NORTH AMERICA EDITION

IMI

Wave 5: The Start of a Global Recovery

Trending, what people are missing, 40+ categories & more.

In-field: April 8th to April 22nd, 2020 | Released: April 23rd, 2020

Background: COVID-19 Study Overview Wave 5

Faced with continued uncertainty around the globe, in the past 10 days IMI's NextWave™ has completed over 54,000 interviews with people 13+ years of age from across the world to better understand consumer attitudes and behaviors.

Wave 4: April 13th, 2020

Wave 5: April 23rd, 2020

Wave 6: Early May 2020

We encourage you to share this information with anyone who it can help make decisions and to reach out to our team if you have suggestions or topic requests for the next update. If you're looking for any previous Waves, everything can be found on our **Global Content Portal, here.**

If you would like more information, please feel free to contact Don Mayo, Global Managing Partner, IMI International dmayo@consultimi.com or Sarah Stovold, Managing Director, IMI NextWave™ sstovold@consultimi.com.

APRIL 2020

SUN	MON	TUES	WED	THURS	FRI	SAT
5	6	7	8	9	10	11
12	13 WAVE 4 RELEASED	14	15	16	17	18
19	20	21	22	23 WAVE 5 RELEASED	24	25
26	27	28	29	30		

Key Dates Reference

January 20-25	First American and Canadian cases
March 11	US travel ban announced; WHO declares pandemic; major sports and events begin suspensions and cancellations
March 12-13	Trump declares a national emergency : School closures, large gathering bans Australia unveils $17.6bn stimulus package
March 20	Reported cases of COVID-19 pass 200,000
March 24	G-20 summit rallies against coronavirus
March 25	UN launches a $2bn global humanitarian response plan to fund the fight against COVID-19 in the world's poorest countries.
April 2	Number of confirmed deaths from the coronavirus surpassed 50,000 with over 1 million confirmed cases globally.
April 8	Number of confirmed cases rises to over 1.5 million globally.
April 21	Number of confirmed cases rises to over 2.5 million globally.
April 23	Global State of Emergency Continues

Wave 5 – April 23rd, 2020 Content Sections:

SECTION 1

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

SECTION 2

Greatest Fear Next 3 Months + Spotlight on Youth Perspective

Health, Financial
or No Current Fears

SECTION 3

Preventative Measures People Take

From hand washing to social isolation, comparing March 27th to April 20th.

SECTION 4

What People Miss

15,000 Interviews
115 Activities Revealed

SECTION 5

Are consumers tired of Covid-19 information or do they want more?

SPECIAL REPORT

Global + Regional Category Spotlights: Future intention to Engage Events and Purchase Travel, Dining, Online and Retail

COMING IN WAVE 6

Mitigating consumer inhibition when the world re-opens

IMI's NextWave™ is currently evaluating many of the actions that venues, brands, products and services can take to overcome the inevitable barriers to get people back to their prior ways of life. We will also be keeping track of data that suggests what a "new normal" might look like going forward.

To do this, we will be providing global and regional consumer reaction to actions that can be communicated and taken to reduce apprehension and accelerate the adoption of life post COVID-19.

This study will cover shopping, dining, attending concerts and events, going to cafes and many other activities.

These results will be shared in our upcoming Wave 6 Report, due to be released within the next 10 days.

SECTION 1

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

WAVE 5 RESULTS

Peoples' perceptions about the expected end date are lengthening but personal health concerns are improving!

Over the past month, IMI's NextWave™ has consistently tracked a) expected end date b) personal health concern and c) financial health concern across 31 countries. Today's reality shows an expected end date of October 2020, which is two months later than it was in early March. Despite this shift in the expected end date, we've seen positive signs on the level of both personal and financial health concern.

For the first time in our COVID-19 tracking, we've seen personal health concern improve in 21 of 31 countries measured. We've also seen improvements in the level of financial concern around the globe. There is a long journey ahead with 81% still concerned for their personal health and 65% for their financial health, but these positive shifts show that strides have been made since Wave 4.

TIMING

Fieldwork for Wave 5 was done between April 8th and 21st. Study released April 23rd, 2020.

Next Global update: within 10 Days

TODAY'S REALITY: April 22, 2020

Current Estimated End Date	**October 2020** (Extended 2 months since being asked in late March 2020)		
Personal Health	**81%** Improved 4% overall and improved across 21 countries CONCERNED		**49%** Improved 9% overall and improved across 22 countries SEVERELY CONCERNED
Financial Health	**65%** Improved 6% overall CONCERNED		**32%** Improved 11% overall SEVERELY CONCERNED

ESTIMATED END DATE: Global Timeframe

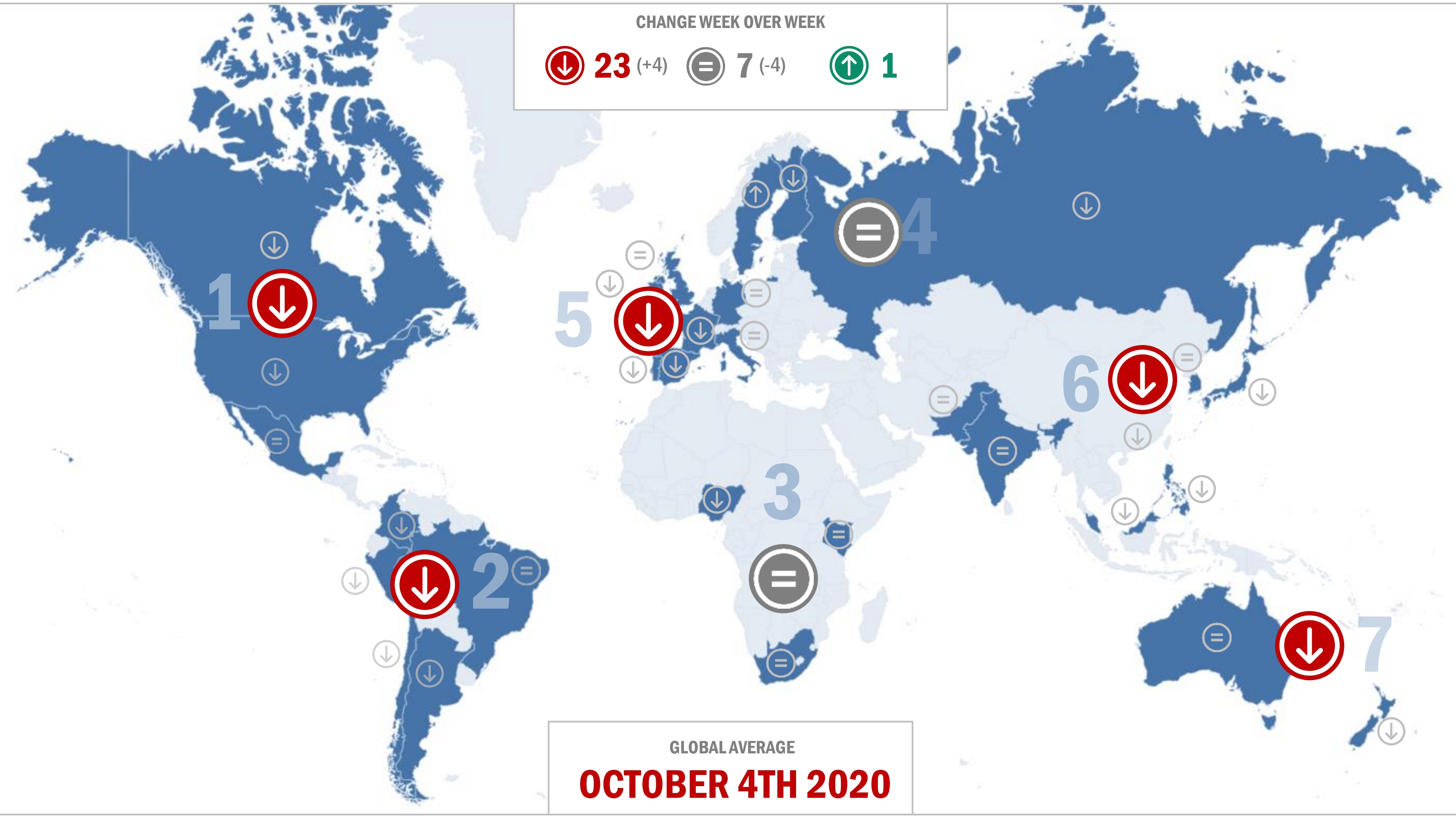
'Estimated Month COVID-19 will no longer be a concern'

April 20th Reality

Average global end date is estimated to be October 2020. Results range from July to November 2020. Momentum suggests people are leaning toward October/November 2020.

CHANGE WEEK OVER WEEK

23 (+4) 7 (-4) 1



GLOBAL AVERAGE

OCTOBER 4TH 2020

North America ZONE 1

USA	October
Canada	October
Mexico	August

South America ZONE 2

Argentina	August
Chile	October
Colombia	October
Peru	October
Brazil	August

Africa ZONE 3

Nigeria	July
South Africa	October
Kenya	October

Nordic + Russia ZONE 4

Sweden	September
Finland	September
Russia	July

Europe + UK ZONE 5

UK	November
Ireland	November
Italy	August
Germany	November
France	September
Spain	October
Portugal	September

Asia ZONE 6

Japan	October
South Korea	October
India	July
Malaysia	September
Philippines	August
Hong Kong	October
Pakistan	August
Singapore	November

Oceania ZONE 7

Australia	November
New Zealand	November

IMI24™ : N=18,000+ April 10-17, 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.

HEALTH: Global Personal Concern

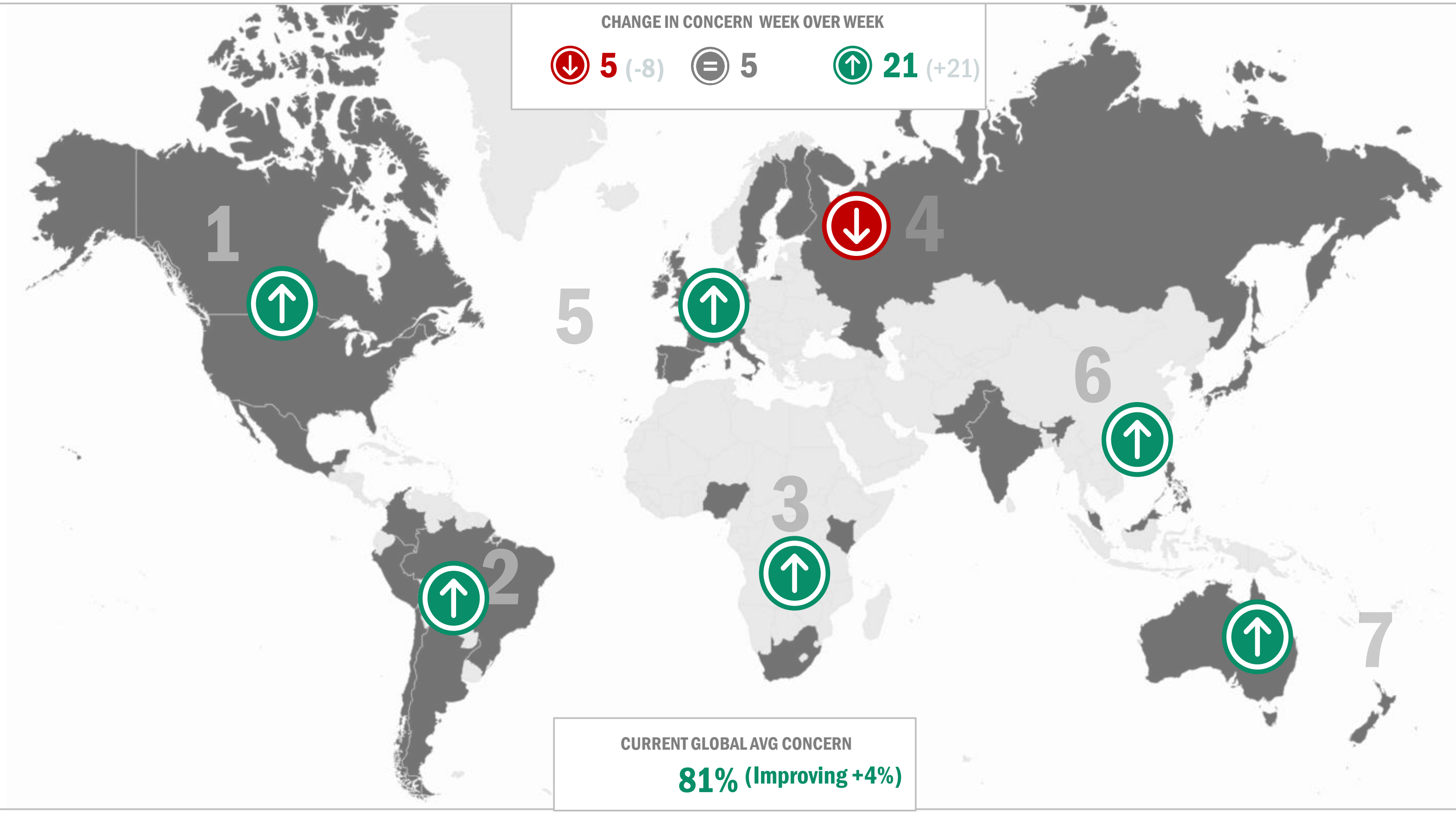
% of people concerned about their 'personal health'

April 20th Reality

There are still 8 out of 10 people concerned for their personal health globally, but we've seen an improvement across 21 of 31 countries that resulted in a 4% improvement overall. This is an encouraging first positive shift in personal health concern.

CHANGE IN CONCERN WEEK OVER WEEK

5 (-8) | 5 | 21 (+21)



North America ZONE 1

USA	82% (-3%)
Canada	77% (-6%)
Mexico	90% (+5%)

South America ZONE 2

Argentina	83% (-2%)
Chile	83% (-2%)
Colombia	92% (-3%)
Peru	85% (-3%)
Brazil	79% (-11%)

Africa ZONE 3

Nigeria	89% (-4%)
South Africa	88% (-3%)
Kenya	90% (-3%)

Nordic + Russia ZONE 4

Sweden	63% (flat)
Finland	66% (flat)
Russia	68% (+11%)

Europe + UK ZONE 5

UK	83% (-9%)
Ireland	89% (-1%)
Italy	80% (-8%)
Germany	79% (-7%)
France	87% (flat)
Spain	91% (+2%)
Portugal	87% (-3%)

Asia ZONE 6

Japan	98% (+3%)
South Korea	79% (-1%)
India	80% (-6%)
Malaysia	85% (-2%)
Philippines	90% (+1%)
Hong Kong	81% (-5%)
Pakistan	77% (-4%)
Singapore	85% (+2%)

Oceania ZONE 7

Australia	76% (-6%)
New Zealand	75% (-7%)

CURRENT GLOBAL AVG CONCERN

81% (Improving +4%)

IMI24™ : N=18,000+ April 13-20, 2020. We asked: How concerned are you about your personal health with Coronavirus?

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

HEALTH: Severe Personal Concern

% of people who feel 'The most ever, extremely or very concerned' about their personal health

April 20th, Reality

Half of the global population remains severely concerned for their health; however, this showcases a significant +9% shift since March. Improvements were recorded in 22 of 31 countries.

North America ZONE 1

USA	51% (-5%)	↑
Canada	46% (-11%)	↑
Mexico	58% (+16%)	↓

South America ZONE 2

Argentina	50% (-24%)	↑
Chile	58% (-5%)	↑
Colombia	59% (-4%)	↑
Peru	58% (+1%)	
Brazil	35% (-24%)	↑

Africa ZONE 3

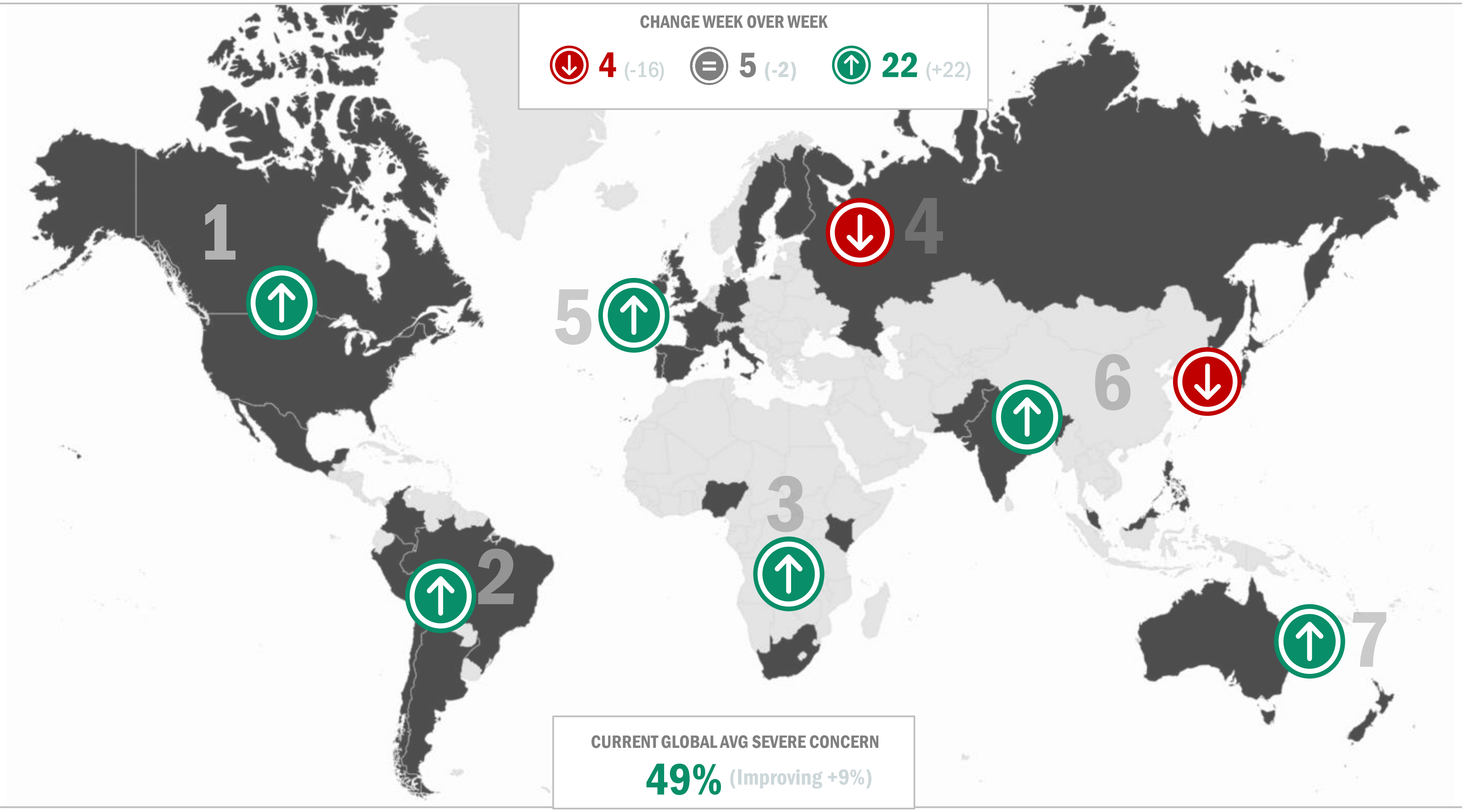
Nigeria	79% (-10%)	↑
South Africa	66% (-2%)	↑
Kenya	70% (-6%)	↑

Nordic + Russia ZONE 4

Sweden	19% (-4%)	↑
Finland	19% (+1%)	
Russia	36% (+7%)	↓

CHANGE WEEK OVER WEEK

↓ 4 (-16) = 5 (-2) ↑ 22 (+22)



CURRENT GLOBAL AVG SEVERE CONCERN

49% (Improving +9%)

Europe + UK ZONE 5

UK	62% (+3%)	↓
Ireland	52% (-7%)	↑
Italy	43% (-7%)	↑
Germany	35% (-17%)	↑
France	52% (-7%)	↑
Spain	58% (-9%)	↑
Portugal	48% (-19%)	↑

Asia ZONE 6

Japan	86% (+42%)	↓↓
South Korea	60% (-1%)	
India	68% (-5%)	↑
Malaysia	71% (+1%)	
Philippines	77% (-1%)	
Hong Kong	54% (-13%)	↑
Pakistan	66% (-7%)	↑
Singapore	62% (-10%)	↑

Oceania ZONE 7

Australia	38% (-8%)	↑
New Zealand	31% (-10%)	↑

IMI24™ : N=18,000+ April 13-20, 2020. We asked: How concerned are you about your personal health with Coronavirus?

↑ = ↓ INDICATES OPTIMISM, STABILITY, OR PESSIMISM COMPARED TO PREVIOUS WAVES.

Wave 5 Global Perspective: A later expected end date, balanced by optimism with the first signs of improvement in the level of personal and financial health concern.

Consumer reality

By looking at the response of Italians who have been fighting COVID-19 longest, paired with improvements on personal / financial concern provides hope that concern has potentially plateaued.

- Consumers ability to accurately forecast future behaviors will improve as levels of concern continue to improve.
- There will be pent up demand for LIVE sports events and a significant surge in online shopping when this is over.
- People are worn out and tired of hearing about COVID-19, an openness for other content.

April 20th Reality	USA	CANADA	UK	ITALY	AUSTRALIA
COMPARING MARCH 30 TO APRIL 20TH, 2020					
Expected End Date	Sept to **Oct**	Sept to **Oct**	Stayed **Nov**	July to **Aug**	Sept to **Nov**
Personal Health Concern	85% to **82%**	83% to **77%**	92% to **83%**	88% to **80%**	82% to **76%**
Financial Concern	79% to **69%**	76% to **65%**	74% to **70%**	66% to **68%**	76% to **54%**
CATEGORY HIGHLIGHT					
Intention to **attend a LIVE Sports event** when COVID is over (% Increase - % Decrease)	-5%	+19%	+10%	+33%	+19%
Intention **to buy 'Everything I need Online'** when COVID is over (% Increase - % Decrease)	+9%	+24%	+9%	+33%	+47%
'Tired of Hearing' Information and data about Covid-19 (vs. Wanting More)	56%	66%	60%	84%	85%

SECTION 1.1

Road to Recovery Time Horizon: Consumer Expectations

HEALTH CONCERNS			SOCIAL IMPACT			ECONOMY RE-STARTS				EVENTS			TRAVEL	
PERSONAL HEALTH	CATCHING COVID-19	FINANCIAL HEALTH	SOCIAL DISTANCING	SOCIAL DISTANCING LIFTED IN PUBLIC	VISIT FRIENDS AND FAMILY	OFFICES & BUSINESS RE-OPEN	GO TO A RESTAURANT FOR DINNER	SCHOOLS OPEN	BARS / CLUBS OPEN	SPORTS LEAGUES LIVE AGAIN	SPORT AT FULL CAPACITY	CONCERTS / FESTIVALS	INTERNATIONAL TRAVEL	NEXT VACATION
				OPEN										

CONSUMER EXPECTATION OF WHEN EACH TOPIC WILL NO LONGER BE AN ISSUE

Road to Recovery as of April 23rd, 2020

GLOBAL PERSPECTIVE

IMI 24™ interviewed 20k+ consumers to determine 'When (action) would occur?"

2020 MAY

2020 JUN

2020 JUL
- OFFICES & BUSINESSES RE-OPEN
- VISIT FRIENDS AND FAMILY
- STOP OF SOCIAL DISTANCING

2020 AUG
- SOCIAL DISTANCING LIFTED IN PUBLIC
- SCHOOLS RE-OPEN
- BARS / CLUBS OPEN
- GO TO A RESTAURANT FOR DINNER
- INTERNATIONAL TRAVEL RESUMES

2020 SEP
- CATCHING COVID-19 NOT A CONCERN
- PERSONAL HEALTH NOT A CONCERN
- SPORTS LEAGUES LIVE AGAIN
- SPORTS PLAY AT FULL CAPACITY
- CONCERTS / FESTIVALS RETURN

2020 OCT

GLOBAL AVERAGE END DATE

OCT 4

- FINANCIAL HEALTH NOT A CONCERN
- NEXT VACATION WITHOUT RESTRICTION

2020 NOV

2020 DEC

2021 JAN

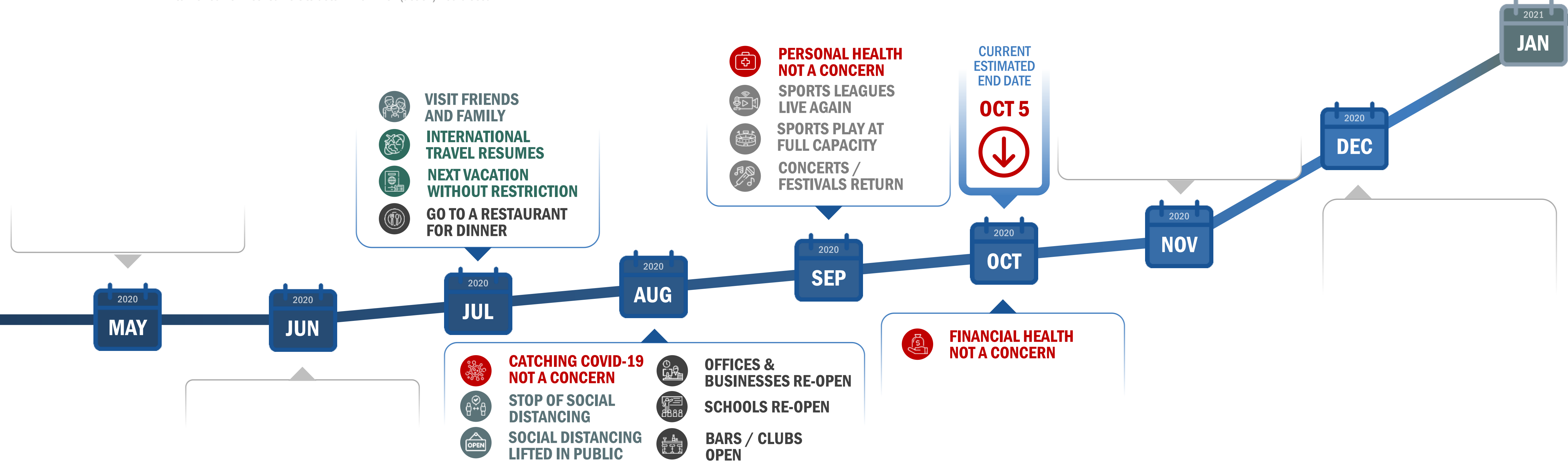
HEALTH CONCERNS			SOCIAL IMPACT			ECONOMY RE-STARTS				EVENTS			TRAVEL	
PERSONAL HEALTH	CATCHING COVID-19	FINANCIAL HEALTH	SOCIAL DISTANCING	SOCIAL DISTANCING LIFTED IN PUBLIC	VISIT FRIENDS AND FAMILY	OFFICES & BUSINESS RE-OPEN	GO TO A RESTAURANT FOR DINNER	SCHOOLS OPEN	BARS / CLUBS OPEN	SPORTS LEAGUES LIVE AGAIN	SPORT AT FULL CAPACITY	CONCERTS / FESTIVALS	INTERNATIONAL TRAVEL	NEXT VACATION

CONSUMER EXPECTATION OF WHEN EACH TOPIC WILL NO LONGER BE AN ISSUE

Road to Recovery as of April 23rd, 2020

USA PERSPECTIVE

IMI 24™ interviewed 20k+ consumers to determine 'When (action) would occur?"



HEALTH CONCERNS			SOCIAL IMPACT			ECONOMY RE-STARTS				EVENTS			TRAVEL	
PERSONAL HEALTH	CATCHING COVID-19	FINANCIAL HEALTH	SOCIAL DISTANCING	SOCIAL DISTANCING LIFTED IN PUBLIC	VISIT FRIENDS AND FAMILY	OFFICES & BUSINESS RE-OPEN	GO TO A RESTAURANT FOR DINNER	SCHOOLS OPEN	BARS / CLUBS OPEN	SPORTS LEAGUES LIVE AGAIN	SPORT AT FULL CAPACITY	CONCERTS / FESTIVALS	INTERNATIONAL TRAVEL	NEXT VACATION

CONSUMER EXPECTATION OF WHEN EACH TOPIC WILL NO LONGER BE AN ISSUE

Road to Recovery as of April 23rd, 2020

CANADA PERSPECTIVE

IMI 24™ interviewed 20k+ consumers to determine 'When (action) would occur?"

2020 MAY

2020 JUN

2020 JUL

2020 AUG
- VISIT FRIENDS AND FAMILY
- STOP OF SOCIAL DISTANCING
- GO TO A RESTAURANT FOR DINNER
- OFFICES & BUSINESSES RE-OPEN
- SCHOOLS RE-OPEN
- BARS / CLUBS OPEN

2020 SEP
- CATCHING COVID-19 NOT A CONCERN
- SPORTS LEAGUES LIVE AGAIN
- SPORTS PLAY AT FULL CAPACITY
- CONCERTS / FESTIVALS RETURN
- PERSONAL HEALTH NOT A CONCERN
- INTERNATIONAL TRAVEL RESUMES
- SOCIAL DISTANCING LIFTED IN PUBLIC

2020 OCT
- FINANCIAL HEALTH NOT A CONCERN
- NEXT VACATION WITHOUT RESTRICTION

CURRENT ESTIMATED END DATE
Oct 31

2020 NOV

2020 DEC

2021 JAN

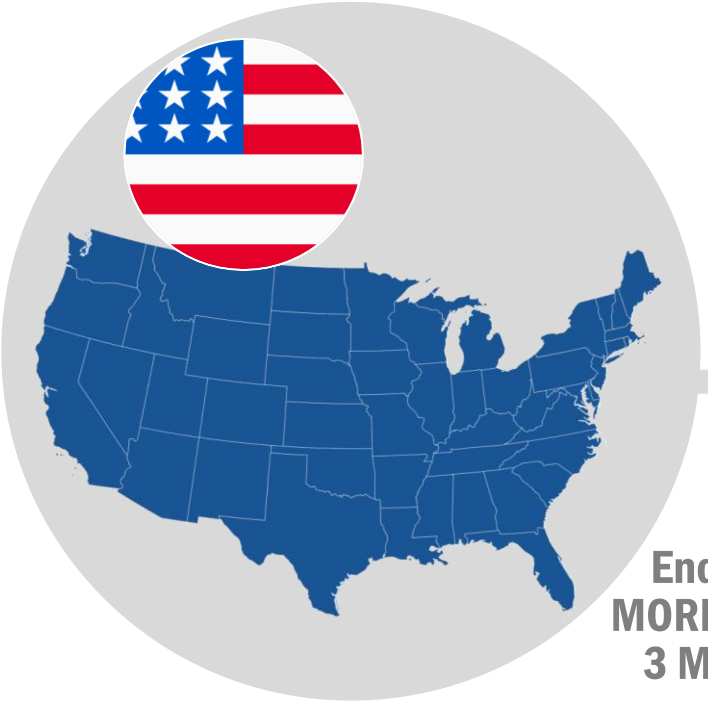
HEALTH CONCERNS			SOCIAL IMPACT			ECONOMY RE-STARTS				EVENTS			TRAVEL	
PERSONAL HEALTH	CATCHING COVID-19	FINANCIAL HEALTH	SOCIAL DISTANCING	SOCIAL DISTANCING LIFTED IN PUBLIC	VISIT FRIENDS AND FAMILY	OFFICES & BUSINESS RE-OPEN	GO TO A RESTAURANT FOR DINNER	SCHOOLS OPEN	BARS / CLUBS OPEN	SPORTS LEAGUES LIVE AGAIN	SPORT AT FULL CAPACITY	CONCERTS / FESTIVALS	INTERNATIONAL TRAVEL	NEXT VACATION

SECTION 1.2

Trending of Regional Timing and Perceptions

ESTIMATED END DATE: American Timeframe Continues to Extend

‘Estimated Month COVID-19 will no longer be a concern’



ESTIMATED END DATE

Date asked	March 10	March 17	March 23	April 3	April 20
Estimated end date	AUG 1	JUL 31	AUG 13	SEP 25	OCT 5
End Date MORE than 3 Months	47%	49%	57%	63%	55%

IMI24™ : N=10,000+ March 10 - April 20, 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.

ESTIMATED END DATE: Canadian Timeframe continues to Extend

‘Estimated Month COVID-19 will no longer be a concern’

ESTIMATED END DATE

Date asked	Estimated end date	End Date MORE than 3 Months	Compared to previous wave
March 10	AUG 7	53%	
March 17	JUL 31	53%	=
March 23	SEP 15	67%	↓
March 30	SEP 17	63%	=
April 3	SEP 24	65%	=
April 20	OCT 31	65%	=

IMI24™ : N=8,000+ March 10 - April 20, 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.

SECTION 2

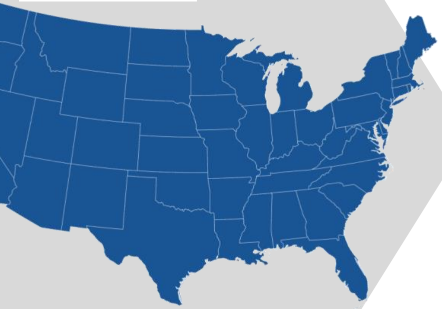
Greatest Fear Next 3 Months

Health, Financial or No Current Fears

GREATEST FEAR NEXT 3 MONTHS: Health, Financial or No Fears

'Select what is the Greatest fear for you and your Family' Asked nationally among 13+ years old

UNITED STATES



IMI24™ : What is the greatest fear you have for you and your family in the next three months due to the Coronavirus?

DATE ASKED	24 MARCH	7 APRIL	21 APRIL	CHANGE PAST MONTH
Personal Health	57%	56%	43%	-14%
Financial Health	32%	25%	29%	- 3%
No Fears	11%	19%	28%	+17%

GREATEST FEAR NEXT 3 MONTHS: Health, Financial or No Fears

'Select what is the Greatest fear for you and your Family' Asked nationally among 13+ years old

CANADA

IMI24™ : What is the greatest fear you have for you and your family in the next three months due to the Coronavirus?

DATE ASKED	24 MARCH	7 APRIL	22 APRIL	CHANGE PAST MONTH
Personal Health	57%	60%	54%	-3%
Financial Health	24%	23%	21%	-3%
No Fears	19%	17%	25%	+6%

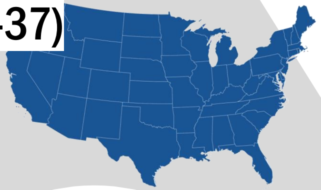
SPOTLIGHT

AMONG Gen-Zs and Millennials
Greatest Fear Next 3 Months

GREATEST FEAR Gen-Zs & Millennials NEXT 3 MONTHS

'Select what is the Greatest fear for you and your Family' Asked nationally among 13+ years old

UNITED STATES
Gen-Zs & Millennials (13-37)



GEN-Z + MILLENNIALS

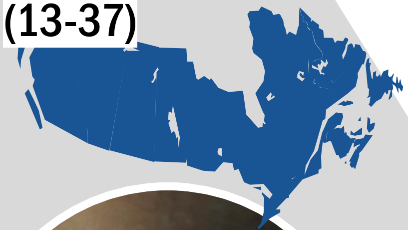
DATE ASKED	24 MARCH	7 APRIL	22 APRIL	CHANGE PAST MONTH
Personal Health	49%	48%	50%	+ 1%
Financial Health	35%	26%	30%	- 5%
No Fears	16%	27%	20%	+ 4%

IMI24™ : What is the greatest fear you have for you and your family in the next three months due to the Coronavirus?

GREATEST FEAR Gen-Zs & Millennials NEXT 3 MONTHS

'Select what is the Greatest fear for you and your Family' Asked nationally among 13+ years old

CANADA
Gen-Zs & Millennials
(13-37)



DATE ASKED	24 MARCH	7 APRIL	22 APRIL	CHANGE PAST MONTH
Personal Health	52%	59%	60%	+ 8%
Financial Health	29%	28%	18%	-11%
No Fears	19%	13%	22%	+ 3%

IMI24™ : What is the greatest fear you have for you and your family in the next three months due to the Coronavirus?

SECTION 3

Preventative Measures People Take

April 20th, 2020

Consistent with late March, many are taking multiple actions to protect themselves however, visiting friends/family continue and hand washing has not accelerated.

Which of the following are you actively doing to prevent / protect you and your family from Coronavirus? 27-Mar-20 vs April 20, 2020	MARCH 27 USA TOTAL 2,000	APRIL 20 USA TOTAL 2,000	MARCH 27 NY STATE 500	MARCH 27 TEXAS 500	MARCH 27 CALIFORNIA 500	CANADA 500	APRIL 20 CANADA 500	MARCH 27 AUSTRALIA 500
Wash hands frequently	75%	70% (-5%)	80%	75%	78%	72%	68% (-4%)	72%
Stop visiting family/friends	49%	52% (+3%)	60%	59%	61%	52%	56% (+4%)	50%
Listen to the news daily	51%	36% (-15%)	52%	47%	46%	52%	50% (-2%)	52%
Stop going outside	15%	20% (+5%)	25%	25%	29%	34%	36% (+2%)	33%
Wearing a mask	8%	48% (+40%)	13%	14%	16%	12%	22% (+10%)	18%
None of the above	13%	17%	11%	14%	11%	15%	14%	21%

Note, wearing a mask has strongly accelerated across the USA, and nearly doubled in Canada.

SECTION 4

What People are Missing

Asked April 8th to 20th, 2020

What People are Missing: Discovery Process

PHASE 1: DISCOVERY

4,000 People

IMI asked one thousand people from the USA, Canada, UK, and Australia, to tell us 'things they missed' in their own words.

2020 MAR

PHASE 2: ANALYSIS

115 Activities Revealed

IMI took their verbatim responses and distilled them into a comprehensive list of 115 activities, categorized into themes:

- Life
- Freedom
- Work / School
- Friends/ Family
- Neighborhood
- Entertainment and Activities

2020 MAR

PHASE 3: GLOBAL RANKING

11,400 People

IMI then went and asked 11,400 people (13+ years of age) across the same four countries if 'they missed' each of these 115 different topics.

2020 APR

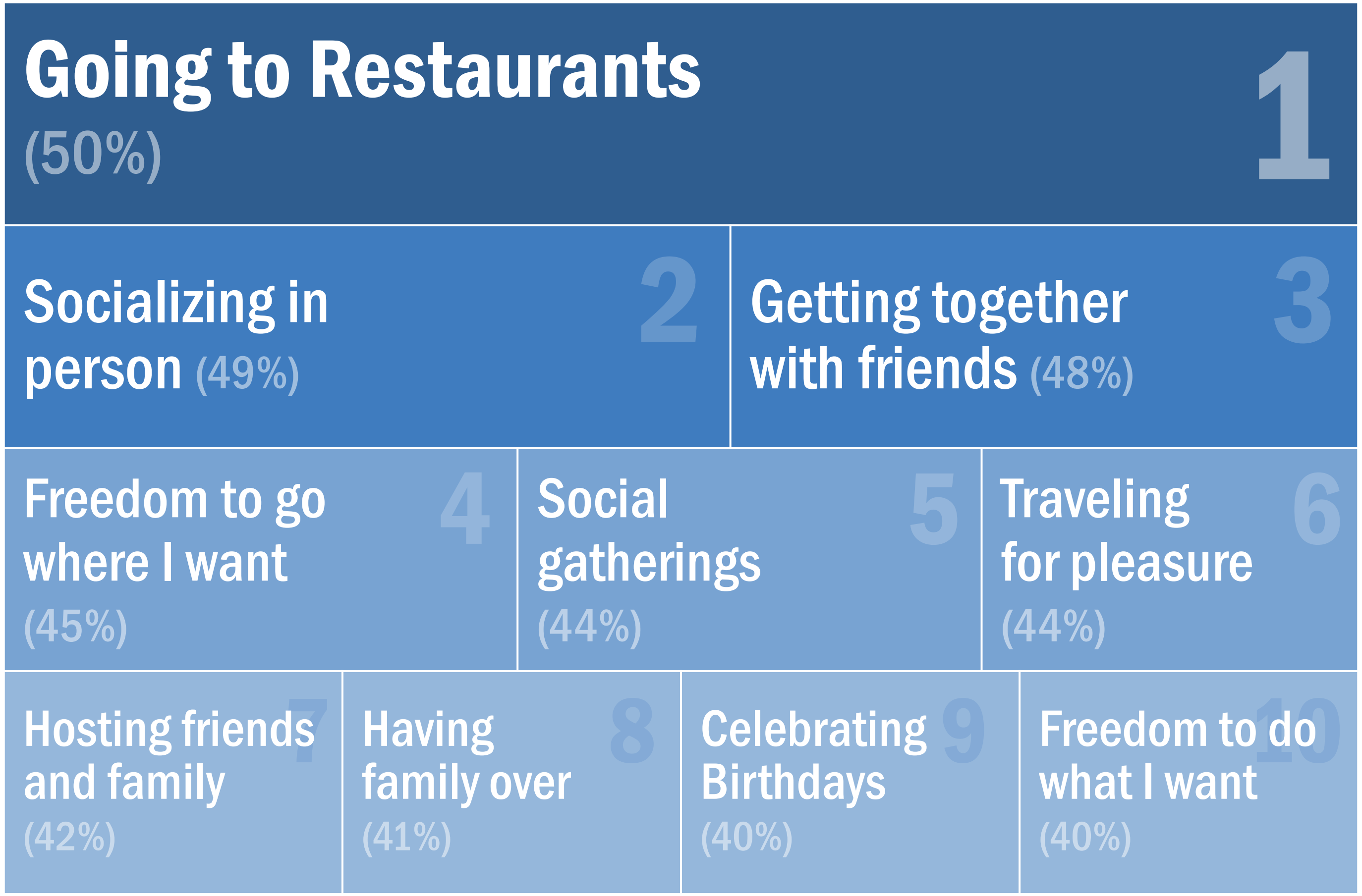
Keep reading to see what we found...

Top 10 things people miss across 115 different activities

Through an initial deep dive into what people are missing, IMI uncovered a 115 social activities and actions that are currently missed. With that list in hand, we completed a comprehensive evaluation to understand how those activities ranked by speaking to 11,400 people across the USA, Canada, UK, and Australia.

We found some positive news for several industries, including:

- Restaurants
- Travel destinations; and
- Places where people go to socialize
- Goods purchased to socialize at home



Top 10 things people miss across 115 different activities

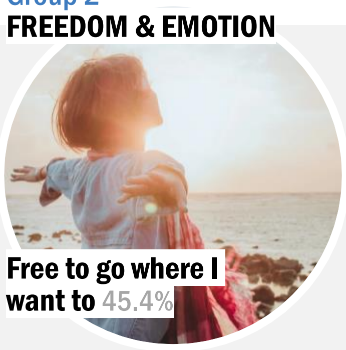
IMI24 N=11,400 April 2020

Today's reality of what people are currently missing most. The #1 response for each section shows great demand for getting out and experiencing life again.

Group 1
SOCIAL ACTIVITIES

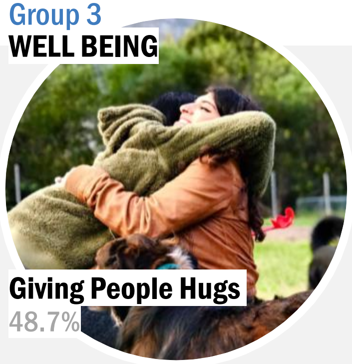
Socializing outside of the family 48.7%

Group 2
FREEDOM & EMOTION



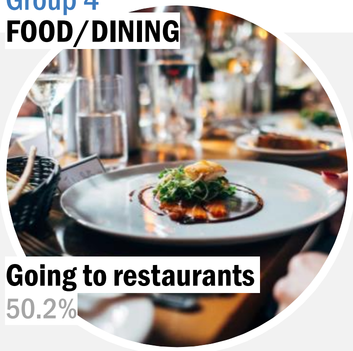
Free to go where I want to 45.4%

Group 3
WELL BEING



Giving People Hugs 48.7%

Group 4
FOOD/DINING

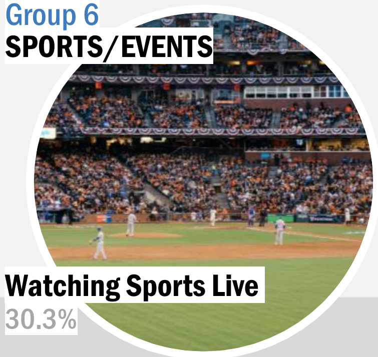


Going to restaurants 50.2%

Group 5
FRIENDS & FAMILY

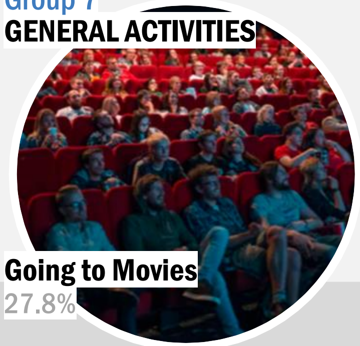
Hosting Friends and Family 42.2%

Group 6
SPORTS/EVENTS



Watching Sports Live 30.3%

Group 7
GENERAL ACTIVITIES



Going to Movies 27.8%

Group 8
TRAVEL

Travel for Pleasure 43.5%

Group 9
WORK AND SCHOOL

Being at Work 21.6%

GLOBAL
April 20th, 2020

IMI 24™ N=11,400
Which of these things do you currently miss?
115 actions tested across the USA, Canada, UK and Australia

IMI 24™ - We Asked: Which of these things do you currently miss? 'x' as many as apply

THE THINGS WE MISS
Built up Desire and Emotion

Optimistic news for many businesses when people can act again. There will be demand when the time comes for:

Restaurants #1 of 115	**Bars/Clubs**	**Local Business**	**Sporting Events**
Pleasure Travel #6 of 115	**Retail/Shopping**	**Movie Theatres**	**Concerts**
Live Music	**Vacation Destinations**	**Coffee Shops**	**Festivals**
Grocery Stores	**Ice Cream Parlors**	**Hair/Nail Salons**	**Community Events**
Health Practitioners	**Large Venues/Arenas**	**Travel**	**Workplaces**

IMI 24™ - We Asked: Which of these things do you currently miss? 'x' as many as apply

Group 1 Social Activities

IMI 24™ - We Asked: Which of these things do you currently miss? 'x' as many as apply

	USA	CANADA	UK	AUSTRALIA
Socializing in person, outside of my family	49%	45%	54%	40%
Getting together with friends	49%	42%	52%	45%
Having family over	43%	32%	49%	39%
Celebrating friends/family members birthdays	39%	35%	44%	38%
Having dinner with family and/or friends	39%	46%	41%	36%
Events around my favorite hobbies	27%	13%	17%	24%
Going out/drinking with friends	27%	30%	44%	30%
Going out on the weekend	23%	30%	48%	43%
Having friends over	24%	36%	39%	34%
Going shopping with friends	22%	35%	43%	22%
Ability to visit, support, help elderly	23%	11%	16%	26%
Going for walk with friends	19%	22%	27%	17%
Playing games with friends	16%	16%	20%	19%
Not being able to go to a wedding	7%	2%	8%	3%
Sitting on a patio	4%	14%	2%	7%

Group 2 Freedom & Emotion

April 20: Things People are Missing

IMI 24™ - We Asked: Which of these things do you currently miss? 'x' as many as apply

	USA	CANADA	UK	AUSTRALIA
General freedom to go where I want	**42%**	**48%**	**67%**	**38%**
Freedom to do what I want	**37%**	**40%**	**53%**	**40%**
Feeling safe going outside	33%	35%	45%	34%
Not feeling anxious about the future	33%	22%	40%	34%
Not being fearful of getting people sick	33%	27%	29%	23%
Not worrying about loved ones all the time	30%	24%	38%	35%
Not living in fear to leave the house	24%	40%	29%	25%
Not having to avoid people I walk by	25%	25%	30%	13%
Being able to shop at a more relaxed pace	18%	19%	28%	22%
Not having every day feel the exact same	15%	23%	35%	20%
Not having free time by myself	18%	17%	21%	14%
Having time away from my kids	18%	6%	14%	8%

Group 3 Well Being

April 20: Things People are Missing

IMI 24™ - We Asked: Which of these things do you currently miss? 'x' as many as apply

	USA	CANADA	UK	AUSTRALIA
Giving people hugs	37%	39%	35%	39%
Any good news at all (big or small)	26%	31%	19%	21%
A good night's sleep	19%	11%	24%	12%
Going for a massage	18%	15%	8%	13%
Going to my doctor for things other than Covid-19	13%	10%	7%	8%
People being friendly when I am out	10%	11%	17%	14%
Going to my dentist	1%	8%	7%	9%

Group 4 Food & Dining

April 20: Things People are Missing

IMI 24™ - We Asked: Which of these things do you currently miss? 'x' as many as apply

	USA	CANADA	UK	AUSTRALIA
Going to restaurants	57%	30%	35%	34%
Supporting local restaurants	37%	32%	24%	23%
Eating at a restaurant	32%	47%	39%	22%
Family style restaurants	37%	37%	16%	21%
Easily finding any item at the grocery store	33%	15%	25%	33%
Chef's special at local restaurants	26%	29%	9%	24%
Going for ice cream	19%	14%	15%	21%
Meeting friends at a coffee shop	15%	31%	30%	25%

Group 5 Family & Friends

April 20: Things People are Missing

IMI 24™ - We Asked: Which of these things do you currently miss? 'x' as many as apply

	USA	CANADA	UK	AUSTRALIA
Hosting friends and family	42%	51%	39%	40%
Seeing my parents	15%	40%	25%	20%
Having any time away from my family	11%	18%	6%	19%

Group 6 Entertainment & Sports

IMI 24™ - We Asked: Which of these things do you currently miss? ‘x’ as many as apply

	USA	CANADA	UK	AUSTRALIA
Watching sports Live	33%	26%	21%	23%
Watching sports with friends and family	33%	24%	21%	10%
Live Music	28%	26%	13%	23%
Watching sports on TV	22%	22%	15%	26%
Going to the gym	27%	20%	8%	22%
College Basketball	22%	12%	2%	2%
Going to concerts, events, festivals	18%	25%	24%	20%
Going to the bar to watch a game	14%	19%	21%	12%
March Madness	15%	17%	11%	8%
The Masters	13%	16%	9%	5%
Seeing friends at sporting events	11%	19%	19%	17%
Playing sports	11%	16%	18%	13%
Watching kids’ sports	11%	5%	2%	9%
Listening to my sports channel in the car	7%	17%	14%	3%
Being able to golf	9%	4%	11%	4%
Tokyo Olympics	3%	6%	14%	15%

Group 7 General Activities

April 20: Things People are Missing

IMI 24™ - We Asked: Which of these things do you currently miss? 'x' as many as apply

	USA	CANADA	UK	AUSTRALIA
Going to the movies	28%	34%	24%	27%
Taking the kids to the park	20%	10%	18%	17%
Having somewhere for the kids to go	19%	14%	12%	12%
Taking my child to playgrounds/activities	16%	21%	18%	13%
Going to the nail salon/hair salon	17%	15%	6%	5%
Walking in the park	10%	28%	21%	29%
Being able to go to the beach	12%	11%	23%	21%
Hiking	12%	16%	11%	11%
Working out with friends	13%	10%	3%	17%
Going to the library	10%	5%	11%	16%

IMI 24™ - We Asked: Which of these things do you currently miss? 'x' as many as apply

	USA	CANADA	UK	AUSTRALIA
Traveling for pleasure	40%	53%	60%	35%
Traveling anywhere	36%	39%	53%	39%
Go on weekend trips	38%	29%	37%	23%
Being able to plan trips for this year	34%	29%	38%	29%
Traveling to other countries	13%	40%	43%	29%
Ability to travel overseas to see my family	12%	24%	22%	28%
Traveling for business	8%	12%	7%	10%

Group 9 Work and School

IMI 24™ - We Asked: Which of these things do you currently miss? 'x' as many as apply

	USA	CANADA	UK	AUSTRALIA
Being at work	**21%**	**17%**	**32%**	**19%**
Going to office, interacting with co-workers	19%	17%	23%	24%
Office friends	18%	30%	10%	22%
Going to work	19%	15%	16%	13%
Going to meetings	14%	15%	13%	5%
Going into the office	11%	19%	6%	11%
Sending kids to school	10%	5%	8%	13%
Being able to go to school	7%	9%	9%	8%
Working without having a kid screaming	6%	7%	11%	10%

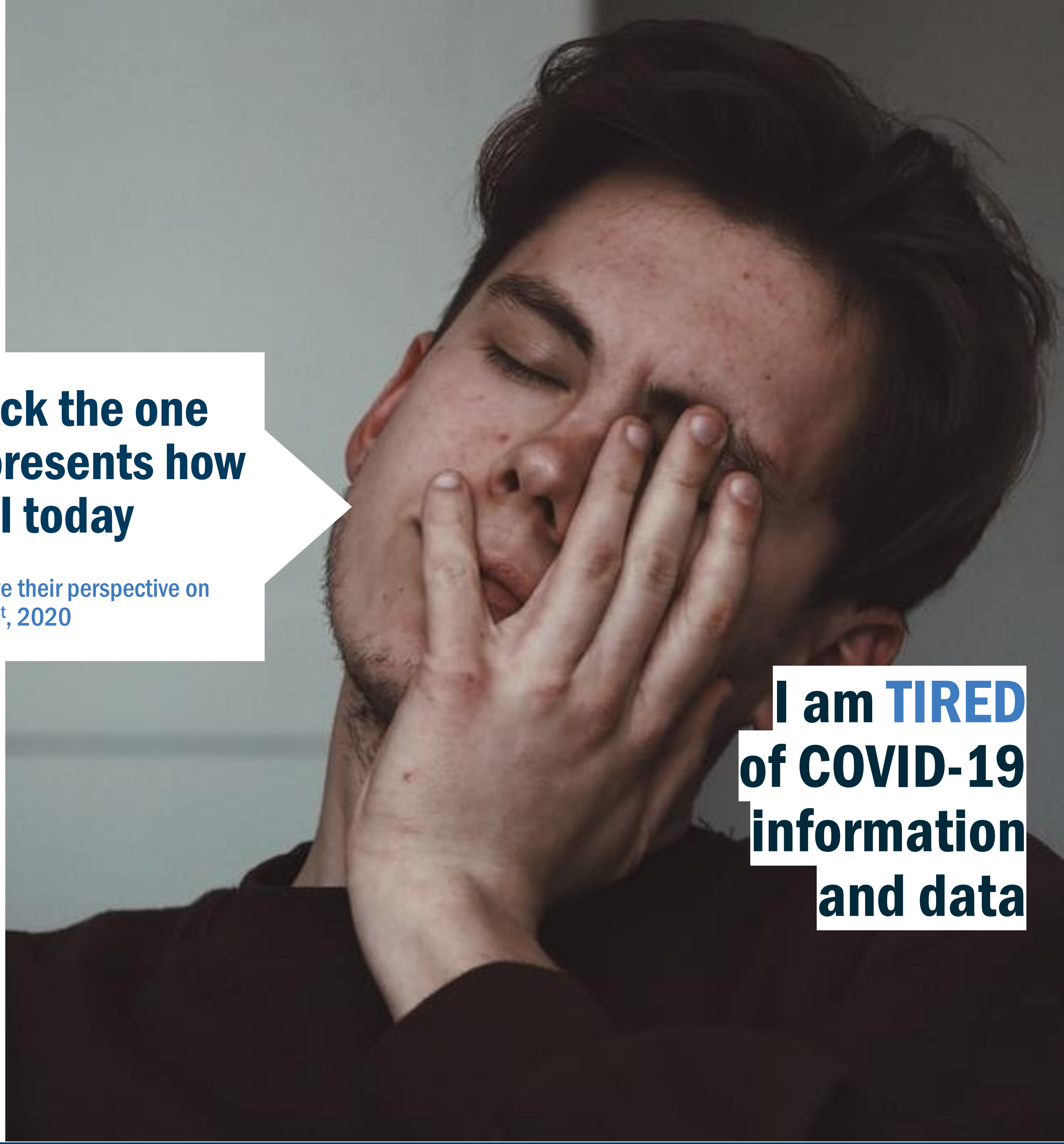
SECTION 5

Are consumers tired of Covid-19 information or do they want more?

I want MORE COVID-19 information and data

Our Ask: Pick the one that best represents how you feel today

Over 5,000 people gave their perspective on April 21st, 2020



I am TIRED of COVID-19 information and data

Looking back, by Summer 2008, consumers across the globe were exceptionally tired of the government and companies / brands talking about the recession. In fact, consumers felt ‘less favorable’ toward brands that 1) got to this message too late or 2) kept the conversation going for too long.

While the COVID-19 story is early in its cycle relative to 2008 standards, the intensity and severity of the topic is greater than ever before. So, on April 21, 2020 IMI asked 5,000 people across 18 countries to tell us how they felt, we asked - do you:

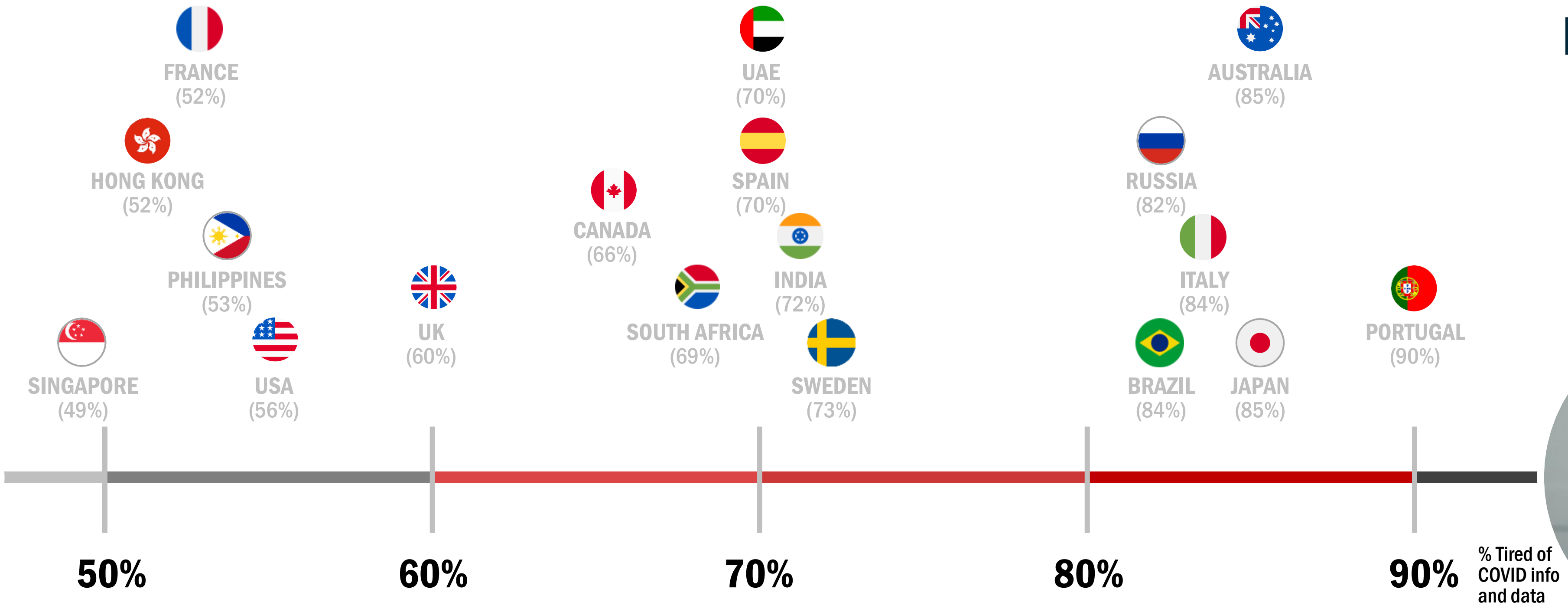
a) want more COVID-19 information and data
b) are you tired of COVID-19 information and data

BRAND RECO

Approximately 2 out of 3 people around the world are 'tired of COVID-19 information and data'. It is IMI's recommendation that brands should exercise caution in delivering any COVID-19 related messaging. If a brand is to do so, there should be a clear tangible benefit to the consumer.

I want MORE COVID-19 info & data

I am TIRED of COVID-19 info & data



Realities for today and tomorrow

Expectations will vary based on the country you operate in and your industry, but three principles will remain true to all:

- **Transparency:** Ensure that people can find your company’s COVID-19 protocol information, but you may not need to actively communicate it.
- **Authenticity:** If you aren't already fully engaged in the conversation, be cautious entering it late.
- **Value-added:** Only say or do something if there is added value - people don’t need or want to hear from corporate presidents. Today, it's better to do nothing than to feel pressured to act without value.

And for the rest of 2020 and 2021, prioritize IMI’s Rule of 3 to rise above (RCB).

1. **Be RELEVANT:** Be relevant to your consumer/customer by talking about what they care about.
2. **Be COMPELLING:** Continue to consider ‘what’s in it for me – the end user.’ This filter keeps messaging focused on sought-after and essential information versus noise.
3. **Be BETTER than your competition:** Now more than ever, consider the competition – globally, locally, online and offline. Deliver products, offers and messaging that are ‘better than current’ and ‘better than the competition’ to create a clear path to profit.

SPECIAL REPORT

Category Spotlight

Future intention to Engage Events and Purchase Travel, Dining, Online and Retail

April 23rd, 2020

Category Report

Current Situation: Global State of Emergency for the past 2 to 8 weeks

Events

- Live Events
- Sports

Travel

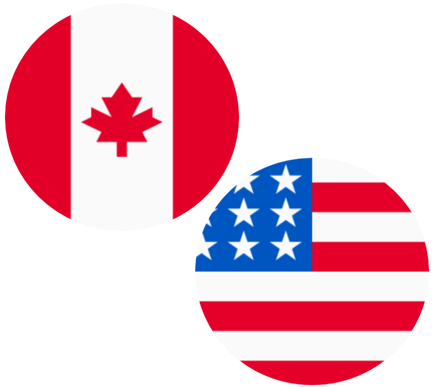
- Industry
- Destinations

Purchasing

- Online
- Retail
- F&B - Dining

Lowest Price Purchasing

Regional Overviews Available

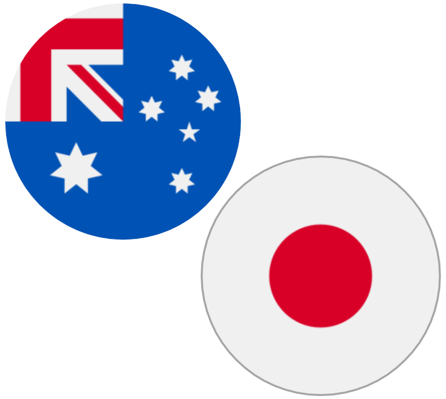


NORTH AMERICA

Canada & USA

EUROPE

UK, Italy & Spain



AUSTRALIA & JAPAN

Reader Note: Establishing the Bottom

Globally, over 80% are concerned about their personal health, 65% concerned about their financial health, and almost the entire population in a state of emergency where many of the activities being evaluated can't even be done today. The subsequent results act as benchmarks during the height of the pandemic.

IMI is committed to tracking consumer sentiment and intention over the coming weeks, and months, to inform decision makers of the evolving consumer realities. As improvements are seen and felt across the globe, IMI expects positive shifts in consumer sentiment and intention.

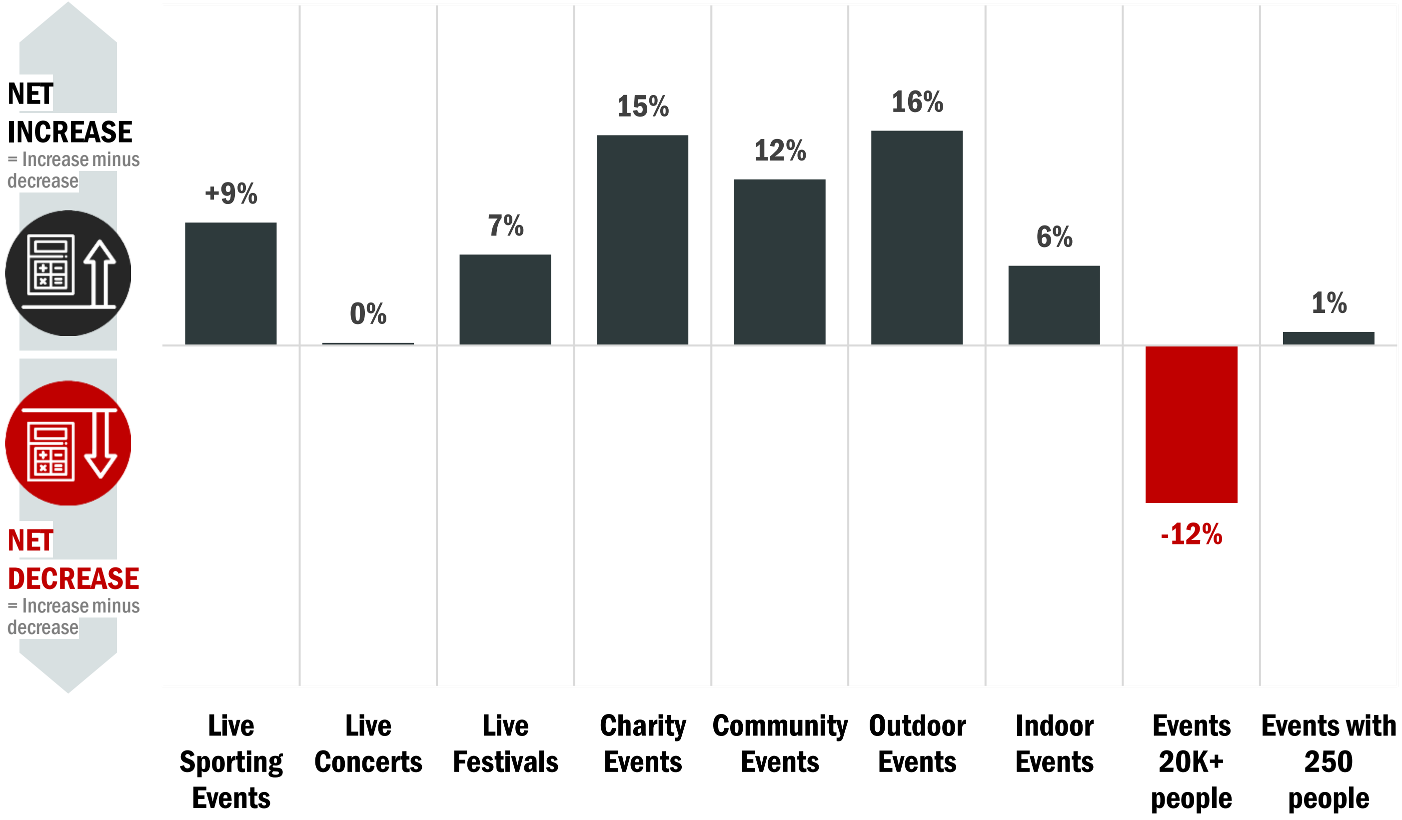
Section 1 – Attending & Consuming Live Events

ATTENDING Live Events - Future Intention

IMI 24™ : N=1,750 interviews per country We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

GLOBAL AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO ATTEND



Global Intention to Attend Live Events when the Coronavirus is no longer a concern

Sports, concerts, festivals, charity, community, outdoor, indoor events

Situation Global State of Emergency

Result Lack of access seems to have created pent up demand for the return of live events. Some hesitation exists to attend events of 20k+ attendees.

April 20th = +9.3%

April 30th = ____

May 15th = ____

IMI is committed to track and report on 'Global Intention to Attend Live Events' throughout 2020.

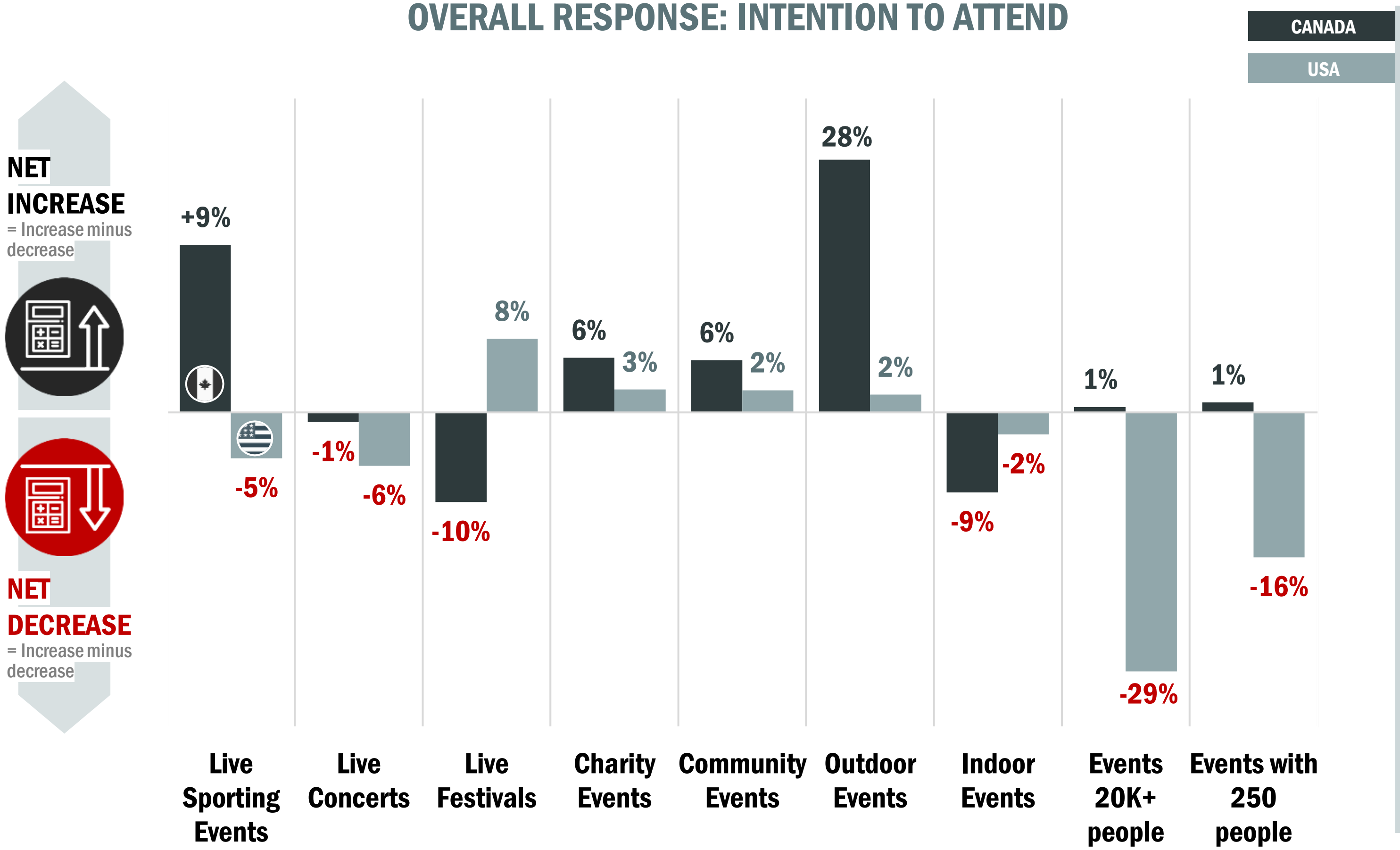
'Global' for this question captures input from USA, Canada, UK, Italy, Spain, Japan and Australia

ATTENDING Live Events - Future Intention

IMI 24™ : N=1,750 interviews per country We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

NORTH AMERICA AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO ATTEND



North American Intention to Attend Live Events when the Coronavirus is no longer a concern

Sports, concerts, festivals, charity, community, outdoor, indoor events

Situation Global State of Emergency

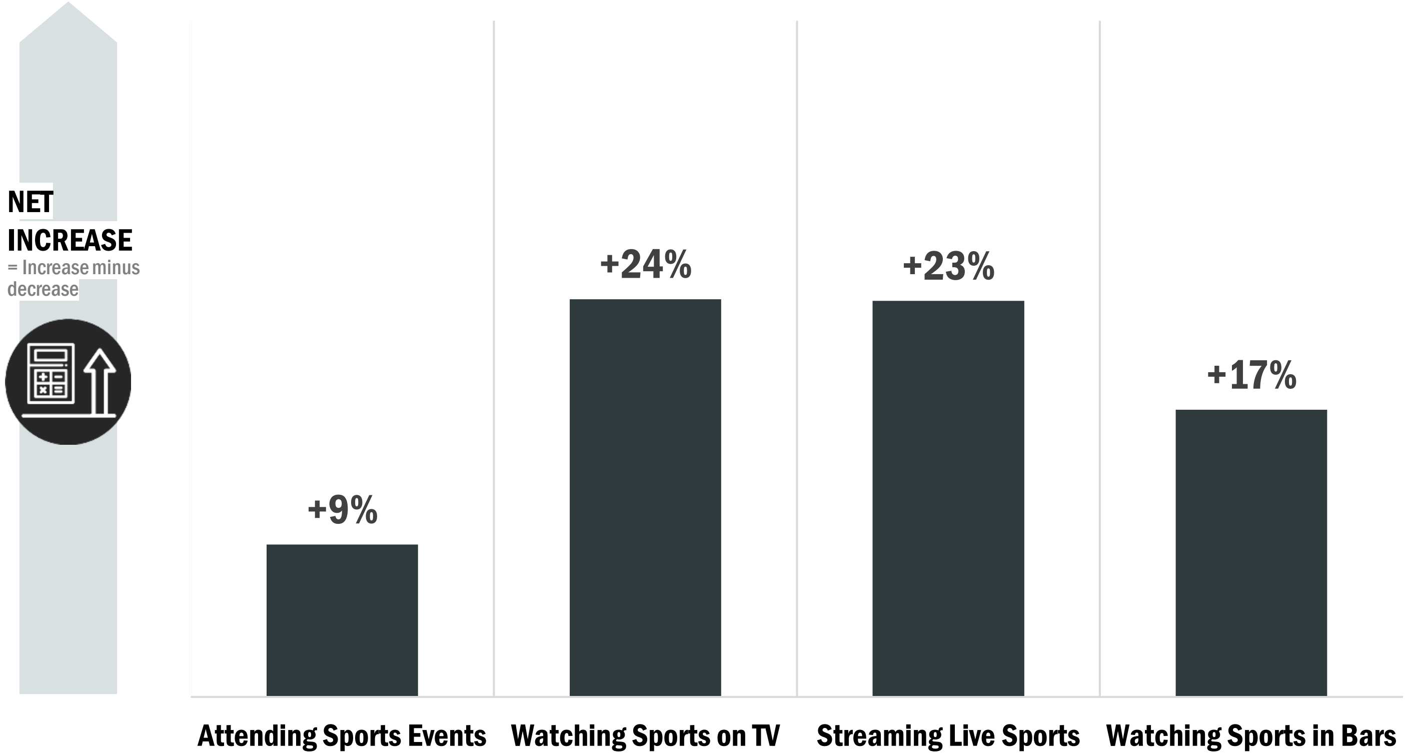
Result US and Canada showcase regional differences. Canadians show a hunger for live sport and outdoor events in general, while Americans show some hesitation on the bases of the number of attendees. Communication on audience size, crowd control and proactive measures will be critical to address that concern.

CONSUMING Live Sports - Future Intention

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

GLOBAL AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO CONSUME SPORT



Global Intention to Consume Live Sport when the Coronavirus is no longer a concern

Attend Sports Events, Watch on TV, Stream Sports Live, Go out to watch Sport

Situation Global State of Emergency

Result There is significant intention to increase overall consumption of sport globally post COVID-19.

April 20th = +15.9%

April 30th = ____

May 15th = ____

IMI is committed to track and report on 'Global Intention to Consume Sport' throughout 2020.

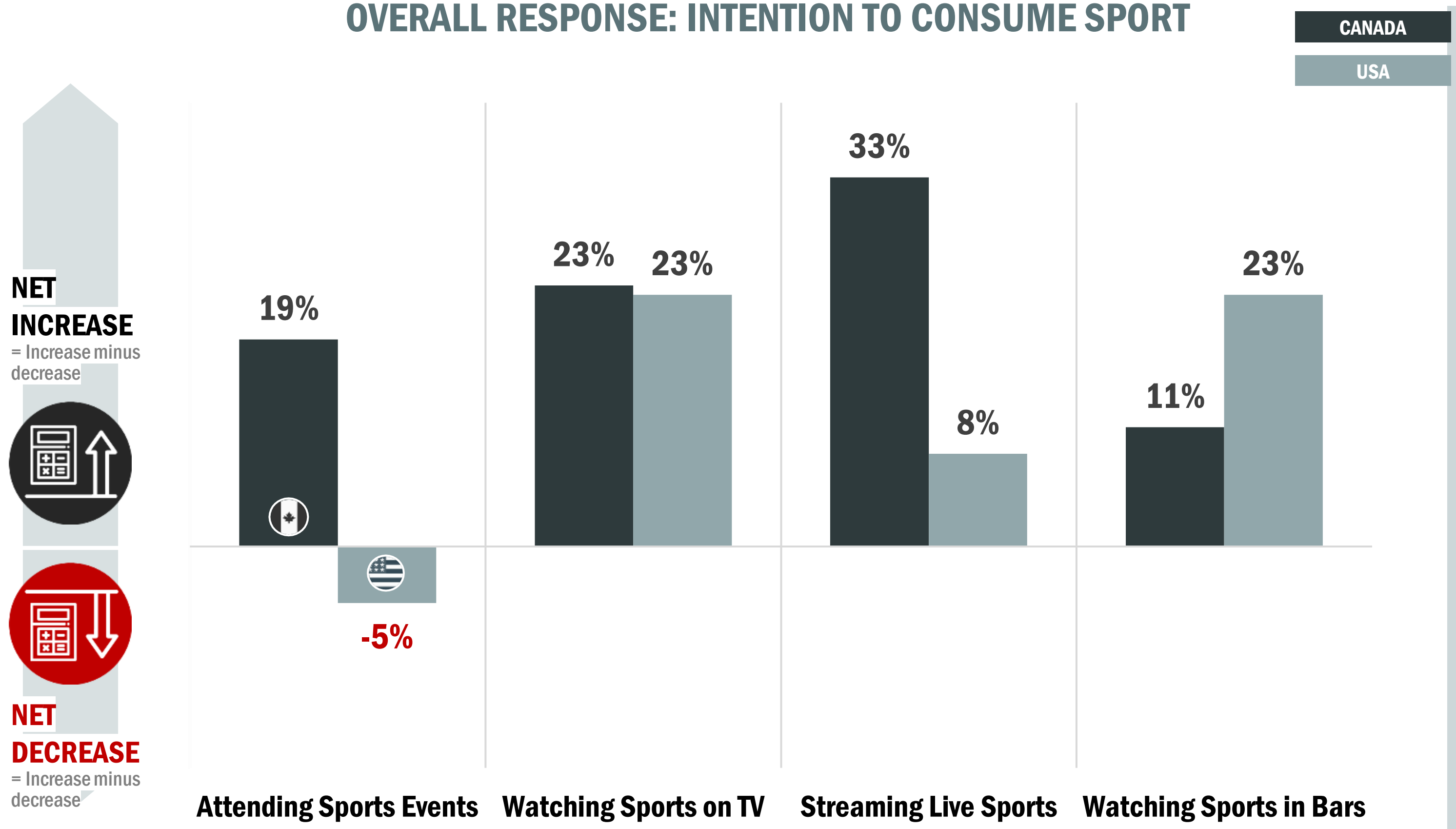
'Global' for this question captures input from the USA, Canada, UK, Italy, Spain, Japan and Australia

CONSUMING Live Sports - Future Intention

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

NORTH AMERICA AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO CONSUME SPORT



North American Intention to Consume Live Sport when the Coronavirus is no longer a concern

Attend Sports Events, Watch on TV, Stream Sports Live, Go out to watch Sport

Situation Global State of Emergency

Result Consumption of sports content across all platforms will experience a significant increase upon their return.

This will present unique opportunities for broadcasters, streaming services, restaurants and brands.

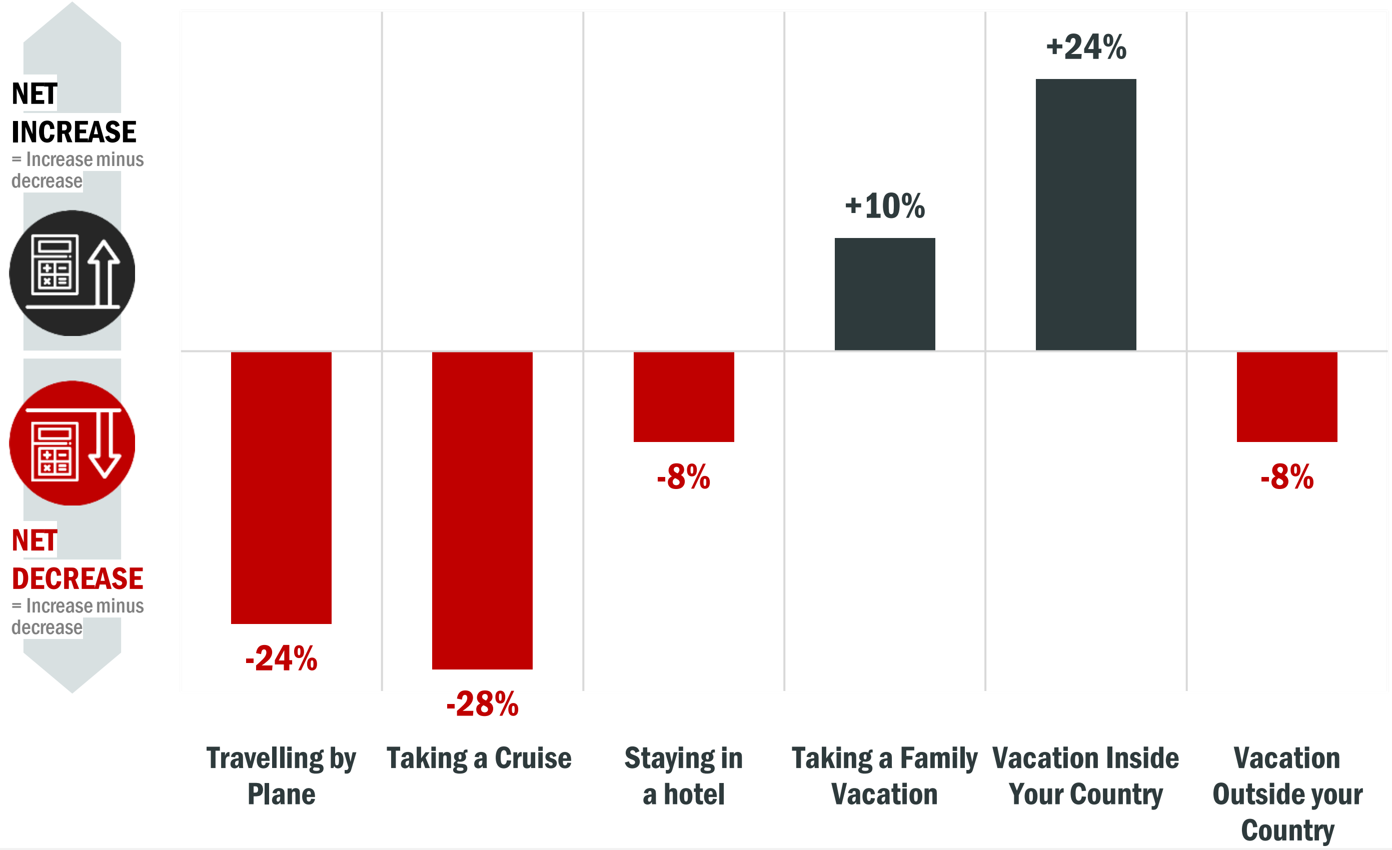
Section 2 - Travel

TRAVEL INDUSTRY - Future Intention

IMI 24™ : N=1,500 We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

GLOBAL AS OF APRIL 20th

OVERALL RESPONSE: TRAVEL INTENTIONS



Global Intention to Travel when the Coronavirus is no longer a concern

Travel by plane, Take a cruise, Stay in a hotel, Take a Family Vacation, Take a Vacation Inside and Outside your Country

Situation Global State of Emergency

Result Global tourism industry will continue to experience significant challenges. As travel restrictions soften, industries will need to take proactive action to restore confidence in the global traveler.

April 20th = -5.6%
April 30th = ____
May 15th = ____

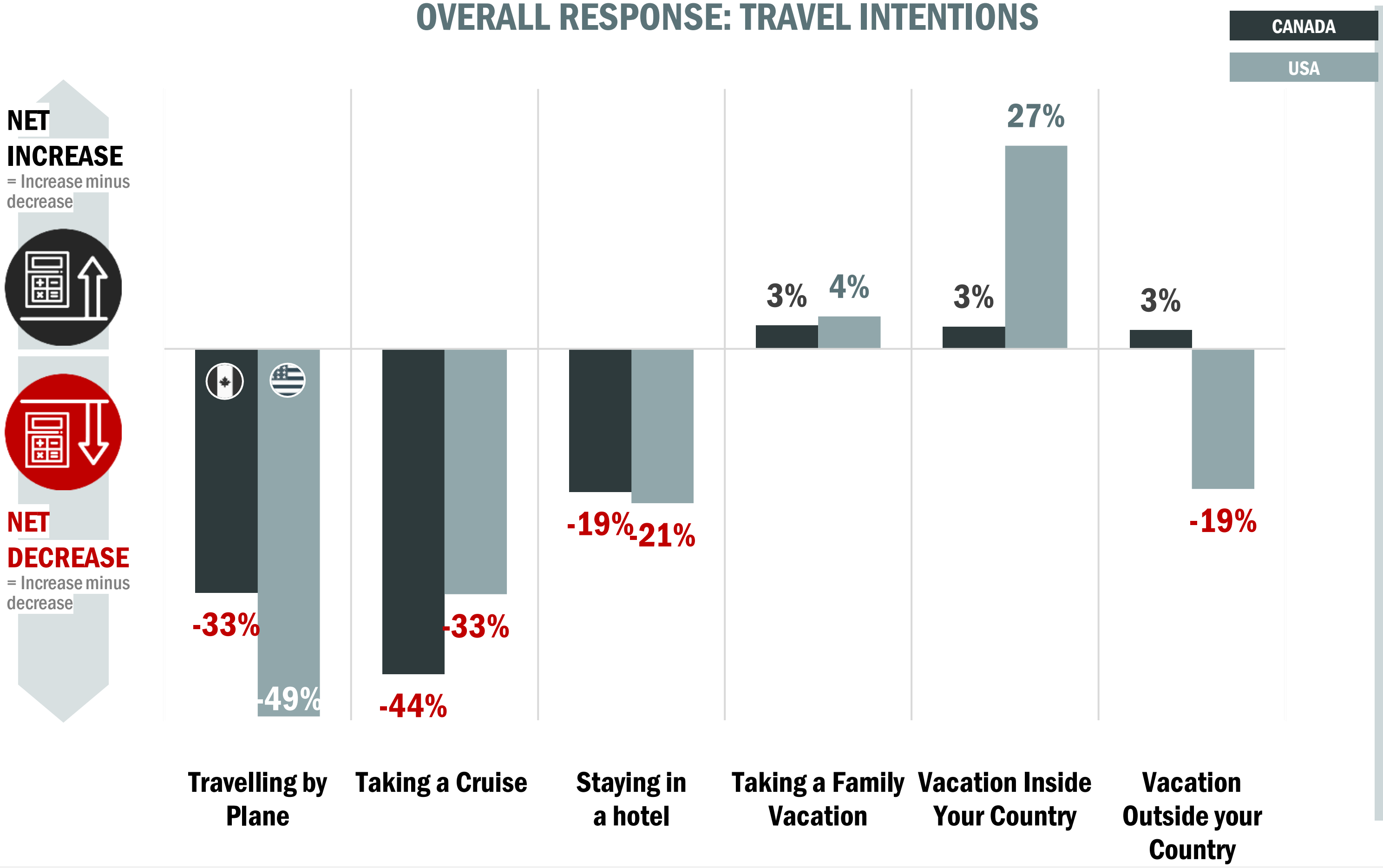
'Global' for this question captures input from the USA, Canada, UK, Italy, Spain, Japan and Australia

TRAVEL INDUSTRY - Future Intention

IMI 24™ : N=1,500 We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

NORTH AMERICA AS OF APRIL 20th

OVERALL RESPONSE: TRAVEL INTENTIONS



North American Intention to Travel when the Coronavirus is no longer a concern

Travel by plane, Take a cruise, Stay in a hotel, Take a Family Vacation, Take a Vacation Inside and Outside your Country

Situation Global State of Emergency

Result North Americans showcase a clear intention to travel less post COVID-19. The global tourism industry will need to develop and communicate creative solutions to alleviate consumer concern.

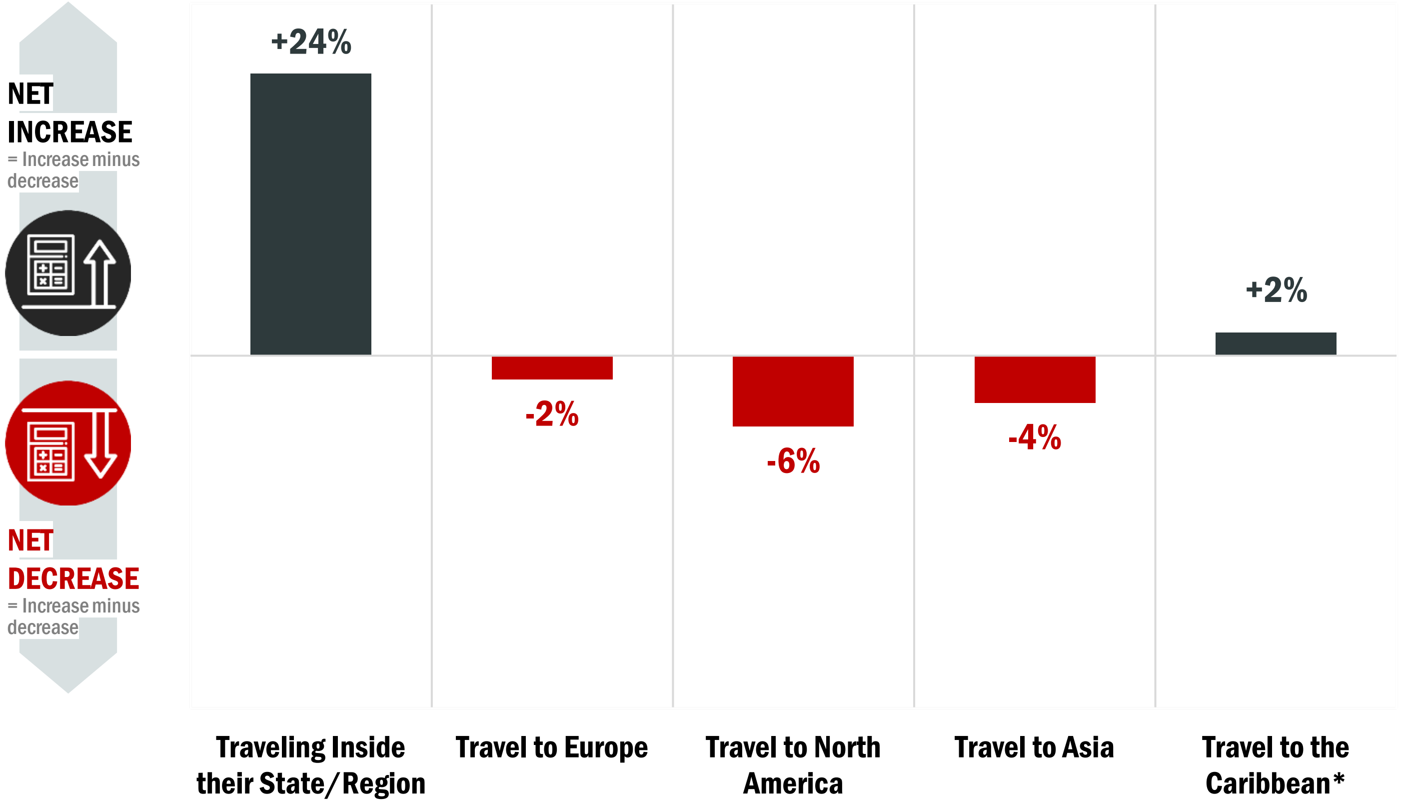
The domestic tourism industry could experience a surge in demand post COVID-19, particularly in the US.

TRAVEL DESTINATION - Future Intention

IMI 24™ : N=1,250 We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

GLOBAL AS OF APRIL 20th

OVERALL RESPONSE: TRAVEL INTENTIONS



Global Travel to Specific Destinations when the Coronavirus is no longer a concern

Travel inside their State/Region, Travel to Europe, North America, Asia and The Caribbean

Situation Global State of Emergency

Result Traveling closer to home appears to be a trend that industries should prepare for and adapt to. International tourism will have work to do to restore confidence in travelers.

April 20th = +3%

April 30th = ____

May 15th = ____

'Global' for this question captures input from the USA, Canada, UK, Italy, Spain, Japan and Australia

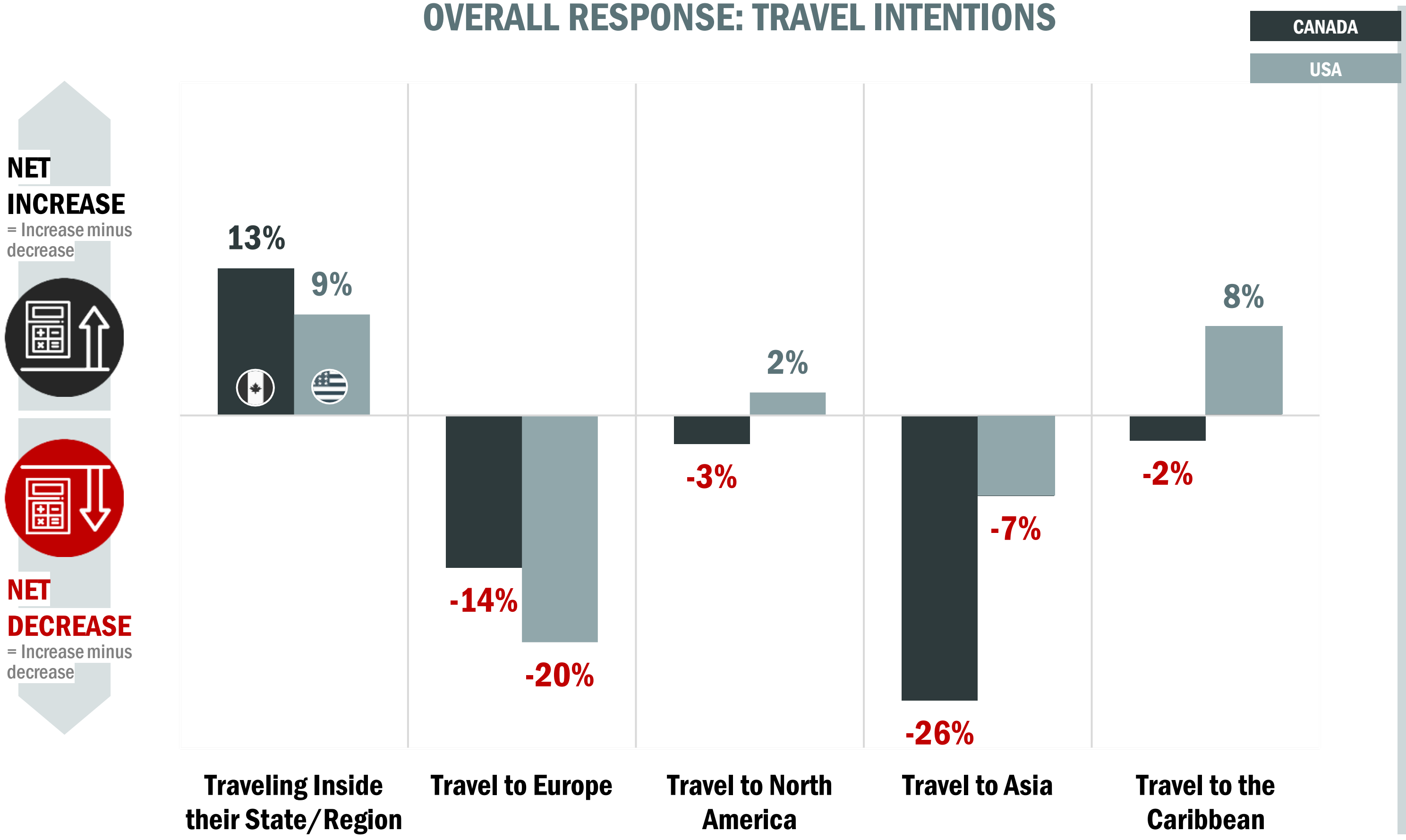
* Indicates only asked across North American markets

TRAVEL DESTINATION - Future Intention

IMI 24™ : N=1,250 We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

NORTH AMERICA AS OF APRIL 20th

OVERALL RESPONSE: TRAVEL INTENTIONS



North American Travel to Specific Destinations when the Coronavirus is no longer a concern

Travel inside their State/Region, Travel to Europe, North America, Asia and The Caribbean

Situation — Global State of Emergency

Result — North Americans intend to travel close to home first and foremost with an openness to travel across one another's borders and to the Caribbean. At this stage, travel to Europe and Asia will be heavily hit.

Section 3 - Purchasing

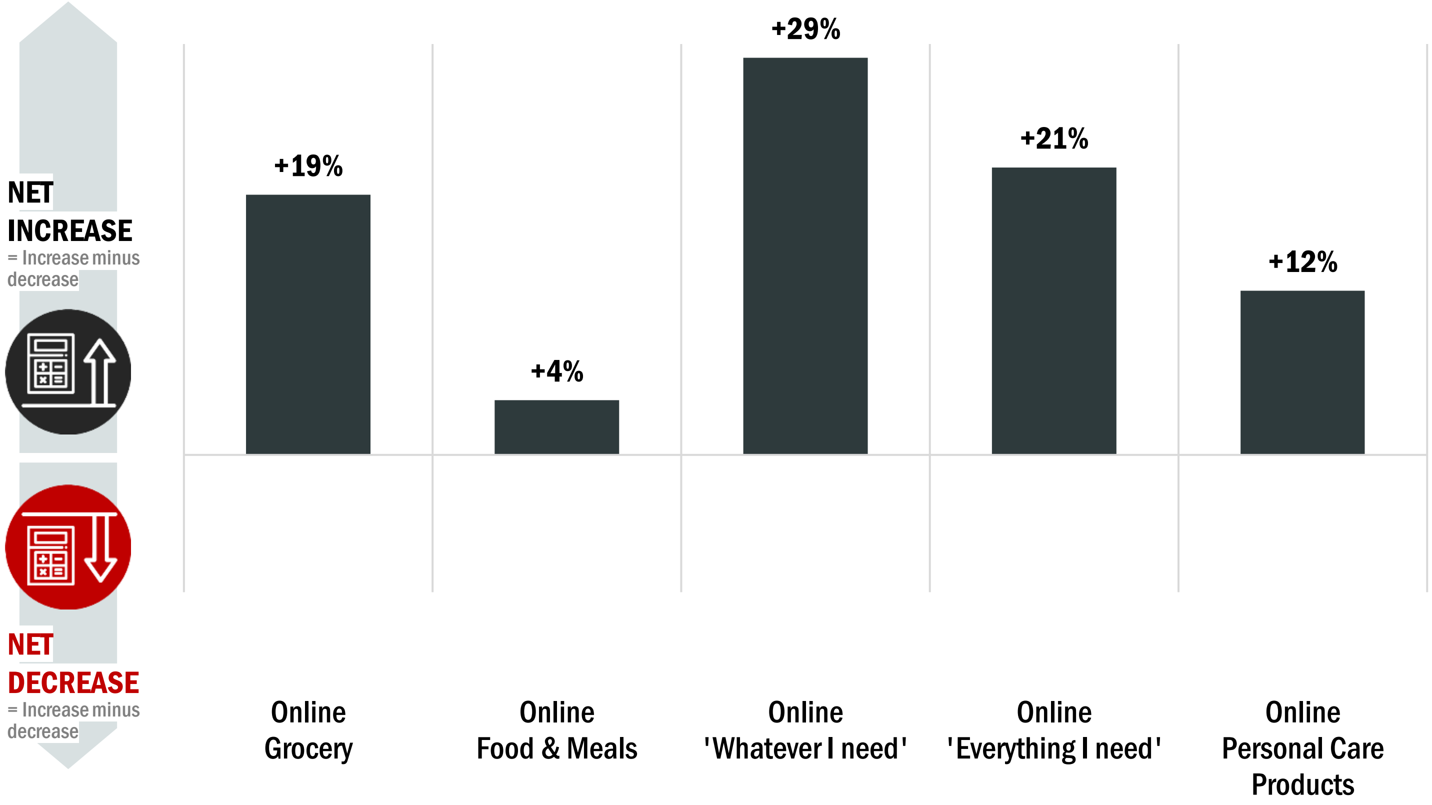
Online, at retail, at restaurants, bars and cafes.

ONLINE Purchasing - Future Intention

IMI 24™ : N=1,250 per country: We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

GLOBAL AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO PURCHASE ONLINE



Global Intention to Purchase Online when the Coronavirus is no longer a concern

Online Grocery, Online Food, Online 'what I need', Online Everything, Online Personal Care Products when the Coronavirus is no longer an issue

Situation Global State of Emergency

Result Globally, there is a significant increased intention to shop online when the pandemic is no longer an issue. Brands and retailers need to act now and adapt to the changing environment to minimize risk.

April 20th	=	+17%
April 30th	=	______
May 15th	=	______

IMI is committed to track and report on 'Global Intention to Purchase Online' throughout 2020.

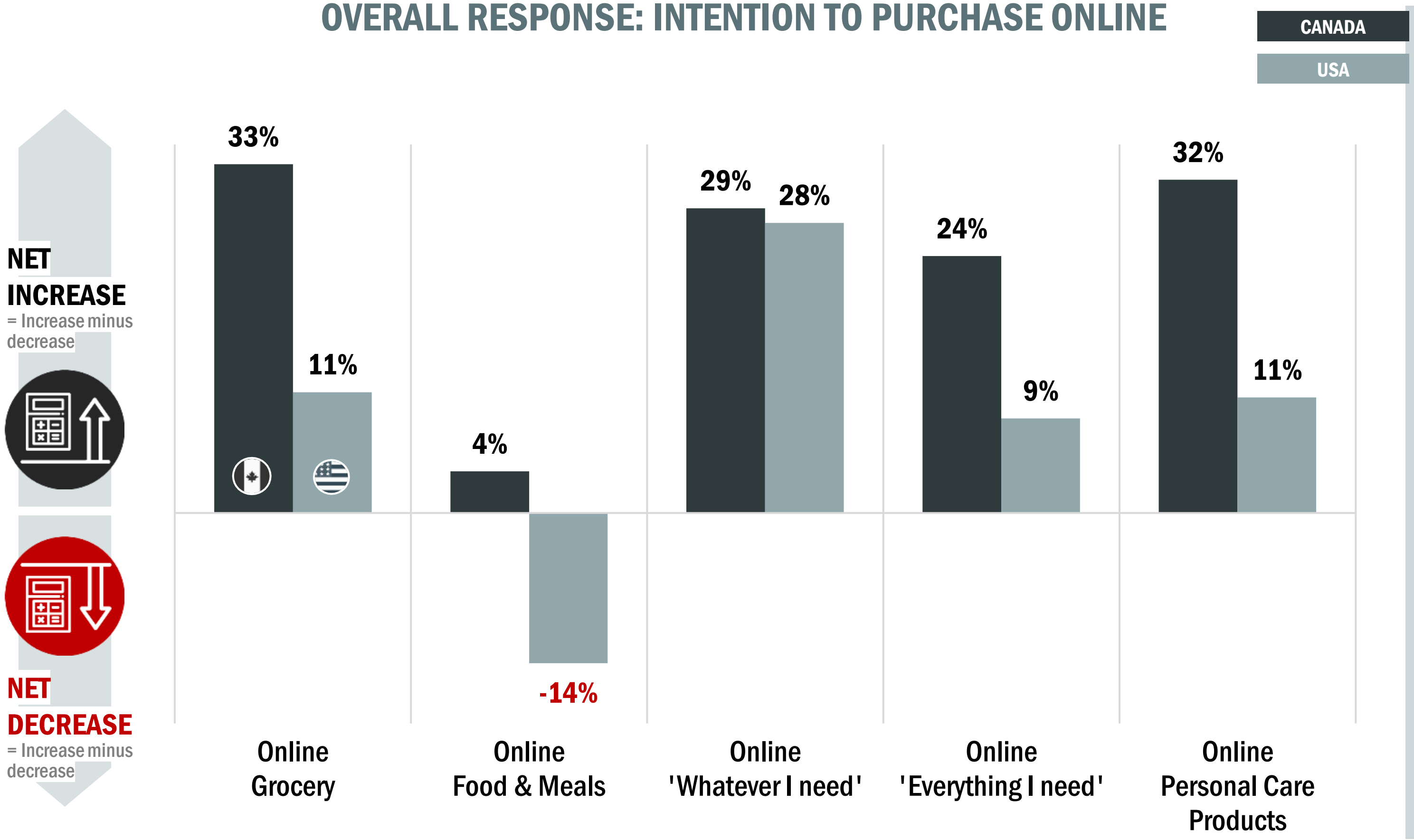
'Global' for this question captures input from the USA, Canada, UK, Italy, Spain, Japan and Australia

ONLINE Purchasing - Future Intention

IMI 24™ : N=1,250 per country: We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

NORTH AMERICA AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO PURCHASE ONLINE



North American Intention to Purchase Online when the Coronavirus is no longer a concern

Online Grocery, Online Food, Online 'what I need', Online Everything, Online Personal Care Products when the Coronavirus is no longer an issue

Situation Global State of Emergency

Result Across North America, there is a significant increased intention to purchase all goods online post COVID-19.

The US shows decreased intention to purchase food and meals online, which could be a positive for the restaurant industry.

RETAIL Purchasing - Future Intention

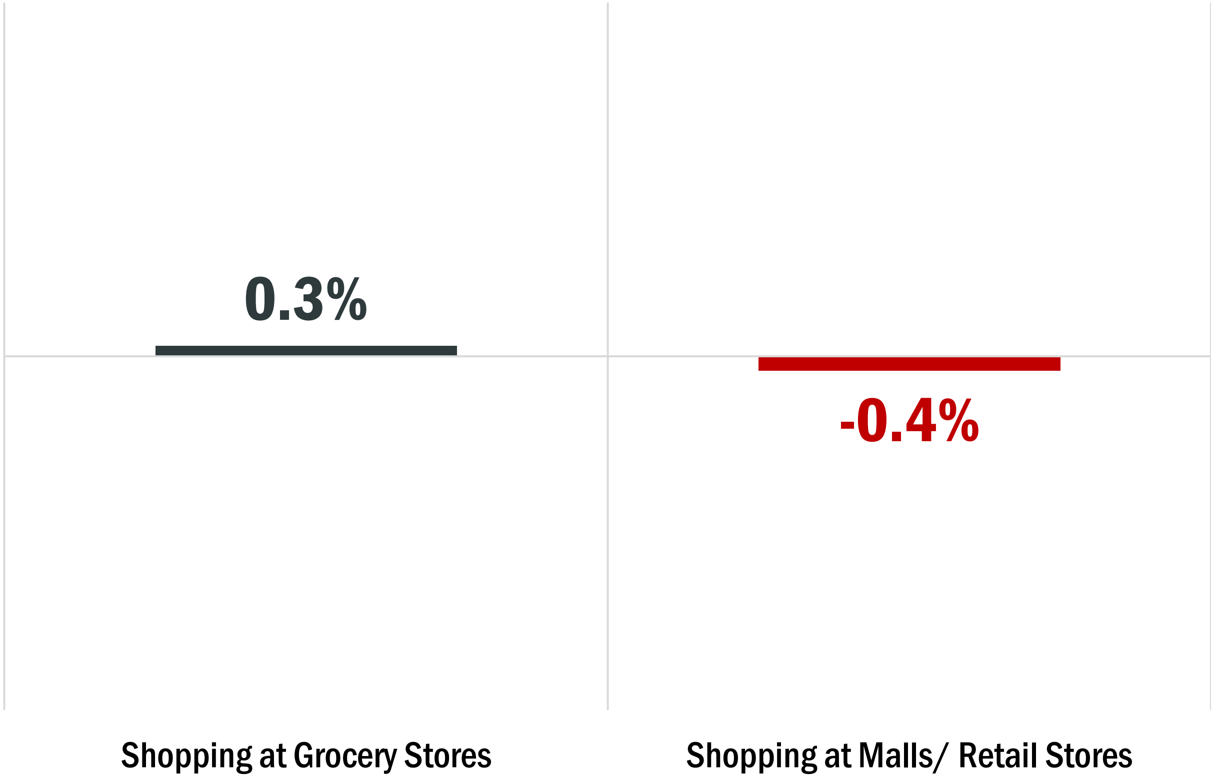
IMI 24™ : N=500 per country: We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

GLOBAL AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO PURCHASE AT RETAIL

NET INCREASE
= Increase minus decrease

NET DECREASE
= Increase minus decrease



Global Intention to Purchase at Retail when the Coronavirus is no longer a concern

Shopping at Grocery Stores, Shopping at Malls / Retail Stores

Situation — **Global State of Emergency**

Result — **Despite the increased intent to shop online post COVID-19, there will still be shoppers looking for the brick and mortar experience. Elevating the consumer experience at retail will be critical to drive traffic.**

April 20th	=	**0%**
April 30th	=	___
May 15th	=	___

IMI is committed to track and report on 'Global Intention to Purchase at Retail' throughout 2020.

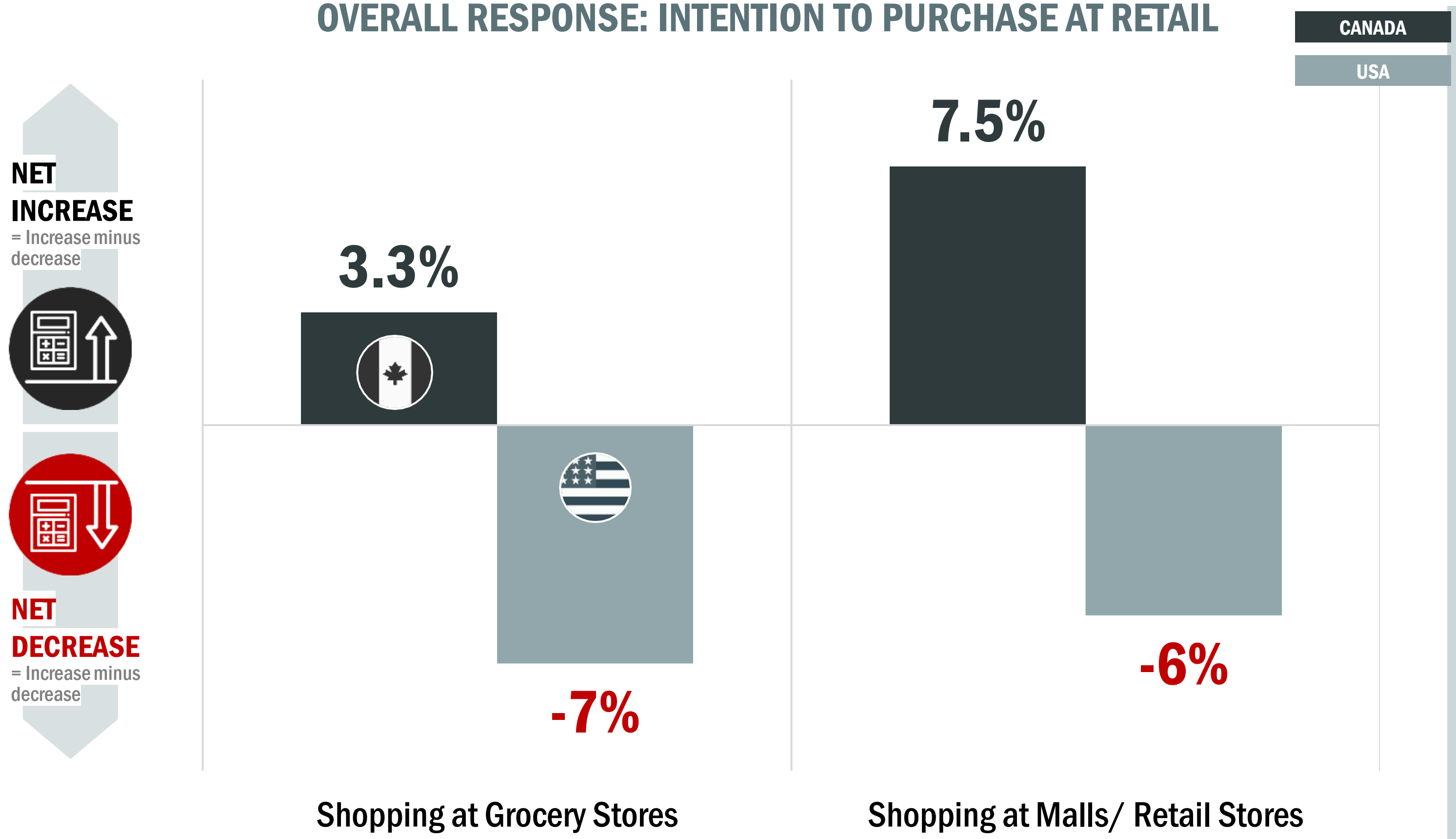
'Global' for this question captures input from the USA, Canada, UK, Italy, Spain, Japan and Australia

RETAIL Purchasing - Future Intention

IMI 24™ : N=500 per country: We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

NORTH AMERICA AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO PURCHASE AT RETAIL



North American Intention to Purchase at Retail when the Coronavirus is no longer a concern

Shopping at Grocery Stores, Shopping at Malls / Retail Stores

Situation Global State of Emergency

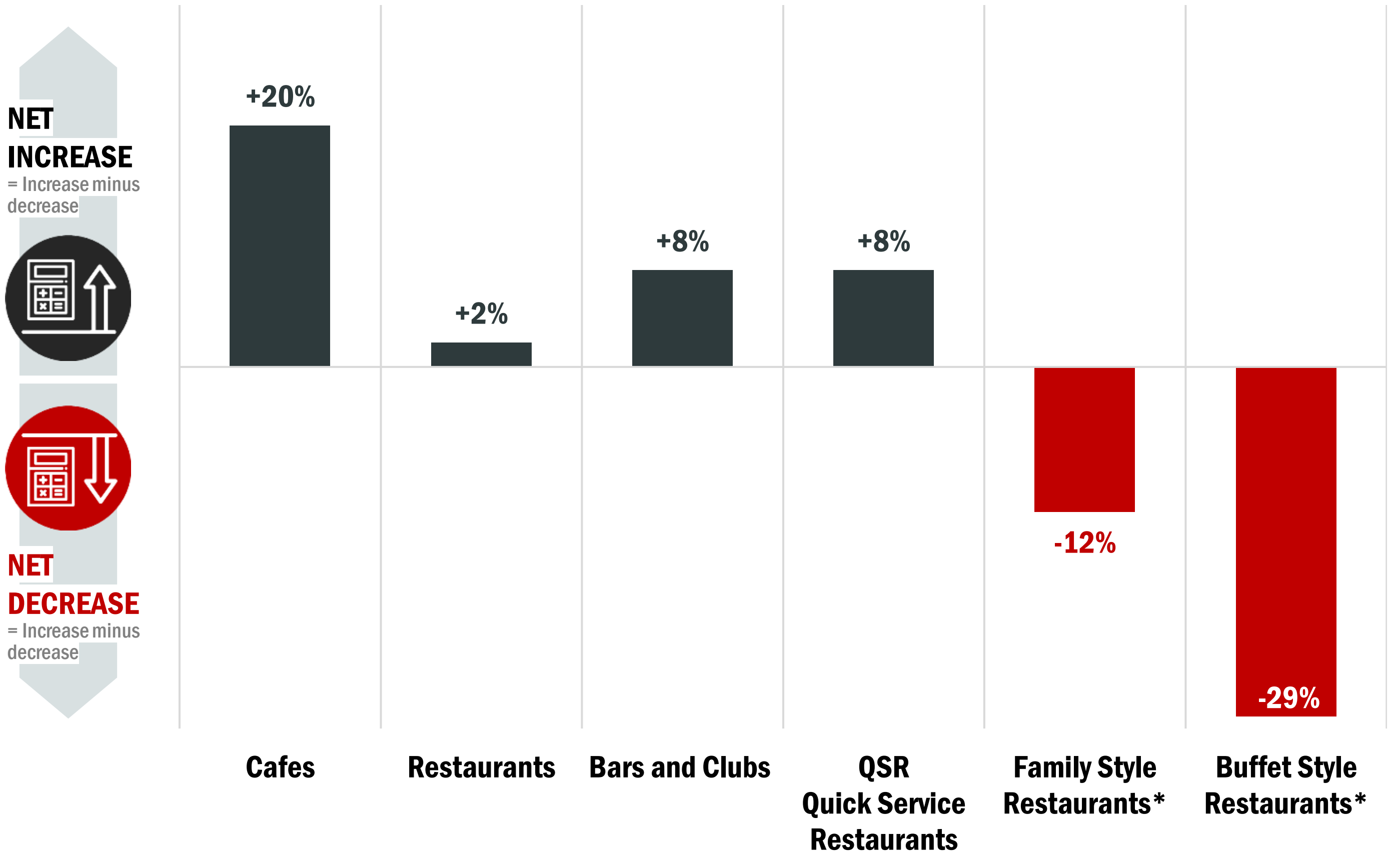
Result North Americans don't seem to agree on shopping at retail post COVID-19. Canadians showcase an increased intention to shop at retail, while Americans are headed in the other direction purchasing what they need online.

RESTAURANT Purchasing + Buffet and Family Style

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

GLOBAL AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO PURCHASE AT RETAIL



Global Intention to go to Restaurants & Bars when the Coronavirus is no longer a concern

Bars, QSR, Restaurants, Café, Buffet Style and Family Style Restaurants

Situation Global State of Emergency

Result Despite the pent-up demand that exists for the parts of the industry at-large, there are significant headwinds and challenges ahead for family style and buffet restaurants. These restaurants need to proactively reconsider the way they offer their product and evolve to meet new consumer needs and expectations.

IMI is committed to track and report on ‘Global Intention to Purchase at F&B’ throughout 2020.

‘Global’ for this question captures input from the USA, Canada, UK, Italy, Spain, Japan and Australia

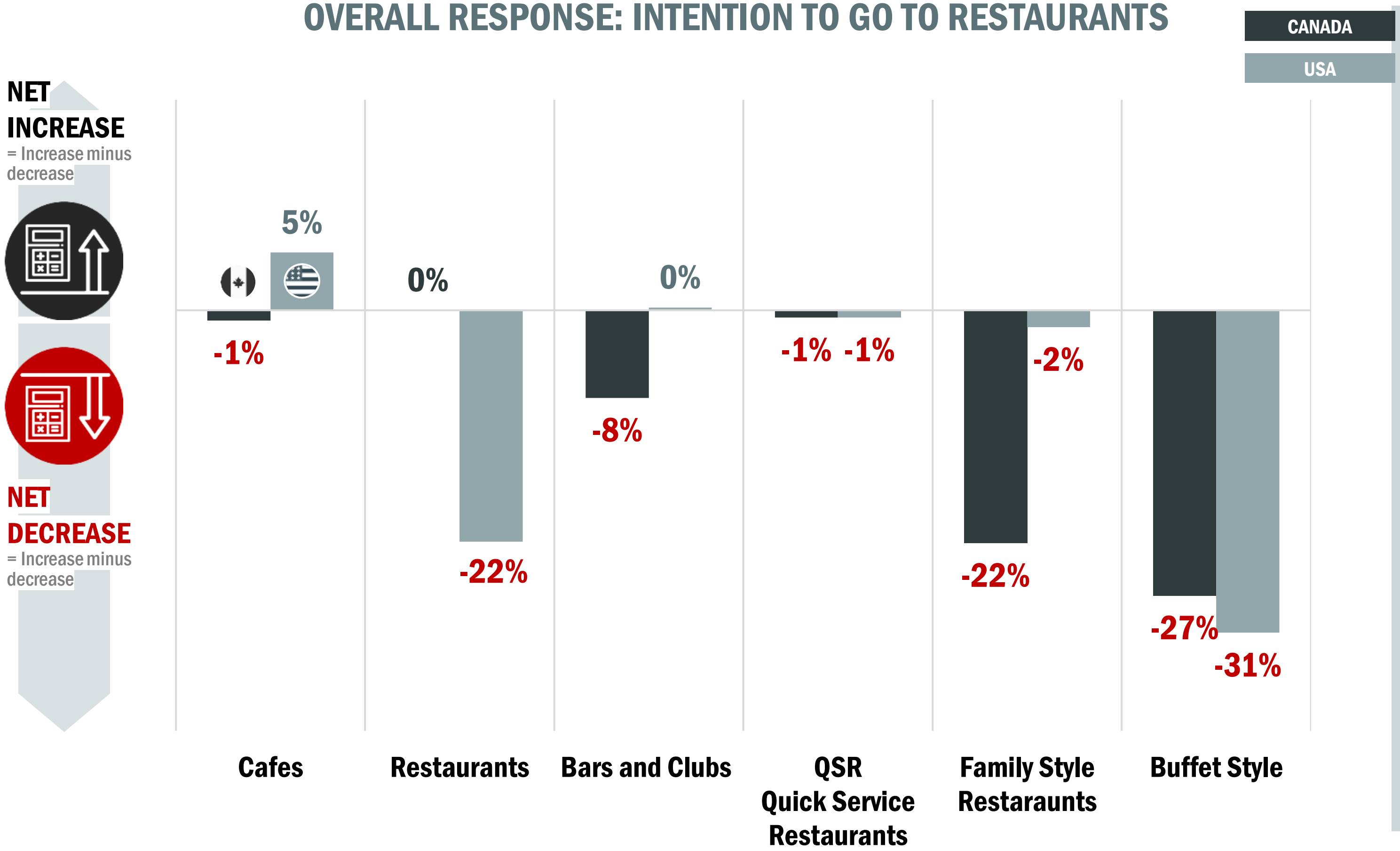
* Indicates only asked across North American markets

RESTAURANT Purchasing - Future Intention

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

NORTH AMERICA AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO GO TO RESTAURANTS



North American Intention to go to restaurants & bars when the Coronavirus is no longer a concern

Bars, QSR, Restaurants, Cafés

Situation Global State of Emergency

Result At this time of the Peak of the Pandemic - there are significant headwinds and challenges ahead for all types of dining establishments. Restaurants need to proactively reconsider the way they offer their product and evolve to meet new consumer needs and expectations.

Section 4 - Purchasing

Additional Categories – Price

Additional Categories – Lowest Price

IMI 24™ : N=500 We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

GLOBAL AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO PURCHASE AT RETAIL

Global Intention to the Lowest Price Merchandise / Personal Care items when the Coronavirus is no longer a concern

Situation Global State of Emergency

Result With 65% of people in the world concerned about their financial health, there will be an increased intent to purchase based on the lowest available price, post COVID-19. This may resemble the price sensitivity seen from 2007-2010 throughout the recession.
It will be essential for 'premium' and 'mainstream' brands to continue driving brand equity by ensuring core functional and emotional benefits are clearly articulated through 2020 and beyond.

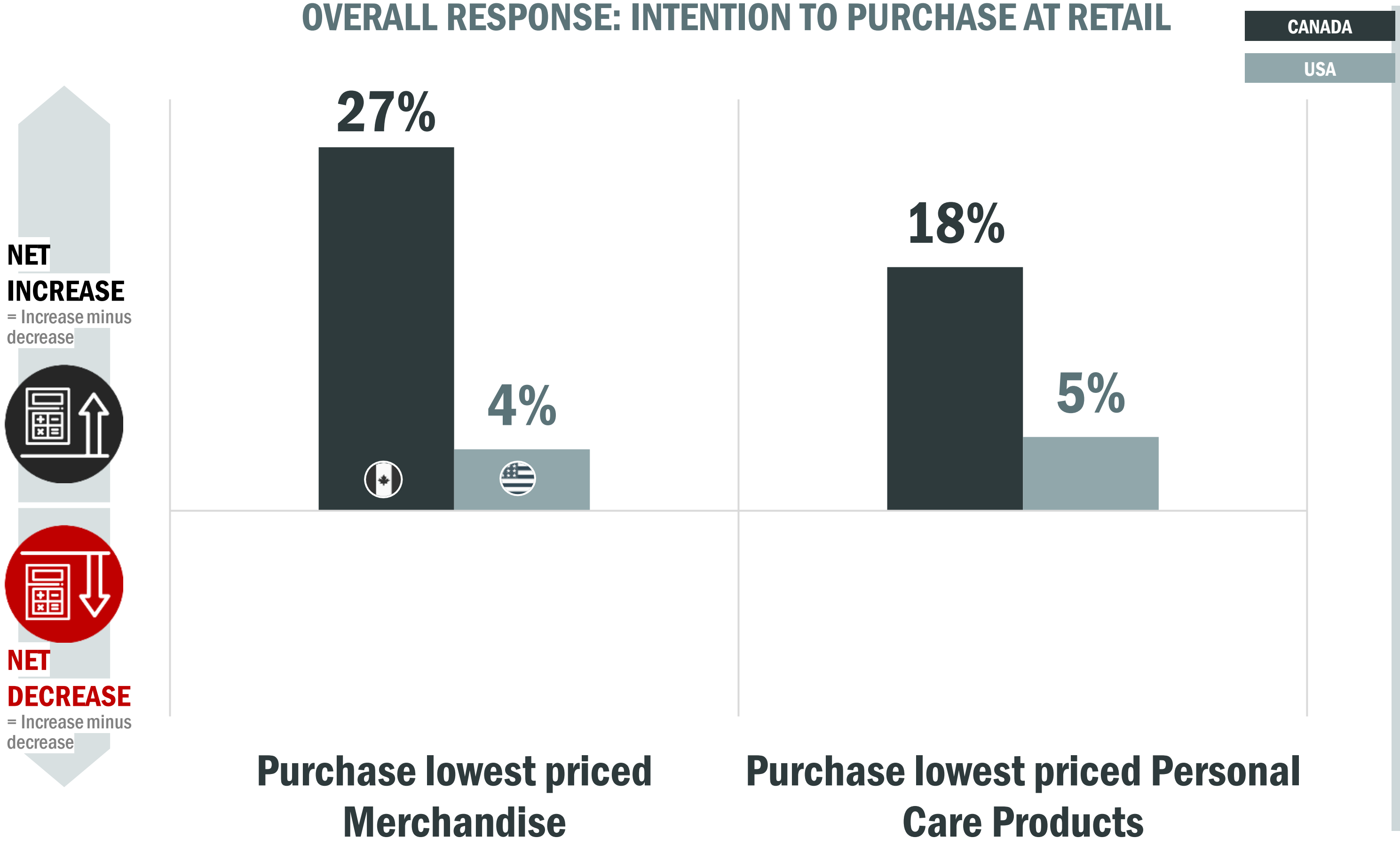
'Global' for this question captures input from the USA, Canada, UK, Italy, Spain, Japan and Australia
* Indicates only asked across North American markets

Additional Categories – Lowest Price

IMI 24™ : N=500 We Asked: Intention Increase, Decrease, Not Change when the Coronavirus is no longer an issue

NORTH AMERICA AS OF APRIL 20th

OVERALL RESPONSE: INTENTION TO PURCHASE AT RETAIL



North American intention to the lowest price merchandise / personal care items when the Coronavirus is no longer a concern

Situation Global State of Emergency

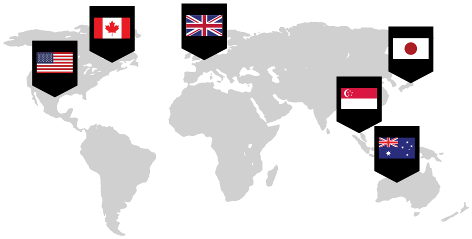
Result North Americans are showing an increased intent to purchase based on the lowest available price post COVID-19; however, Canadians are currently projecting a much greater sensitivity to price once the pandemic is no longer an issue.

IMI International Since 1971

CORE PURPOSE

INSIGHT
DRIVING
PROFIT

LOCATIONS



150+
Clients

45
Countries

POINT OF DIFFERENTIATION

20,000+ Case Studies

R Y G

THOUGHT LEADERSHIP THROUGH CUSTOM SOLUTIONS

NEXTWAVE

Fuel and inspiration.
- What to do NOW & next
- Fact based guidance for your next step forward; key demos, QSR, hot trends, health and wellness, innovation ,events etc.
- Annual IMI investment in R&D

SPONSORPULSE

24/7/365 insight.
- Insight at your fingertips
- Deeper dive into Sponsorship with SponsorPulse™ and coming soon, understand everything about the people you care most about with GenPulse.
- Much more to come…

PINPOINT

Deep dive with custom solutions.
- Tailored approach to unique questions.
- Specific questions to drive your ROI
- Brand Strategy, Product, Messaging, Segmentation
- Event Activation
- Sponsorship
- Price Optimization etc.

NEXT UPDATE : COVID-19

The next comprehensive COVID-19 update will be delivered within 10 days.

IMI

Wave 5: The Start of a Global Recovery

If you would like more information, please feel free to contact Don Mayo, Global Managing Partner, IMI International dmayo@consultimi.com.