



IMI

Wave 12: Looking to 2021

Key Trends, Sentiment and Expectation

In-field: Nov 20th to December 16th, 2020 | Presented: Dec 17th, 2020 | Input from 39 Countries

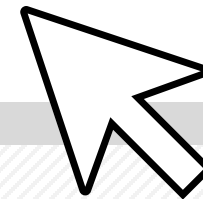
Shining a Light on Consumer Perspectives Amidst COVID-19

12 x 10
WAVES MONTHS






1M x 39
PEOPLE COUNTRIES

February 4th
START OF THE 2021
RECOVERY SERIES

ALL 2020 CONTENT AVAILABLE FOR DOWNLOAD AT
content.consultimi.com



Wave 12 - December 17th, 2020 Content Sections:

SECTION 1	SECTION 2	SECTION 3	SECTION 4	SECTION 5
Global Trending <ul style="list-style-type: none">a) Estimated End Dateb) Personal Healthc) Financial Healthd) A look back to March 2020 	Endorsing the Vaccine <ul style="list-style-type: none">a) Public Servantsb) Companiesc) Sports / Celebrity 	Looking Forward 2021 <ul style="list-style-type: none">a) Exciteb) Missc) Eventsd) Travel 	Consumer Spotlight USA <p>Current online and smart phone behaviors to embrace in the USA</p> 	Future Intention <p>Short term momentum with re-opening: Events, and Travel</p> 
SECTION 6	Playbook V7 Excerpt Summary			



Update

SECTION 1

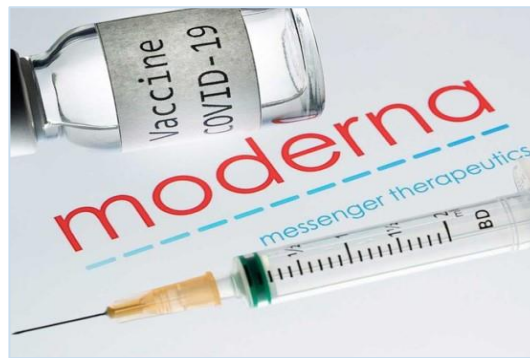
Trending Consumer Realities: a) Estimated End Date b) Personal Health c) Financial Health



Realities Since November 2020

Multiple Positive Vaccine Results since November 2020

Estimated month COVID-19 will no longer be a concern





Realities in December 2020

People taking the Vaccine

Estimated month COVID-19 will no longer be a concern





ESTIMATED END DATE: Global Timeframe

Estimated month COVID-19 will no longer be a concern

Dec 17th Reality



Estimated global end date has started to flatten and has remained the same since the positive introduction of vaccines.

North America ZONE 1

USA August
Canada August
Mexico August

South America ZONE 2

Argentina July
Chile August
Colombia September
Peru June
Brazil June
Venezuela June

Africa ZONE 3

Nigeria July
South Africa August
Kenya October
Uganda July

Nordic + Russia ZONE 4

Sweden July
Finland June
Russia May

Europe + UK ZONE 5

UK August
Ireland September

Europe + UK ZONE 5

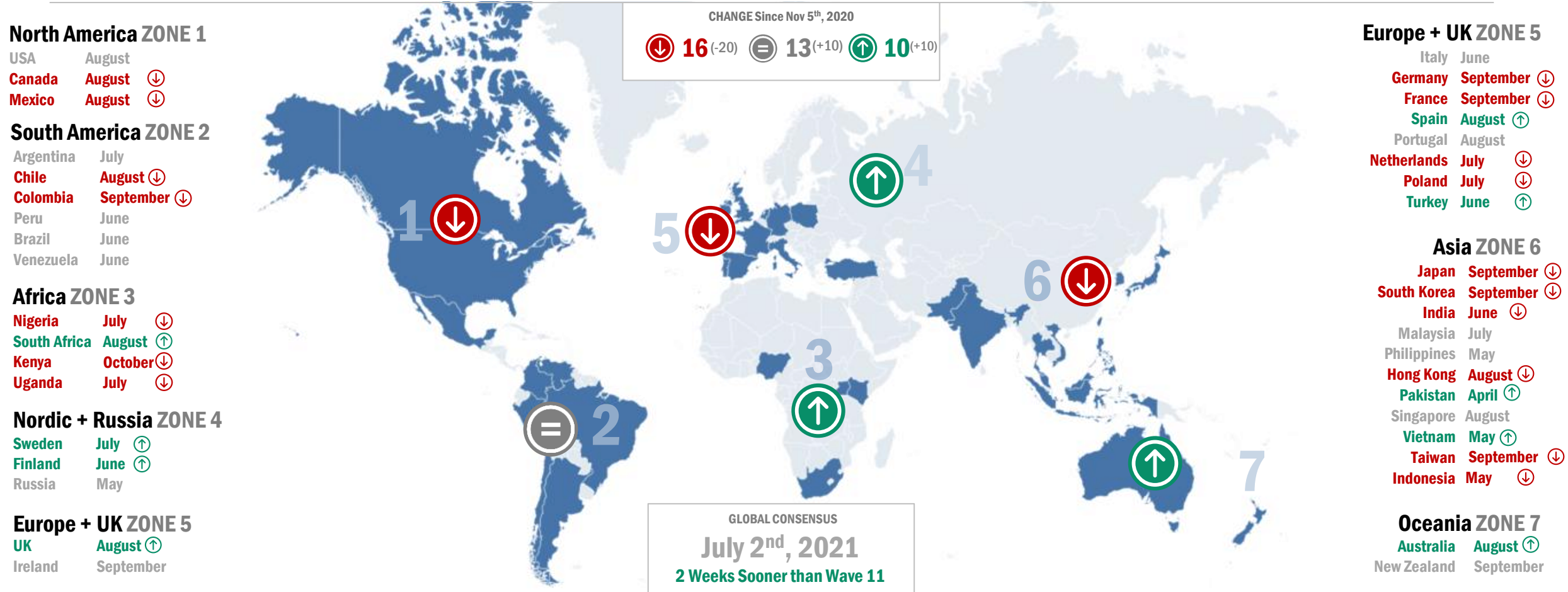
Italy June
Germany September
France September
Spain August
Portugal August
Netherlands July
Poland July
Turkey June

Asia ZONE 6

Japan September
South Korea September
India June
Malaysia July
Philippines May
Hong Kong August
Pakistan April
Singapore August
Vietnam May
Taiwan September
Indonesia May

Oceania ZONE 7

Australia August
New Zealand September



IMI24™ : N=23,000 December 2020 We asked: In how many months do you think it will be until the Coronavirus health issue ends - is no longer of any concern?



INDICATES OPTIMISM, STABILITY, OR PESSIMISM COMPARED TO PREVIOUS WAVES.



Global End Date – Time Series has finally stalled



Date Asked	Global End Date	Change
March 2020	July 2020	
April	Oct 2020	+ 3 months
May	Nov 2020	+ 1 month
June	Jan 2021	+ 2 months
July	March 2021	+ 2 months
September	May 2021	+ 2 months
November	July 14 th , 2021	+ 2 months
Multiple Positive Trial Results, Approval and Immunization		
December 17 th	July 2 nd , 2021	- 12 Days



Global End Date



As of
Mar 31st
2020

As of
Dec 17th
2020

**August
2020**

**August
2021**



USA

**August
2020**

**August
2021**



CANADA

**August
2020**

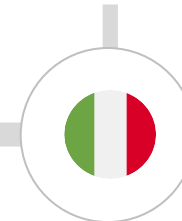
**August
2021**



UK

**June
2020**

**June
2021**



ITALY

**August
2020**

**August
2021**



AUSTRALIA

**July
2020**

**July
2021**



39
Countries

IMI24™ : N=23,000 across the globe: March 2020 and December 2020.

We asked: : In how many months do you think it will be until the Coronavirus health issue ends - is no longer of any concern?



Update

SECTION 1.1

Trending North America: a) Personal Health b) Financial Concern



HEALTH: Global Health Concern – Updated December 17th, 2020

How concerned are you about your personal health?



SEVERELY
CONCERNED



CONCERNED

46%

78%



USA

46%

75%



CANADA

39%

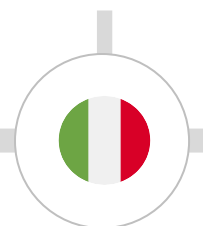
80%



UK

41%

80%



ITALY

19%

64%



AUSTRALIA

42%

77%



39
Countries

IMI24™ : N=5000 across the globe: December 2020.

We asked: How personally concerned are you about your health with Coronavirus?



HEALTH: Canadian Personal Concern

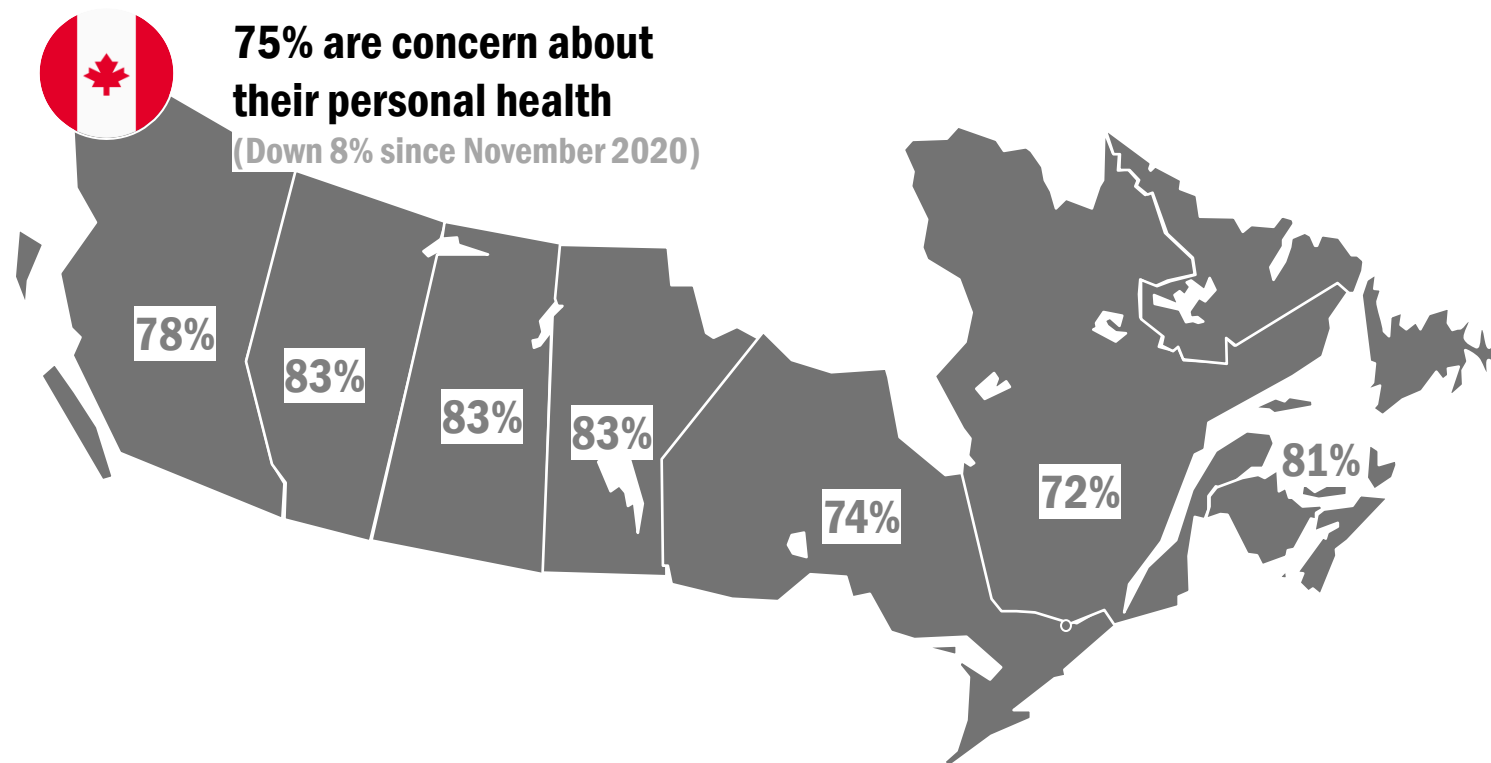
% of people concerned about their 'personal health'

Dec 17th Reality



Nationally, 3 in 4 Canadians have some personal health concern, with all provinces stabilizing on level of significant concern.

	CONCERNED	SEVERELY CONCERNED
CANADA	75%	46%
British Columbia	78%	45%
Alberta	83%	45%
Saskatchewan	83%	45%
Manitoba	83%	45%
Ontario	74%	42%
Quebec	72%	38%
Atlantic	81%	50%



IMI24™ : N=1,500 Canada per wave, N=2,100 across provinces each month.
We asked: How concerned are you about your personal health with Coronavirus?



INDICATES OPTIMISM, STABILITY, OR PESSIMISM COMPARED TO PREVIOUS WAVES.



FINANCIAL: Global Financial Concern is STABLE- updated December 17th, 2020

How concerned are you about your financial situation?



SEVERELY
CONCERNED



CONCERNED

27%

57%



USA

25%

58%



CANADA

23%

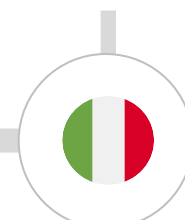
61%



UK

49%

79%



ITALY

11%

47%



AUSTRALIA

25%

57%



39
Countries

IMI24™ : N=5000 across the globe December 2020

We asked: How concerned are you at this time about your Financial Situation?



FINANCIAL: Canadian Financial Concern

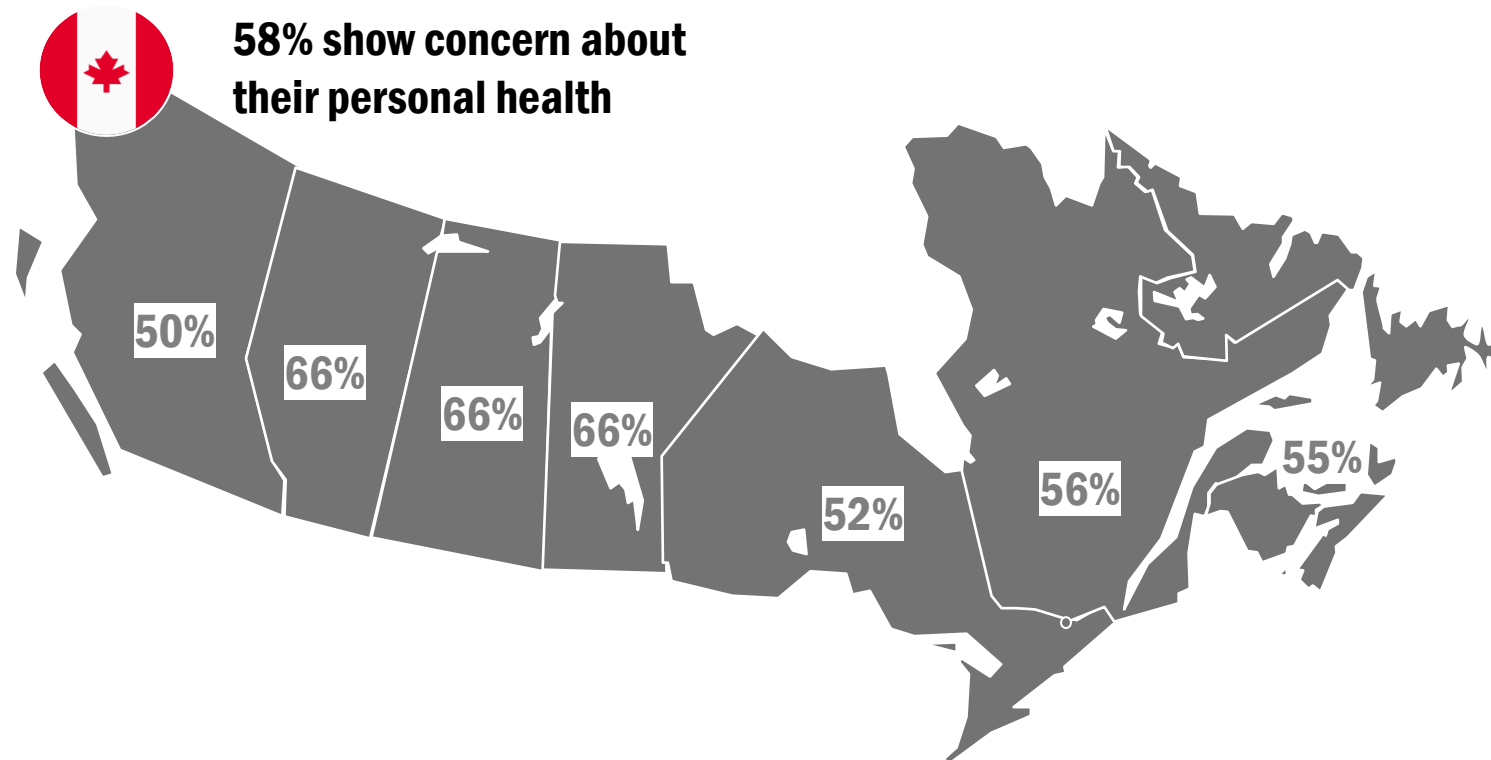
How concerned are you about your financial situation?

Dec 17th Reality



Nationally, almost 6 in 10 Canadians have some financial concern, with all provinces stabilizing on level of significant concern.

	CONCERNED	SEVERELY CONCERNED
CANADA	58%	25%
British Columbia	50%	28%
Alberta	66%	32%
Saskatchewan	66%	32%
Manitoba	66%	32%
Ontario	52%	18%
Quebec	56%	22%
Atlantic	55%	20%



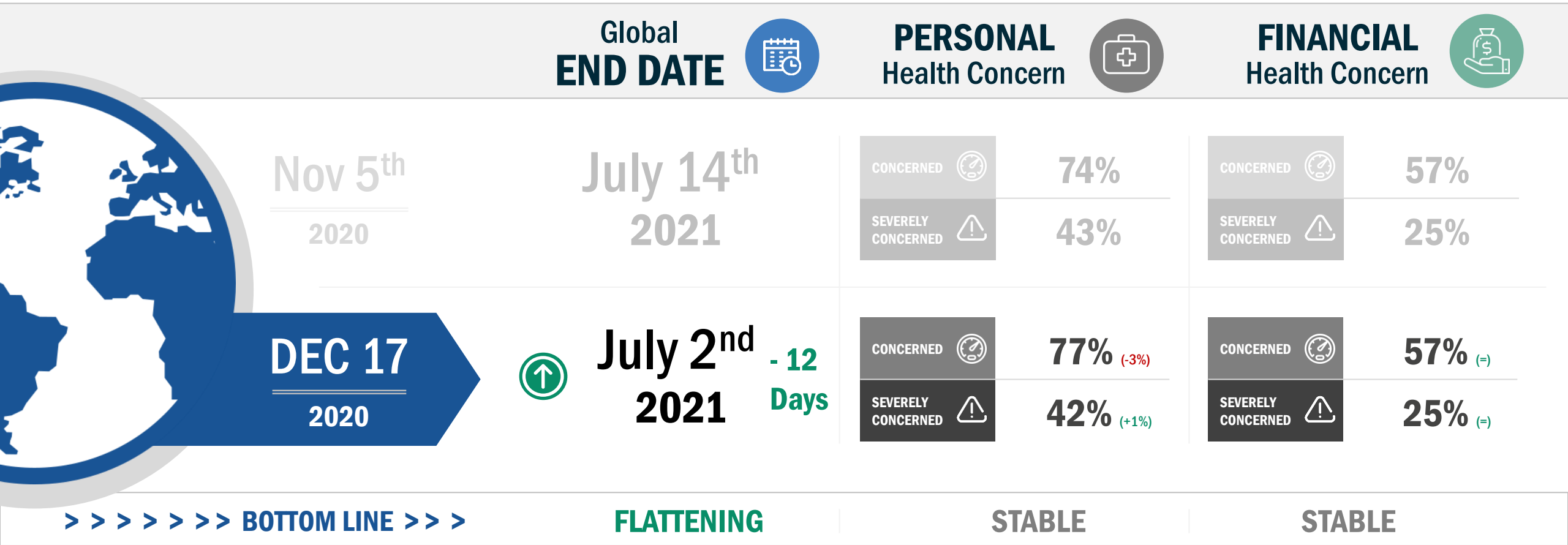
IMI24™ : N=1500 across Canada December 2020

We asked: How concerned are you at this time about your Financial Situation?



INDICATES OPTIMISM, STABILITY, OR PESSIMISM COMPARED TO PREVIOUS WAVES.

Change in Perceptions – Past 6 weeks – Globally across 39 Countries





SECTION 2

Encouraging Taking the Vaccine...

Endorsements that would reinforce the safety and effectiveness and
‘encourage
Americans to take the Vaccine’



TOP 10 AIDED



The Surgeon General

(36%)

1

Head of the CDC

(36%)

2

President Obama

(29%)

3

Joe Biden

(27%)

4

Head of the WHO

(25%)

5

President Trump

(24%)

6

New York Times

(24%)

7

Harvard University

(23%)

8

Lebron James

(21%)

9

Oprah Winfrey

(21%)

10

Top 10 People that would ‘Encourage’ taking the Vaccine

IMI24 N=3,000 December 2020



Endorsements that would reinforce the safety and effectiveness and
‘encourage
 Americans to take the Vaccine’



#11 through #20



Kamala Harris (18%)		11	
Michael Jordan (17%)	12	CNN (17%)	13
Time Magazine (15%)	14	Dr Sanjay Gupta (14%)	15
		Fox News (13%)	16
Governor Cuomo (13%)	17	Tiger Woods (11%)	18
		The Queen of England (7%)	19
		The Kardashians (4%)	20

Ranking of People that would ‘Encourage’ taking the Vaccine

IMI24 N=3,000 December 2020



COMPANY

Endorsements that would reinforce the safety and effectiveness and
‘encourage’
Americans to take the Vaccine’



Pfizer

(44%)

1

Moderna

(27%)

2

AstraZeneca

(24%)

3

Target

(20%)

4

Walmart

(19%)

5

Amazon

(15%)

6

Costco

(12%)

7

Nike

(8%)

8

Nestle

(6%)

9

J&J

(6%)

10

Top 10 Company that would ‘Encourage’ taking the Vaccine

IMI24 N=3,000 December 2020



SPORTS LEAGUES



Endorsements that would reinforce the safety and effectiveness and
‘encourage’
Americans to take the Vaccine’



NFL

(27%)

1

NBA

(21%)

2

LeBRON JAMES

(21%)

3

MLB

(20%)

4

NCAA

(19%)

5

MICHAEL JORDAN

(17%)

6

NHL

(15%)

7

USA OLYMPIC TEAM

(14%)

8

FIFA

(14%)

9

UFC

(11%)

10

Top 10 Company that would ‘Encourage’ taking the Vaccine

IMI24 N=3,000 December 2020



SPORTS LEAGUES



Endorsements that would reinforce the safety and effectiveness and
‘encourage’
Canadians to take the Vaccine’



NHL

(41%)

1

CFL

(19%)

2

MLB

(17%)

3

NFL

(15%)

4

NBA

(15%)

5

**OLYMPIC
TEAM**

(15%)

6

FIFA

(15%)

7

MLS

(13%)

8

UFC

(8%)

9

F1

(7%)

10

Top 10 Company that would ‘Encourage’ taking the Vaccine

IMI24 N=3,000 December 2020



Endorsements that would reinforce the safety and effectiveness and
‘encourage
Canadians to take the Vaccine’



TOP 10 AIDED



NHL (41%)				1														
The Prime Minister (39%)			2		Your Premier (36%)		3											
CBC/CTV/ G&M (26%)			4		CFL (19%)			5		Peter Mansbridge (17%)		6						
NFL (17%)		7		NBA (15%)			8		Gretzky, Virtue, McDavid (13%)			9		Drake, Bieber, Mendes (8%)			10	

Top 10 People that would ‘Encourage’ taking the Vaccine

IMI24 N=3,000 December 2020





SECTION 3

On people's minds for 2021...

Unaided – Top 10 that Helped the most in 2020

ON PEOPLE'S MINDS FOR 2021

1 Nothing – No one

2 NHS

3 Donald Trump

4 Pfizer

5 Amazon

6 Dr. Fauci

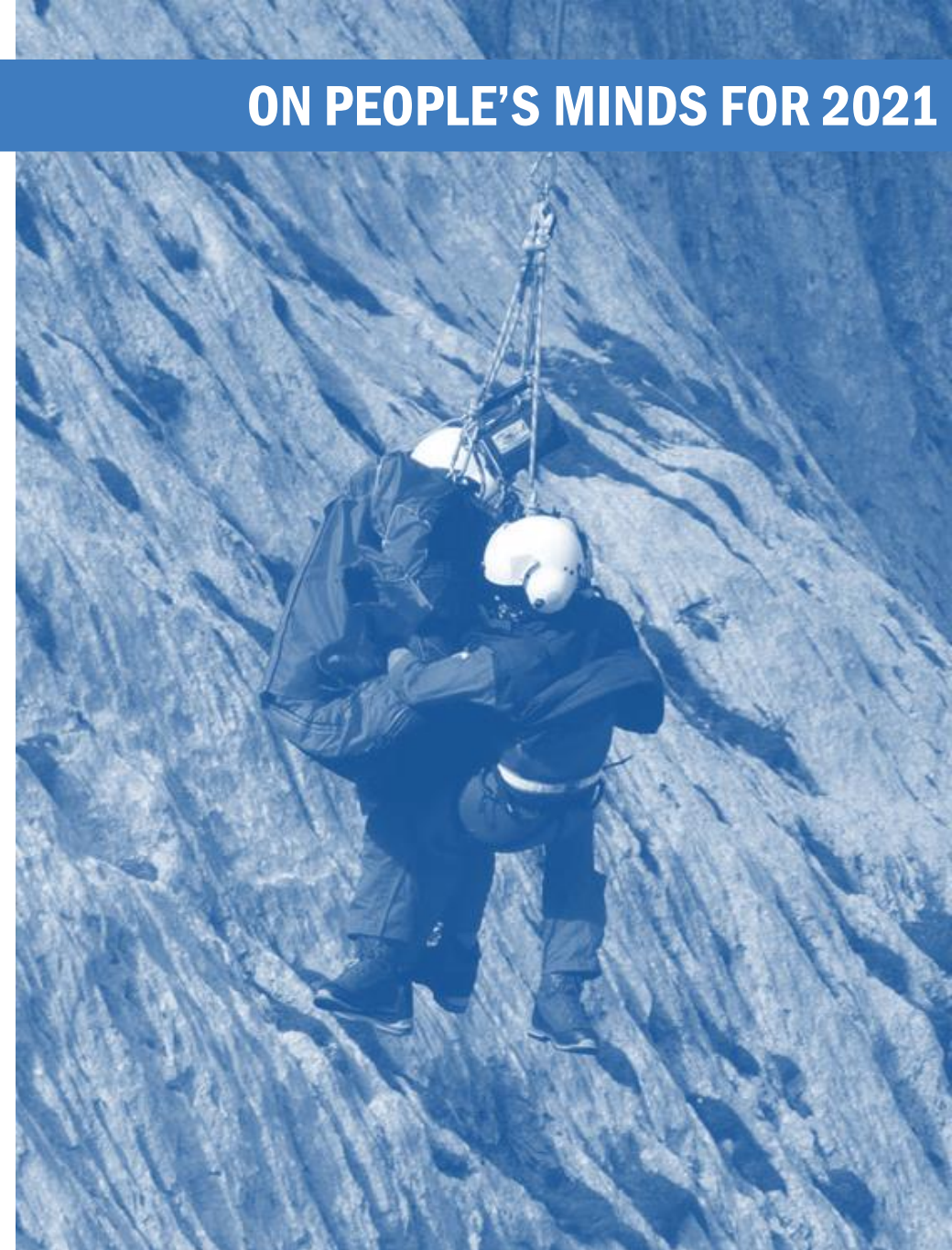
7 Bill Gates

8 Holidays

9 Health Care Workers

10 Marcus Rashford

IMI24™ : N=2,600 people across the countries 13+ Years of age – December 10th to 15th 2020



Unaided – Top 10 People/Brands that disappointed in 2020

1 Donald Trump

2 Boris Johnson

3 Amazon

4 Government

5 Facebook

6 Republicans

7 Mitch McConnell

8 Joe Biden

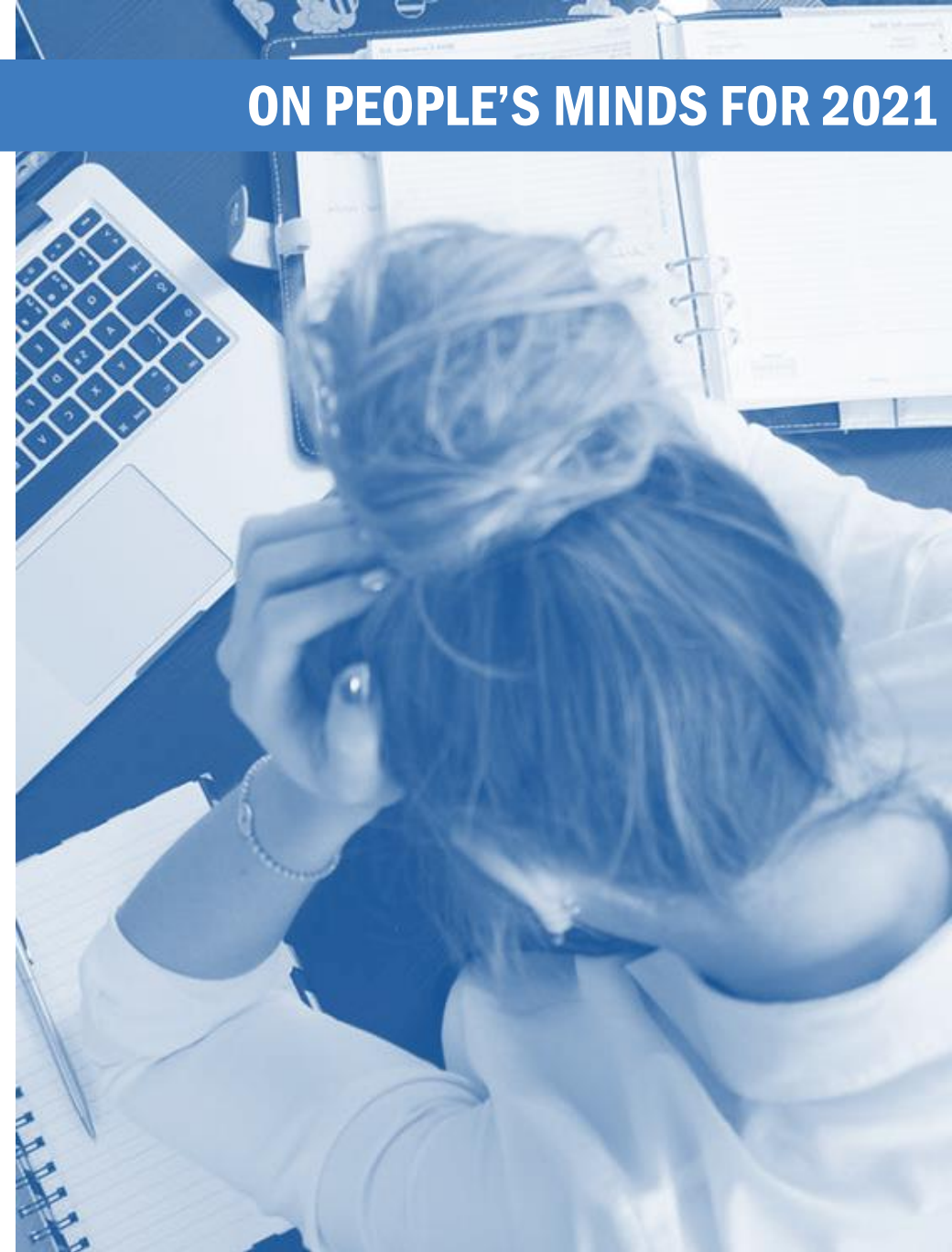
9 Democrats

10 Google

IMI24™ : N=2,600 people across the countries 13+ Years of age – December 10th to 15th 2020



ON PEOPLE'S MINDS FOR 2021



Unaided – Top 10 Best things that happened in 2020

ON PEOPLE'S MINDS FOR 2021

1 Biden Winning the Election

2 Trump Defeated

3 COVID-19 Vaccine

4 Family Time Increases

5 Working From Home

6 Life

7 New Job

8 Brexit

9 Summer

10 New Child

IMI24™ : N=2,600 people across the countries 13+ Years of age – December 10th to 15th 2020





SECTION 3.1

People Looking forward to 2021 ...

Unaided - Top 10 Things People Look Forward to Seeing/Doing in 2021

ON PEOPLE'S MINDS FOR 2021

1 Seeing Family

2 Travelling

3 Seeing Friends

4 Restaurants

5 Going Out

6 Hugging

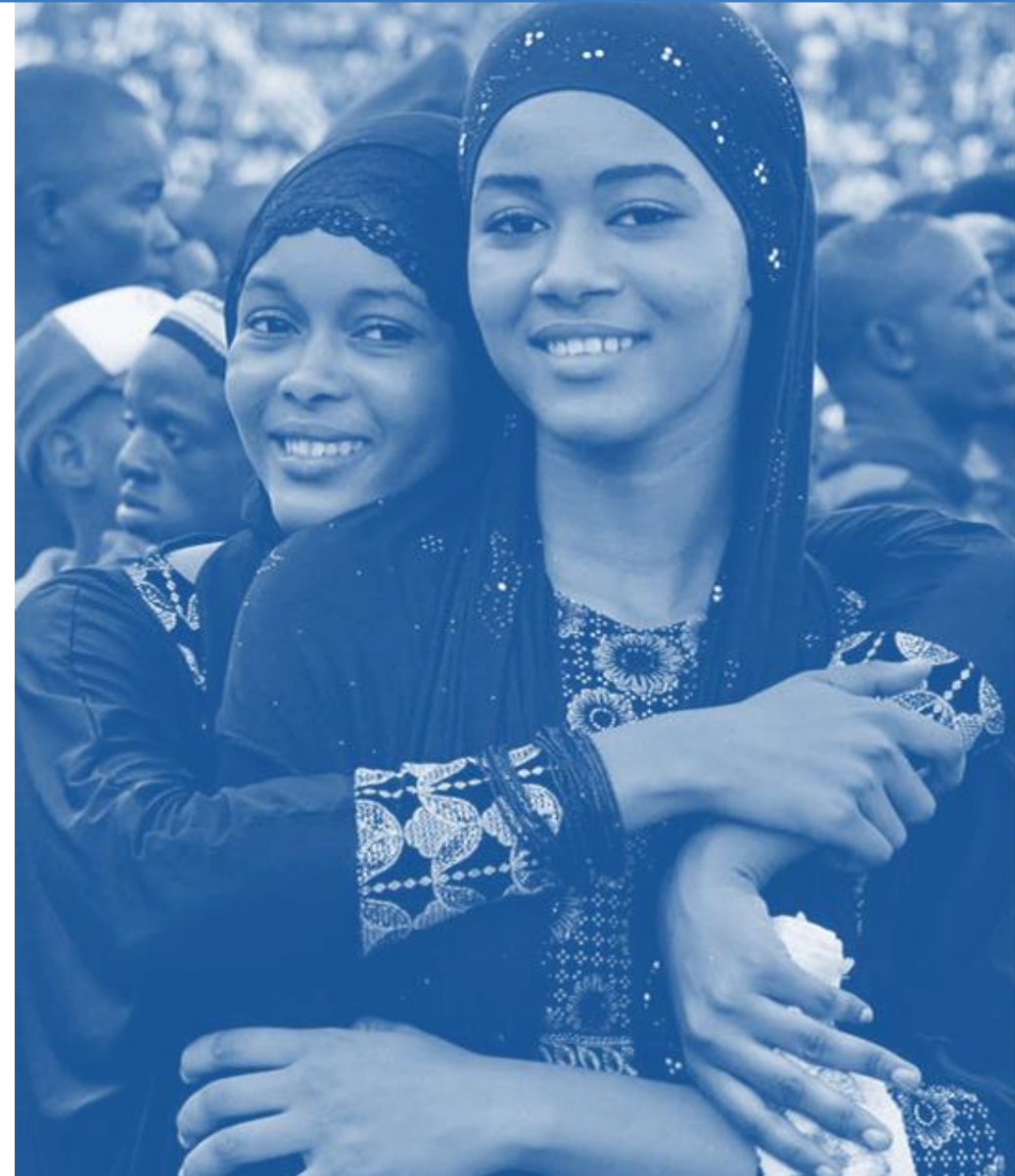
7 No Masks

8 Holidays

9 Freedom

10 Sports

IMI24™ : N=2,600 people across the countries 13+ Years of age – December 10th to 15th 2020



Unaided - Top 10 **Things People will MISS** When COVID-19 is Over

ON PEOPLE'S MINDS FOR 2021

1 Nothing

2 Being at Home

3 Working from Home

4 Family Time

5 Being/Eating Healthy

6 Reading

7 Watching TV

8 Zoom

9 Sleep

10 Complaining About it

IMI24™ : N=2,600 people across the countries 13+ Years of age – December 10th to 15th 2020



Unaided – Top 10 Dream destinations in the next 5 years

1 Hawaii

2 Italy

3 Australia

4 Spain

5 Ireland

6 Greece

7 New York

8 Canada

9 Florida

10 France

IMI24™ : N=2,600 people across the countries 13+ Years of age – December 10th to 15th 2020



ON PEOPLE'S MINDS FOR 2021



Unaided – Top 10 Future Sporting events People want to attend

1 NFL

2 Soccer

3 MLB

4 NBA

5 Tennis

6 NHL

7 Olympics

8 PGA

9 F1

10 Rugby

IMI24™ : N=2,600 people across the countries 13+ Years of age – December 10th to 15th 2020



ON PEOPLE'S MINDS FOR 2021



Unaided – Top 10 Recreational sports people want to play

ON PEOPLE'S MINDS FOR 2021

1 Soccer

2 Golf

3 Tennis

4 Swimming

5 Running

6 Baseball

7 Football

8 Basketball

9 Hockey

10 Cycling

IMI24™ : N=2,600 people across the countries 13+ Years of age – December 10th to 15th 2020



KEY OPPORTUNITY

**How do we help
people get what
they're dreaming
about ?**



SECTION 4

Consumer Spotlight - USA



APP USAGE

Your opportunity everyday starts right when people wake up and ends right before they go to sleep.

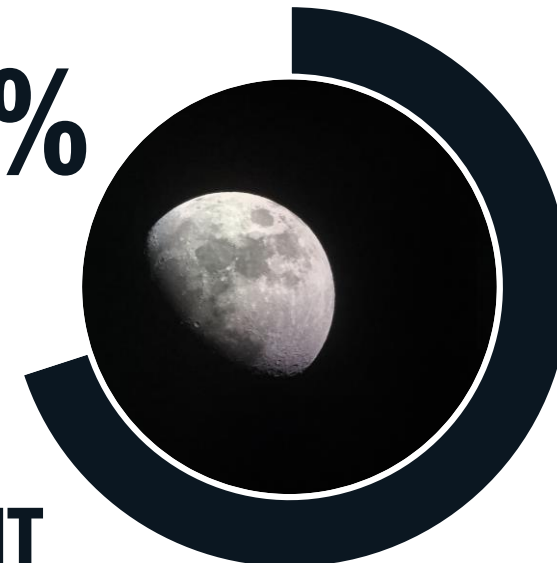
71%



MORNING

Within 5 minutes of waking up

70%



NIGHT

Right before going to sleep

Unaided - Which app do you look at first - in the morning - within the first 5 minutes of waking up, if any?
Unaided - Which app do you look at last - just before you go to bed, if any?
IMI 24, USA, 13+

Apps used most frequently first thing in the morning and right before bed - Unaided



MORNING

WITHIN 5 MINUTES OF
WAKING UP

20%



Facebook

8%



Weather

5%



Instagram

4%



Google

4%



Snapchat

NIGHT

JUST BEFORE GOING
TO SLEEP

21%



Facebook

5%



Instagram

5%



Email

4%



Google

4%



Twitter

Intensity (Daily/Weekly) App Usage. Aided Top 10 Apps in December 2020 compared to the rest of 2020. 🇺🇸

APP USAGE INTENSITY

	FEB 2020	MAY 2020	JULY 2020	DEC 2020
Email Apps	62%	62%	52%	59%
Social Media Apps	60%	58%	54%	57%
Weather App	55%	52%	46%	50%
Music App	46%	41%	42%	45%
TV/Movie Streaming App	41%	40%	35%	43%
Finance/Banking App	41%	40%	38%	41%
Gaming App	37%	38%	36%	38%
Shopping App	34%	36%	30%	36%
GPS App	37%	31%	31%	35%
News App	29%	31%	24%	32%

GenPulse™ : N=31,344 people across the countries 13+ Years of age – December 2020





BOREDOM

What Apps are Americans Using When They are Bored to pass time? - Unaided

Which 2 apps do you use most when you are bored? November 2020. USA (13+ Years)

35%



Instagram

18%



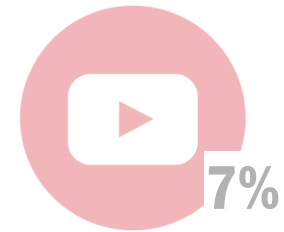
Google

11%



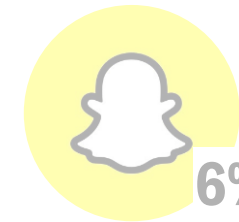
Twitter

10%



YouTube

7%



Snapchat

6%



TikTok

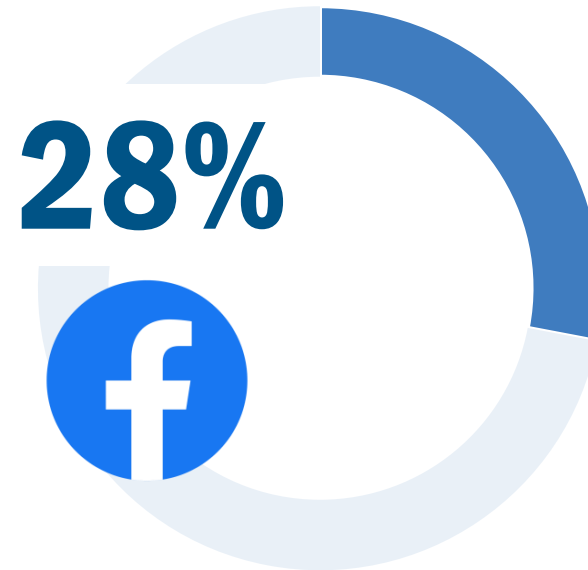
4%



FUN

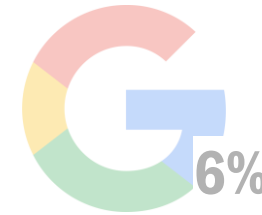
What Apps are Americans Using for Fun? - Unaided

Which 2 Apps do you turn for fun?
November 2020. USA (13+ Years)



Instagram

12%



Google

6%



Twitter

5%



Snapchat

5%



TikTok

5%



Solitaire

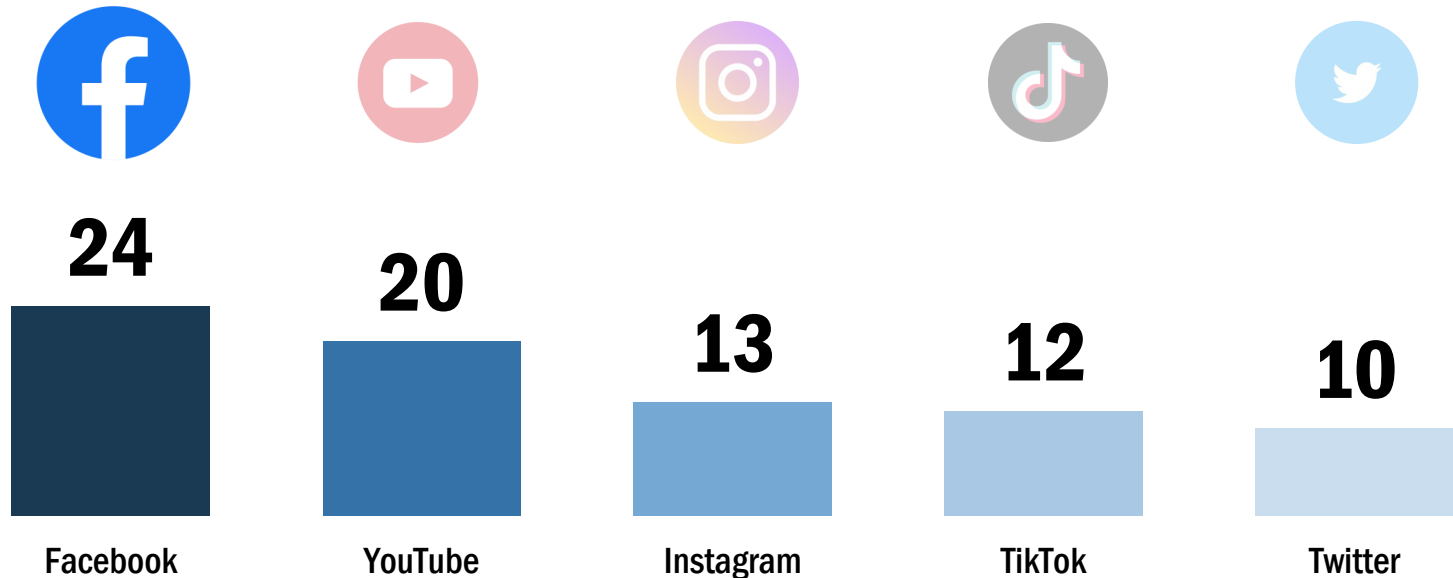
4%



LAUGHING

What Apps are Americans Using When They Want to Laugh ? - Unaided

Which 2 apps do you use most when you want to laugh? November 2020. USA (13+ Years)

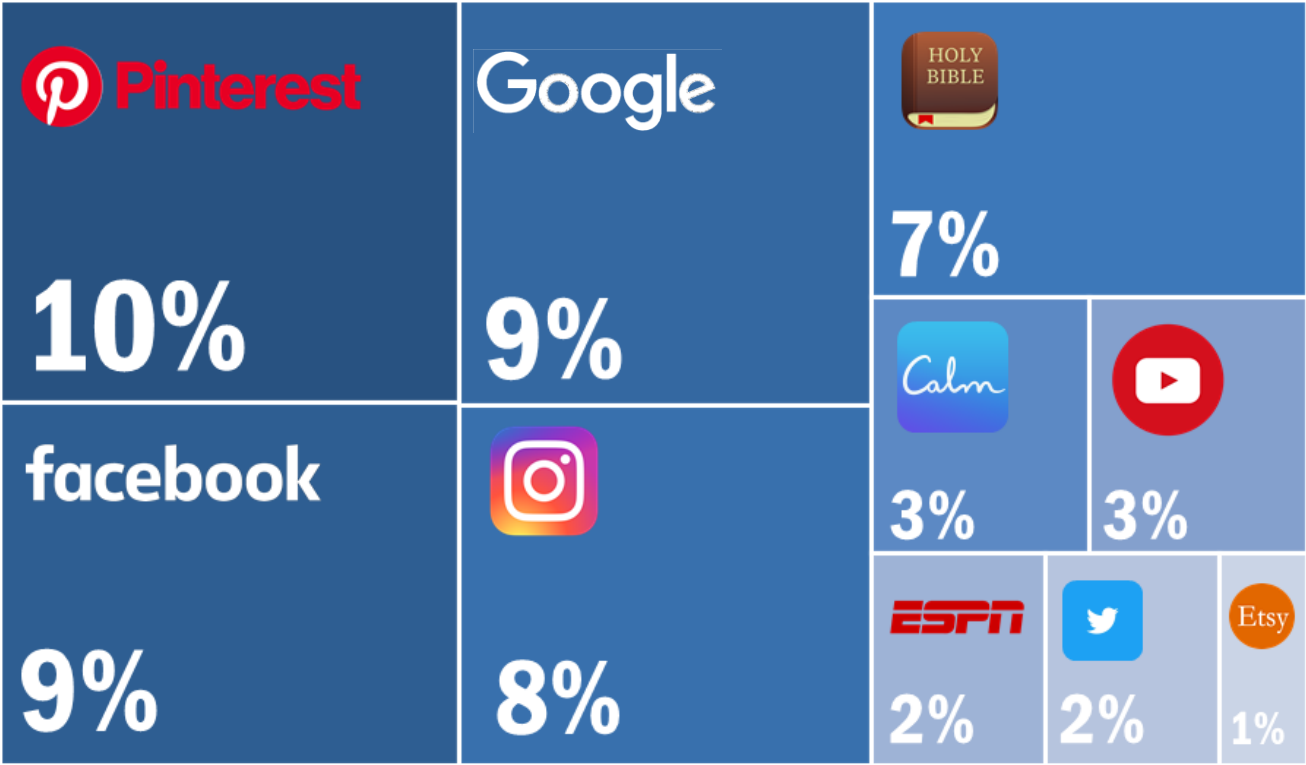




INSPIRATION

What Apps are Americans Using for Inspiration? - Unaided

Which 2 apps do you turn to for inspiration? November 2020. USA (13+ Years)

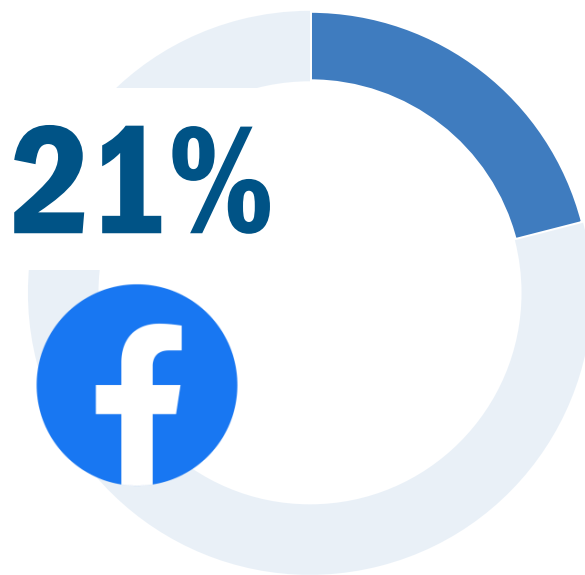




RELAXATION

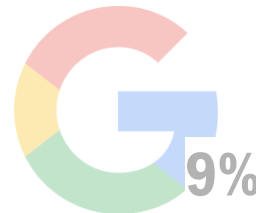
What Apps are Americans Using When They Want to Relax and Unwind - Unaided

Which 2 apps do you use most when you want to relax? November 2020. USA (13+ Years)



9%

Instagram



9%

Google



8%

YouTube



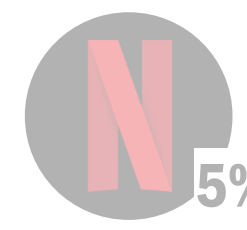
5%

Calm



5%

Spotify



5%

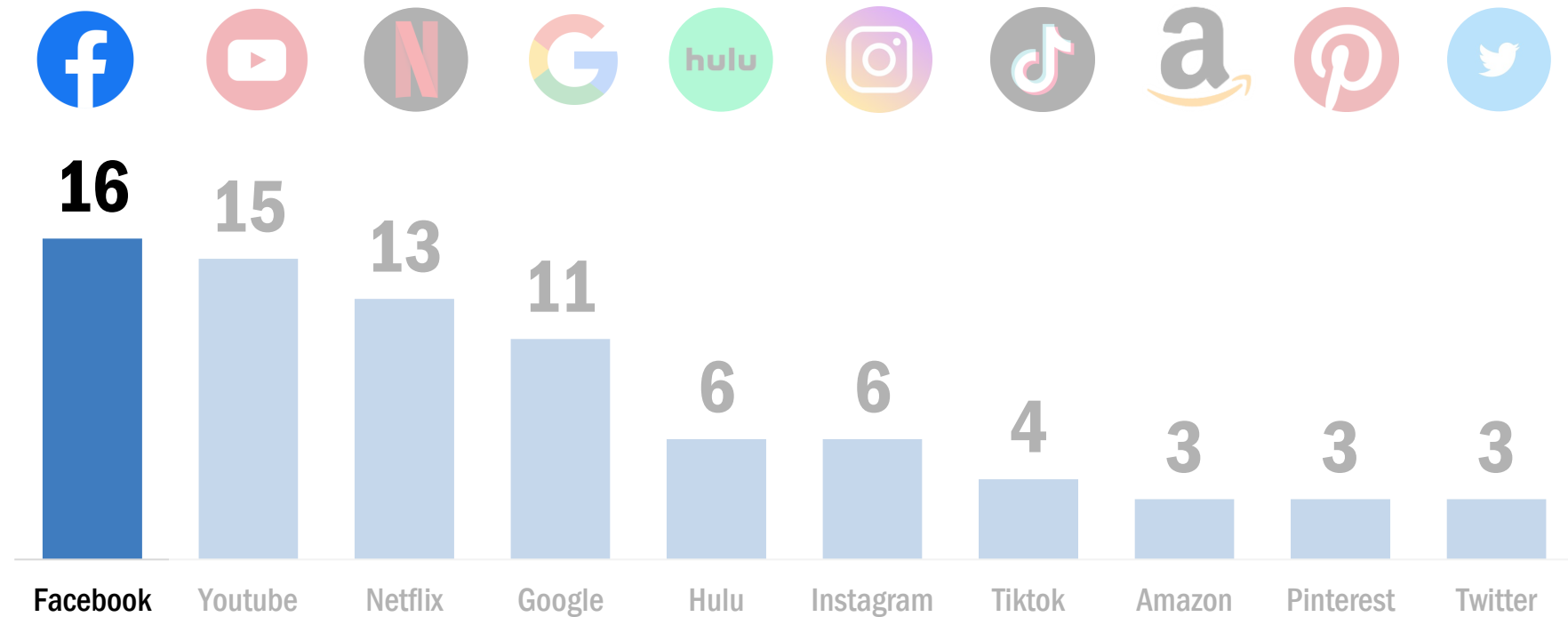
Netflix



ENTERTAINMENT

What Apps are Americans Using for Entertainment? - Unaided

Which 2 apps do you turn to for Entertainment? November 2020. USA (13+ Years)



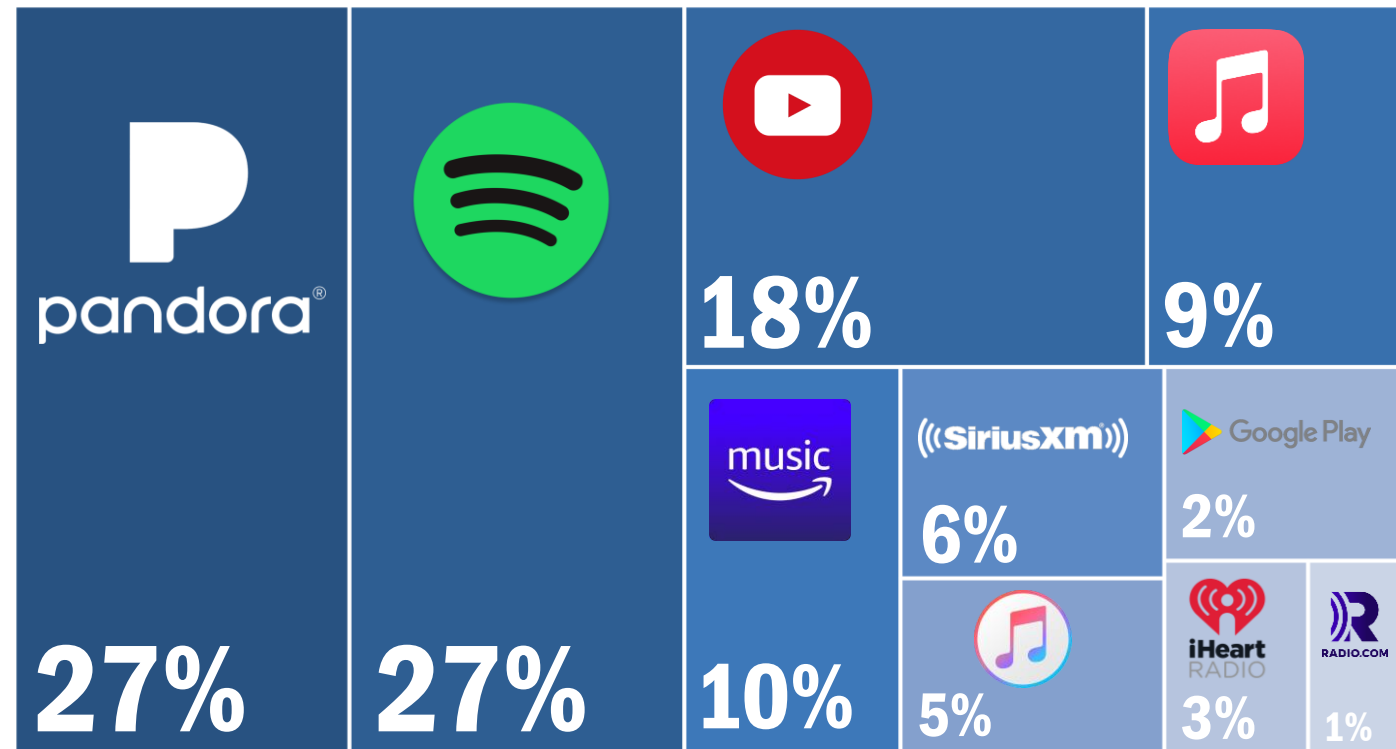


MUSIC

What Apps are Americans Using for Music? - Unaided

Which 2 apps do you turn to for *music?*

November 2020. USA (13+ Years)



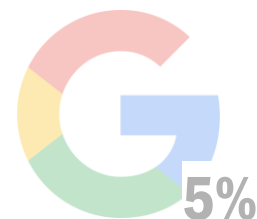
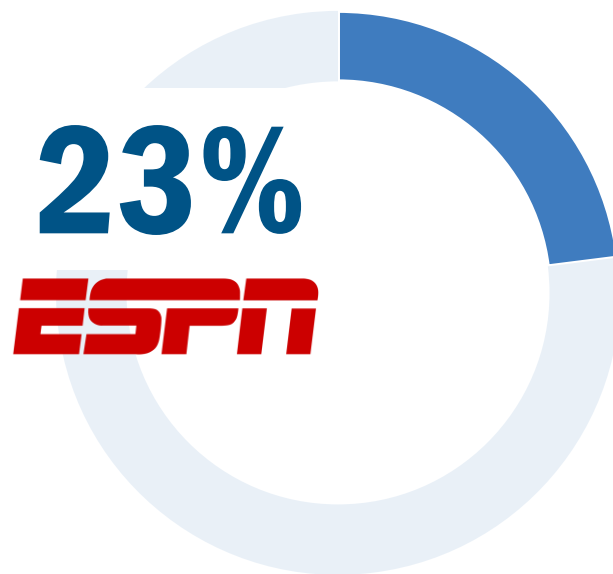


SPORTS

What Apps are Americans Using for Sports? - Unaided

Which 2 apps do you turn to for sports?

November 2020. USA (13+ Years)



5%

Google



5%

Fox Sports



3%

Yahoo



5%

CBS



2%

Facebook



2%

NFL

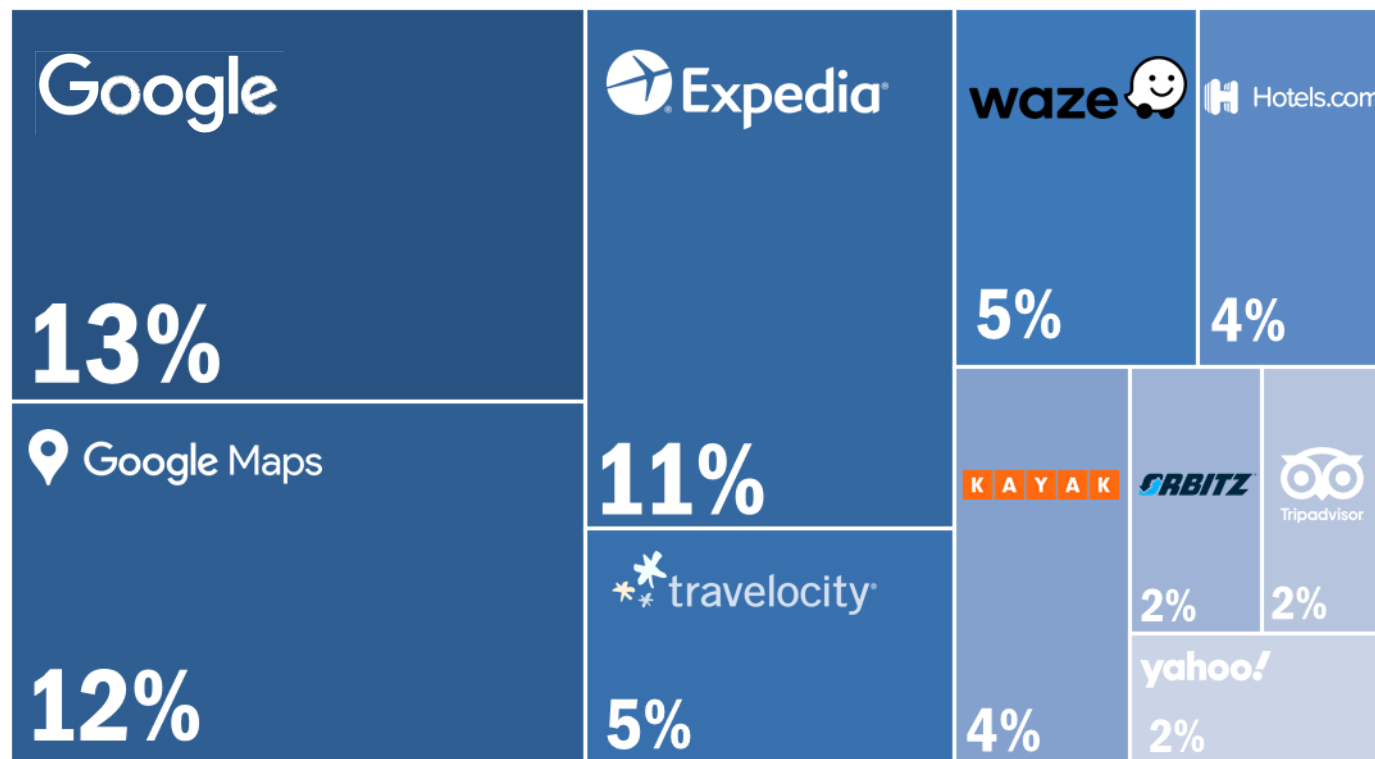


TRAVEL

What Apps are Americans Using for Travel? - Unaided

Which 2 apps do you turn to for Travel?

November 2020. USA (13+ Years)

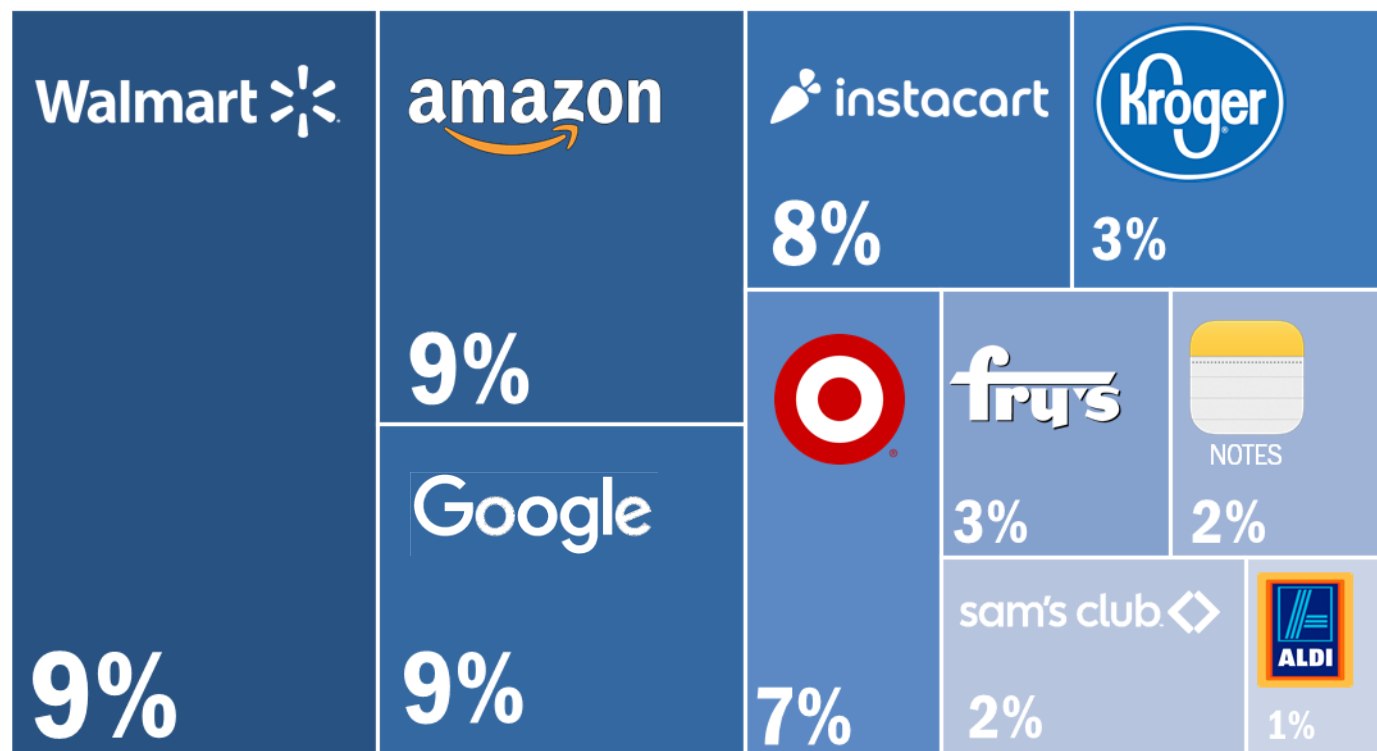




GROCERIES

What Apps are Americans Using Before Shopping for Groceries? - Unaided

Which 2 apps do you turn to for *before you go shopping for groceries?* November 2020. USA (13+ Years)





FOOD

What Apps are Americans Using for Food ? - Unaided

Which 2 apps do you use for food?
November 2020. USA (13+ Years)



15



Pinterest



15



Google



6



All Recipes



5



Facebook



4



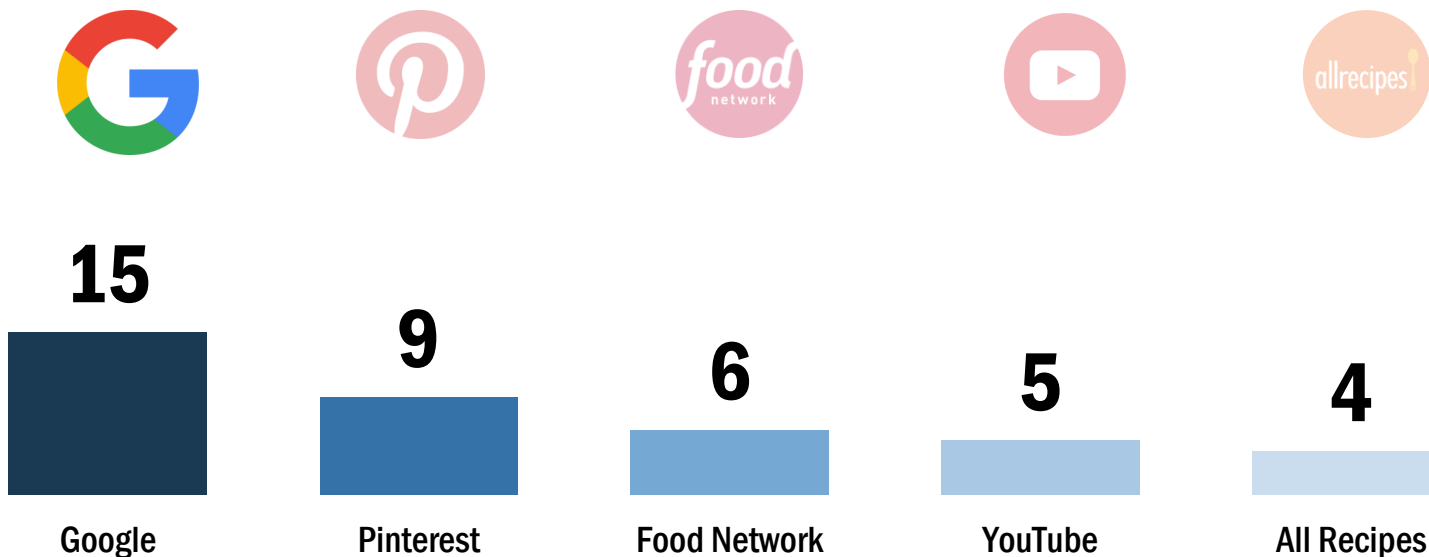
Instagram



COOKING

What Apps are Americans Using for Cooking Ideas? - Unaided

Which 2 apps do you use for Cooking Ideas? November 2020. USA (13+ Years)

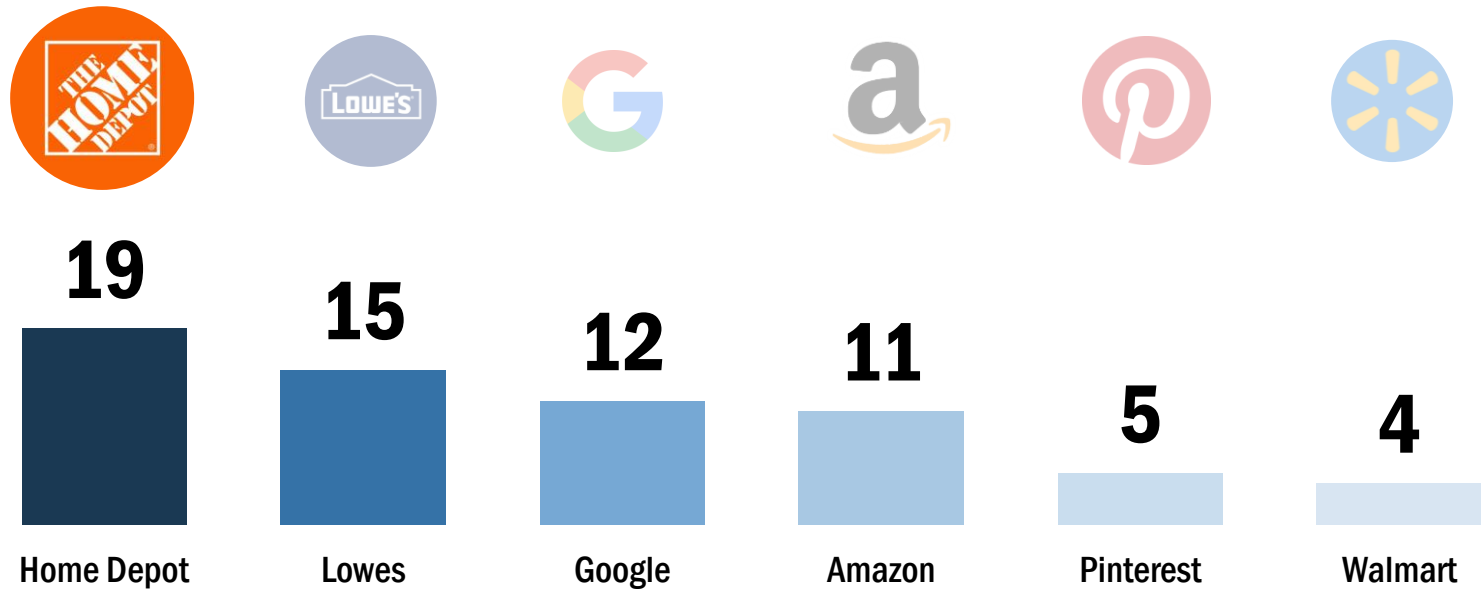




HOME IMPROVEMENT

What Apps are Americans Using for Home Improvement? - Unaided

Which 2 apps do you use for Home Improvement? November 2020. USA (13+ Years)





Last point of reference before purchasing –
where are consumers searching? - Unaided



SECTION 5

Short Term Momentum with Re-opening: Events, Travel, Dining, Online and Retail

Category Reports Inside



Start of
Re-opening



Re-opening
schools/work



Record cases
2ND Wave



Record cases Continue
Multiple Vaccines
People getting



Events

- Live Events
- Sports
- Community /Charity



Travel

- By Mode of Travel
- Destinations



Part 1 – Attending & Consuming Live Events



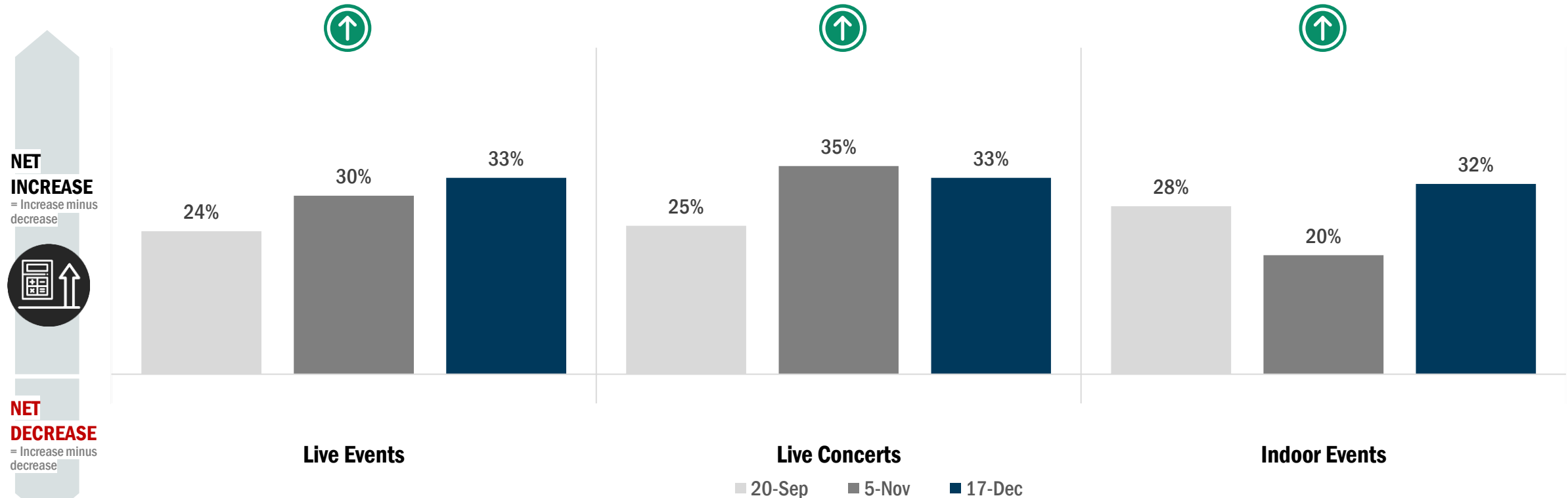
ATTENDING EVENTS - Future Intention Shows Growth

IMI 24™ : N=4,800 per country. We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

GLOBAL AS OF DEC 17TH



OVERALL RESPONSE: SIGNIFICANT PENT UP AND GROWING DEMAND FOR LIVE EVENTS AND EXPERIENCES



IMI 24™ : Wave 12 - December 2020 N=1,000 people per location : Completed trending work across Canada, USA, UK and Australia



INDICATES OPTIMISM, STABILITY, OR PESSIMISM COMPARED TO PREVIOUS WAVES.



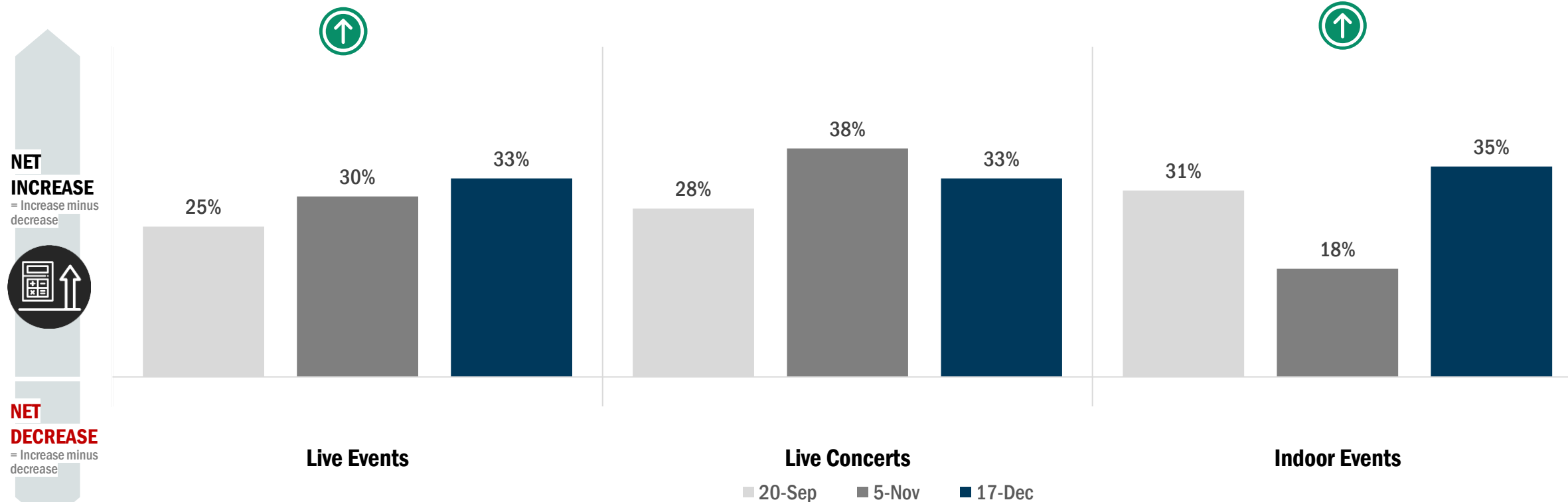
ATTENDING EVENTS - Future Intention Shows Growth

IMI 24™ : N=4,800 per country. We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

USA AS OF DEC 17TH



OVERALL RESPONSE: SIGNIFICANT PENT UP AND GROWING DEMAND FOR LIVE EVENTS AND EXPERIENCES



IMI 24™ : Wave 12 - December 2020 N=1,000 people per location : Completed trending work across Canada, USA, UK and Australia



INDICATES OPTIMISM, STABILITY, OR PESSIMISM COMPARED TO PREVIOUS WAVES.



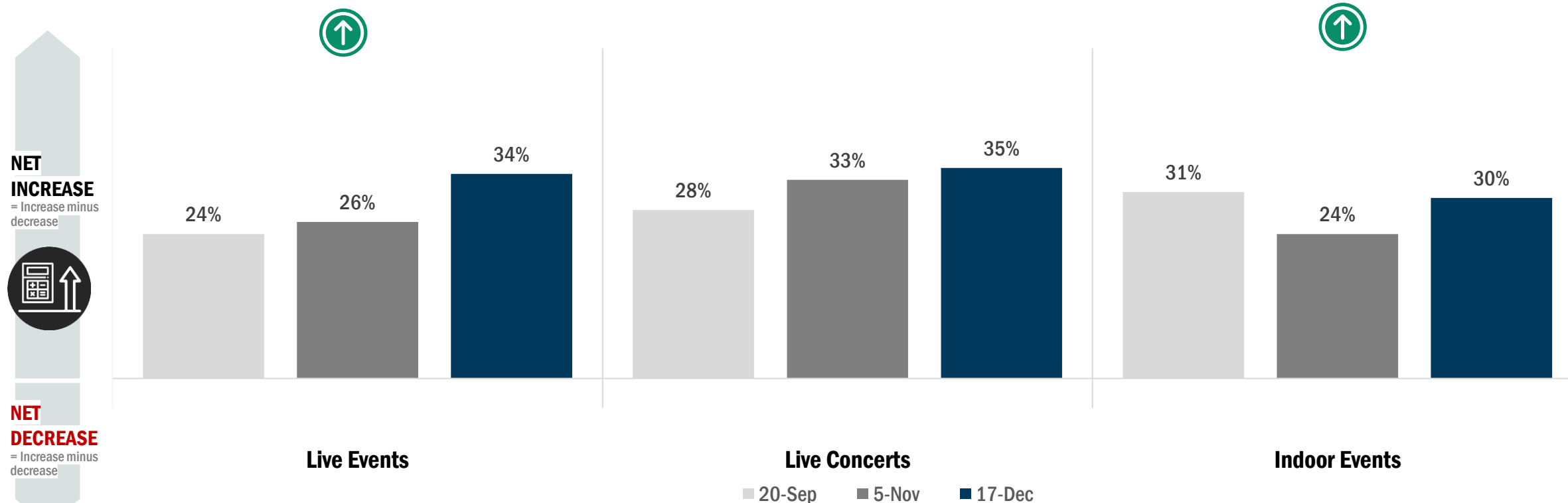
ATTENDING EVENTS - Future Intention Shows Growth

IMI 24™ : N=4,800 per country. We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

CANADA AS OF DEC 17TH



OVERALL RESPONSE: SIGNIFICANT PENT UP AND GROWING DEMAND FOR LIVE EVENTS AND EXPERIENCES



IMI 24™ : Wave 12 - December 2020 N=1,000 people per location : Completed trending work across Canada, USA, UK and Australia



INDICATES OPTIMISM, STABILITY, OR PESSIMISM COMPARED TO PREVIOUS WAVES.

Osheaga Returns 2021

GlobalPulse, 13+, N=400 December 2020, USA



TOP 25%
OVERALL



GEN POP



BUY



SHARE



BETTER

TESTED:



WHO: Osheaga

WHAT: Montreal Music and Art Festival Osheaga is returning with a live event in 2021. The Foo Fighters, Cardi B and Post Malone will headline the festival.

WHEN: December 2020

WHERE: Canada

WHY: Festival, Experience, Music

COMPARED WITH
IMI'S DATABASE



TOP 10%



TOP 25%



TOP 50%



BOTTOM 50%



Part 2 - Travel



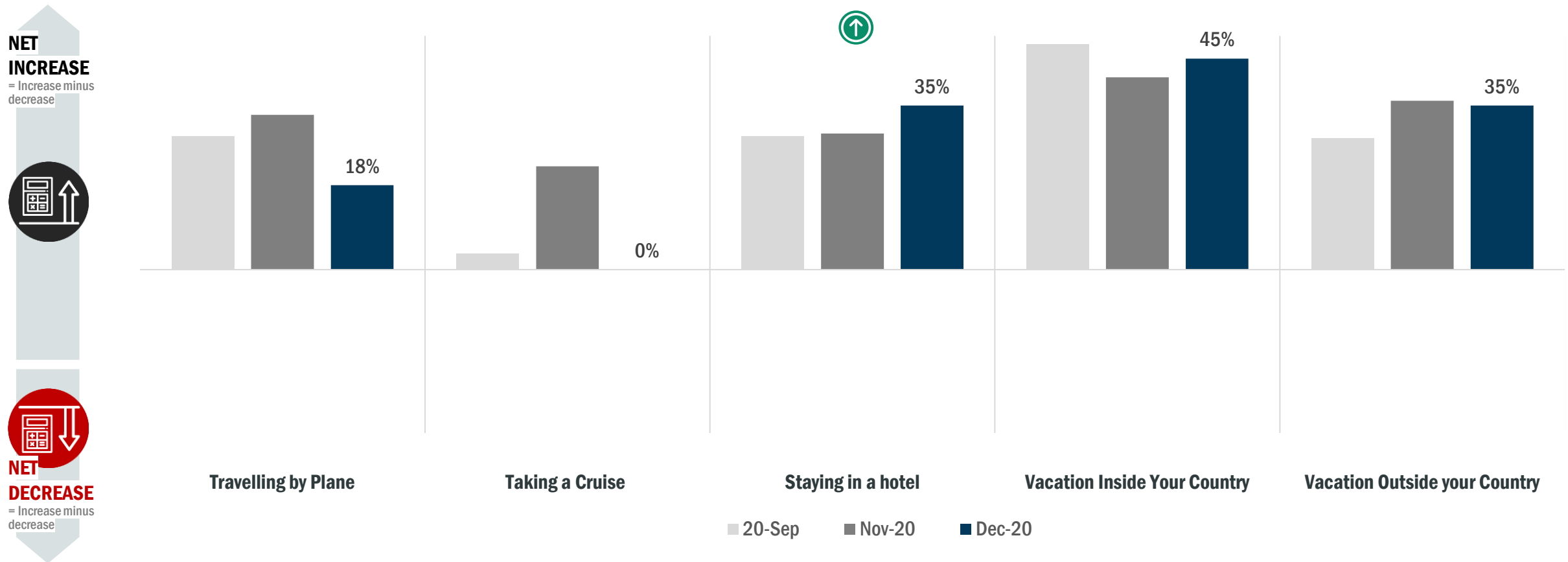
TRAVELING - Future Intention Shows Growth

IMI 24™ : N=1,800 We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

GLOBAL AS OF DEC 17TH



OVERALL RESPONSE: TRAVEL INTENTIONS SHOWS DEMAND FOR A STRONG RETURN WHEN POSSIBLE



IMI 24™ : Wave 12 -December 2020 N=1,000 people per location : Completed trending work across Canada, USA, UK and Australia



INDICATES OPTIMISM, STABILITY, OR PESSIMISM COMPARED TO PREVIOUS WAVES.

Hotels.com Credit Cards

GlobalPulse, 13+ N=400 December 2020, North America



TOP 25%
OVERALL



GEN POP



BUY



SHARE



BETTER

TESTED:



WHO: Hotels.com

WHAT: Hotels.com released its first ever credit card and will be giving new cardholders a Reward Night worth \$125 when you spend \$1,000 on card purchases in the first 3 months of opening an account.

WHEN: December 2020

WHERE: North America

WHY: Travel, Finance

COMPARED WITH
IMI'S DATABASE



TOP 10%



TOP 25%



TOP 50%



BOTTOM 50%



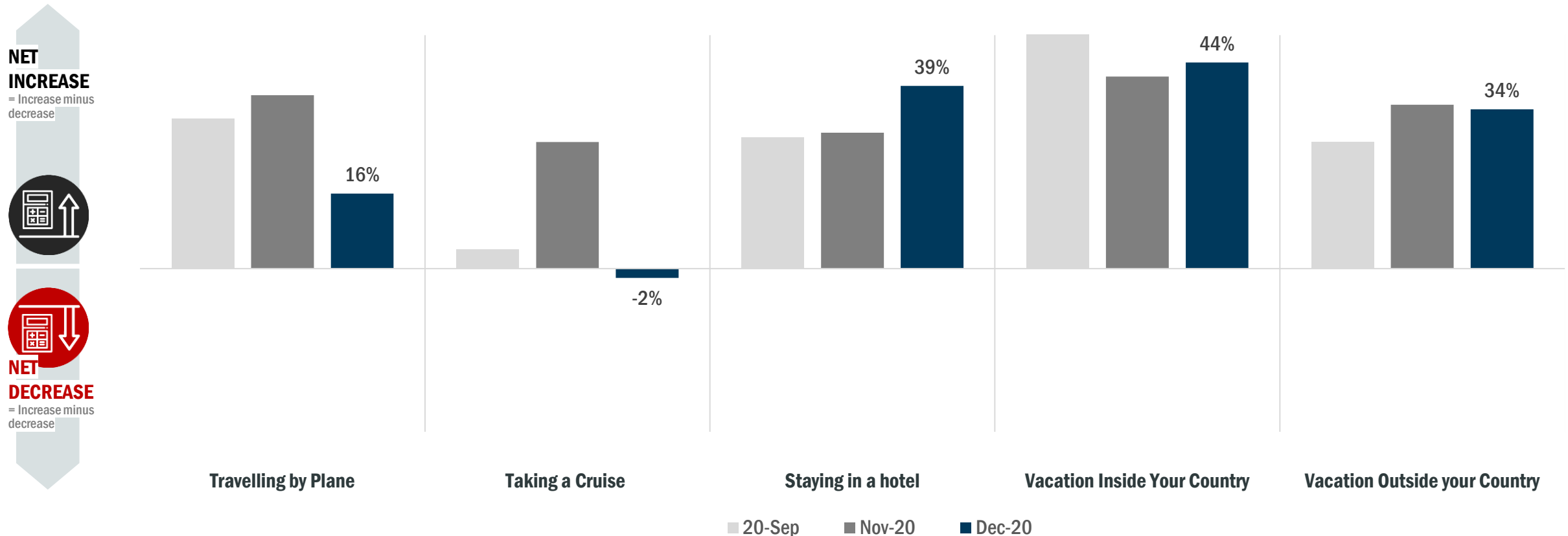
TRAVELING - Future Intention Shows Growth

IMI 24™ : N=1,800 We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

USA AS OF DEC 17TH



OVERALL RESPONSE: TRAVEL INTENTIONS SHOWS DEMAND FOR A STRONG RETURN WHEN POSSIBLE



IMI 24™ : Wave 12 -December 2020 N=1,000 people per location : Completed trending work across Canada, USA, UK and Australia



INDICATES OPTIMISM, STABILITY, OR PESSIMISM COMPARED TO PREVIOUS WAVES.

Mandatory Vaccine on Qantas Flights

GlobalPulse, 13+, N=700 November 2020, USA



TOP 10%
OVERALL



GEN POP



BUY



SHARE



BETTER

TESTED:



Top 50%

WHO: Qantas

WHAT: Qantas Airlines has made it mandatory for international travelers to have the vaccine before taking international flights.

WHEN: November 2020

WHERE: Australia

WHY: Travel, COVID- 19

COMPARED WITH
IMI'S DATABASE



TOP 10%



TOP 25%



TOP 50%



BOTTOM 50%



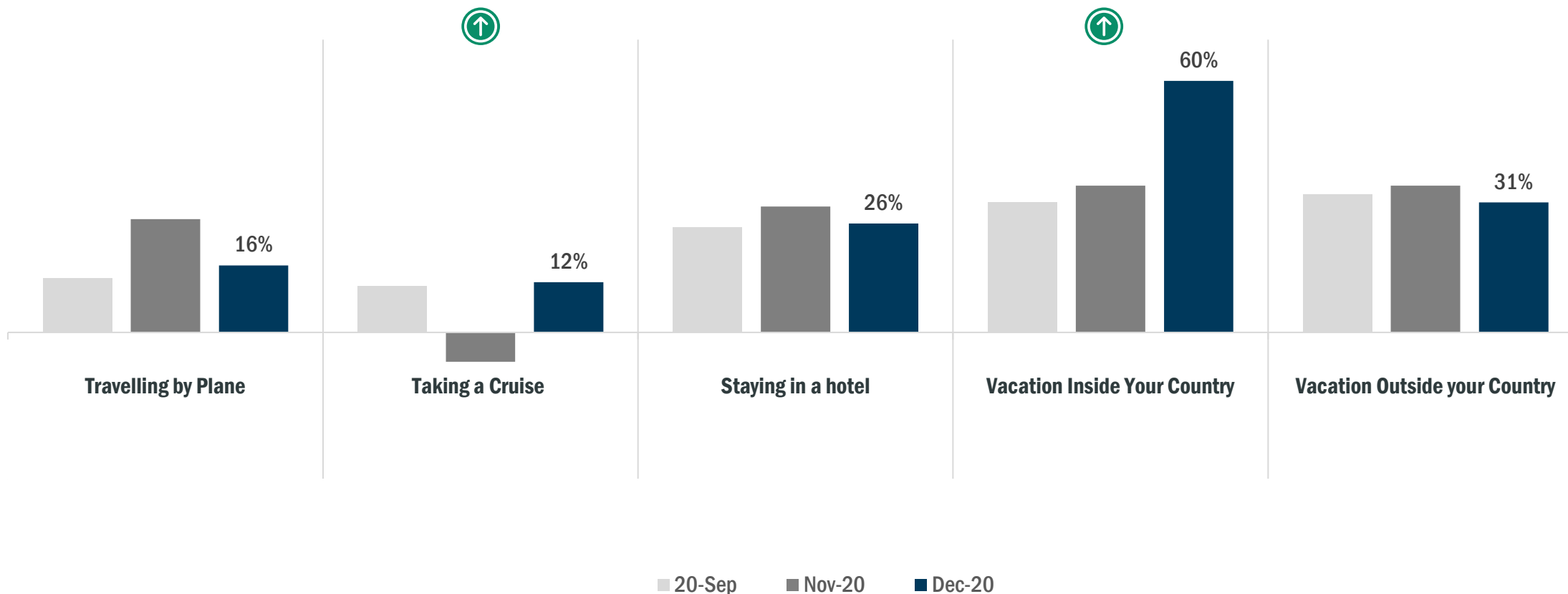
TRAVELING - Future Intention Shows Growth

IMI 24™ : N=1,800 We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

CANADA AS OF DEC 17TH



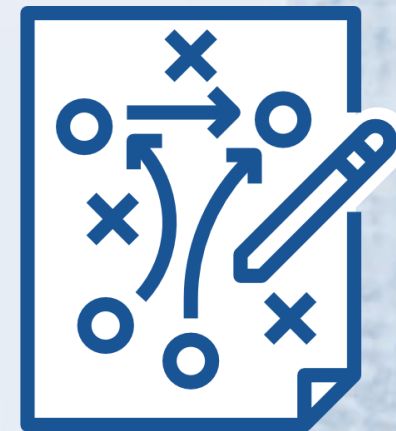
OVERALL RESPONSE: TRAVEL INTENTIONS SHOWS DEMAND FOR A STRONG RETURN WHEN POSSIBLE



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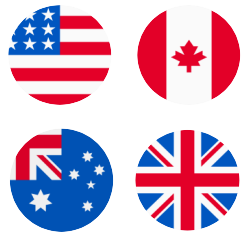
SECTION 6

Playbook V7 Excerpt Summary

200+ Brands



1,500+
Pieces of Content
From around the globe



+1MM

Ages 13-34 / 35+

Action Standards



Walmart Parking Lot Transformations

GlobalPulse, 13+, N=400 December 2020, USA



**TOP 10%
OVERALL**



GEN POP



BUY



SHARE



BETTER

TESTED:



WHO: Walmart

WHAT: Walmart is transforming 140+ parking lots contact free farmer market type events supporting local vendors.

WHEN: December 2020

WHERE: USA

WHY: COVID-19, Grocery

COMPARED WITH
IMI'S DATABASE



TOP 10%



TOP 25%



TOP 50%



BOTTOM 50%

DoorDash Prepared Meals

GlobalPulse, 13+, N=400 December 2020, USA



Expanding Project DASH to serve vulnerable communities in the face of COVID-19

**TOP 10%
OVERALL**



TESTED:



WHO: DoorDash + United Way

WHAT: As part of a partnership with United Way, DoorDash is sending groceries and prepared meals to households in need. Since April, over 1 million meals have been delivered to those in need.

WHEN: December 2020

WHERE: United States, Canada

WHY: Travel, COVID- 19

COMPARED WITH
IMI'S DATABASE



Burger King Gives Independent Restaurants the Opportunity to Advertise for Free

GlobalPulse, December 2020, North America

THERE'S MORE TO LIFE THAN THE WHOPPER.

There's Roti King, Sultan's palace, Tayyab's, Eco, Dumplings Legend, Ochi's, Damak, Platzki... In short, there are many great dishes from thousands of restaurants that deserve to be as famous as the Whopper®. As we head into tier three across more parts of the country, it's clear independent restaurants need all our support.

So, we've decided to give you a break from our burger pics and make our Instagram available to all these restaurants.


Until they can reopen, they can advertise on our Instagram for free.


Friends from the hospitality industry: if you want us to share your signature dish on Instagram, post it with [#WhopperAndFriends](#)





GO TO INSTAGRAM @BURGERKINGUK

IN-FIELD NOW




 GEN POP

 BUY

 SHARE

 BETTER

TESTING IN:



WHO:

Burger King

WHAT:

Burger King is giving independent restaurants the opportunity to advertise on their Instagram account free of charge until they can open again because restaurant dishes deserve to be as famous as the Whopper.

WHEN:

December 2020


WHERE:


United Kingdom


WHY:


COVID-19, Hospitality

COMPARED WITH IMI'S DATABASE

 TOP 10%

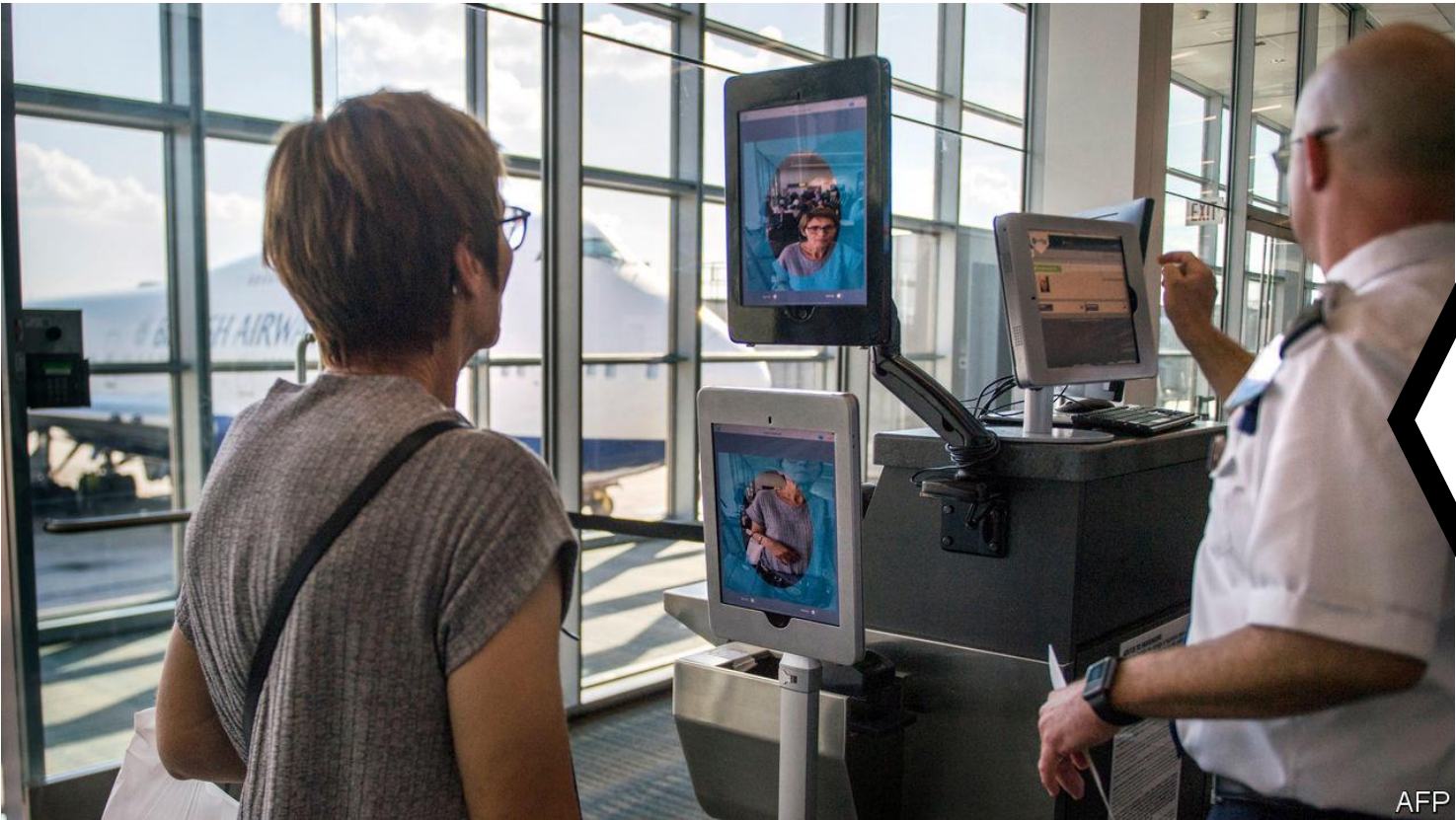
 TOP 25%

 TOP 50%

 BOTTOM 50%

Biometric Airport Screenings

GlobalPulse, 13+, N=400 December 2020, USA



AFP

TOP 10%
OVERALL



GEN POP



BUY



SHARE



BETTER

TESTED:



WHO: AFP

WHAT: Airlines are utilizing biometric check-ins to reduce human contact in airports. Through this system, customers can check their bags and check-in to their flights in a contactless manner.

WHEN: December 2020

WHERE: United States, Canada

WHY: Travel, COVID- 19

COMPARED WITH
IMI'S DATABASE



TOP 10%



TOP 25%



TOP 50%



BOTTOM 50%

Bud Light Seltzer Home Sampling

GlobalPulse, 13+ N=400 December 2020, North America



**TOP 50%
OVERALL**



GEN POP



BUY



SHARE



BETTER

TESTED:



WHO: Bud Light

WHAT: Anheuser-Busch is giving 1,000 fans \$20 gift cards to buy a pack of Bud Light Seltzer at their local retailer and post a review on social media. Simply apply online to be entered.

WHEN: December 2020

WHERE: North America

WHY: Alcohol, Experience, Product

COMPARED WITH
IMI'S DATABASE



TOP 10%



TOP 25%



TOP 50%



BOTTOM 50%



Responses to Questions asked by participants prior to the Wave 12 Webinar

Audience Questions for Wave 12

Q.1 Have online brands, products and services replaced everything physical forever?

Q.2 Vaccines are here– 1. Will People take 2. What % want before they attend an event 3. Reaction if you have to have proof of a vaccine to enter an event? In other words, no vaccine no entry?

Q.3 Specifics on changing habits and barriers within the on-premise and bev-alc retail space would be very useful!

Q.4 Do consumers' attitudes suggest the promise of the Vaccine will get us to recovery by Spring 2021?

Q.5 Importance of Social Unrest, Diversity and Inequality Today

Q.6 Great work – can you summarize 3 things we can use for 2021?



Audience Questions for Wave 12

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Unaided – All Time Favorite Brand, Product, or Service

GenPulse™ Dec 2020, N=4057, USA



Unaided – All Time Favorite Brand, Product, or Service

GenPulse™ Dec 2020, N=4901, Canada



Audience Questions for Wave 12

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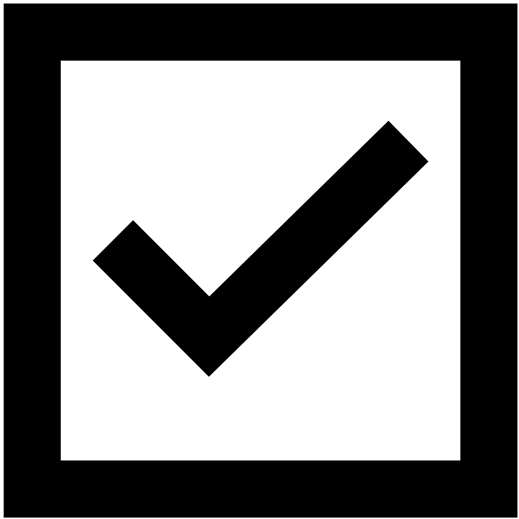
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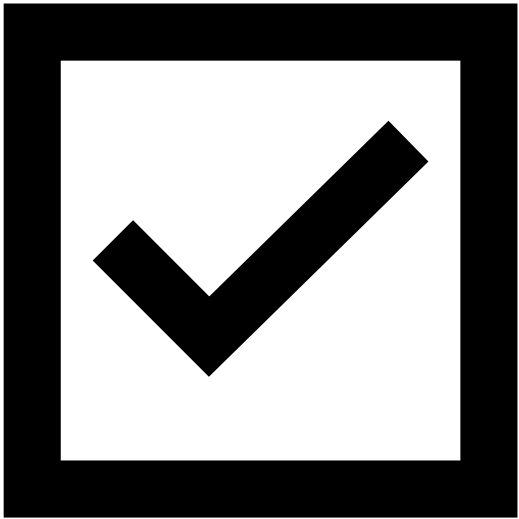
Q.2.1 Vaccines are here – will people take the vaccine



YES, People show a desire to get the vaccine with between 60% and 75% anxious to get the vaccine.



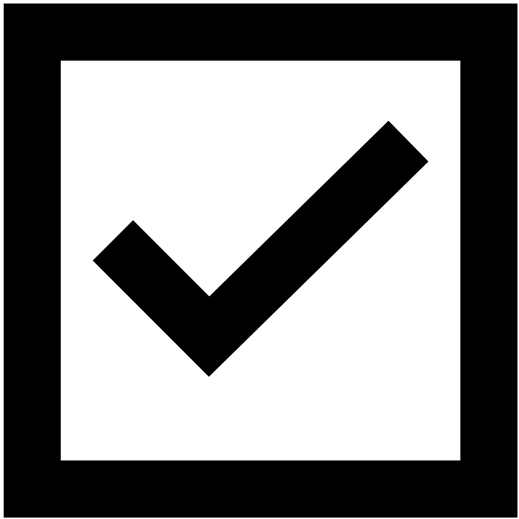
Q.2.2 Are Vaccines required prior to people attending Live Events



About 1/3 will attend NOW (younger skew). Among frequent event goers over 55% want a Vaccine prior to their next Live Event.



Q.2.3 Reaction to requiring proof of a vaccine to enter an event? **No vaccine No entry?**



Strong positive reaction to mandatory proof of vaccine prior to Flying / Events - from people across Canada/UK/Aus - US consumers not so much.



Audience Questions for Wave 12

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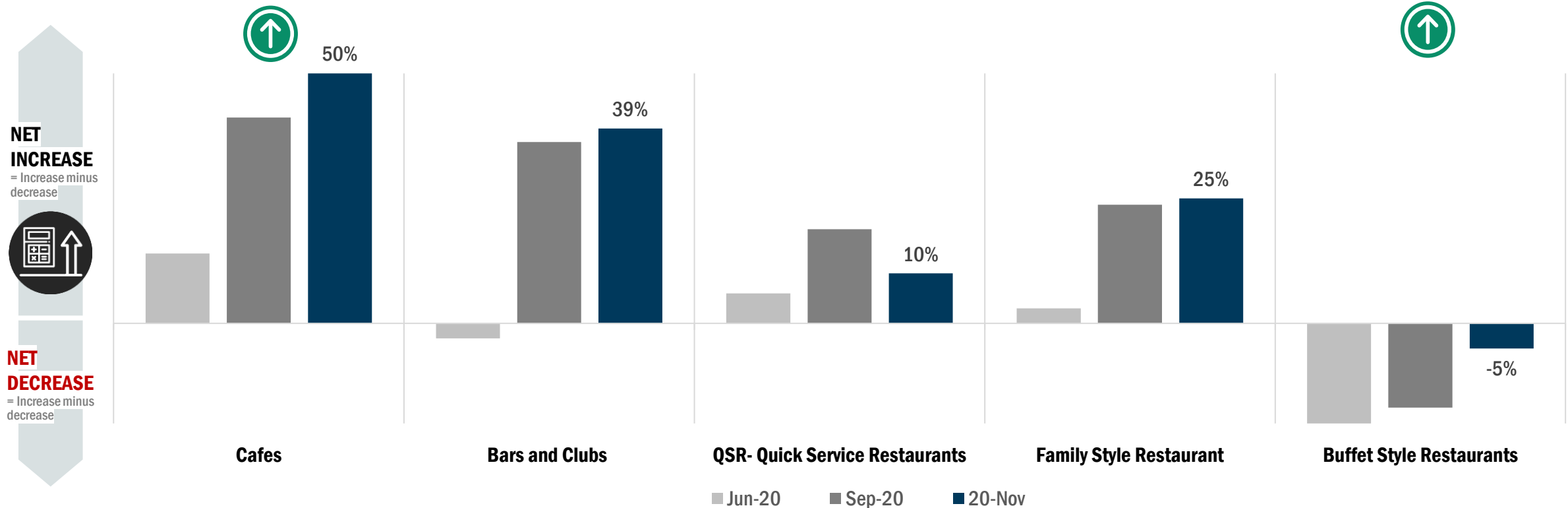
Bar and Restaurant Future Intention is Improving

IMI 24™ : N=1,000 We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

GLOBAL AS OF NOV 5TH



OVERALL RESPONSE: DEMAND IS IMPROVING WITH TIME – ONLY ‘BUFFETS’ LAG – AS TO BE EXPECTED



IMI 24™ : Wave 11 – November 2020 N=1,000 people per location : Completed trending work across Canada, USA, UK and Australia



INDICATES OPTIMISM, STABILITY, OR PESSIMISM COMPARED TO PREVIOUS WAVES.

Audience Questions for Wave 12

Q.1 Have online brands, products and services replaced everything physical forever?

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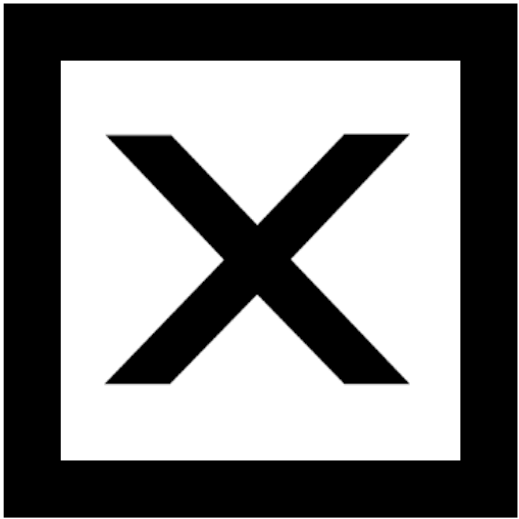
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Q.6 Great work – can you summarize 3 things we can use for 2021?

Q.4 Do consumers' attitudes suggest the promise of the Vaccine will get us to recovery by Spring 2021?



NO, Across the Globe consumers think normal will return in the fall – but their planning may start summer 2021?



Audience Questions for Wave 12

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Q.5 Importance of Social Unrest, Diversity and Inequality Today

Q.6 Great work – can you summarize 3 things we can use for 2021?



Pick the biggest issue today : Health, Financial or Social Unrest

BIGGEST ISSUE TODAY – Dec 17th, 2020

What is the biggest issue facing you and your community today? Aided - one choice	USA 	CANADA 	UK 	AUSTRALIA 
Health Issues	33%	41%	38%	29%
Financial Issues	19%	18%	23%	15%
Social Unrest, Diversity and Inequality	19%	15%	12%	26%
No Issues	29%	27%	27%	34%





IMI24™ : N=2,600 people across the countries 13+ Years of age – Dec 12th to 15th 2020



Social unrest, diversity and inequality has declined significantly during the 2nd Wave

BIGGEST ISSUE TODAY – Dec 17th, 2020

SOCIAL UNREST, DIVERSITY AND INEQUALITY





What is the biggest issue facing you and your community today? Aided – Social Unrest, Diversity, Inequality or Health Issues or Financial Issues or No Current Issues	USA 	CANADA 	UK 	AUSTRALIA 
June 9, 2020	52%	34%	22%	31%
July 3, 2020	35%	25%	27%	29%
September 23, 2020	33%	24%	22%	22%
December 17, 2020	19%	15%	12%	26%
Change Since JUNE 9	-33%	-19%	-5%	-5%

IMI24™ : N=2,600 people per week across the countries 13+ Years of age



There remains a variety of issues facing people across the globe.

BIGGEST ISSUE TODAY – Dec 17th, 2020

What is the biggest issue facing you and your community today? Aided - one choice	USA 	CANADA 	UK 	AUSTRALIA 
Health Issues	37%	38%	39%	26%
Financial Issues	21%	18%	19%	20%
Social Unrest, Diversity and Inequality	21%	17%	15%	19%
The Environment	10%	16%	22%	32%
Food Insecurity	3%	9%	6%	2%
No Issues	28%	27%	28%	34%

IMI24™ : N=2,600 people across the countries 13+ Years of age – Dec 12th to 15th 2020



Audience Questions for Wave 12

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Q.5 Importance of Social Unrest, Diversity and Inequality Today

 **Q.6 Great work – can you summarize 3 things we can use for 2021?**



Summary of 2020– Be afraid NOT to engage

1. Engage people with what they miss, need and dream about.
2. The virtual world continues for the next 6+ months – are you ready for the LIVE TSUNAMI in summer/fall 2021 through 2022?
3. Future success is based on being 1) **Relevant** 2) **Compelling** 3) **Better** – people have choice.

No more Excuses - We Mostly Know What is Ahead



2021 Recovery Series

Live Release Feb 4th @ 1pm

1. **THANK YOU FOR JOINING US THROUGH 2020**
2. **We are open for business and would love to chat**
3. **If you would like this presented to your team – [contact us](#)**



HAPPY
Holidays