Fairgen Twins · Market Probe International, Inc. · Bloomberg · Quirk's NYC 2026

Turning real research into living audiences:

How digital twins are opening new ways to unlock insight, with perspective from Bloomberg

WHO WE ARE

When brand, agency and technology come together

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at Fairgen

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Probe International

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Global Director, Data Translation
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THE QUESTIONS WE GOT ASKED

“Where can simulated audiences be trusted?"

“Will this replace my research budget or add to it?”

“What happens when it's confidently wrong?”

“And who keeps the technology honest?”

THE QUESTION WE START WITH

"Which business decision are we trying to improve, and what kind of evidence does that decision require?"

Why are we experimenting with AI and simulation?

Perspective from Bloomberg

PROBLEM WE ARE TRYING TO SOLVE

A day in the life…

"Sales is preparing a media plan for an upcoming Bloomberg campaign targeted to financial advisors.
We need audience intelligence to support the offer.
The proposal goes out today."

Urgent business question ↓

Search proprietary audience and content platform, reports, previous research, market-level data to self-serve ↓

Follow-up with respective data or research owners for "what else" may be available ↓

Decide whether existing evidence is sufficient ↓

If time permits, commission custom research ↓

Six people. Eleven days. The proposal shipped on day three. The business decision moves forward, whether the answer is ready or not

“The problem is rarely a lack of data.
It is the distance between the
question and the answer.”

OUR MIND MODEL

The aspiration: one place for audience intelligence

Can we bring together Bloomberg AIQ, previous research, market intelligence, and internal expertise, so internal stakeholders could get faster, data-driven answers?

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CustomGPTs, Gems, fail to deliver high-quality insights and acceptable UX

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Bloomberg AIQ

Previous research

Behavioral signals

Audience intelligence

Campaign learnings

Market-level data

What agencies have to do differently in the AI era

The agency's job didn't shrink. It became the foundation.

THE ADVICE

The solution isn't a smarter tool. It's three different jobs, kept separate

1. Anchor on the great data you have in-house
2. Pilot it. Don't build it. One real challenge, start to finish.

Retrieve

We already know this. Answers in minutes from research Bloomberg already paid for.

Simulate

We think they'd react this way. A directional read in minutes, anchored on real respondent data

Validate

Here's what we still need to go ask real people. New audiences and angles to field. A set refresh cadence for the anchor. Periodic checks of twin output against held-out respondents.

THE AGENCY'S ROLE

Accelerating without abandoning rigor

Strategic Partner

We come in before the data does: framing the business question, mapping the research strategy, designing the study.

Innovation Advisory

Deciding where new tools can genuinely accelerate decisions, and provide support during implementation and maintenance.

Integrity Guardian

In an environment that pushes for speed and cost reduction, importance of sound design, representative data, respondent-level fidelity, transparent limitations.

Warranted confidence is the deliverable. The method is what makes it warranted.

THE PILOT

What do financial advisors actually want from Bloomberg?

- And could we find out in minutes instead of weeks?
- We mapped a couple of scenarios to pilot our vision.

THE VISION

Multi-stream insights workflows

Data		Workflows		Briefs		Testing		Delivery
Bloomberg AiQ Surveys Editorial preferences Market news Performance metrics Ad hoc data Social listening	→	RFP Review Content Review News Reaction Creative Testing	→	Projects list: - Owners - Clients	→	Digital twins: - Qual - Quant	→	Reports Artifacts

DATA FOUNDATION

Grounded in Bloomberg's own high-quality data

Audience Research

Bloomberg's own advisor study, attitudes, motivations, and segmentation data

Content Preferences

What this audience actually reads and watches on Bloomberg's platforms, themes and formats, not just topics.

Behavioral Profile

How this audience engages online relative to a general audience, channels, formats, and interests.

Media Habits

Broader news, video, and audio habits, plus the everyday traits that describe this audience.

SETTING UP DIGITAL TWINS

Real research. Protected identities. Interactive profiles.

Patrick Garcia

Chat now

Patrick Garcia is a 48-year-old male financial advisor based in the US, working full-time at an independent broker-dealer.

- Manages $50 million assets for approximately 100 individual clients
- Uses financial news websites/apps and firm research portal regularly
- Proactively contacts clients during sharp market changes
- Values compliance-ready, ready-to-share client materials highly
- Reports worse trustworthiness and accuracy in financial news over past year

Independent Broker-Dealer

Lisa Perez

Chat now

Lisa Perez is a 52-year-old female financial advisor based in the US. She works full-time at a Registered Investment Advisor firm.

- Manages relationships with 250 individual and business clients
- Consults multiple financial news sources including CNBC, Bloomberg, newsletters
- Relies heavily on financial news for market trends and client conversations
- Extremely likely to use company-provided financial calculators or tools
- Values clear data and case studies in financial content

Registered Investment Advisor

KNOWLEDGE RETRIEVAL

Understanding habits from existing data

From your Knowledge Base

What in the data relates to these concepts? Do we know content consumptions preferences in terms of format, how often financial advisors prefer to consume and other preferences?

The data provides insights into financial advisors' content consumption preferences regarding format, frequency, and other general preferences.

Content Consumption Formats:

- **Overall Preferred Formats (across firm types):** Short articles are highly preferred, with 84% for Wirehouse, 90% for IBD, and 87% for RIA advisors. Longer articles are also popular (62% Wirehouse, 62% IBD,...

Show more

Wave 6 Key Findings Digest.pdf FA Editorial Preferences.pdf

From your Knowledge Base

Do financial advisors prefer a weekly deep-dive, a daily reading habit, or an on-demand reference tool for personal-finance content, and why?

Financial advisors generally lean towards frequent engagement with financial news and real-time updates rather than solely a weekly deep-dive. Across firm types, Wirehouse advisors (66%), IBD advisors (59%), and RIA advisors (54%) prefer real-time updates over summaries. However, among generations, Millennials show a preference for summaries (53%) over real-time updates (47%), while Gen X (61%) and Boomers...

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Wave 6 Key Findings Digest.pdf FA Editorial Preferences.pdf

TESTING CREATIVES

Testing concepts with simulated respondents

Which concept is strongest

Positive

Version C is most practical and client-ready	68% · 34
Version B is practical and credible for client conversations	26% · 13
Version A is clear and practical for immediate use	16% · 8

Base: 50 twins · Scored first, then asked: "What's the main reason for your answer?"

Brandon Smith
35-44 · Male · US

“It feels too slow for what I usually need. If I’m looking at market news, I want something I can use right away for client conversations or quick portfolio decisions, not a weekly recap.”

"A — Bloomberg Money Weekly (appointment viewing..."

REPORT

Getting instant feedback and recommendations

The dashboard concept pulls ahead, while the daily format struggles to earn a place

Prioritize refining and scaling the dashboard content concept to emphasize its practical, client-ready features, given it garners the strongest overall potential among financial advisors.

Financial Advisors

When financial advisors were asked to pick the Bloomberg content concept with the strongest overall potential for organizations like theirs, they didn't split the room. Version C, the dashboard-style concept, took the majority of picks, well clear of Version B and far ahead of Version A. Version C leads Version B by a real margin — 29 picks to 15 out of 50 — a gap outside sampling error, which means this isn't noise settling one way today and another way tomorrow. It's a genuine preference, and it's the clearest signal in the whole study.

Version C 29 58%

Where are we going from here?

LOOKING BACK

What we have learned:

Five principles for practical adoption

1. Start with a decision, not a data dump.
2. Do not confuse retrieval, simulation, and validation. They answer different questions.
3. Better research creates better twins. Methodology remains foundational.
4. Treat simulation as evidence, not truth. Inspect, challenge, validate.
5. Build an ecosystem, not a crystal ball.

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Thank you!

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Find us on LinkedIn!

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