Global Growth Wave 2

Presented by Don Mayo. May 5th, 2022 | Released May 6th

IMI NEXTWAVE

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About the Speaker

Don Mayo is IMI International's Global Managing Partner.

Don started his career helping sponsors understand key optimization drivers around the Calgary Olympics. Over the past 25 years he has worked with 1,000+ organizations across 40+ countries to champion the voice of the consumer, accelerating the performance of go-to-market strategies for every stage of the consumer journey.

The driving force behind IMI's focus on innovation, Don is constantly in search of more efficient and effective ways to garner relevant, compelling, better insight for partners... driven by the purpose of INSIGHT.DRIVING.PROFIT.

A dynamic, sometimes provocative, always engaging speaker, Don has appeared on stages the world over and become known for his "straight-shooter" approach. With no lack of passion, he delivers undeniable value by being laser focused on the audience, working to enlighten, expand and empower better, fact-based business decisions.



Don Mayo Global Managing Partner, IMI International



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IMI International Overview

SINCE 1971 OUR CORE PURPOSE

INSIGHT DRIVING PROFIT



FACT-BASED GUIDANCE FOR EVERY STEP OF THE WAY

150 +CLIENT PARTNERS

FROM 45+ COUNTRIES







MAKE THE MOST OF EVERY



Uncover opportunity. Set your strategy. Intercept and engage.

Drive your ROI.

Report sources include:

IMI24[™] GENPULSE ●





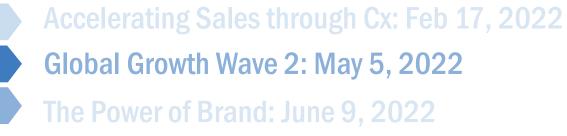


WH ()

HOW

Background: IMI NextWave[™] Content Series

Over the last 25+ months, IMI's NextWave[™] has conducted interviews with well over 2M people ages 13+ from across the world to better understand consumer attitudes and behaviors to help navigate this time.



If you would like more information, please feel free to contact Vanessa Toperczer <u>vtoperczer@consultimi.com</u>.

All content is available on IMI's Global Content Portal



content.consultimi.com



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Content Sections:

Insight from over 75,000 interviews with consumers 13+ across 35 countries March – May 5th.

SECTION 1	SECTION 2	SECTION 3
Today's Reality – Global a) Impact of War, Inflation, Gas Prices b) Personal / Financial / Mental Health	The next 180/365 Days and the Return to Live a) What people look forward to b) What they will delay c) What is appropriate and inappropriate	 Growing your brand a) How people respond to brands that are activating b) How should you show up c) What are they responding to / what is repelling them
Update		





SECTION 1

People that are 'Very Concerned' 1) Covid 2) War in Ukraine 3) Health 4) Environment + Climate



Six specific issues were tested among consumers. The list was generated by tracking the biggest issues people stated they had over the past 12 months.

Question: Which of the following issues are you 'very concerned' about today?

The list is as follows and was randomized and rotated for an unbiased representation of current perceptions.

Physical Health (you and your families)	Financial Health (you and your families)	Mental Health (you and your families)	The war in Ukraine	Environment Climate Change	Becoming infected with COVID-19
None of the above					





Which of these are you very concerned about at this time, if any?

- Becoming infected with Covid-19
- The War in the Ukraine
- You and your family's Mental health
- You and your family's Financial health
- You and your family's Physical health
- The Environment and Climate Change
- I am not concerned about any of these issues

 $N=2\,4\,,0\,00$ + surveys completed across 35 countries covering the americas, europe, africa and austraasia

GLOBAL HIGHS AND LOWS - MAY 2022

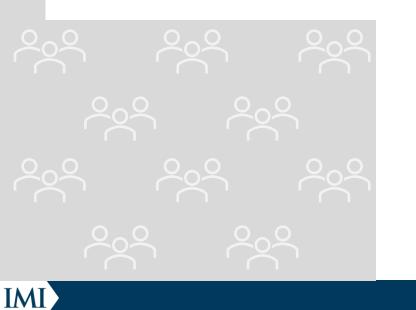
HIGHS

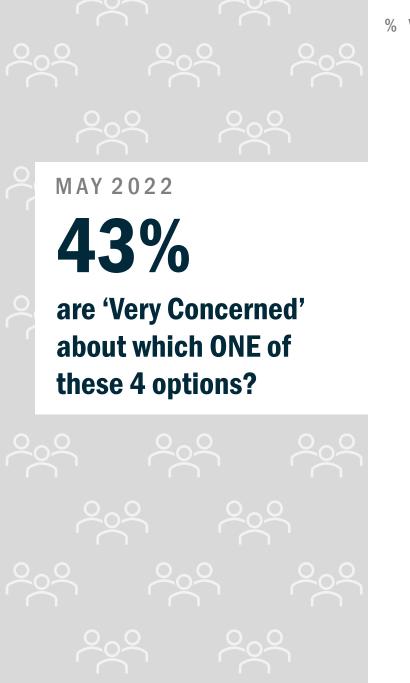
You and your family's Financial health The War in the Ukraine You and your family's Physical health You and your family's Mental health The Environment and Climate Change Becoming infected with Covid-19

HIGHEST %	COUNTRY	LOWEST %	COUNTRY	VARIANCE
65%	Nigeria	14%	Switzerland	51%
62%	Poland	18%	Pakistan	44%
41%	Kenya	16%	Portugal	25%
36%	South Africa	12%	Sweden	24%
33%	New Zealand	16%	Singapore	17%
33%	Malaysia	4%	Switzerland	29%

LOWS

% 'Very Concerned' with the following issues across 35 countries





% VERY CONCERNED

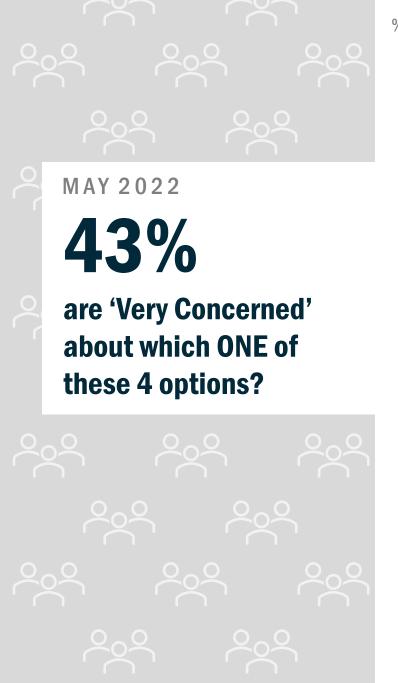
USA, Canada, United Kingdom, Australia - MAY 2022

a. The War in the Ukraine

b. Becoming infected with Covid-19

c. No concern for any of these





% VERY CONCERNED

USA, Canada, United Kingdom, Australia - MAY 2022

a. The War in the Ukraine

b. Becoming infected with Covid-19

c. No concern for any of these

USA	CANADA	UK	AUSTRALIA
44%	43%	38%	39%



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% VERY CONCERNED

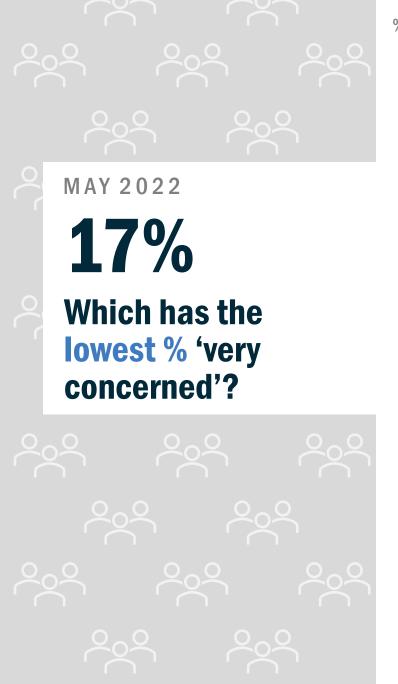
USA, Canada, United Kingdom, Australia - MAY 2022

a. The War in the Ukraine

b. Becoming infected with Covid-19

c. No concern for any of these





% VERY CONCERNED

USA, Canada, United Kingdom, Australia - MAY 2022

a. The War in the Ukraine

b. Becoming infected with Covid-19

c. No concern for any of these

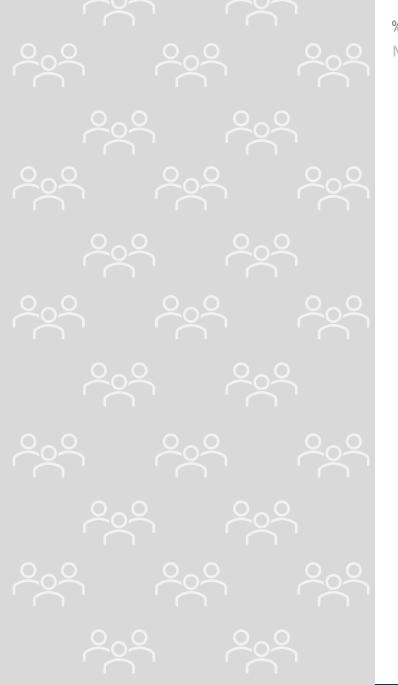
USA	CANADA	UK	AUSTRALIA
17%	17%	14%	23%

DAY 21 OF RUSSIA-UKRAINE WAR DEFINING IMAGES OF INVASION





INDIA TODAY



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% VERY CONCERNED ABOUT THE WAR - USA, UNITED KINGDOM, CANADA & AUSTRALIA N = 2 , 4 0 0 + PER WAVE

MARCH 2022 38% Very Concerned about the War in the Ukraine

Q. TODAY MAY 2022 What % are Very Concerned

a. The Same Level of concern 38%

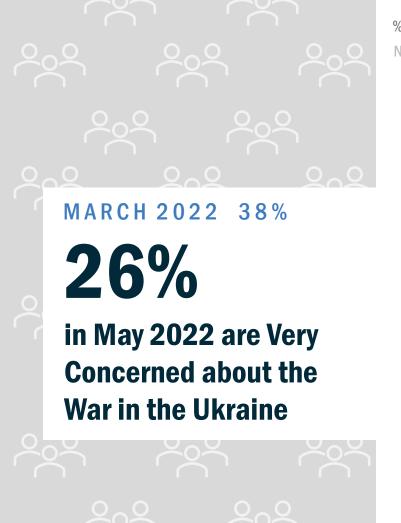
b. Significant *Increased* Level of concern

c. Significant *Decreased* Level of concern

16

50%

26%



% VERY CONCERNED ABOUT THE WAR - USA, UNITED KINGDOM, CANADA & AUSTRALIA N = 2 , 4 0 0 + PER WAVE

TODAY MAY 2022

a. The Same Level of concern

b. Significant *Increased* Level of concern

50%

38%

c. Significant *Decreased* Level of concern **26%**



Significant drop in concern as the war intensifies. Reality is that people desensitize to any issue over time that don't impact weekly. % VERY CONCERNED ABOUT THE WAR N = 2, 400 + PER WAVE

USA, Canada, United Kingdom, Australia

Aided List of Top Issues	MARCH 2022	MAY 2022	VARIANCE
The War in the Ukraine	38%	26%	-12%
You and your family's Physical health	24%	26%	2%
You and your family's Financial health	28%	26%	-2%
The Environment and Climate Change	22%	21%	-1%
You and your family's Mental health	20%	19%	-1%
Becoming *infected with Covid-19*	14%	17%	3%

Change in percentage 'Very Concerned' over the past 8 weeks



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KEY LEARNING FOR BRANDS

If being in the press (media/social) every second of every day with heinous images and horrendous testimonials cannot maintain an audience – what do you have to do as a brand to keep relevant to:

- a) Your Customers
- b) Your Category's Best Customers
- c) Your Competitor's Best Customers

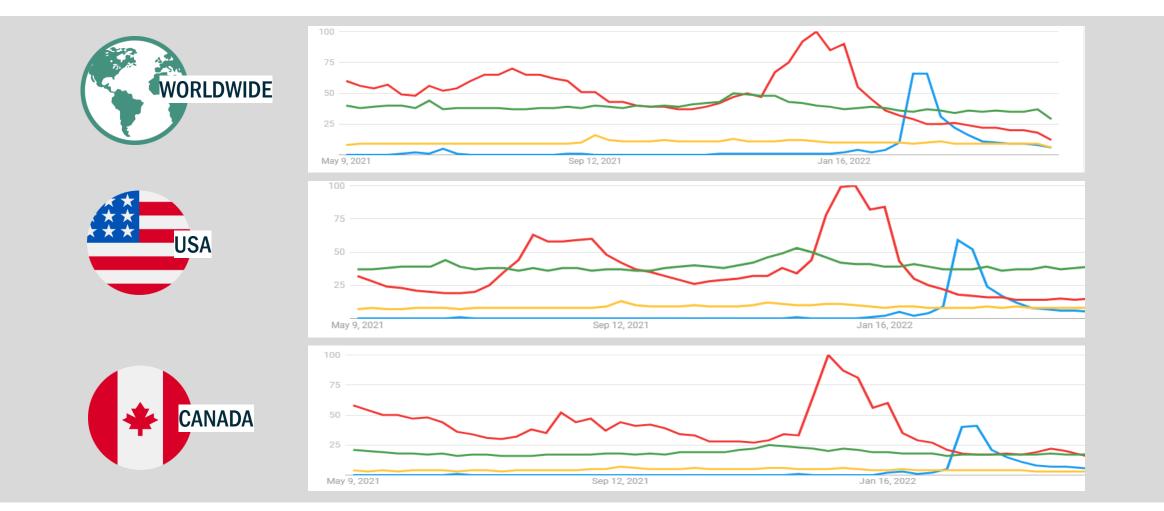


OWNING THE MEDIA AT EVERY TOUCH POINT, 24 HOURS A DAY DOES NOT GUARANTEE SUCCESS **BUT DOES GUARANTEE** SUBOPTIMAL ROI.

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P12 Months Web Search : Source Google Trends

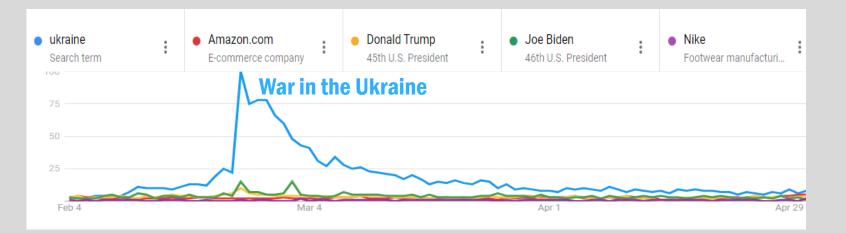
• ukraine	• covid	• Apple	• Amazon.com
Search term	Search term	Technology company	E-commerce company



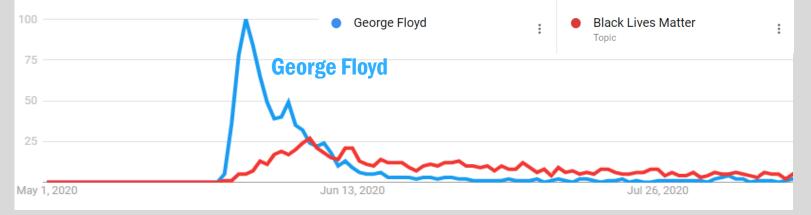


Maximum of 5 to 8 Week attention Span – For Major Events











Google Trends

KEY LEARNING FOR BRANDS

Major global events have a micro-burst for 5 to 8 weeks, identifying once again that attention spans lapse after this point.

Consider how much money your brand spends, or agency recommends spending, on campaigns that last longer than 6 weeks (usually 20%+)

Reality is, for 20 years, IMI's ROI Market Spend Effectiveness shows less than 5% incremental impact on campaigns that i) Run longer than 6 to 8 weeks or ii) Have two burst periods with a lapse in-between.



ONE THING PEOPLE ARE MOST CONCERNED ABOUT

Aided list generated from global assessment Unaided

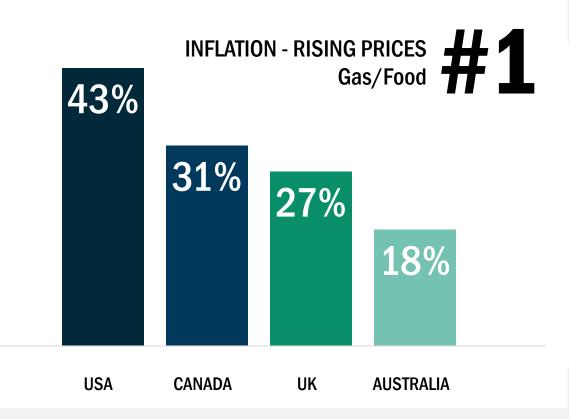
Update



SECTION 1.1

One Thing you are 'Personally Most Concerned about at this time'

Aided list – single answer May 1st, 2022 – N=400+ Per Country



Country	USA	Canada	UK	Australia
	%	%	%	%
Climate Change	15	13	17	12
The War in the Ukraine	14	15	20	15
Mental Health	14	12	12	18
Rising Interest rates	8	3	2	8
Race and Gender equality	6	5	5	5





SECTION 2

THE NEXT 180/365 DAYS AND THE RETURN TO LIVE



RUSSIA INVADES UKRAINE TOP DEVELOPMENTS

What people will delay doing due to the War in Ukraine

INDIA TODAY



Impact on Travel - Delay Doing until after the war in Ukraine subsides

Aided list – Multiple answer : April 26th, 2022 : N=600+ Per Country

	USA	CANADA	UK	AUSTRALIA
Travel out of the country	35%	29%	24%	32%
Take a vacation	24%	29 %	20%	15%
Travel to see family	15%	16%	5%	10%
Travel to see friends	12%	12%	9%	13%
Travel in your country	11%	9%	10%	9%





Impact on Experiences - Delay Doing until after the war in Ukraine subsides

Aided list – Multiple answer : April 26th, 2022 : N=600+ Per Country

	USA	CANADA	UK	AUSTRALIA
Travel to see a Sporting Event	22%	17%	20%	23%
Travel to see a Concert or Event	18%	15%	18%	25%
Go out to a restaurant	10%	8%	10%	12%





KEY LEARNING FOR BRANDS

- 1. Focus attention on the people READY TO ACT AND ENGAGE LIVE, BRANDS, TRAVEL AND THE WORLD.
- 2. Brands are doing themselves a big disservice looking at the glass ½ empty vs. ½ full and growing.
- 3. Build campaigns and activations for people that are Open and Ready while being conscious of concerns. At this time in North America, the UK and Australia rising prices and inflation are capturing the hearts and minds of consumers – not Covid or the War.



What is Appropriate for the Return to Live

30+ ways to activate were evaluated



6 in 10 people across the USA and Canada <u>do not believe any</u> of the previously used (2019) ACTIVATION TOUCH POINTS ARE INAPPROPRIATE AT THIS TIME. But you still need to use common sense.

It is essential to educate Venues, Property's, Brands and Agencies on these facts.





What Touch Points People believe are Inappropriate at this time (May 2022)

Aided list - Multiple answer : April 26th, 2022 : N=600+ Per Country

INAPPROPRIATE AT THIS TIME	USA	CANADA	
	%	%	
Intercepting people on the street	20	20	
Having representatives approach you	18	17	GO GO
Inviting you into a tent to show you product	17	17	
Running contests where you enter your name	17	13	
Having tablets where you can interact	11	7	
Offering "free stuff"	11	12	
Having game rooms for children	10	9	
Entering promotion on a tablet	9	7	
Inviting you to a booth to show you product	9	10	MADLE LEAF SOLLADE
Offering a live music area	7	10	TORONTO, ONTARIO



The second state of the se

GLASS 60% full People believe to be Appropriate - <u>if done right</u> - at this time (May 2022)

Aided list - Multiple answer : April 26th, 2022 : N=600+ Per Country

APPROPRIATE AT THIS TIME	USA	CANADA	
	%	%	
Intercepting people on the street	80	80	
Having representatives approach you	82	83	
Inviting you into a tent to show you product	83	83	
Running contests where you enter your name	83	87	
Having tablets where you can interact	89	93	
Offering "free stuff"	89	88	
Having game rooms for children	90	91	
Entering promotion on a tablet	91	93	CONTRACTOR AND C
Inviting you to a booth to show you product	91	90	MAPLE LEAF SQUARE
Offering a live music area	93	90	CONTARIO

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GLASS 60% full People believe Appropriate – <u>if done right</u> - at this time (May 2022)

Aided list – Multiple answer : April 26th, 2022 : N=600+ Per Country

APPROPRIATE AT THIS TIME	USA	CANADA
	%	%
Offering open food samples	77	79
Communicating through QR Codes	85	87
Having product displays	94	93
Offering samples that are self contained	94	93
Offering product displays you can look at	95	93







SECTION 3

Growing Your Brand - Case Studies 1) Drive Action 2) Buy/Consider 3) Feel Better Toward 4) Amplify







300+ CONCEPTS TESTED USING IMI'S CERTAINTY™ TESTING PRODUCT - ONLINE STUDIES - EACH RESPONDENT EVALUATED 1 CONCEPT ONLY (MONADIC STUDY DESIGN) - 48,000 INTERVIEW ACROSS THE USA IN TOTAL IN LATE APRIL - MAY 2022

WHAT WAS COMPLETED

Q. Which of the following would you do after seeing this, if anything?

- I would not do any of these actions
- Stop to learn more information
- Search for more information online
- Talk about this with friends and family
- I would buy (ST) / I would consider buying (LT)
- It is better than other company's actions
- I would feel more positive about the company



Benchmarks by metric LT Vs. ST Category Vary by Country / Language - 50,000+Case studies

<u>GUARANTEE</u>: Optimize the <u>Creative</u> * <u>Tactic</u> * Media * Monies * Moment to ensure it meets/exceeds your objective(s) – before going into market. Fact: 41% of activations have NO CHANCE of impacting Attitude, Emotion or Behavior



SAMPLE BRANDS EVALUATED



2022 F-150



airbnb

Help house 100,000 refugees fleeing Ukraine









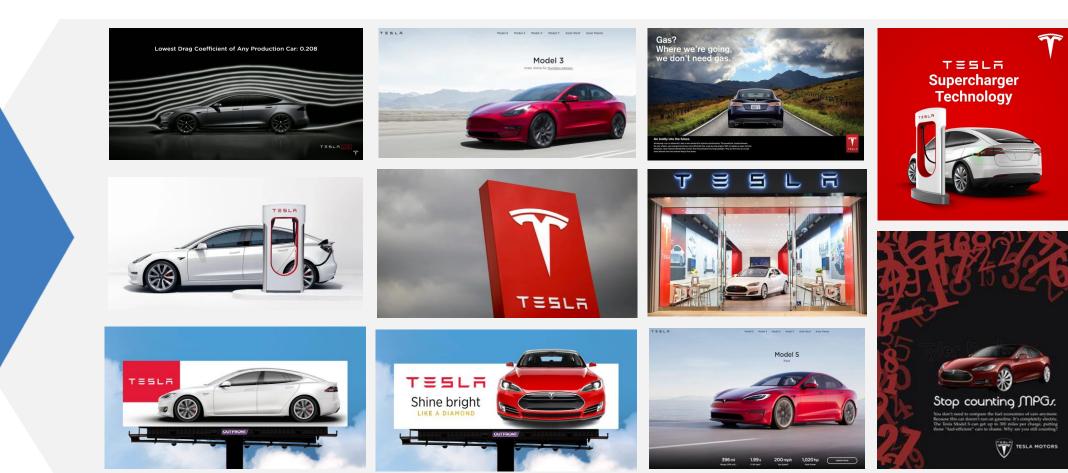








Examples of What Was Tested





STARBUCKS

Examples of What Was Tested

















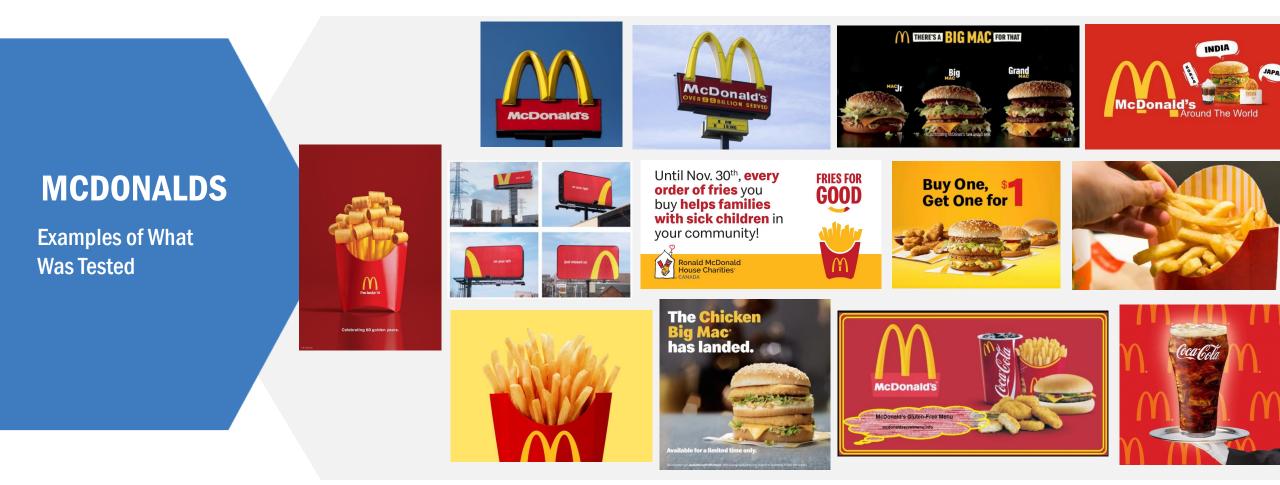














SECTION 3.1 PRODUCT IS THE HERO TO DRIVE ROI





 $\label{eq:implication} \begin{array}{c} \mathsf{IMI} \ \mathsf{CERTAINTY}^{\texttt{M}} \ \mathsf{IN} \ \mathsf{MARKET} \ \mathsf{TESTING} \ - \ \mathsf{MAY} \ \mathsf{2022} \ : \ \mathsf{USA} \ : \\ \mathsf{N=300} \ \mathsf{RESPONDENTS} \ \mathsf{PER} \ \mathsf{CONCEPT} : \ \mathsf{MONADIC} \ \mathsf{TESTING} \end{array}$

% THAT WILL BUY OR CONSIDER AFTER EXPOSURE



CONCEPT 2

11% Will Purchase after exposure vs. 4%

2 CONCEPTS TESTED





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4% Will consider buying

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% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

 $\mathsf{MAY}\ 2\ 0\ 2\ 2$

25% Will Purchase after exposure vs. 19% **CONCEPT 1** Product + Benefit Heroes

Dempster's EST 1800 Signature

DEMPSTER'S SIGNATURE BAGELS, PROUDLY BAKED WITH 'OUR SIMPLEST INGREDIENTS', HAVE WON A 2022 Product of the year award in the bread & bagel category. Try your favourite bagel today!



25% Will buy

CONCEPT 2 Benefit without Product



19% Will buy

X P O S U R E

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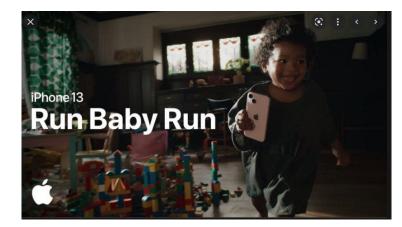
% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

CONCEPT 1

CONCEPT 2

10% Will Purchase after exposure vs. 4%.

2 CONCEPTS TESTED





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10% Will consider buying





% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

2 CONCEPTS TESTED

28% Will Purchase after exposure vs. 27%

CONCEPT 1



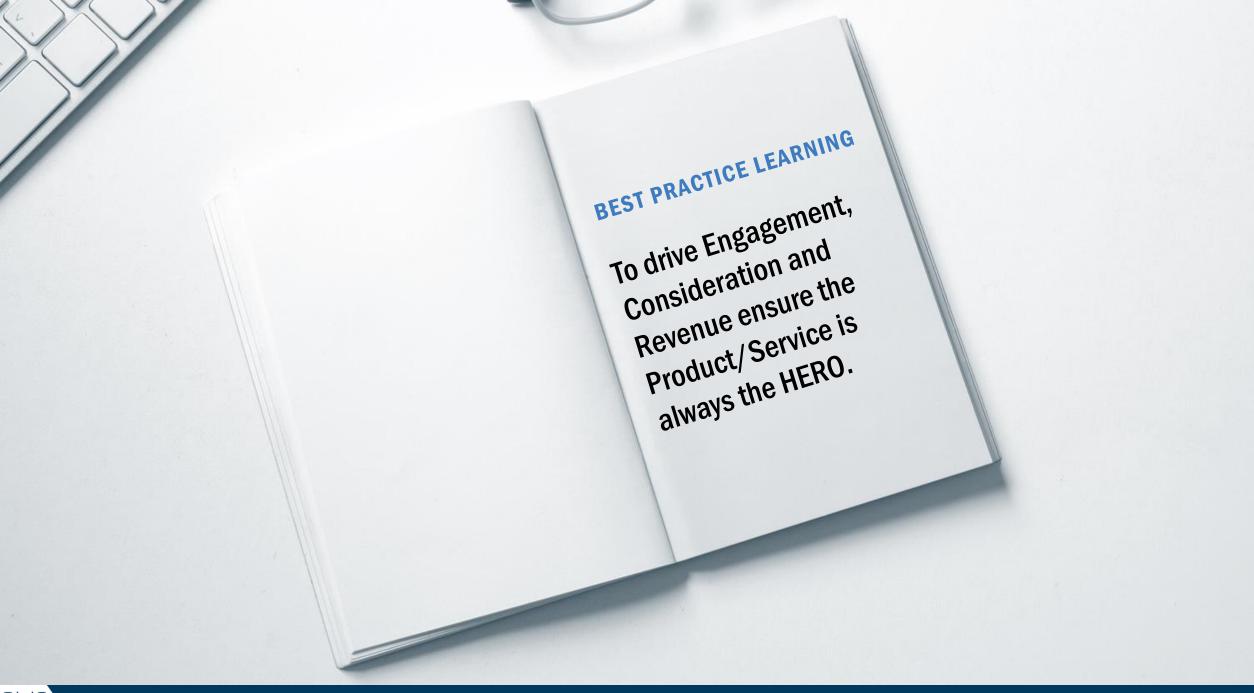
27% Will buy





RECOMMENDATION Lead with Product Heroes through each touch point

28% Will buy





SECTION 3.2

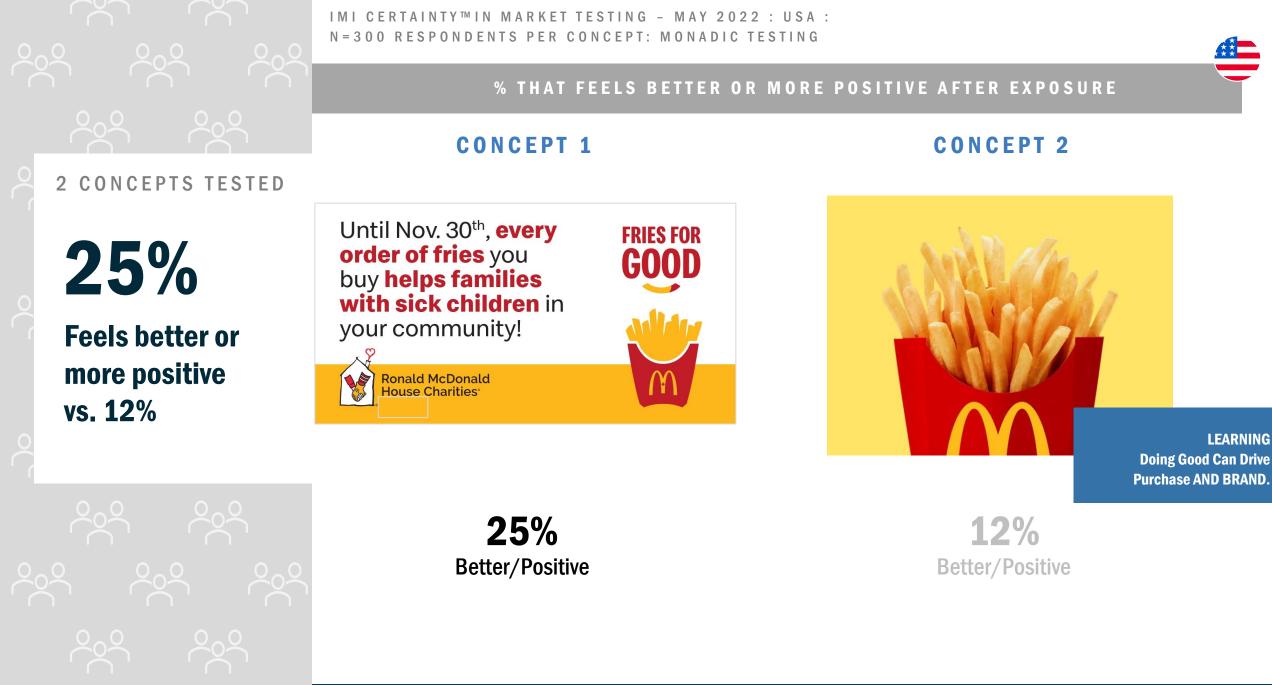
PRODUCT IS THE HERO - ACCELERATE IMPACT WITH COMMUNICATING PRODUCT BENEFITS







IMI



% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

2 CONCEPTS TESTED

24% Will Purchase after exposure vs. 8%.





Face editing removes blemishes, freckles and confidence.

This is a representation of how fed reloaching apps can distort beaut Harmful and readily available, 80% of gir are already using them by the age of 1 It's no wonder their perception of beaut and their self-esteem are so distorte Help reverse the damage. Downloa our new Social Media Confidence K Devs.com/confidence

Let's **Change** Beauty

Dove

8% Will buy



CONCEPT 2

24% Will buy



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**

> % THAT WILL STOP TO LEARN MORE, SEARCH OUT MORE INFORMATION OR TALK ABOUT WITH FRIENDS AND FAMILY

CONCEPT 1

CONCEPT 2



48%

Talk/Stop/Search

48% Talk about or Search for More, or learn More.

2 CONCEPTS TESTED

What happens on your iPhone, stays on your iPhone. ppt-con/physcy

49% Talk/Stop/Search







% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

2 CONCEPTS TESTED

10%

Will Purchase with product + features > up 40% from the **impact of Product Benefit message**

CONCEPT 1

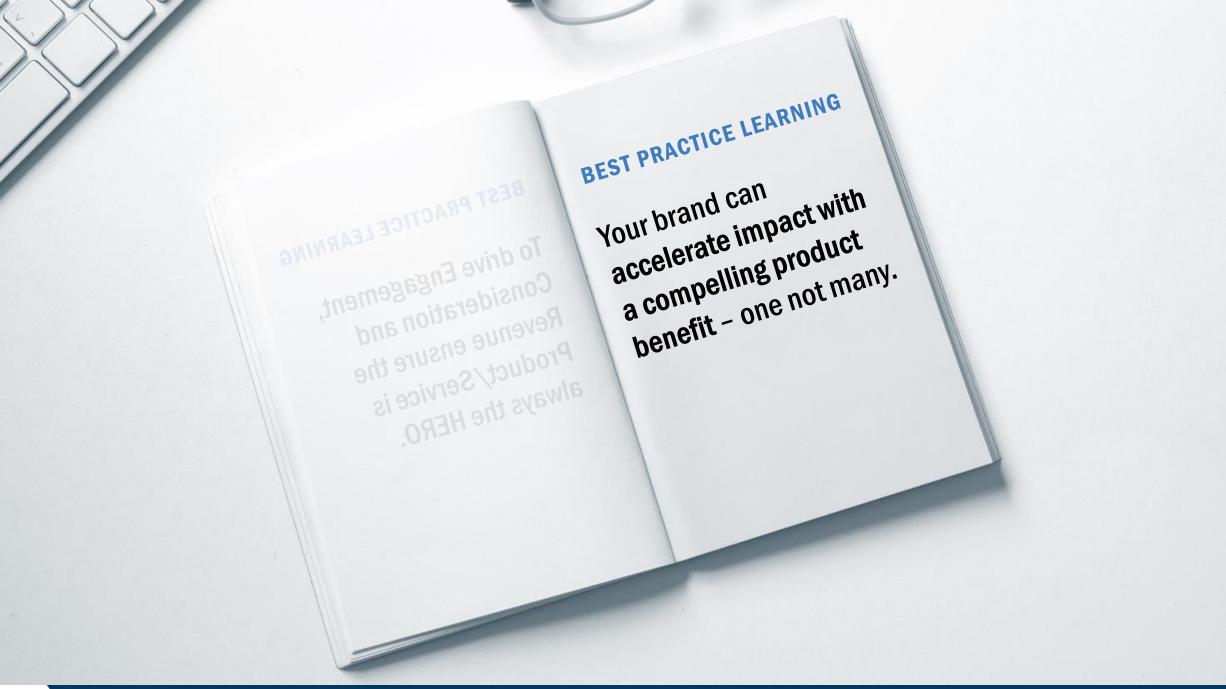


6% Will consider buying **CONCEPT 2**



RECOMMENDATION: Identify what the impact of the incremental privacy benefit to the product feature creative

10% Will consider buying





SECTION 3.3

PRODUCT IS THE HERO – BUT TOO MANY PRODUCTS MAY DECELERATE GREAT CREATIVE





 $\label{eq:implication} \begin{array}{c} \mathsf{IMI} \ \mathsf{CERTAINTY}^{\texttt{M}} \ \mathsf{IN} \ \mathsf{MARKET} \ \mathsf{TESTING} \ - \ \mathsf{MAY} \ 2022 \ : \ \mathsf{USA} \ : \\ \mathsf{N=300} \ \mathsf{RESPONDENTS} \ \mathsf{PER} \ \mathsf{CONCEPT} : \ \mathsf{MONADIC} \ \mathsf{TESTING} \end{array}$



% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

 $\mathsf{MAY}\ 2\ 0\ 2\ 2$

30% Will Purchase

after exposure vs. 21% **CONCEPT 1** Product + Benefit Heroes



21%

Will buy

CONCEPT 2 Benefit without Product



30% Will buy





% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

2 CONCEPTS TESTED

25% **Will Purchase** after exposure

vs. 20%



CONCEPT 1

Packed with flavour and nutrients, nothing goes against these grains.

LEARN MORE →

25% Will buy



CONCEPT 2

12 grain goodness

Packed with flavour and nutrients, nothing goes against these grains.

LEARN MORE →

Wrap, roll or bake

From a full meal to a road trip snack, is there anything you can't do with these tortillas?

LEARN MORE →



Give your burger the best

Baked up delicious, these hamburger buns are a BBQ classic for a reason!

LEARN MORE →







SECTION 3.4

MESSAGING/VISUAL CUES MUST BE COMPELLING AND IMPACTFUL TO ACCELERATE IMPACT







% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

2 CONCEPTS TESTED

29% Will Purchase after exposure vs. 11%. CONCEPT 1



29% Will buy

CONCEPT 2



11% Will buy



% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

CONCEPT 1

CONCEPT 2





Will Purchase after exposure

2 CONCEPTS TESTED

19%

vs. 5%.



IMI

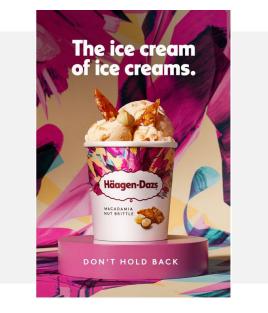
IMI CERTAINTY™IN MARKET TESTING - MAY 2022 : N=300 RESPONDENTS

R C H

% THAT WILL TAKE ACTION - BUY/SHARE/TALK/FEEL BETTER/SEARCH

CONCEPT 1

CONCEPT 2



48% 1+ Actions



Will take 'Action'> Buy, Share, Talk about, Feel better or Search vs. 25%

MAY 2022

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IMI CERTAINTY™IN MARKET TESTING - MAY 2022 : N=300 RESPONDENTS

DUO. Don't stop yourself.

xplore the Collection

% THAT WILL TAKE ACTION - BUY/SHARE/TALK/FEEL BETTER/SEARCH

CONCEPT 1

CONCEPT 2



47% 1+ Actions

47% Will take 'Action'>

Buy, Share, Talk about, Feel better or Search vs. 30%



30% 1+ Actions

IMI

 $\begin{array}{c} \mathsf{IMI} \ \mathsf{CERTAINTY}^{\mathsf{IM}} \mathsf{IN} \ \mathsf{MARKET} \ \mathsf{TESTING} \ - \ \mathsf{MAY} \ \mathsf{2022} \ : \ \mathsf{USA} \ : \\ \mathsf{N=300} \ \mathsf{RESPONDENTS} \ \mathsf{PER} \ \mathsf{CONCEPT} : \ \mathsf{MONADIC} \ \mathsf{TESTING} \\ \end{array}$

% THAT FEELS BETTER OR MORE POSITIVE AFTER EXPOSURE



CONCEPT 2

Bacardi donates \$1m to Ukraine

18 MARCH 2022 By Melita Kiely

by meand the

Family-owned Bacardi has donated US\$1 million to support humanitarian efforts in Ukraine, and suspended exports and frozen advertising investments in Russia.



24% Better/Positive

24%

2 CONCEPTS TESTED

Feels better or more positive vs. 14%



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% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

2 CONCEPTS TESTED

after exposure vs. 17%.

CONCEPT 1

I'm lovin' i

Celebrating 60 golden year

17%

Will buy

CONCEPT 2



RECOMMENDATION: Avoid the temptation to change the Product Hero



CELEBRATING 60 GOLDEN

YEARS

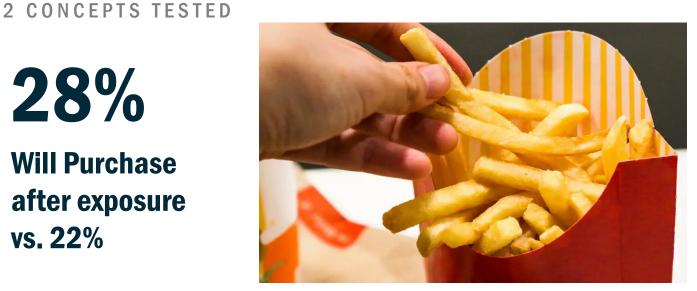


% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

CONCEPT 1

CONCEPT 2

28% **Will Purchase** after exposure vs. 22%



LEARNING: Hands + Food during Covid = **Decreased Buy**

IMI



28% Will buy

% THAT WILL STOP TO LEARN MORE, SEARCH OUT MORE INFORMATION OR TALK ABOUT WITH FRIENDS AND FAMILY

 $\mathsf{MAY}\ 2\ 0\ 2\ 2$

29% Talk about or Search for More,

or learn More 11%

CONCEPT 1 Product + Benefit Heroes



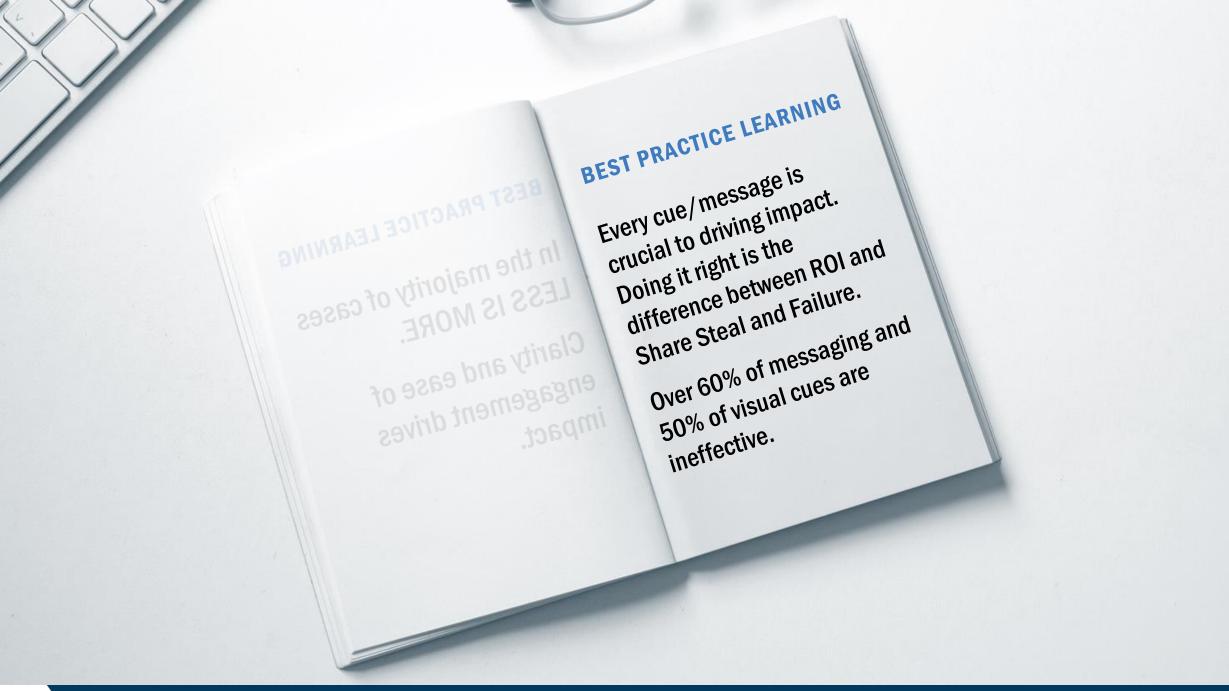
29% Talk/Stop/Search **CONCEPT 2** Benefit without Product



11% Talk/Stop/Search



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SECTION 3.5

PRODUCT HERO + COMPELLING MESSAGING/ VISUAL CUES CAN REDUCE THE NEED FOR PRICE





% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

2 CONCEPTS TESTED

34% Will Purchase

after exposure vs. 30%

CONCEPT 1

Buy One, Solution Get One for

CONCEPT 2



LEARNING Great 'Product Heroes' can help minimize the need for endless TPR/ Discounts



30% Will buy

71

% THAT WILL BUY OR CONSIDER AFTER EXPOSURE

2 CONCEPTS TESTED

13% Will Purchase with an incentive > up 30% from 10%

CONCEPT 1



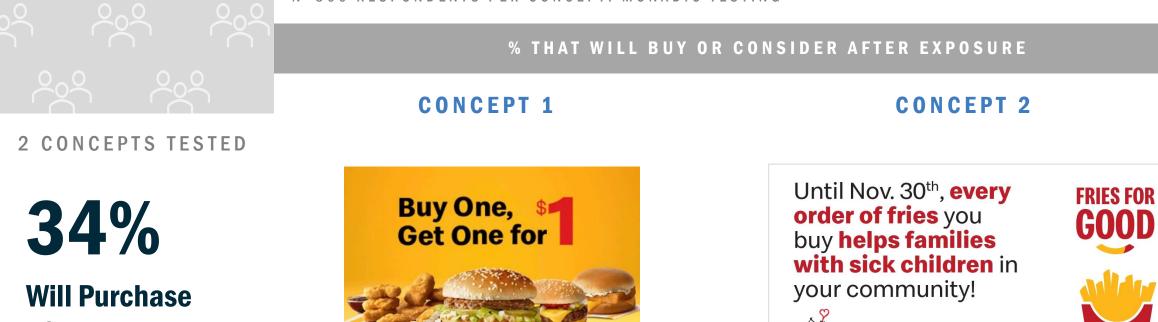


CONCEPT 2

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10% Will consider buying



after exposure vs 28%.



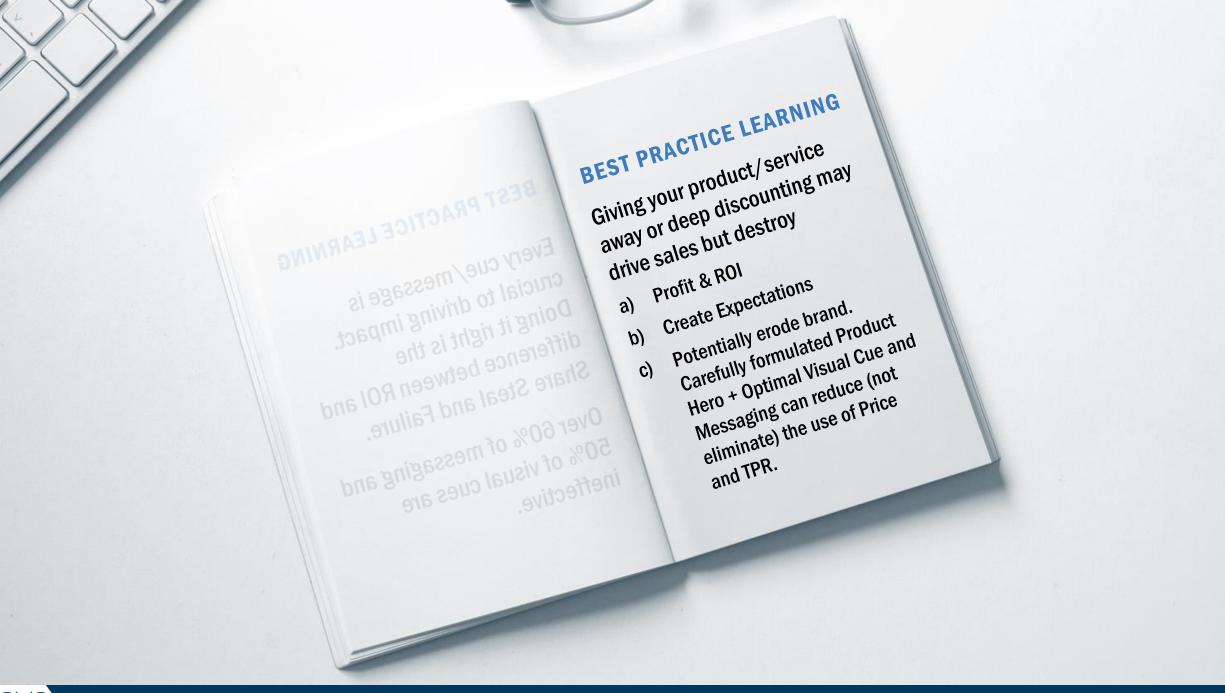


IMI





28% Will buy



BEST PRACTICE LEARNING

- 1. To drive Engagement, Consideration and Revenue ensure the Product/Service is always the HERO.
- 2. Your brand can accelerate impact with a compelling product benefit one not many.
- 3. In the majority of cases LESS IS MORE Clarity and ease of engagement drives impact.
- 4. Every cue/message is crucial to driving impact. The difference between ROI and Share Steal and Failure and ZERO impact. Over 60% of messaging and 50% of visual cues are ineffective.
- 5. Giving your product/service away or deep discounting may drive sales but destroy a) Profit & ROI b) Create Expectations and c) Potentially erode brand. Carefully formulated Product Hero + Optimal Visual Cue and Messaging can reduce (not eliminate) the use of Price and TPR.



IMI NEXTWAVE

CONTENT SERIES

JUNE 9TH 11:30 AM ET

The Power of Brand

In this presentation Vanessa Toperczer will deep dive into the impact and value of a brand including the best from over 1,000 case studies and 100 brands.

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

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