily. I'm also hoping that they do not approach the situation too conservatively.</i>

Aside from any spending changes, briefly describe how (or you expect) your client's marketing approach will look different.

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	Response
45	<i>Many of our industry trade shows have already been cancelled for this year, which is a huge blow to our clients. As they sell capital equipment, the majority of their customers prefer to 'kick the tires' at events like this. It's removed a great deal of valuable 1:1 communication, and quite frankly, just spooked customers. Orders have dropped off dramatically.</i>
46	<i>Shift to in-house resources in effort to be faster for the business and closer to the customer.</i>
47	<i>Use different tactics and cut some budget in some companies and increase budgets in other companies</i>
48	<i>The consumer accounts, that are event-driven, have paused all of their media dollars. Hard to tell whether budgets will be pushed forward.</i>
49	<i>Sensitivity to content, in context to Coronavirus</i>
50	<i>Continuing our content marketing and social tie-in efforts, suspending emphasis on arranging for in-person meetings. As the days of remote working continue, we may find opportunities for video chat meetings. Not sure of that at this point.</i>
51	<i>Changes to messaging, shifts of investment from one thing to another thing, (media to website for example,) and of course, a complete pause.</i>
52	<i>Everyone is much more aware of the content and context of messaging. Want to be a resource but don't want to look like they are trying to capitalize on the situation. Desire to be thoughtful and empathetic.</i>
53	<i>Especially in the B2B space, clients are searching for relevance in this time where most people are profoundly distracted.</i>
54	<i>Less spend. Pulling ads. More social content. More internal communication support and strategy.</i>
55	<i>some clients are looking to plan ahead and innovate against massive changes in their industry; some clients are adapting their brand strategy to better resonate with consumer mindset; other clients are halting brand work due to severe economic impact in their business</i>
56	<i>Messaging is changing, being contextualized, timing is altered, for some their retail stores are closed, pick-up is or is not an option, etc. This is change for every client where their products are perfect for this crisis (e.g. online bill pay) or really hurt it (Retail chain where stores are closed due to interruptions in their supply chain from China, a forbidden category for online advertising and no eCommerce business. These are two extremes. Other clients are somewhere in between.</i>
57	<i>They are pushing this off. wait and see approach.</i>
58	<i>While under various recommendations from federal and local governments, our clients are over-communicating with their constituents to ensure transparency.</i>
59	<i>more online as offline events are cancelled.</i>
60	<i>stop everything</i>
61	<i>Messaging is adjusting - hoping they will stay active, build good will and steal share during down cycle.</i>
62	<i>More reliance on social media tactics to reach people who are working from home.</i>
63	<i>Postponing every campaign until the crystal ball says the world will be semi normal in 2-4 weeks.</i>
64	<i>some clients are pulling back dramatic, a few are seeing opportunity.</i>
65	<i>Changing of messages; revisit what they are marketing</i>
66	<i>Shift of messaging from sales to support.</i>
67	<i>shift from events to content and demand gen</i>
68	<i>Delayed new product launches. Delay spending.</i>
69	<i>Client's strategic initiatives are being delayed - things like acquisitions, launching new programs, employer branding initiatives</i>

Aside from any spending changes, briefly describe how (or you expect) your client's marketing approach will look different:

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	Response
70	<i>Clients that are in tourism are delaying the beginning of their summer campaigns and any restaurant client has turned off advertising. Other industries are business as usual at the moment, however there's a strong hesitancy to sign for anything new.</i>
71	<i>Funds will be allocated to other area's of the company (ie. fulfillment and distribution)</i>
72	<i>I have 3 restaurant clients. All three are shut down. I have one national client that this has not affected because its solely radio.</i>
73	<i>A few have paused their marketing efforts</i>
74	<i>New projects or new product marketing has slowed down.</i>
75	<i>Leveraging more digital technologies</i>
76	<i>Some clients are pausing campaigns at this time</i>
77	<i>Everything is on hold for now due to the uncertainty</i>
78	<i>We have created marketing to talk about our clients commitment to their customers and communities.</i>
79	<i>Changing creative to meet reality of the situation.</i>
80	<i>More concern about health related safety at live events</i>
81	<i>Our clients with our help are developing messaging around COVID-19 and want to be sure their websites are are staying up to date with those messages.</i>
82	<i>Some of our seasonal clients are delaying campaigns. We have had several clients adjust their messages so as to be appropriate and helpful during this time.</i>
83	<i>Shift in messaging and product marketing. Sales channel engagement messaging.</i>
84	<i>Most have closed due to restrictions and ad spending has stopped.</i>
85	<i>Reduced spending</i>
86	<i>Reduced spending</i>
87	<i>Business model changing to even more online as covid has customers sheltering in home</i>
88	<i>Projects put on hold</i>

Outside of spending requests, what is the most common request clients are making right now?

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	Response
1	<i>Most leaders (the top 188) have no clue what to do. We also factored in why they struggle to shape a better solution. Employees & stakeholders have long been ready. Everything is inter-connected so my experience proved out for HP - another left brain dominated org - the vital value a conscious designer with unique systems thinking skills adds to align to today's values-based business significance requirements.</i>
2	<i>From smaller clients, we're seeing more knee-jerk type reactions, but that's to be expected. They don't have the luxury of standing still, they have to produce, and with that comes a lot of testing new things. Our focus is to calm them - get them to think as rationally as possible. Not to act out of desperation.</i>
3	<i>Issues management, messaging</i>
4	<i>Help with overcoming situations where in-person interactions are now impossible.</i>
5	<i>Holding off on projects.</i>
6	<i>Asking what are our other clients doing now.</i>
7	<i>Nothing - but we are being proactive by collating information regarding the industry's response and also notable changes like the TV Upfronts, increase in TV watching, etc.</i>
8	<i>Clients want their agency to provide strategy, planning and execution. They don't want to have to push the agency.</i>
9	<i>For healthcare clients its content about COVID. For other clients its to pause.</i>
10	<i>Crisis and internal communications</i>
11	<i>Spending requests aren't coming in as only budget cuts. Some clients in the CPG space feel it's bad optics to be out there. Most common request so far is changing social & web content to apply to alternate product/service delivery</i>
12	<i>Help messaging and communicating with customers, video help, social media.</i>
13	<i>Web updates/refreshes</i>
14	<i>COVID-19 related messaging</i>
15	<i>Help them distribute their COVID 19 content and instructions</i>
16	<i>Strategy/opinions on timing for pitching and promoting non-corona related products/services.</i>
17	<i>Wait.</i>
18	<i>Lots of questions about "tone of message"</i>
19	<i>"Help us navigate changes in how tech media are covering IT infrastructure companies."</i>
20	<i>Speed, access to original files</i>
21	<i>Adjusting messaging from brand sell to more customer/community support</i>
22	<i>Provide them with messaging for their stakeholders.</i>
23	<i>How do we stay in touch with our customers and what value can we bring them, even if they can't buy right now?</i>

Outside of spending requests, what is the most common request clients are making right now?

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	Response
24	asking questions, asking us to help them with signage changes
25	in times of crisis, there often is a dearth of leadership. Our focus is to continue being THAT leader for our clients, freeing them to focus on other critical issues in their business.
26	pause retainers.
27	Halt planned media, pare back meetings
28	how we can help them change their media plans to fit the current change in consumption of media. How would OOH (out of home) work in a place where you cant go (out of YOUR home) is one example.
29	How do we rework the current communications plan.
30	Continue with current projects, but things may change.
31	Stay focused for us to maintain momentum while others are distracted.
32	What ideas do you have for me and my team to continue and enhance our comms initiatives in this environment?
33	Strategic thinking on how to "shift" business in light of the current economic and consumer spending environment
34	ideas, strategies for dealing with the changing environment
35	How to manage customers
36	COVID statements on website.
37	Help with messaging around COVID-19 communications
38	Planning
39	Crisis planning
40	They're not. I think they have bigger fish to fry in terms of their own customers, team and operations. Marketing remains important but I don't know that it's the hottest item on the menu.
41	COVID-19-related customer and employee communication. Suggestions for ways to minimize spending.
42	Give us time to figure things out and get back to you.
43	virtual meetings
44	Speed up digital work. Last minute requests that are being caused by the virus.
45	Social media and PR help.
46	They want to know how PSAs are doing in general. We have outstanding tracking capabilities that can monitor by project results. Overall airings are steady (so far) and impressions per airing up (based on Nielsen data).
47	Project-related requests.
48	Help. Like HELP. We prepared for this since late January and had pioneered remote work for many years. Three weeks ago, we tested and hardened systems to ensure tech capacity for entire staff. We had a 3-Level response, (which we did roll through in 48 hours. THAT was not expected.) Many clients though, had done little to no prep, or got caught lagging... like so many others. We have heard that our Calm and Functional is greatly appreciated.

Outside of spending requests, what is the most common request clients are making right now?

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	Response
49	<i>New strategy to address the changing course of business and need to communicate to customers, employees and the business community</i>
50	<i>To figure out what is mission critical and what are "nice to haves" in the scope of the work. Human and capital resources are getting tight.</i>
51	<i>Slow campaigns down, less intensity</i>
52	<i>Taking break on fees. Video content. Strategy for internal</i>
53	<i>insights around leadership in these times; foresight when it comes to consumer mindset shifts; innovative working practices to foster collaboration and creative thinking; anticipating impact on their brand</i>
54	<i>Quickly adapt creative, messaging, context, timing, images, etc. to the new normal.</i>
55	<i>just making sure we are open and working on their issues.</i>
56	<i>We focus on the tech sector, with many collaboration software vendors. Our clients are mostly continuing as usual, but are having to move their in-person event and sales activities to digital</i>
57	<i>"put that on hold"</i>
58	<i>Email marketing and crisis plan updates.</i>
59	<i>pause work assist with crisis comms</i>
60	<i>too early</i>
61	<i>How should a brand behave in this new surreal world</i>
62	<i>Pull all advertising.</i>
63	<i>Deadline extensions</i>
64	<i>How do we plan for a future that is unknown?</i>
65	<i>Asking for changes in retainer.</i>
66	<i>Crisis consulting</i>
67	<i>social media and pr help</i>
68	<i>Shift messaging from sales to support.</i>
69	<i>What do we do once the "shelter at home" order is lifted?</i>
70	<i>Wait</i>
71	<i>When we reopen, will you (asking me directly) still work with us?</i>
72	<i>Help with messaging and getting stalled projects back on track.</i>
73	<i>Postponing non-essential projects</i>
74	<i>We're going to pause or delay the project...</i>
75	<i>Web site updates</i>

Outside of spending requests, what is the most common request clients are making right now?

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	Response
77	<i>Asking what level of marketing is appropriate given the current environment in an effort not to be seen as "tone deaf."</i>
78	<i>Help with preparing COVID-19 statements and communications for customers, employees and business partners. Reactive media relations support for COVID-19 stories.</i>
79	<i>Update website</i>
80	<i>Is there messaging they were putting out that is potentially viewed as insensitive understanding the current climate.</i>
81	<i>Cancel everything</i>
82	<i>understand what is owed to them from sports properties</i>
83	<i>Enhanced online services & support gfor their customers</i>
84	<i>They are looking for ad solutions focused on reaching individuals who can't leave their homes.</i>
85	<i>consulting to brainstorm ideas on what they can do.</i>

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