

IMI International Overview

SINCE 1971 OUR CORE PURPOSE

INSIGHT DRIVING PROFIT

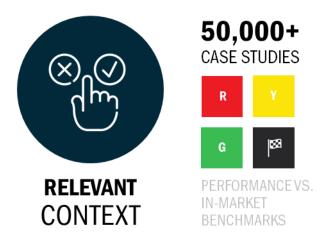
150+CLIENT PARTNERS

FROM 45+ COUNTRIES



MONTHLY INSIGHT X18 COUNTRIES

OFFICES ON FOUR CONTINENTS



FACT-BASED GUIDANCE FOR EVERY STEP OF THE WAY





CONFIRM

FACT BASED RELATIVE TO IN MARKET ACTION STANDARD / BENCHMARKS'



Uncover Opportunity, Set your Strategy, Intercept and Engage to drive your ROI.

WHO TO FOCUS ON



HOW TO CONNECT



WHERE TO BE



WHAT TO SAY



IMI PRESENTATION SOURCES

GENPULSE •

CATEGORYPULSE

BRANDPULSE •

GLOBALPULSE •

IMI Webinar Series

Since the beginning of the pandemic IMI has been releasing insight to help provide pragmatic counsel and support strong decision making that drives your ROI.

For this presentation we received input from over 100k consumers 13+ across North America. Over 20,000 interviews were completed in October and analysis was completed on 'Trust related questions' from over 80,000+ interviews completed in January to September 2021.



TRUST Exposed: TODAY

Accelerating Consumer Engagement with Not-For-Profit: Nov 18 What Drives People to Purchase: Jan 20th, 2022

These are in addition to the GLOBAL GROWTH series updates.

If you would like more information, please feel free to contact Vanessa Toperczer vtoperczer@consultimi.com or Don Mayo, dmayo@consultimi.com.

All content is available on IMI's Global Content Portal



content.consultimi.com



About the Speaker

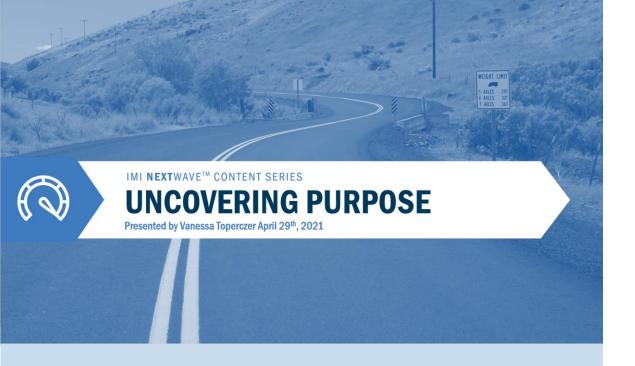
Driven by intention and curiosity, Vanessa's career to-date has provided her with a 360 view of the Marketing world - spanning Agency at Anthem Worldwide and Monsoon Communications, Brand at Coca-Cola, Not-for-Profit at WE Charity, Social Enterprise at ME to WE and the Insights sides of the business at IMI International.

Her experience encompasses brand transformation and optimization; growth strategy development; communications strategy and articulation, partnership and sponsorship strategy, team leadership and empowerment, plus entrepreneurial business development and hustle.

Vanessa's core focus is to leverage insight to uncover strong and pragmatic direction for any business challenge.



Vanessa ToperczerSenior Vice President, IMI International



Fundamentals + PURPOSE = Purchase

Quality. Trust. Price. Ease + PURPOSE

MUST HAVES: STRONG FUNDAMENTALS

REASON FOR BEING

In our April Webinar Uncovering PURPOSE we highlighted the fundamentals for building your brand.



We've set the stage to know that TRUST is important.

Now we're exposing the nuances to learn how we can develop and keep this powerful building block.



TRUST

What does it really mean?

How do you build it?

Does its importance differ by demographic?

Does it differ by category?

Any messages that build it?

Can visuals impact trustworthiness?

TRUST EXPOSED

SECTION 1

Fundamentals of TRUST

- Size of Influence
- What it's made of...how you lose it
- Years to Build
- Can you get it back, if lost?
- Actions that accelerate and decelerate TRUST

SECTION 2

Category, Brand and Demographic Differences

- Demographic profiling who does it most influence/ least influence?
- Differences between categories?
- Are there different expectations of specific brands?

SECTION 3

Importance of the Right Messaging

- What messages drive trust
- What messages drain it

Followed by Q&A





SECTION 1

The Fundamentals of TRUST





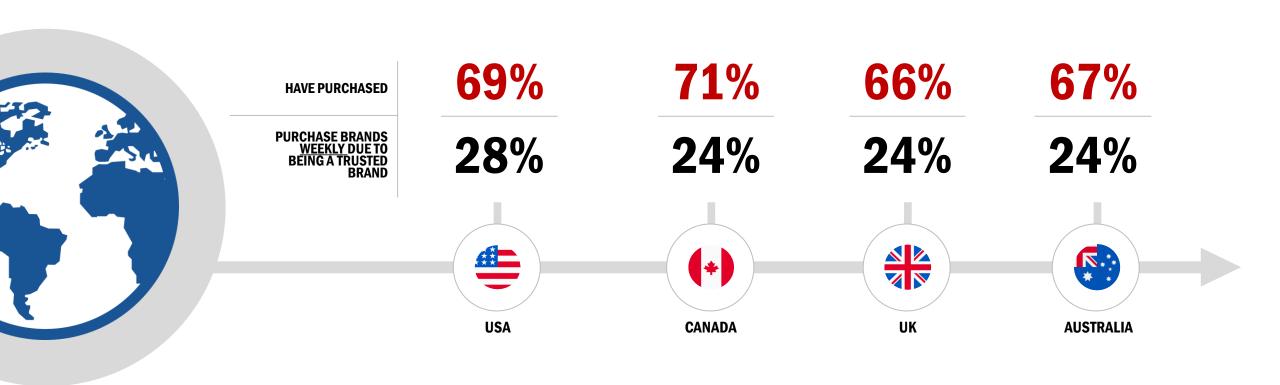
TRUST Drives Purchase for OVER 2/3^{RDs} of the US Population 13-65 yrs





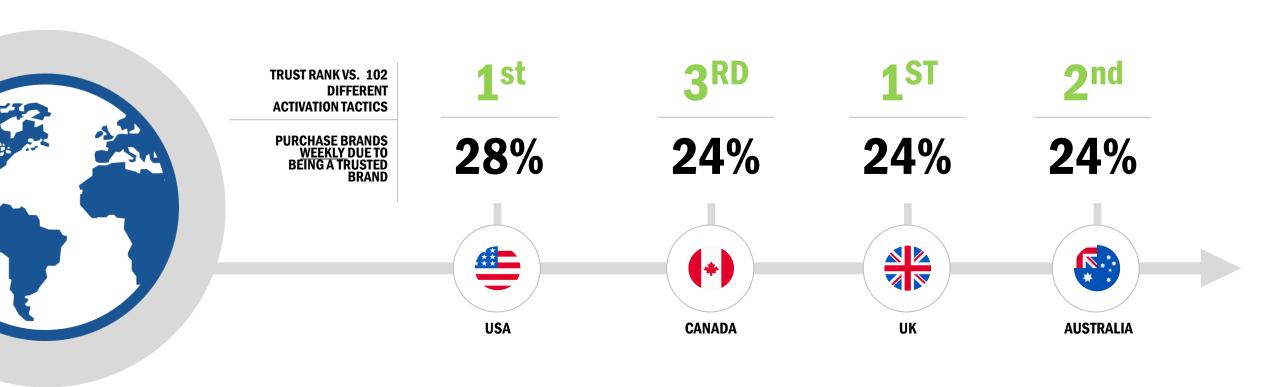


PURCHASED A BRAND, PRODUCT OR SERVICE DUE TO TRUST



IMI24™: N=140,000 across the 4 countries - Feb 2020 through July 2021

WHERE TRUST RANKS IN DRIVING PURCHASE WEEKLY



IMI24™: N=140,000 across the 4 countries - Feb 2020 through July 2021



Trust is built with multiple components

Unaided- 'Why People Do Trust Brands". October 2021 TRUST Quality **Price Value Consistency Dependability** Reliability **Stand by their product Years in business Durability** They work **Good work Usability Environmentally Life Span Canadian Made Natural Products Brands** Name **Friendly** Innovation Style/Looks Leadership **Reviews Popularity** Reputation Well-known **Testimonials** Honest **Truth in Advertising** Cost

With the Top 5 being Quality, Price, Value, Well-Known and Cost

Unaided- 'Why People Do Trust Brands". October 2021

TRUST

Quality

Price

Value

Well-known

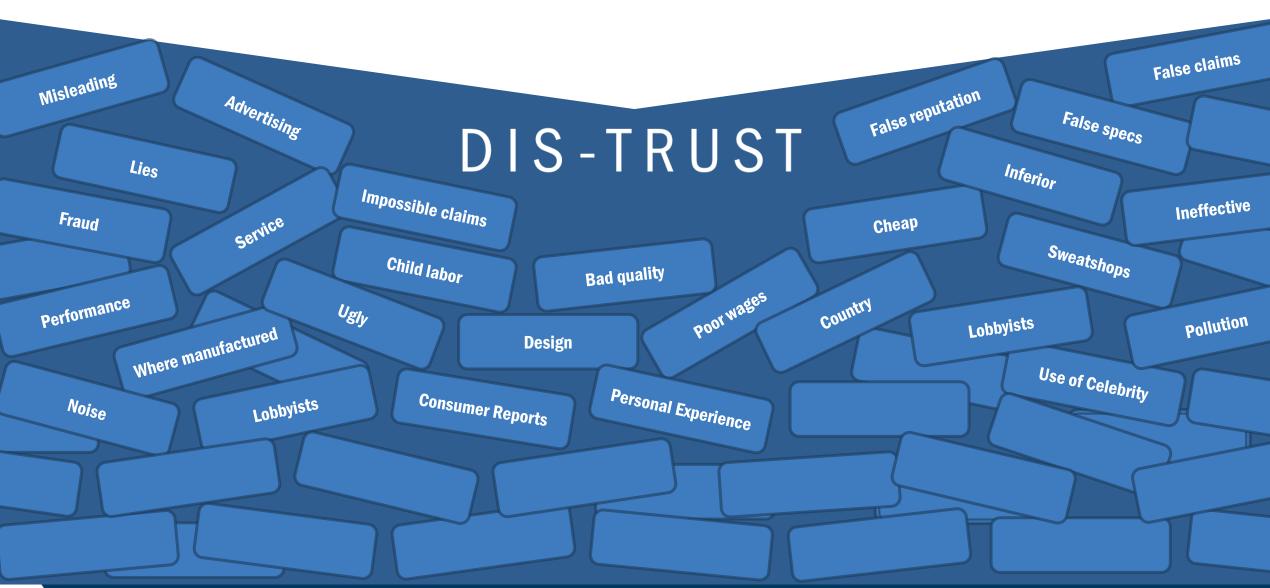
Cost

COST+QUALITY AND QUALITY+VALUE ARE TWO WORDS USED TOGETHER OFTEN.

IT'S THE COMBINATION OF DELIVERING GREAT

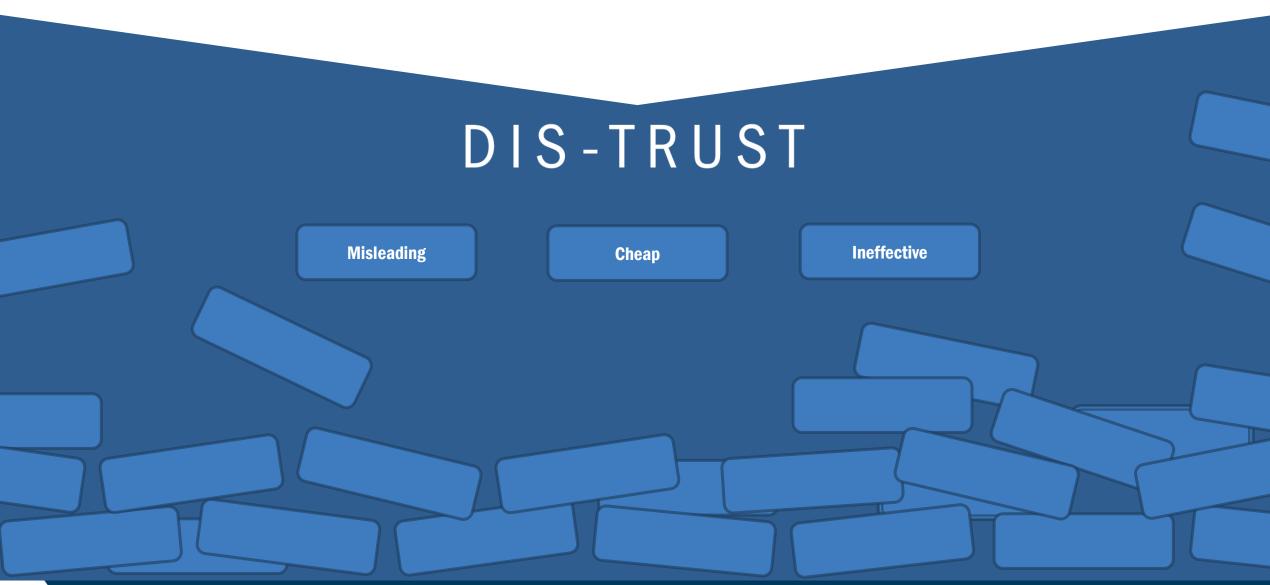
And on the flip side there are key factors leading to dis-trusting brands

Unaided- 'Why People Do Not Trust Brands". October 2021.



With the Top 3 being Misleading, Cheap and Ineffective

Unaided- 'Why People Do Not Trust Brands". October 2021.





It takes many years to build TRUST...

Completed October 10-13, 2021, 13+ Years old, n=500 USA, Canada, UK

YEARS



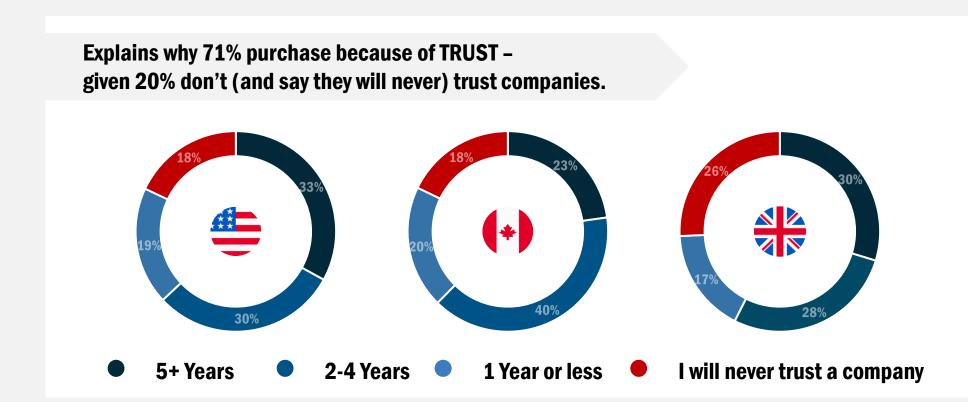
5.2



4.5



5.3



In Canada, Youth are faster to TRUST but less will EVER TRUST A COMPANY



AND ALTHOUGH GENERALLY CANADIANS TRUST FASTER - YOUNG AMERICANS ARE MORE TRUSTING THAN YOUNG CANADIANS

*						
	13-34	35-54	55+	13-34	35-54	55 [.]
Trust a Company	69%	82 %	75 %	81%	76 %	779
Will never Trust a Company	31%	18%	25%	19%	24%	239
Years to Build Trust? Avg.	4	5	6	4.6	5.5	5

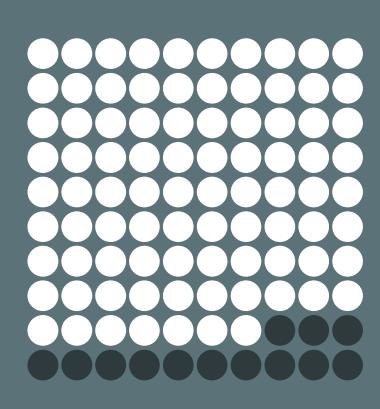
How many years would it take for a company, product or service to *build your Trust in them?*



Do People ever LOSE TRUST?

Unaided-Name a brand that has lost your TRUST

Completed October 10-13, 2021, 13+ Years old, n=600 USA, Canada



87%

of North Americans named 1+ Brands

Types of companies where they lost TRUST NO CATEGORY IS SPECIAL

- Home improvement -

Government - Search engines

- Retail

Banks - Telecommunications

- CPG

- Auto

Social - R

- Soft drink

- Pharmacy

- Streaming services

Apps

Technology

Health and wellness

- QSR

- Real Estate

Lawyers

- Airlines

- 0il

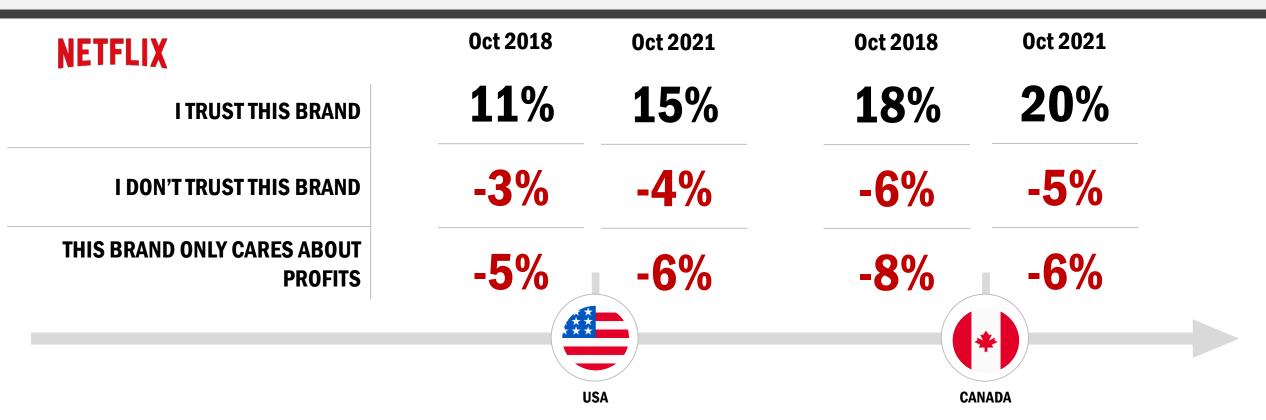


Difficult and Possible



Maintaining trust is essential, difficult and possible

Completed October 10-13, 2021, 13+ Years old, n=500 USA, Canada

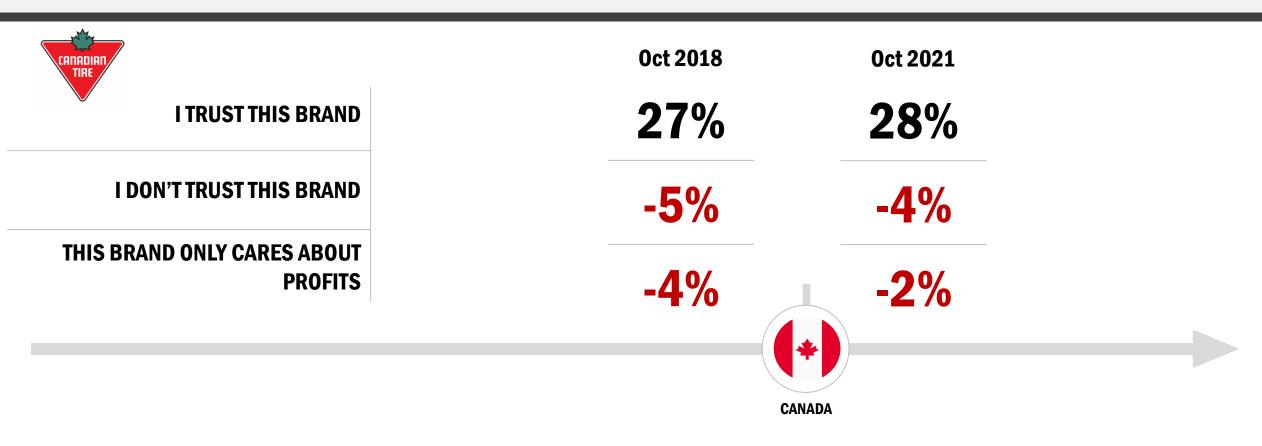


LOOKING AT THE POSITIVE AND THE NEGATIVE IS IMPORTANT - NEXTFLIX HAS DONE A GOOD JOB OF BUILDING TRUST AND NOT INCREASING DIS-TRUST IN THEIR BRAND.



Canadian Tire has remained steady on both the positive and negative of TRUST

Completed October 10-13, 2021, 13+ Years old, n=500 USA, Canada



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Facebook has gained significantly on the Dis-TRUST side of the equation.

Completed October 10-13, 2021, 13+ Years old, n=500 USA, Canada

I TRUST THIS BRAND	0ct 2018 8%	0ct 2021 9%	0ct 2018 9%	0ct 2021 9%	
I DON'T TRUST THIS BRAND	-22%	-26%	-21%	-25%	
THIS BRAND ONLY CARES ABOUT PROFITS	-14%	-22%	-15%	-24%	
	USA		CANAD	CANADA	

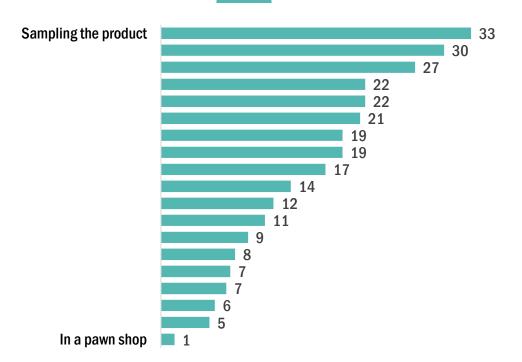


Where you Show Up Impacts Trust...

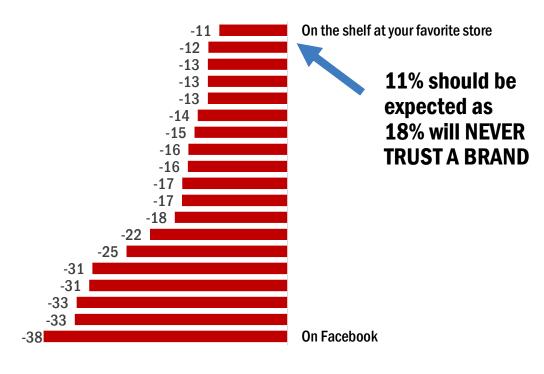
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IMI NextWave October 2021 – N=900 respondents per country

% THAT 'TRUST A BRAND MORE WHEN THEY SEE AT...



% THAT 'TRUST A BRAND LESS WHEN THEY SEE AT...



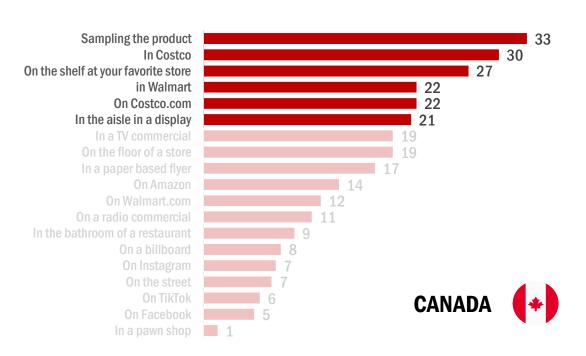
Q. When seeing a brand, product or service at the locations – it encourages me to TRUSTTHE BRAND MORE

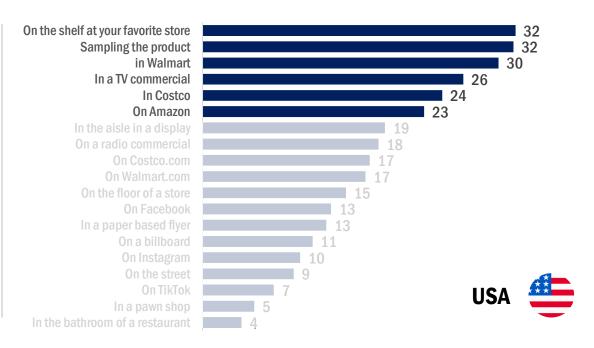


Where you show up impacts TRUST...

IMI NextWave October 2021 - N=900 respondents per country

% THAT 'TRUST A BRAND MORE WHEN THEY SEE AT...



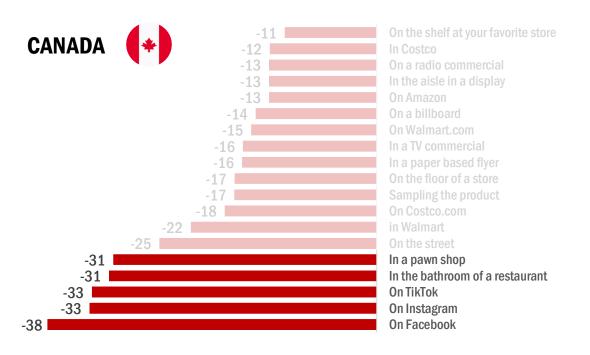


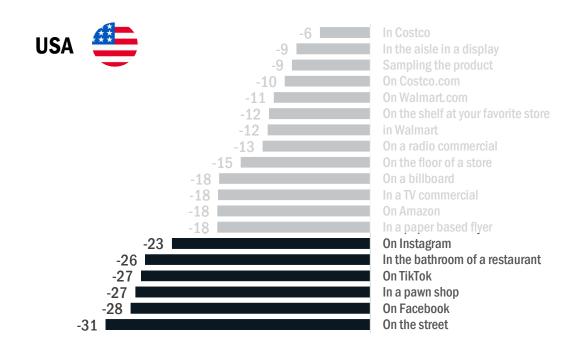
Q. When seeing a brand, product or service at the locations – it encourages me to TRUST THE BRAND MORE

Actions brands take that will get people to TRUST THEIR BRAND LESS

IMI NextWave October 2021 - N=900 respondents per country

% THAT 'TRUST A BRAND LESS WHEN THEY SEE AT...





Q. When seeing a brand, product or service at the locations - it encourages me to TRUSTTHE BRAND LESS



Showing up in peoples' favorite store, with In-Store Display or In-Store Sampling or on Television can help build brand TRUST.



Yes, BUT it takes action and not everyone will come back onboard...

Completed October 10-13, 2021, 13+ Years old, n=300 USA, Canada



What can a company, product or service do to regain your Trust - if they have done something to lose it?

What can you DO to regain TRUST?

Completed October 10-13, 2021, 13+ Years old, n=300 USA, Canada



What can a company, product or service do to regain your Trust - if they have done something to lose it?

EVERY purchase is a relationship with your brand – keep it sacred!

If you lose trust with a consumer, it takes energy and resources to get it back...which could be spent on driving your business forward.



lympho. combining

SECTION 2

Category, Brand and Demographic Deep-Dive

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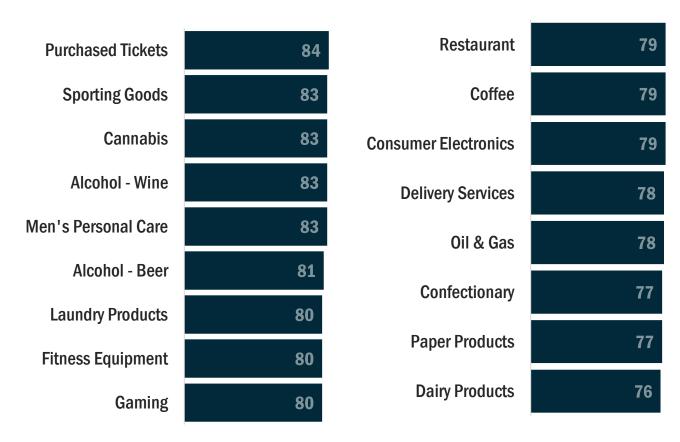




PURCHASE BECAUSE IT'S A TRUSTED BRAND NAME (P12M)

In the US, the purchase of some categories are more influenced by TRUST than others but there isn't a clear pattern.

The reality is that as TRUST is important to people it is a driver across categories.







TRUST is more important to those that purchase fitness wearables than those that use ride share.

INTUITAVELY IT WOULD BE THE OTHER WAY AROUND...







PURCHASE BECAUSE IT'S A TRUSTED BRAND NAME (P12M)

The reality is that trusted brand names drive purchase.

In Canada, similar to the US, in some categories TRUST has a heightened importance but there isn't a clear pattern. You have to do the work to understand its relative importance.

Sporting Goods	84
Consumer Electronics	83
Beverages - Sport Drinks	83
Delivery Services	83
Women's Personal Care	82
Health & Wellness	81
Car Rental	80
Retailers	79
Apparel	78
Alcoholic Beverages - Wine	77
Ticketing	77

Restaurant	77
Coffee Products	77
Household Goods	77
Confectionery	76
Cereals	76
Paper Products	75
Cannabis	74
Dairy Products	74
Gambling & Lottery	74
Oil & Gas	73

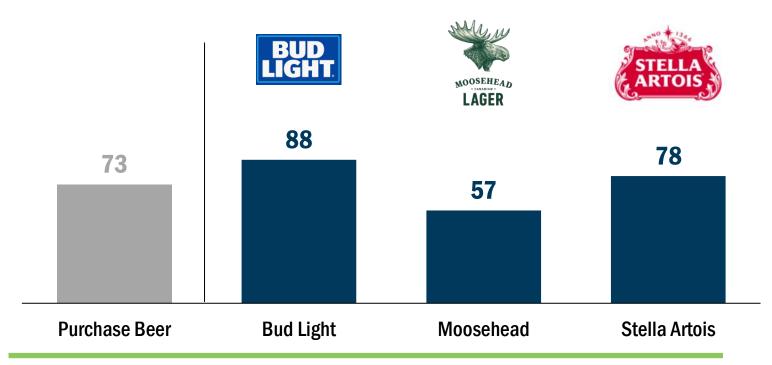




For Beer Brands, whether in Canada or the US, not all brand purchasers are alike...



Purchase because it's a TRUSTED brand



TRUST has a different level of importance depending on the brand. If you're retaining Moosehead purchasers TRUST may not be your main focus but if you're looking to recruit you may need a different story.

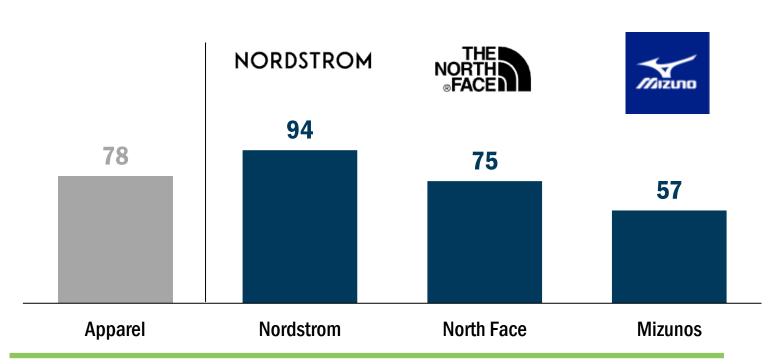
BrandPulse™ June 2021.



Similar story in the Apparel Category...



Purchase because it's a TRUSTED brand



People that purchase from Nordstrom are more influenced by TRUST than those that purchase from The North Face. Important to dive into who you care about to drive your brand.

BrandPulse™ June 2021.



45

What about People. Who is TRUST most important to...OR not important to at all?

TRUST has a similar influence across all demographics in Canada



GEN-Z (13-24)



71%

MILLENNIALS (25-39)



71%

GEN-X (40-55)



70%

BOOMERS (56-64)



74%

It's when you look at the nuances that you find the insight...



KIDS OR NO KIDS?	ڝٛٛؽؿ
Kids < 18	75%
No Kids < 18	69%
Kids < 3	80% ■
Kids 4-6	84%
Kids 7-12	76%
Kids 13-17	72 %



It's when you look at the nuances that you find the insight...



KIDS OR NO KIDS?

Kids < 18

No Kids < 18



75 %	
69%	
76%	

EDUCATION AND INCOME



University / Doct Cred	71%
University / Post Grad	1 1 70
College	72 %
High School or Lower	73 %

NA: Under \$70K	67%
NA: \$70K+	74 %
NA: Under \$100K	69%
NA: \$100K+	75 %



TRUST does not play as important a role across generations in the US - exception being Gen-X and older Millennials.



GEN-Z (13-24)



63% **(*)** 71%

MILLENNIALS (25-39)



69% (*) **71**%

GEN-X (40-55)



76%



BOOMERS (56-64)



64%

***)** 74%

GenPulse™ June 2021. Purchase because it's a TRUSTED brand name

Driven by "older millennials" 34-39 year olds at 75%

It's similar across those that identify as male or female





In the USA the importance of TRUST is the opposite in families with kids



KIDS OR NO KIDS?	ڝٛٛؽؙڝٛ	
Kids < 18	76%	
No Kids < 18	63%	
Kids < 3	67%	
Kids 4-6	78%	
Kids 7-12	81%	
Kids 13-17	81%	

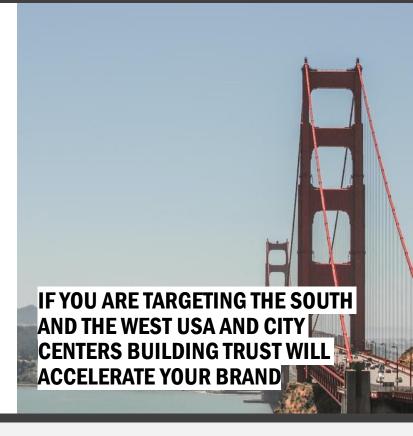


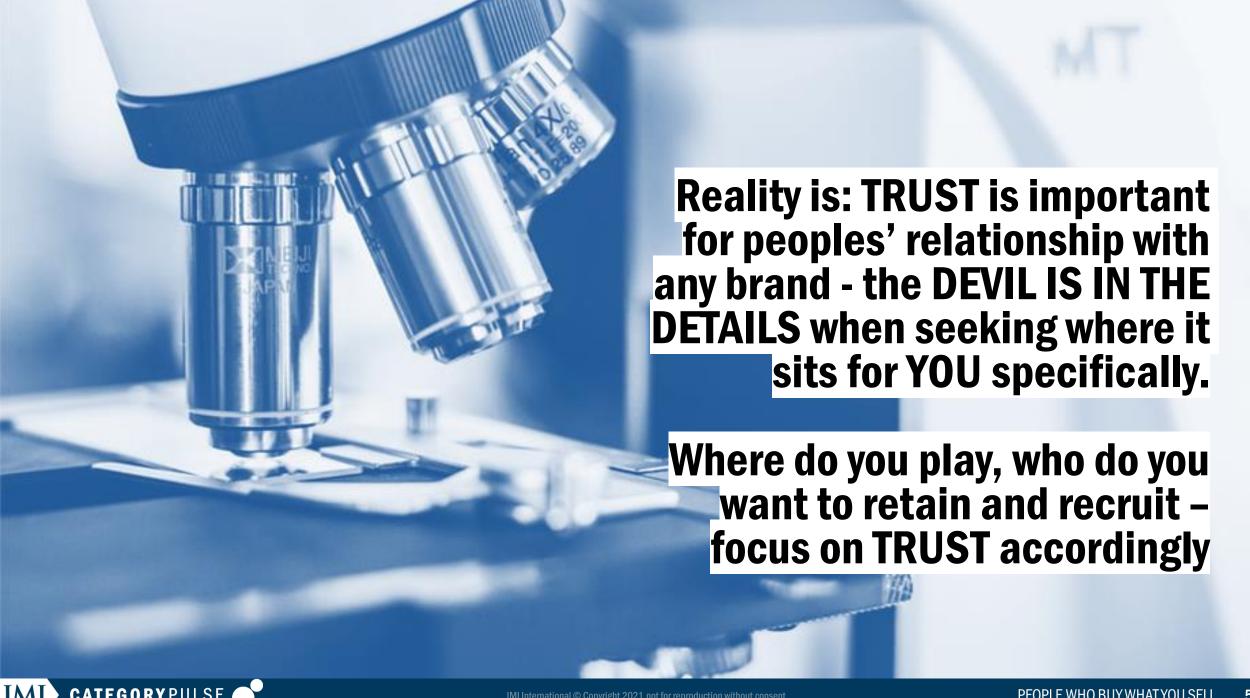
Regional areas show significant differences...



KIDS OR NO KIDS?	
Kids < 18	76%
No Kids < 18	63%
Kids < 3	67%
Kids 4-6	78%
Kids 7-12	81%
Kids 13-17	81%

REGION	000
Small town/rural	65%
Suburban	65%
City/Downtown	77%
Northeast	64%
Midwest	61%
South	73 %
West	





When we dive even deeper that's where the magic happens

When you take action - you have control of WHAT you say and SHOW.



SECTION 3

Messages that Drive OR Drain TRUST



Over 100 Messages and Visuals Cues were tested us IMI's GlobalPulseTM, assessing their direct impact on Trust of a Brand with the lens of...

Does it drive or drain TRUST?

Summary of Trust More and Trust Less: CANADA



-100+ messages tested in October 2021: A maximum of 6 messages or visual cues were shown to each respondent. A total of 6,800 people 13+ years of age in Canada and the United States evaluated the messages/cues.

TOP 10 TRUST MORE

Made in Canada	49%
Recommended by a family member	38 %
Have seen people in your family purchase	33 %
Recommended by a friend	32 %
Great Quality	31 %
Great Value	29 %
Available locally	29 %
All natural	28 %
Uses 100% renewable materials	28 %
90 Day Money Back Guarantee	28 %

TOP 10 TRUST LESS

Made in China	-32%
Endorsed by a celebrity you don't like	-26%
Endorsed by a celebrity	-23%
World's best	-22%
Hassle free guarantee	-22%
Made in Russia	-22 %
Buy one get one free	-20%
Consumer Rating of 3.7	-20%
Trusted by Americans	-20%
Endorsed by a celebrity you don't know	-19%

Summary of Trust More and Trust Less: USA



-100+ messages tested in October 2021: A maximum of 6 messages or visual cues were shown to each respondent. A total of 6,800 people 13+ years of age in Canada and the United States evaluated the messages/cues.

TOP 10 TRUST MORE

Made in the USA	42%
Great Value	34%
Have seen people in your family purchase	30 %
Recommended by a family member	29 %
All natural	28%
Great Price	28%
Consumer Rating of 4.5	28 %
Developed with your health in mind	28%
Hassle free guarantee	27 %
90 Day Money Back Guarantee	26 %

TOP 10 TRUST LESS

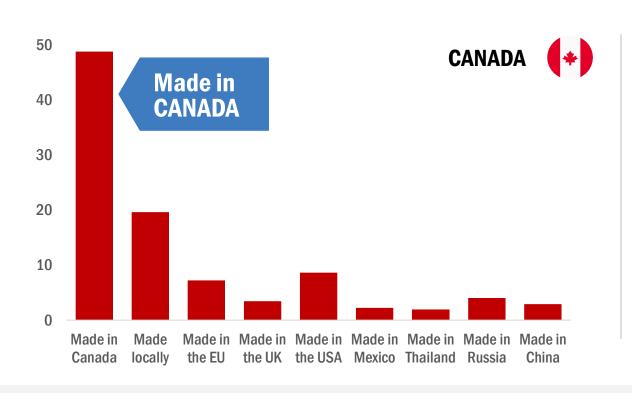
Consumer Rating of 3.7	-30%
Endorsed by a celebrity	-30%
Made in China	-27%
World's best	-26%
Hassle free guarantee	-24 %
50% off	-22%
Endorsed by a celebrity you don't like	-22 %
Made in Thailand	-22 %
Best Price anywhere	-21 %
Consumer Rating of 3.7	-30%

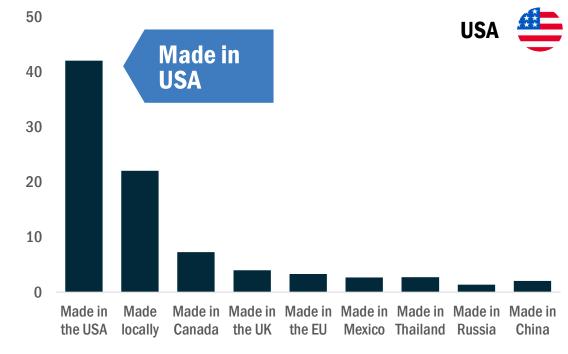
Major Sections



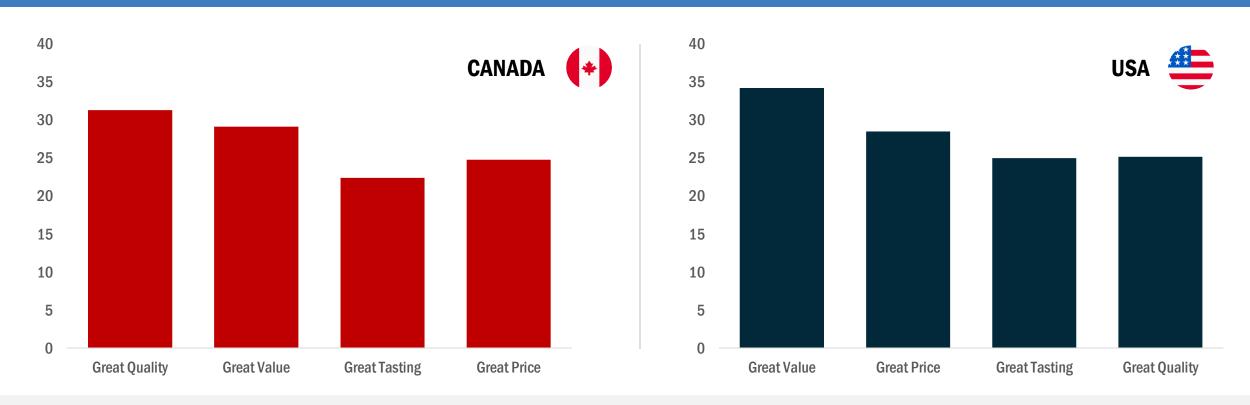
Where Made - Visual or Written Cues that drive "Trust More"

BUILDS TRUST



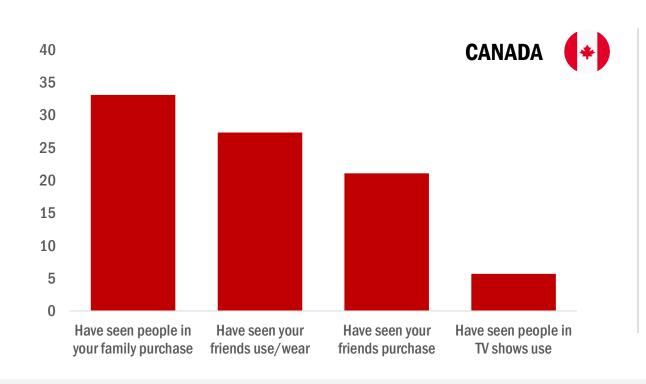


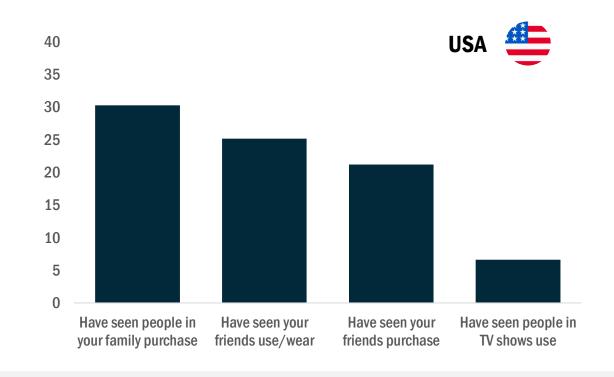
" - Visual or Written Cues that drive "Trust More"



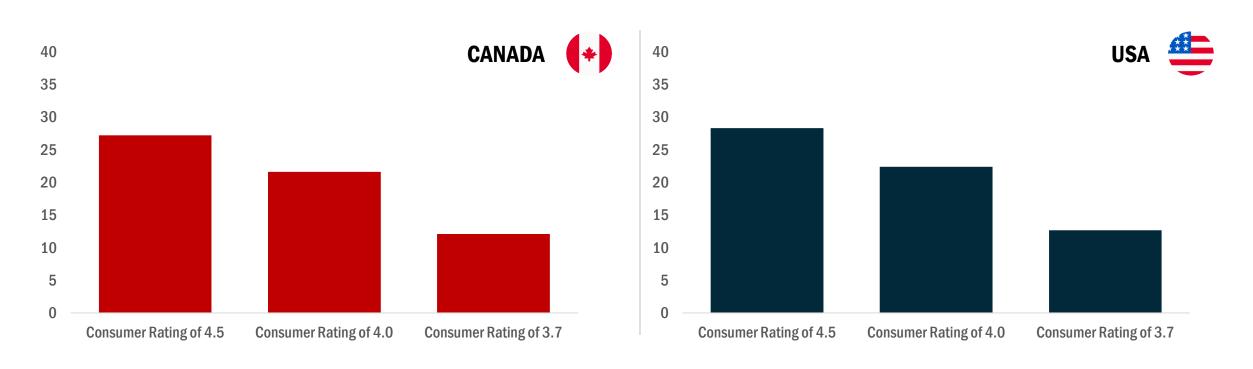


" - Visual or Written Cues that drive "Trust More"



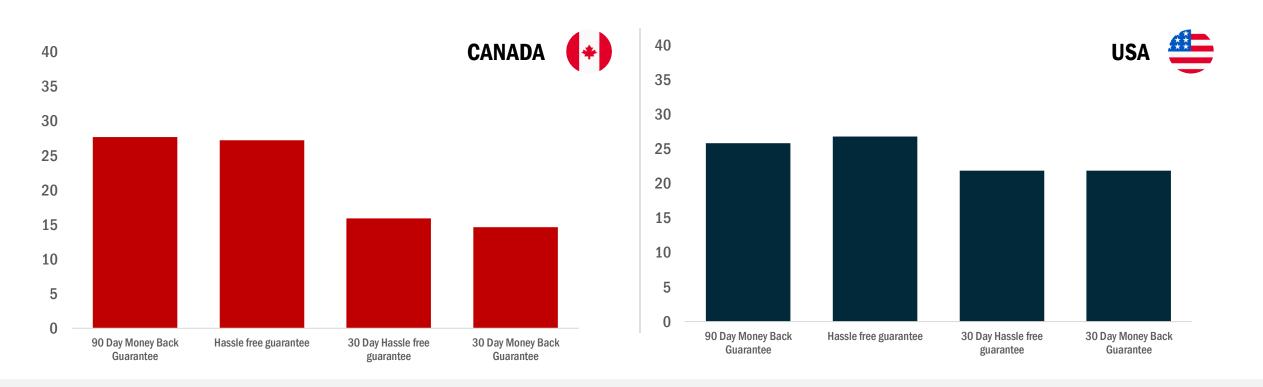


<u>" - Visual or Written Cues that drive "Trust More"</u>

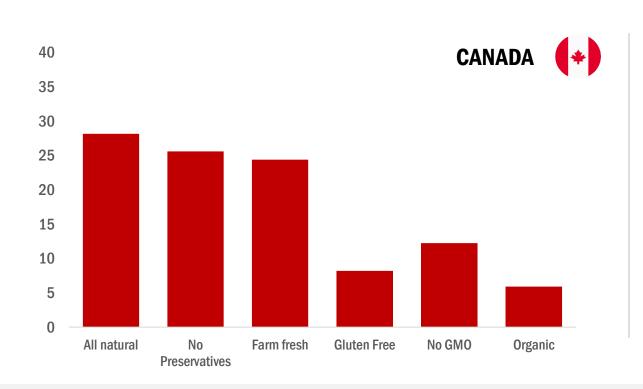


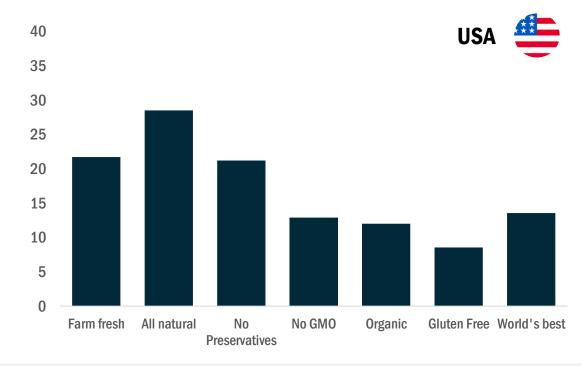


" - Visual or Written Cues that drive "Trust More"



" - Visual or Written Cues that drive "Trust More"







What does all this mean?

TRUST ACCELERATES **BRANDS BUT TAKES TIME**

Purchase because it's a TRUSTED brand is important to 71% of Canadians and 69% of Americans.

It's a brand fundamental and takes time to build it...just like a relationship.

IT DOESN'T HAVE THE SAME **CLOUT WITH EVERYONE**

Know your category, your brand and the people you care about to understand what its relative importance is to driving your brand.

Don't paint everything and everyone with the same brush.

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YOU CAN GET IT BACK BUT...

It takes effort, time and money which takes you away from driving your brand forward AND you may not get everyone back.

What does all this mean?

BE IN FRONT OF THE PEOPLE YOU CARE ABOUT

A purchase is a relationship. Being in-store or in front of people can help build TRUST as you are creating that one-on-one connection.

TRUST is not created by just being on the back of the bathroom stall or in a Pawn Shop.

WORDS and VISUALS MATTER

Your message on any medium can either drive or drain your TRUST. What you say matters so choose wisely.

The devil is in the details.



JOIN US

NOVEMBER 18TH 11:30 AM EST

ACCELERATING CONSUMER ENGAGEMENT WITH NOT-FOR-PROFIT

Presented by Laura Janes, VP at IMI International. Leveraging our recent Charity/Cause Brand Health & Optimization, other insights & case studies we've gathered, we will deep-dive on the lay of the land in the Charity space, focusing on key insights to grow your organization's engagement and maximize your potential to make a difference.



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If you would like a live presentation or have any questions please reach out!

vtoperczer@consultimi.com

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