

# DISCOVIDERY

Understanding the impact of the Covid-19 crisis  
on businesses and marketing in the South West

11/06/2020

# UNDERSTANDING THE IMPACT OF THE COVID-19 CRISIS ON MARKETING IN THE SOUTH WEST

Much has already been said, and continues to be said, on the Covid-19 crisis. The loss of life and the impact on livelihoods around the world continues to grow every day, and we must all continue to support each other and help those around us.

11 weeks ago in the UK, the quickest and possibly largest mass-change of our behaviours in a lifetime occurred. Some businesses have found themselves unwilling beneficiaries of this situation, while others have seen their income reduced to zero.

We wanted to understand how the Covid-19 crisis affected our small corner of the world, and particularly its impact on the marketing strategies and activities of the brands and suppliers who base themselves here. In the following twenty or so pages you'll see how they've been affected (negatively), how they're feeling (optimistic) and how big an impact it's had on their marketing (large).

I hope you find it useful and interesting, and I'll leave you with this quote from the esteemed Hunter S Thompson - "when the going gets weird, the weird turn pro."



**Nick Barthram**

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Produced in partnership between



# EXECUTIVE SUMMARY

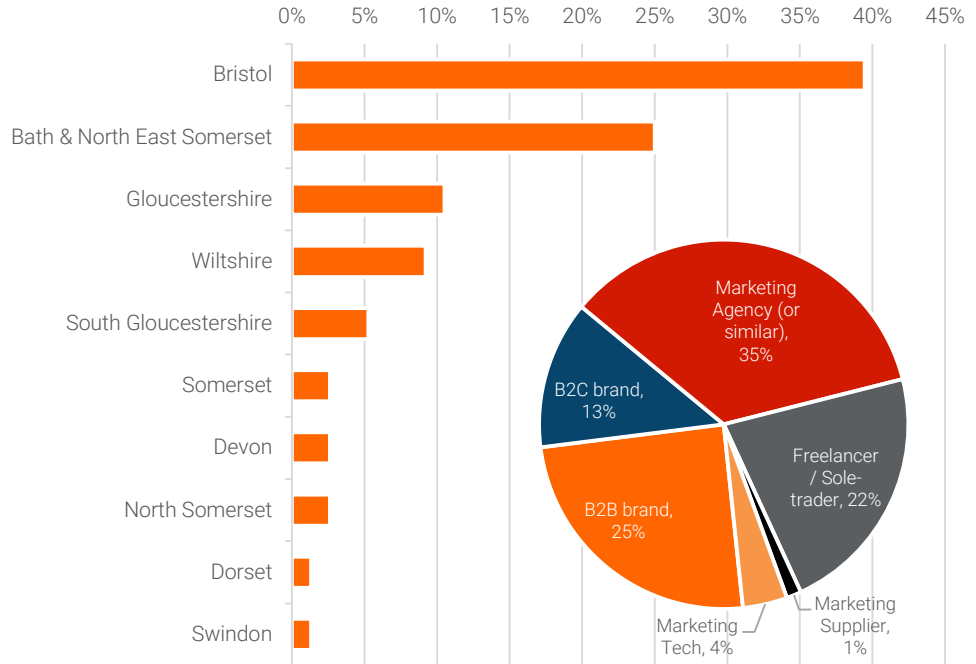
- This survey represents the views of 77 business leaders and senior marketers across brands, agencies, suppliers, freelancers and consultants in the South West, with responses collected between the 23<sup>rd</sup> April and 20<sup>th</sup> May.
- 70% of respondents reported a negative effect from the Covid-19 crisis. However, most remained positive, estimating we would be in a 'new normal' within 6 months and that they were already acting on opportunities created by the situation.
- Around 60% of businesses surveyed had furloughed staff, across all categories. At the time of the survey, no Brand respondents had made any staff redundant, though 19% of agencies and suppliers had begun making redundancies.
- Brands in the SW consider themselves better equipped to deal with the crisis than marketing suppliers, and were more able to plan for the long-term. Across all respondents, 'planning for the new normal' was the most important business planning task, suggesting that most had at least got to grips with the restrictions of the current situation.
- Most SW businesses had updated their marketing strategy to take account of the Covid-19 crisis. The majority of brands had made large changes to their strategy and were confident in those changes, whereas marketing agencies and suppliers had made less significant changes and were less confident.
- Social media as a discipline and as a channel has received more focus since the crisis began, with an increased emphasis on organic reach, as overall paid media budgets are cut by around half of brands.
- Changes to messaging have so far predominantly focused on Covid-19 related messages, rather than the switch to direct sales messages seen in the last recession.

# THE VIEWS OF 77 BUSINESS LEADERS AND SENIOR MARKETERS IN THE SOUTH WEST

## We spoke to 77 business leaders and senior marketers in the South West of the UK about the effect of the Covid-19 crisis on their businesses.

- The survey data was captured between 23<sup>rd</sup> April and 20<sup>th</sup> May 2020 – a month after lockdown began.
- Two-thirds of respondents were from businesses based within Bristol or Bath, the rest were spread across the South West region.
- Around 38% of respondents were from non-marketing brands covering a broad range of sectors, the remainder were made up of agencies, suppliers, freelancers and consultants offering marketing services.
- There is a broad range of sizes and ages of businesses across all categories. Full audience splits can be seen in the appendix.

## Under normal circumstances, where is your business based?



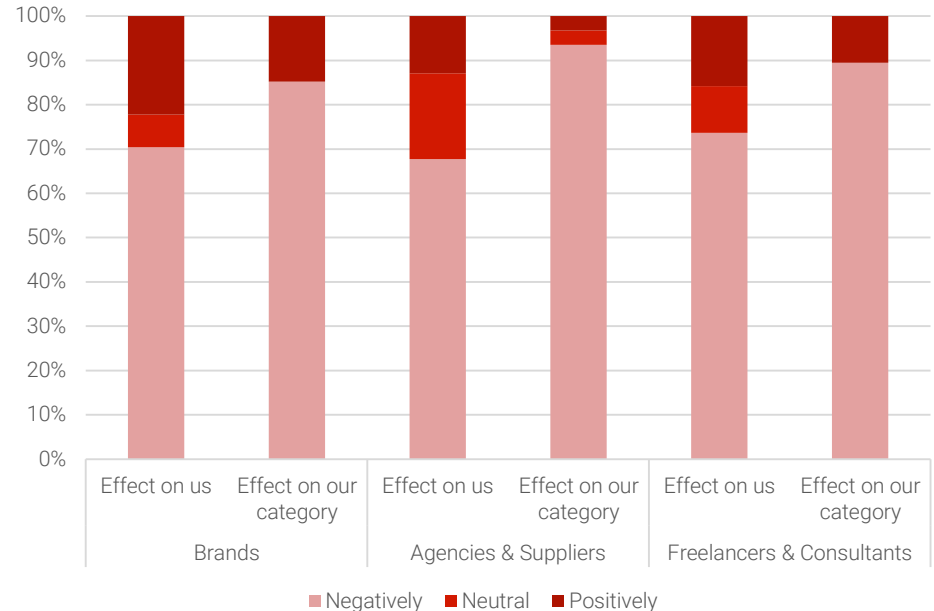
# THE IMPACT OF THE COVID-19 CRISIS ON BUSINESSES AND MARKETING

# 70% OF RESPONDENTS REPORT A NEGATIVE EFFECT FROM THE COVID 19 CRISIS SO FAR

**Unsurprisingly, the crisis has had a negative effect on marketing and businesses in the South West with most respondents reporting negative impact.**

- Across all three categories, around 70% of businesses have been negatively affected by the Covid-19 situation. Although this is obviously a high majority, a recent survey by the DMA put the national number as high as 94%.
- Optimistically, most respondents considered that their category was doing worse than they were.
- The few businesses who say they have been positively affected are generally defined being over 5 years old as a business, and between 10-50 staff.

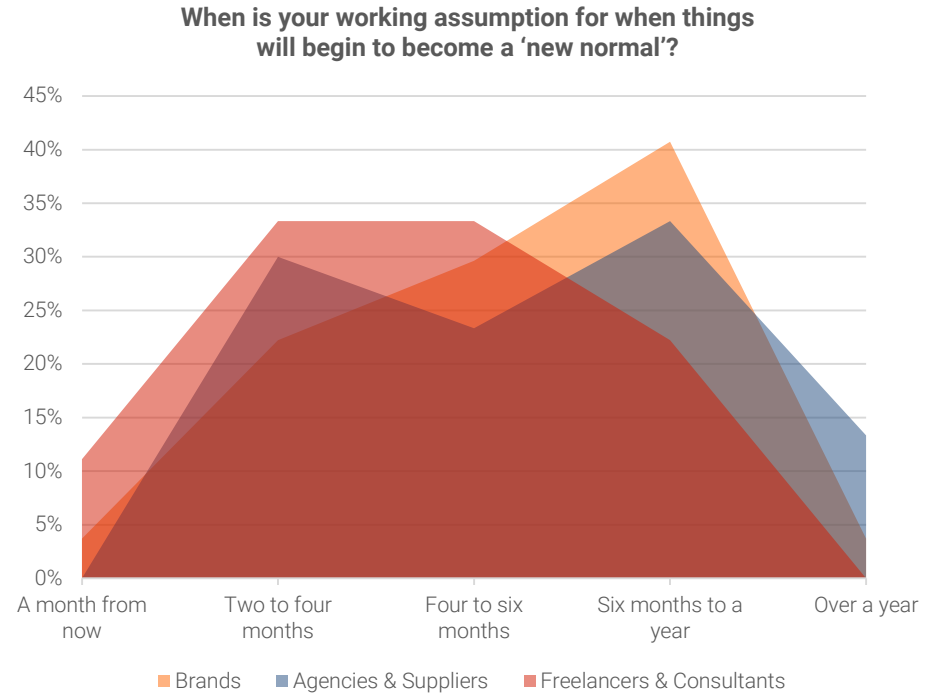
**How has the current COVID-19 situation affected your/your category's business opportunities?**



# THE MAJORITY OF BUSINESSES THINK THE CRISIS WILL BE OVER WITHIN 6 MONTHS

**Across the board, the majority of survey respondents thought that the 'new normal' will settle within the next six months.**

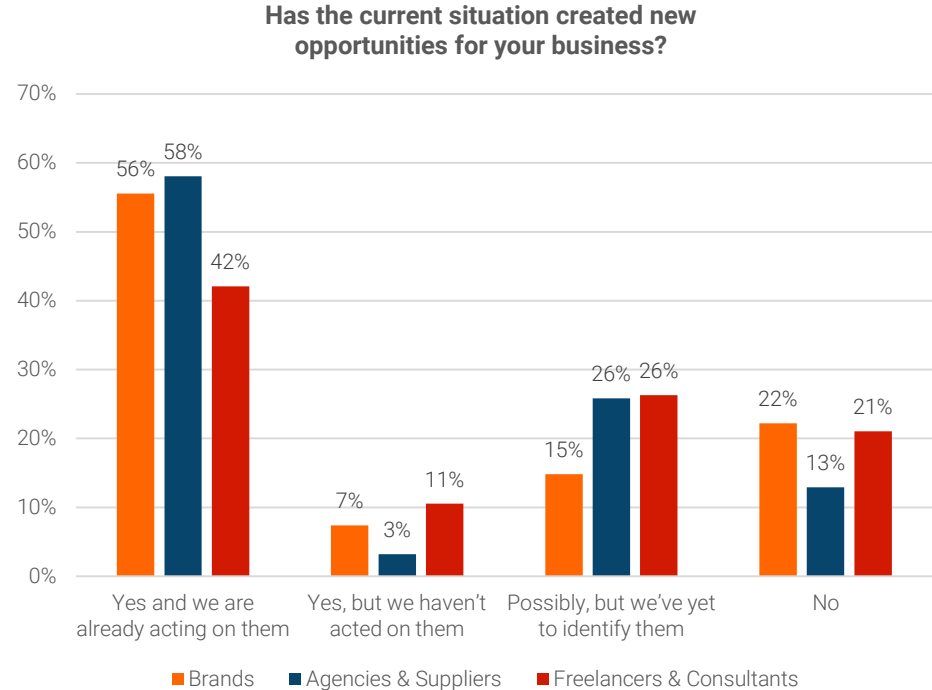
- However, there were differences in opinion as to the short-term arrival of a 'new normal'.
- Brands were more pessimistic, believing it to be within 6-12 months.
- Agencies and suppliers appeared to be split between short-term optimists who opted for two to four months, and long-term pessimists who considered that it would take 6 months to a year.
- Consultants and freelancers were the most hopeful, guessing that things will clear up within the next 6 months.



# MOST BUSINESSES ALSO SEE OPPORTUNITIES IN THE CRISIS AND ARE ACTING ON THEM

**Although no-one expressed a specific intention to profit from the crisis, the majority of respondents acknowledged that there were opportunities to be found.**

- Given the speed and severity of the impact of lockdown, it is encouraging to see that around 60% of brands and agencies are already acting on these opportunities.
- Surprisingly given their agile nature, freelancers and consultants were less likely to be acting on opportunities (though they had spotted them), possibly due to a focus on sensitive short-term cash-flow.





# CRISIS AND OPPORTUNITY FOR MARKETERS IN THE SOUTH WEST



**Nick Dean**  
*Managing Director*  
ADLIB Recruitment

“It’s no surprise that recruitment during Covid-19 has been put on the back-burner for many organisations. Recruitment of more traditionally creative disciplines have in the main ground to a halt, although ecommerce and data specialists have remained relatively buoyant.

Whilst businesses come to terms with the new shape of their teams as the furlough scheme draws to a conclusion, it is likely that hiring for growth will be several months down the track for many integrated and brand marketers. We predict experts within customer acquisition, retention and engagement will be in demand.”



**Ian Bates**  
*Creative Partner*  
Firehaus

“Brands and agencies have had to review their purpose and processes. So will we see real innovation as a result, and a greater harnessing of talent across the region – real collaboration.

Necessity has been the mother of invention with strategies changing, but this might lead to more fundamental reviews of why both brands and agencies exist. Home-working, home-schooling, flexible hours has probably focussed attention on the effective use of time and the value of the outputs. This could lead to more agile, decision-oriented processes in what had become largely stodgy processes across the marketing sector.”



**John Lanyon**  
*Creative Director*  
Hurricane

“Mapping out the next 6 months is a vital part of rebuilding the sector. It’s easy to become siloed in one’s opinion, so listening to voices from across the spectrum of brands, agencies and sectors is vital in arriving at useful insights.

It’s great to see some a cautious optimism in the South West with flexible thinkers finding opportunity in the downturn. Once cash flows ease a little it is these thinkers that will drive the return to growth for the region.”

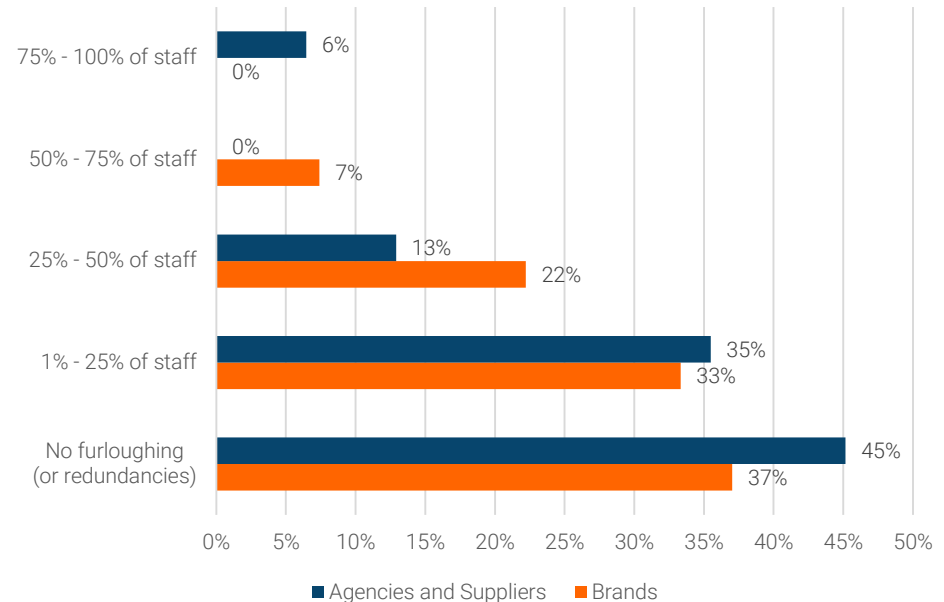
# THE EFFECT OF THE COVID-19 CRISIS ON BUSINESS PLANNING AND RESOURCING

# MOST BUSINESSES HAVE TAKEN ADVANTAGE OF THE GOVERNMENT FURLOUGHING SCHEME

## The majority of businesses, both brands and agency/supplier side, have taken advantage of the furloughing scheme to manage their staff.

- Around 55% - 65% of businesses with more than one employee have furloughed staff, with the majority only furloughing up to 25% of their employees.
- At the time of the survey, no brands surveyed had made any redundancies, but 19% of agencies and suppliers had made up to 25% of staff redundant as a result of the Covid-19 situation. These businesses had all also furloughed people.
- Brand and agencies did not feel that their reduced workforce had meant they were more reliant on suppliers. Over 90% of respondents said they could handle the situation with existing staff and suppliers, but with some creativity in roles and responsibilities.

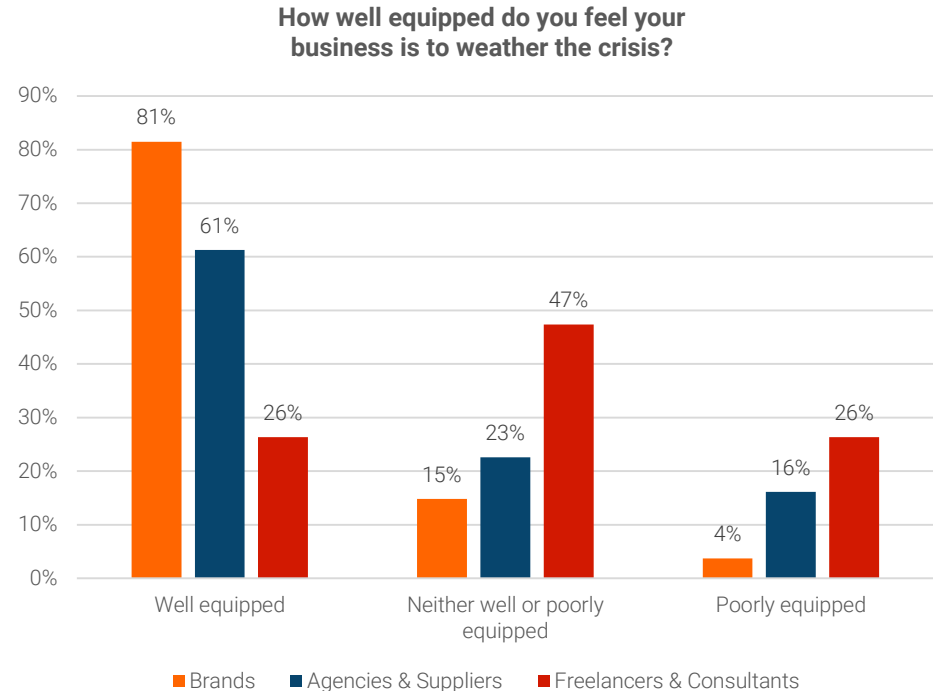
## How many of your staff have you FURLOUGHED (or are anticipating to do so) due to the current situation?



# DIFFERING LEVELS OF PREPAREDNESS ACROSS BRANDS, AGENCIES AND CONSULTANTS

## The majority of brands and agencies feel well equipped to deal with the impact of the crisis on their business, with freelancers and consultants less confident.

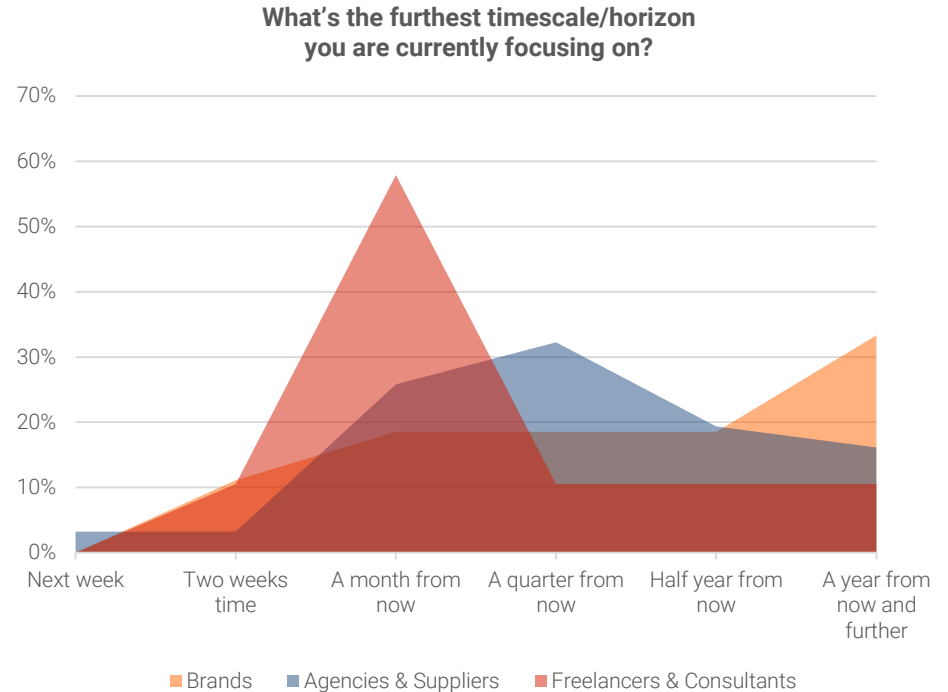
- The vast majority of brands (81%) feel well-equipped to deal with the crisis, the most confident of our three groups. Those feeling well equipped tended to be from older business (>2 years).
- 61% of agencies and suppliers considered themselves well equipped. The 16% who felt poorly equipped were disproportionately from smaller businesses, perhaps highlighting their more lean resources and the importance of more future-facing business planning.
- Unfortunately only 26% of freelancers and consultants considered themselves well-equipped. Surprisingly, the older the business the *less* well-equipped they were, suggesting perhaps a reliance on 'business as usual' rather than active planning for the future.



# BRANDS STILL MANAGING TO LONG-TERM PLAN WHILST OTHERS FOCUS ON THE SHORT-TERM

**Just over 50% of brands are still able to plan for beyond the next 6 months, whereas only 35% of agencies and 21% of freelancers and consultants are able to.**

- Reflecting the differing levels of preparedness across the categories, a significantly higher number of brands are able to create longer-term plans versus agencies and freelancers.
- Interestingly, all categories ranked 'confidence in future needs' and 'consumer behaviours' as the top reasons they couldn't plan further into the future, yet planned to different timescales.
- Encouragingly, less than 13% of businesses mentioned 'operational capacity' or 'management headspace' as barriers to future planning, suggesting that reports of short-termism due to internal firefighting are unfounded in our region.

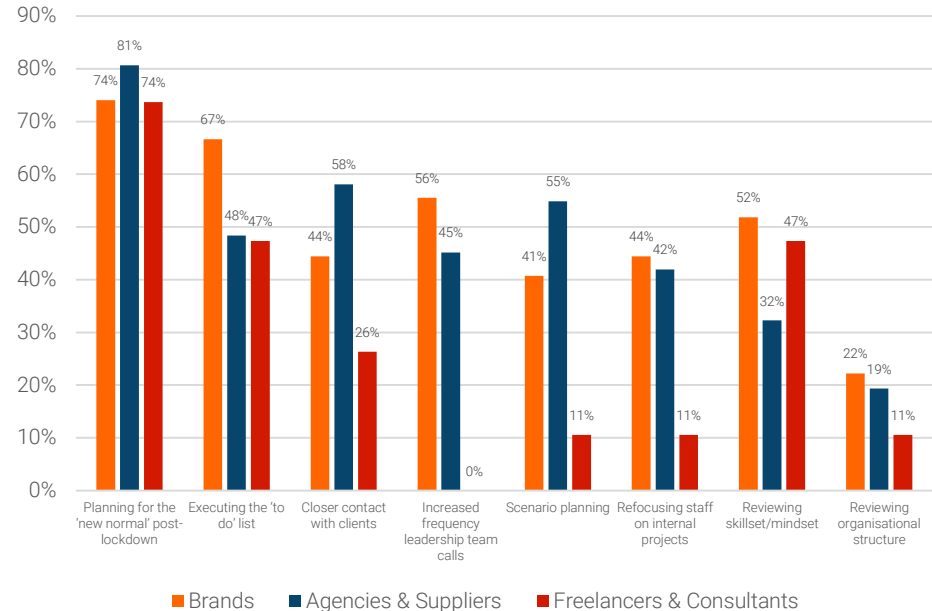


# WIDE RANGE OF ADDITIONAL PLANNING PROCESSES BEING UNDERTAKEN

**Outside of 'planning for the new normal', a wide variety of planning processes are being used, but not uniformly across respondents.**

- Over 70% of respondents declared they had begun 'planning for the new normal' though under 40% of them said they were using tools like Scenario Planning to help them deal with the high levels of uncertainty.
- Brands were much more likely to admit that they were focusing on 'executing the 'to do' list', though this is likely symptomatic of their increased preparedness for the crisis.
- The crisis is causing brands and agencies to reflect on their skillset and structure. 43% of respondents admitted to reviewing their internal skillset and mindset and 18% said they had begun reviewing their organisational structure.

**How are you approaching business planning and delivery under the current uncertainty?**



# DIFFERENCES IN PREPAREDNESS AND PLANNING ACROSS THE REGION



**Beth Pope**  
*Brand Partner*  
Firehaus

“Brands have undoubtedly been more decisive than agencies in response to the crisis - furloughing staff in greater numbers, reviewing skill-sets, and making more significant changes to strategy. Perhaps because of this, they also feel better-equipped and able to plan further ahead. In contrast, agencies appear in limbo, reduced to believing that the new normal will make itself apparent sooner.

Maybe this is inevitable. Agencies are service businesses. They wait to see how clients respond and then adjust to those needs. But this makes their position and outlook more precarious.”

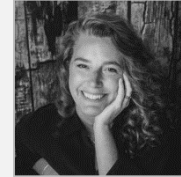


**Mette Davis**  
*Co-founder*  
Our Agency Value

“We’ve seen a large number of businesses realising the opportunity to take stock and develop a two-tiered approach to planning.

The first centres around building resilience to address the immediate, short-term challenges raised by Covid-19.

The second focuses on the longer-term, future vision for the business, and the opportunities afforded by the 'new normal', including access to a more diverse pool of talent and skills, flexible ways of working and greater collaboration”.



**Nicola Payne**  
*Managing Director*  
Noisy Little Monkey

“What is so uniquely complex about the Covid-19 crisis is its unpredictability. We can prepare - and this data shows us how businesses are doing this - but the predictions for recovery aren’t fixed or clear.

I’m sure we’ll look back at this time and identify winners and losers and post-rationalise their different strategies and kick ourselves that we didn’t think of them. But actually it may be more down to luck than judgement or complex systems. Luck coupled with resilience, flexibility and agile thinking (plus cash in the bank).”

# CHANGES IN MARKETING STRATEGY AND APPROACH DUE TO THE COVID-19 CRISIS

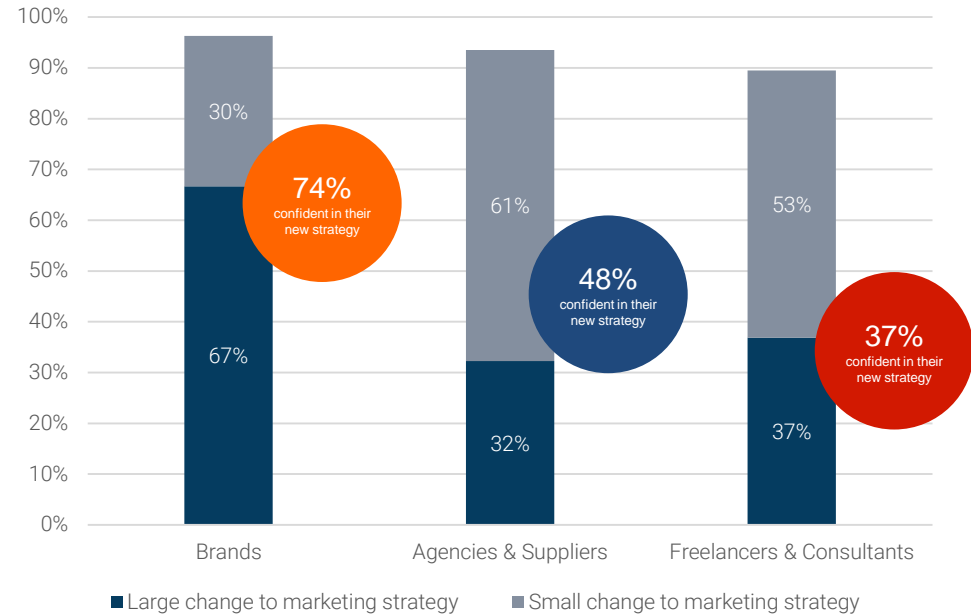


# MOST HAVE CHANGED THEIR MARKETING STRATEGY, BUT TO VARYING LEVELS

**A significant majority of brands have made large changes to their marketing strategy but only around a third of agencies and freelancers have done the same.**

- Around 50% of respondents declared that marketing was now an increased priority with most of the remainder declaring it's importance hadn't changed.
- However, brands had made the most sweeping changes to their approach, with 67% of them making large changes. 74% of brands were confident in the changes they'd made.
- Agencies, freelancers and consultants were more conservative with their changes with most making some changes, but only a third of them making large changes. They were also less likely to feel confident in their strategy compared to the brands they advise.
- *"Our current marketing strategy could pivot for the change in circumstances, and that the proposition still remains relevant and importantly not anachronistic."* **Brand Leader**

**To what extent has your marketing strategy changed during the current situation?**

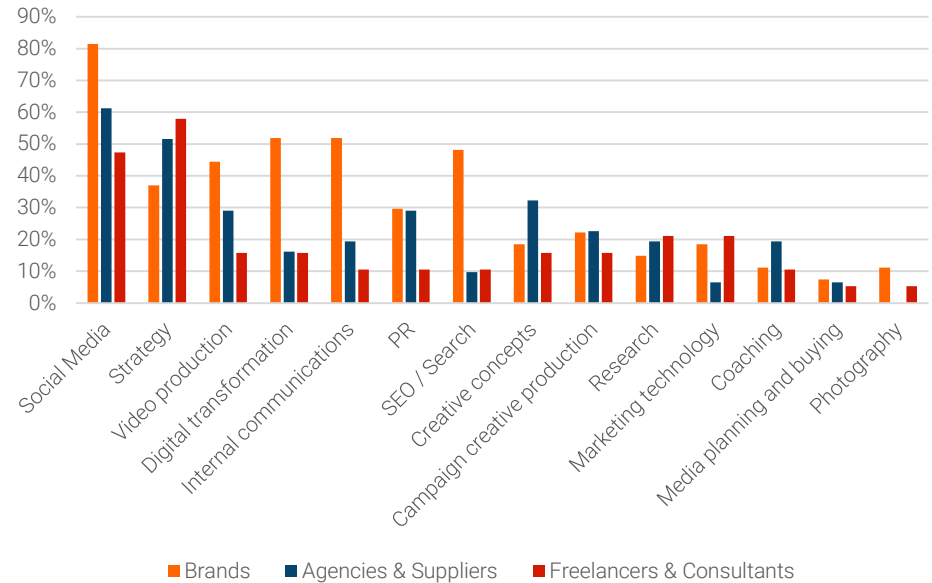


# SOCIAL MEDIA DISCIPLINE PRIORITISED BY BRANDS AND AGENCIES ALIKE

**Social media identified as the number one discipline brands and agencies most likely to increase resources in, though similarities end there.**

- Strategy was the second most important, but was more highly valued by agencies and freelancers than brands.
- Brands were much more likely to focusing on owned assets such as video production, digital transformation and internal comms than agencies and freelancers.
- Overall, agencies and freelancers were less likely to be refocusing resources on any disciplines than brands – continuing the theme of making fewer changes to their marketing approach than their better prepared clients.
- *“At this time the strength of ongoing relationships with clients and the any residual good will you may have built up is all-important. Marketing at times like these is tricky and possibly counter-productive.” Agency Leader*

**Which of the following marketing DISCIPLINES will you be focusing significantly MORE resources on in the current situation?**

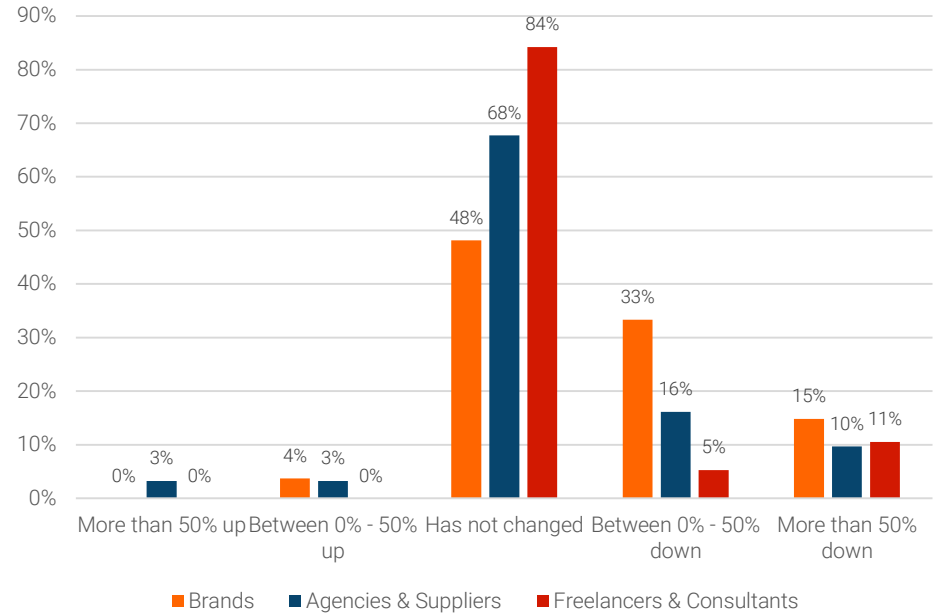


# HALF OF BRANDS CUT MEDIA SPEND, WHILST AGENCIES MAINTAIN CURRENT LEVELS

**Brands have seen more drastic cuts to their media budgets levels than agencies who are more likely to have maintained or made smaller changes to their budgets.**

- Although the survey did not capture the absolute size of media budgets, it's worth noting that there was a significant number of B2B brands within the brand category, subject to the same norms of B2B advertising as agencies themselves.
- Despite the documented increased performance of media spend during a downturn (due to increased extra share of voice) very few brands and agencies have chosen to increase their budgets.
- *"Our marketing budget has completely stopped while we have no revenue coming in. So we have to be creative with spend already sat with agencies, and using LinkedIn to greater effect."* **Senior Brand Marketer**

**How has the level of your media spend changed during the current situation?**

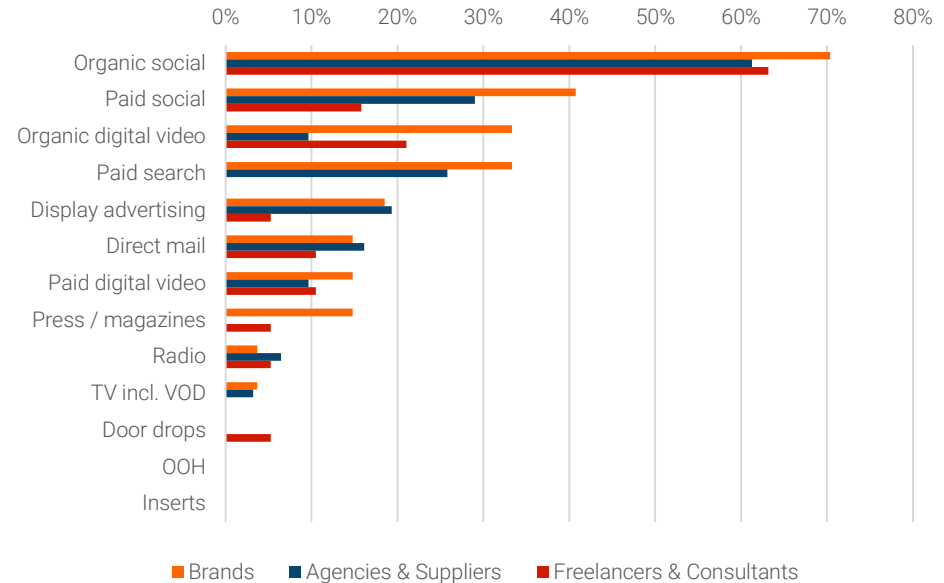


# SOCIAL MEDIA INCREASES IN USAGE BUT OVER-RELIANCE ON ORGANIC REACH

**The vast majority of respondents have prioritised social media as a channel, but with significantly more resource behind organic versus paid.**

- The majority of respondents have reacted to decreasing media budgets by increasing resources in organic Social Media, likely increasing their ratio of production spend to media spend.
- As expected, search and display emphasis has increased, with marketers trading long-term brand effects for short-term conversion and predictability.
- Paid digital video has only modestly increased in emphasis, surprising given the increasing evidence in its effectiveness and ability to target specific needs.
- With the exception of Direct Mail, more traditional channels have only seen modest increases in focus.

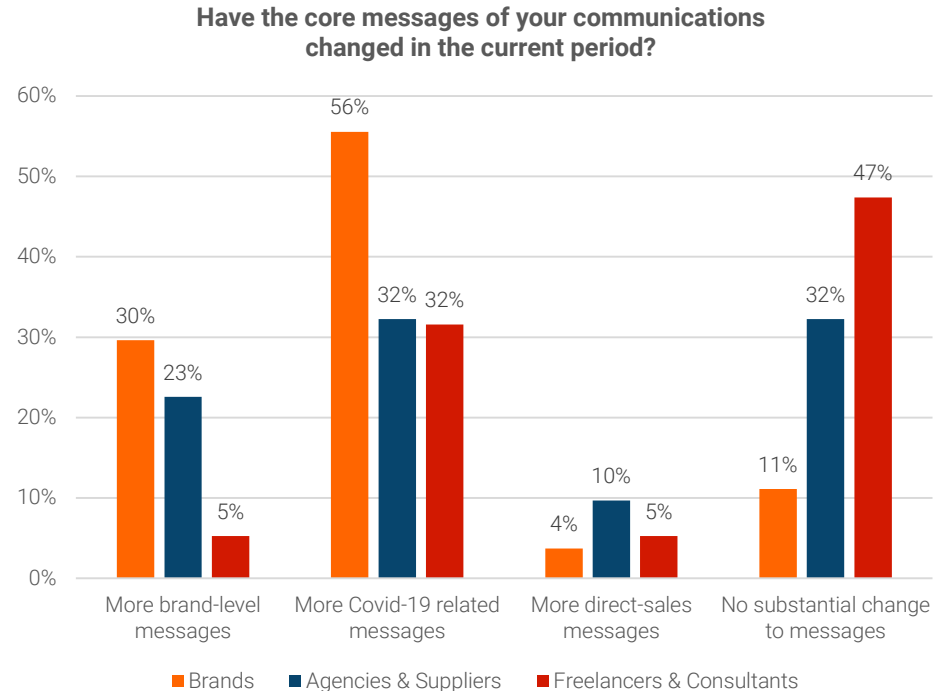
**Which of the following marketing CHANNELS will you be focusing significantly MORE resources on in the current situation?**



# MARKETERS HAVE SO FAR HELD BACK FROM INCREASING DIRECT SALES MESSAGING

**In contrast to previous crises, marketer have so far restrained themselves from refocusing their messaging on immediate sales driving.**

- However, it's likely that this is due to a desire to not appear to be profiteering from the crisis, as time goes on it's likely that direct sales messaging will increase, with other reports already warning of a global increase.
- The main change to messaging is an increase in Covid-19 specific messaging in paid advertising, something we also see, and hear debated, at a national level.
- Most surprisingly, a significant proportion of agencies and freelancers have not changed their messaging at all, in contrast to the significant changes made by brands.



# HOW TO GET THE BEST BANG FOR YOUR MARKETING BUCK IN A CRISIS



**Dan Fallon**  
*Managing Director*  
SearchStar

“Some of our ecommerce clients have never had it so good, but the majority of impact has been negative with over 50% of our clients cutting budgets in March and April.

However confidence has been steadily building since early May and this now seems to be gathering pace.

How fast and far the recovery goes is obviously critical. The clear focus from clients is efficiency, growth and pivoting to digital/ecommerce.”



**Nuala McBride**  
*PPC Manager*  
Loom Digital

“In a COVID-19 world, marketing budgets are understandably stretched. However, using website and ad account data strategically offers a tangible opportunity to help your business continue generating strong ROAS.

Careful and regular examination of this data will highlight where you can cut down on unnecessary spend, and how you should adjust your campaigns on an ongoing basis. Understanding this data will also give you a head start when things begin to stabilise in the paid space – it’s predicted to become a more competitive market.”



**Jon Mowat**  
*Managing Director*  
Hurricane

“The move away from media spend during the crisis represents a missed opportunity for many brands. Viewing times are up, media costs are down and now is the cheapest time for years to buy share of voice. This trend isn’t just on social, even national TV channels are offering large discounts on airtime.

As cash flow eases with the end of lockdown there may well be a golden window of opportunity for brands in which they can channel budget into advertising and capitalise on low cost exposure before media prices return to pre-Covid levels.”

# QUESTIONS?

If you have any questions or would like to know more about the survey results, don't hesitate to get in touch with us at [nick@firehaus.co.uk](mailto:nick@firehaus.co.uk).

# APPENDIX #1

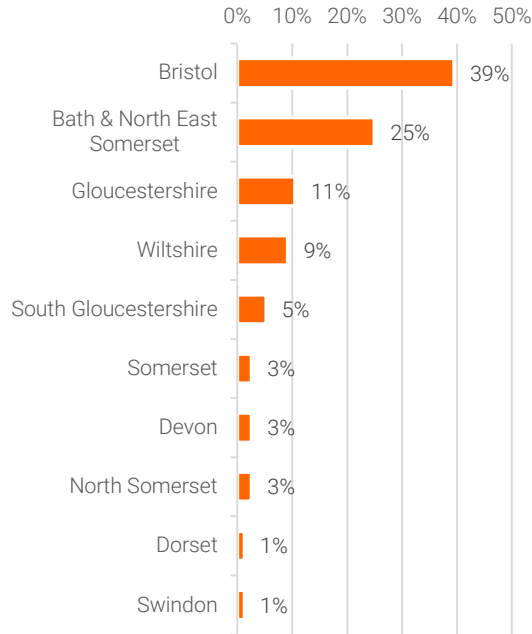
# **AUDIENCE DETAILS**



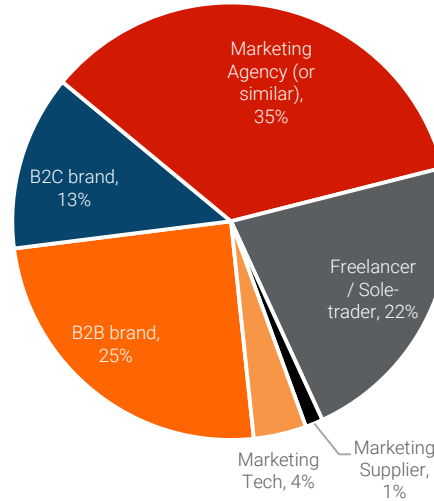
# AUDIENCE DETAILS

## LOCATION AND SECTOR

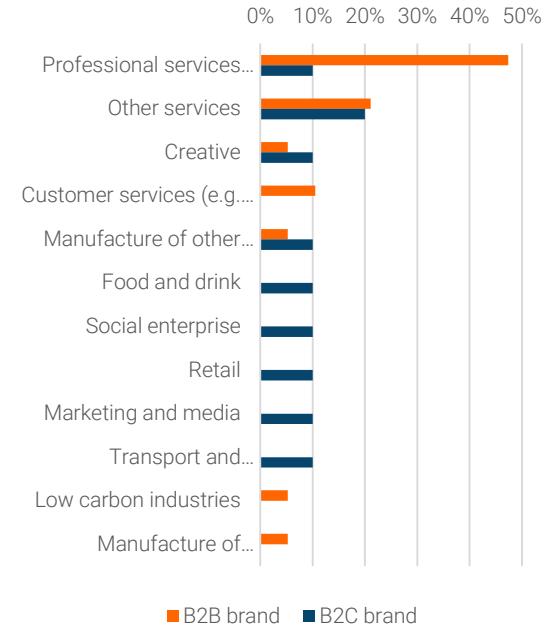
Under normal circumstances, where is your business based?



Which of the following categories most closely resembles your business?



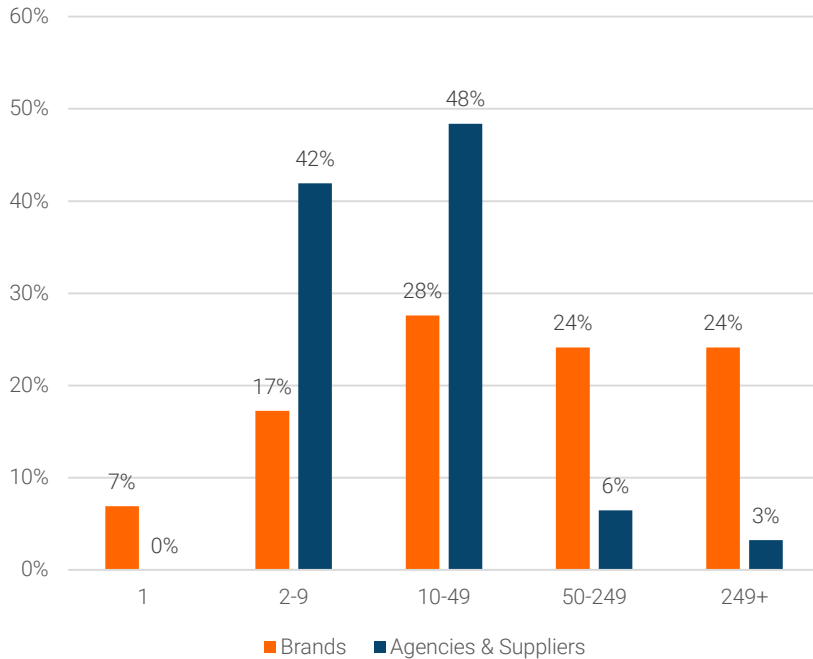
Which of the following sectors is your business within? (BRANDS only)



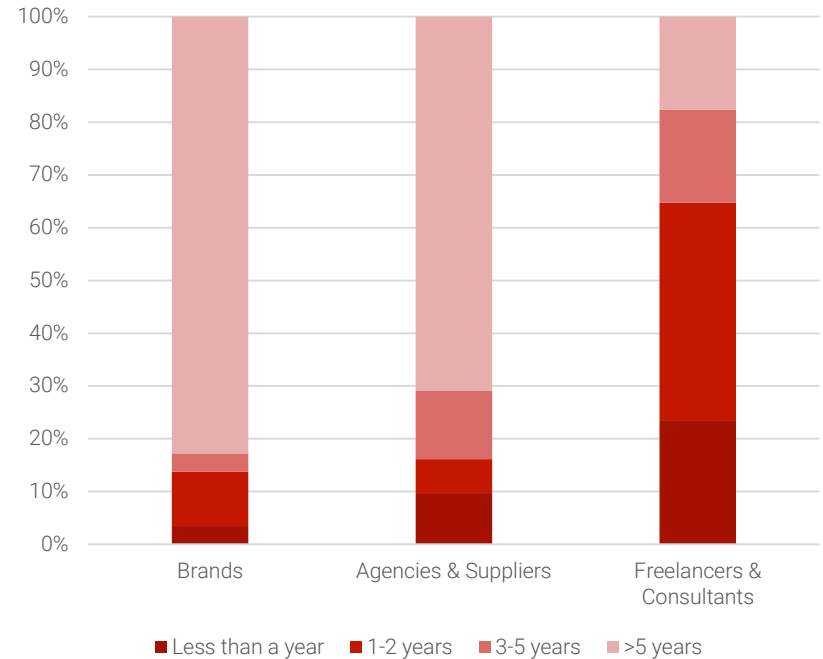
# AUDIENCE DETAILS

## SIZE AND AGE

How many people are employed in your business?



How long has your business been in existence?



# APPENDIX #2

# **QUAL RESPONSES**

# WHAT ELSE HAS CHANGED?

## ANSWERS FROM BRANDS

Clients being available, work being put on hold,

More zoom. More talking to clients, thinking about how we can help them.  
More training.

More focus on what is critical and important to clients and customers - no time wasting marketing material - key messages and less marketing jargon or telling people what they know already.

Being aware that everyone is in different spaces and is facing unusual challenges - such as mindset.

We have introduced a lot more digital marketing strategies we previously didn't use - video marketing, pinterest channel, etc.

Focused far more on our ability to operate a business as usual model. A lot more market commentary and client (and B2B) interaction both directly and through the provision of information that hopefully calms people down and lets them know we're here to help (and can!).

More agile - questioning laid down plans at every key decision point. Have daily go - no go meetings.

Increase in helping clients. Brand elevation through the sharing of resources. Offering free communication solutions to help people collaborate from home.

More focussed on local customer support - especially for vulnerable customers.

it's all about our member database

"Our marketing team consists currently of just me. Working from home has not been particularly easy with our lawyers who are also working from home - we have an increased need for marketing our services, and with particular relevance to businesses and individuals/families, but some of the teams are incredibly busy and don't have the time to devote to this. Other teams who aren't so busy, are finding that people don't really have an interest in their services currently (commercial property etc) as they are unsure of their financial position. Our Managing Partner has also cut all but absolutely essential expenditure, so that we are financially in a better position when we come out of this. This just means I'm having to work harder and be more creative with no real money to spend (I can spend a tiny bit). But we are very lucky in that our jobs are all safe, and we are being well lead by our Board.

Just making sure the content we promote is relevant to the situation, so we are focussing on mental health and wellbeing.

Thinking more short term with an eye on the long term

As a brand we have become more focused. This situation has actually given us time to take stock and review our processes, some of which we have determined were flawed.

strategy review and refinement followed by tactics review and refinement to open even smaller niche opportunities

marketing budget completely stopped while we have no revenue coming in. So have to be creative with spend already sat with agencies, and using LinkedIn to greater affect. Also attending video conferences trying to get our CEO on a panel as a replacement for F2F conferences.

"Luckily, we are happy that our current marketing strategy could pivot a little bit for the change in circumstances and that the proposition still remains relevant and importantly not anachronistic. We could easily incorporate more 'taking care' messaging as we had already been doing this for the last 2 years or so. We've ramped up our capacity to deliver quality content for social, and it's certainly focussed the mind on the key tactical requirements for the business for the next 3-6m. The plan hasn't changed, we are still going to support the products and services we had already slated, it's just that the messaging and means of communicating is changing a bit. One downside is that workloads are focussed on a smaller pool of people because of furloughs and we're all doing the best we can in the circumstances. The other is that business coming in has been way down, but we're seeing that start to change now as clients wake up to getting back to BAU. Our messaging has been supporting this...we're here when you're ready.

# WHAT ELSE HAS CHANGED?

## ANSWERS FROM AGENCIES & SUPPLIERS

### Client accessibility

We are at the will of our potential clients - if they are closed to outside opportunities (new agency contacts) because they are trying to sustain their BAU, we have limited abilities to disrupt this,

To be honest, we don't market ourselves. At this time the strength of ongoing relationships with clients and the any residual good will you may have built up is all-important. Marketing at times like these is tricky and possibly counter productive. Being around for as long as we have, though, is different to younger organisations who always have to appear as if they are surfing the zeitgeist. So we just trust to the fact that people know who we are and what we can do.

Focusing on concisely describing our key offer and our USP and communicating that to a wider audience

Events cancelled/postponed/replaced with ZOOM. Brand partnership/collaboration/Commercials revised for the times. Client relations up/sales contact down/different.

Homeschooling and life generally makes working fulltime impossible, we are trying to meet needs of clients but little to no time to look at own business as a result. Directors both furloughed now which means business (should) be suspended completely - a death sentence.

Major relaunch of our brand on hold until further notice.

Making sure we concentrate on the positive message as well as the BAU messaging.

### Too much home working!

Much more direct with existing clients/prospects. Taking opportunity to further refine brand position.

We had a plan. but we have accelerated it. We had to furlough our marketing manager, we are spreading across the team at the agency. More people involved. Less precious about making things perfect. Trying new things.

We have needed to change our approach from physical meeting and greeting to hawk our wares to a digital first approach. On the plus side it has given us the impetus to refocus on who we want to target, how we want to target and what the funnel is through to conversion. On the negative side, the whole situation sucks.

We've moved from twice yearly real world events to weekly webinars

We've stuck largely to our 2020 plan, the big difference has been the ability to get hold of clients and prospects more easily (they're home bound). So it's reminded us of the importance to build relations and get to know our clients personally, not just professionally. These insights have informed our outbound comms.

Reviewing websites & some propositions about how to package our services, and provide covid related insight and impact on consumer behaviours. Development of forecasting & modelling with macro-economic data.

More spontaneous marketing in social media, adapting to news and weather events. Making social media more personal introducing staff members creating a 'story'.

Shift to virtual and remote which we love...

1) For messages relating to our agency proposition, we have tried to simplify our communications. Good practice that we should have done previously! 2) We are also producing a content series, which looks at how the focus will change as we move through different periods of the crisis.3) We're focusing a lot of attention in organic posts - encouraging colleagues and contacts to share or get involved in co-creation.

Continuing direct client engagement to determine when projects will come online. Been surprised and disappointed that clients are pitching low value projects to multiple agencies and then asking them to do further work for no income. seem slightly immoral in current circumstances and puts a lot of pressure on agencies at a time when they could do with a bit of security and loyalty.

# WHAT ELSE HAS CHANGED?

## ANSWERS FROM FREELANCERS & CONSULTANTS

I provide a service to clients, ranging from strategic thinking and planning to execution support. The biggest challenge has been that many clients were blindsided by COVID as stopped external spend, regrouping internally to deal with the crisis and therefore no role for me. Also many clients were going through their own crisis be it furloughing or family life and approaching them about work sometimes felt insensitive and just 'not the right thing to do'. Finding the balance to reassure clients you are here for them vs. too pushy is a hard balance to strike.

Thinking about I am communicating my business.

More focus on supporting a post COVID 're-set' Strategy - persuading clients of the need to shift from a defence to offence mindset

Income dropped to about 1/3 Returning to old clients who previously I'd hoped to move on from. Broadening service options. Broadening target geographical area

Less marketing related, more skills development based. Given opportunity to investigate and grow skills I know I need to develop. This will enable me to then market my offering with more confidence over the coming months. As a freelancer, marketing for me has meant having more 'catch up' conversations so that I'm on the front foot at the right time when 'new normal' comes around!

I've noticed that my audience has changed so I've had to completely adjust the type of marketing we have been previously doing. I've found I had to include more sales into marketing which then brings fear of it changing the personality of the business and ultimately clients.

I rely on networking a lot normally, so still doing lots of that, but virtually of course.

Now marketing at one person businesses until I can get back to photographing SME's

More Coronavirus related content required from clients.

# ANYTHING ELSE TO ADD?

## ANSWERS FROM ALL

### BRANDS

Charging a bit less than London means that we're better set up to weather these kind of storms. Also they've helped us focus on our core as well as being nimble enough to help in different ways. Definitely more creativity is needed currently.

I think the South West has been lucky not to feel the full force of the virus - cases here have been quite low, comparatively. We can be thankful for that and I hope to see all of our people back in our offices in good time. I've seen some really creative and thoughtful marketing coming out from companies I follow - more collaboration and less competition - long may that continue! We're in this together and can support each other. Thanks for asking.

We all need to buy more services locally to support them.

The need to support local businesses - including the suppliers of marketing services is more important than ever. But the ways that our customers will want to interact with us and the ways we work have probably changed forever and this means that we all have to seriously think about our business models and most importantly our people.

Times are tuff for us all, open transparency amongst clients and agencies will be key to get through. Along with some out of the box thinking.

### AGENCIES & SUPPLIERS

Confident that the south west is a great place and will remain a great place to do business

Directors of small/micro businesses - please look up #ForgottenLtd on Facebook, join the fight for better support.

In order to thrive collaboration is key

It's a time to co-operate and collaborate and be less competitive. More openness, honesty and support for each other.

The need for travel - wondering whether flights to client offices etc will forever be seen in a different light post-COVID

Wealth of talent within the SW in all marketing including strong IT and digital disciplines. 60% of our business is internationally based, and this is the area that has grown for us. The "new normal" is our BAU i.e. servicing clients virtually and engaging in fast agile developments and insight.

Well, this is the first major interruption this industry has had to face since it really came of age in the late 50s/early 60s. It's been on a rollercoaster ever since. But now it faces a period of re-evaluation, like it or not. It used to be the survival of the loudest, brashiest and shiniest and perhaps forgot that it's just about communication. The industry became self-important and too many became obsessed with being in the business rather than doing the business. It's time to strip a lot of that away, lose the agency layers and cod-science and just get on with it.

### FREELANCERS & CONSULTANTS

I think the government and media have largely failed us during this crisis and it feels like the creative industries can play a much more prominent role in driving real change but also spreading real, grounded positivity.

There's a lot to learn from this. Anyone involved in marketing at this time should be learning a lot of new things. Although it's been scary at times, it has also been an amazing journey to live through and learn from.

EVERYTHING right now relies on marketing and it's a time to learn and excel. Even if your company is unable to operate during this time there is so much to learn research and plan for when it does get rolling again.