



IMI NEXTWAVE™

The Power of Brand: Unlocking the Mind of the Consumer

Presented by Vanessa Toperczer | November 16th, 2023



ABOUT THE SPEAKER

VANESSA TOPERCZER

Senior Vice President

As an insight-driven leader, Vanessa is laser focused on motivating marketers and the C-suite to make strong, fact-based decisions that accelerate their business and maximize ROI.

Fuelled by intention and curiosity, she has cultivated a 360-degree skill set in the marketing world encompassing Agency, Brand, Not-for-Profit, Social Enterprise and Consumer Insights. Her considerable expertise reaches across brand transformation and optimization, growth strategy development, communications strategy and articulation, product and innovation development, partnership and sponsorship strategy, and team leadership and empowerment.

Vanessa is inspired to help others see beyond their own vantage point, opening up opportunity before homing in on what's essential. This passion energizes her work with clients, as a sought-after speaker at events and conferences, and on board and committee roles she holds across multiple organizations.

IMI International Overview

SINCE 1971 OUR CORE PURPOSE



INSIGHT DRIVING PROFIT

150+
CLIENT PARTNERS

FROM **45+**
COUNTRIES



**FOCUSED
INTEL**

-  GEOGRAPY
-  DEMOGRAPHIC
-  PASSIONS
-  CATEGORY

MONTHLY INSIGHT **X18** COUNTRIES
OFFICES ON FOUR CONTINENTS



**RELEVANT
CONTEXT**

50,000+
CASE STUDIES



PERFORMANCE VS.
IN-MARKET
BENCHMARKS

FACT-BASED GUIDANCE FOR EVERY STEP OF THE WAY



DISCOVER
UNCOVER
GENUINE
OPPORTUNITY



CONFIRM
FACT BASED RELATIVE TO IN
MARKET ACTION STANDARD
/ BENCHMARKS'



OPTIMIZE
MAKE THE MOST OF EVERY
DOLLAR WITH CONTINUOUS
ROI OPTIMIZATION

Uncover opportunity.
Set your strategy.
Intercept and engage.

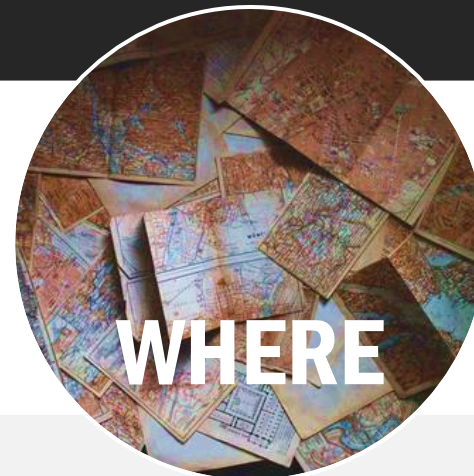
Drive your ROI.

Report sources include:

IMI 24™

GENPULSE 

GLOBALPULSE 
CATEGORYPULSE 



IMI NextWave™

IMI NextWave™ continuously dives into salient topics on professionals' minds today. **Fact based insight to drive your profit.**

Maximizing Impact in Cause & Charity in 2023 & Beyond

Maximizing the Impact, Effectiveness & ROI of LIVE

Driving your Brand's Volume with Promotion

The Power of Brand: Unlocking the Mind of the Consumer

Winning with Youth – December 2023

To stay informed and get first access to upcoming events, follow us on LinkedIn and look out for our emails!

All content is available on
IMI's Global Content Portal



content.consultimi.com





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

All Reports and Webinar Registrations:
content.consultimi.com



**Click Here to Email
Vanessa Toperczer,
SVP IMI International**



What's inside?

Consumer Sentiment
Dive into Financial Health
Consumer Intentions and Realities



Connecting with Consumers
Unlocking What's on Peoples
Minds



Driving Purchase
Core themes driving purchase now
- exploring the SAY/DO GAP



We are constantly bombarded by what's in the news

**Violence
Recession
Wars
Job Loss**

Canada is seeing violent crime like never before. What's behind the wave of killings and attacks

Untreated mental illness and 'prolific offenders' have left a rising number of Canadians fearing for their safety

Tristin Hopper
Published Apr 13, 2023 • Last updated Apr 14, 2023 • 8 minute read
366 Comments

Shopify cuts 20% of its workforce

The cuts are the second round of layoffs for the Canadian e-commerce company.

Russia-Ukraine war: List of key events, day 622

As the war enters its 622nd day, these are the main developments.

Recession Forecast Still Right For Late 2023 Or Early 2024

Bill Comerty Senior Contributor @ I connect the dots between the economy ... and business!

Aug 5, 2023, 07:30am EDT

Listen to article 5 minutes

Year	% change
2021	~7
2022	~2
2023	~-1
2024	~-2

Scotiabank reduces global work force by 3% as Bay Street cuts deepen

STEFANIE MAROTTA > BANKING REPORTER
PUBLISHED OCTOBER 18, 2023

Ford: anticipated layoffs

LIVE

Al Jazeera

Israel-Hamas war live: UN says 'tragedy of colossal proportions' in Gaza | Israel-Palestine...

1 hour ago

LIVE

CNN

Israel-Hamas war rages as outcry grows over Gaza crisis: Live updates

48 mins ago

LIVE

NBC News

Israel-Hamas war live updates: Gaza 'security responsibility' to be Israel's when conflict...

8 mins ago

CNBC 4:26

SQUAWK BOX

THE WORLD BANK'S WARNING
GLOBE MAY BE HEADING FOR 2023 RECESSION

World Bank warns globe may be heading for 2023 recession

Watch

Uploaded: Sep 19, 2022

Concern today among North Americans is NOT EXCESSIVE



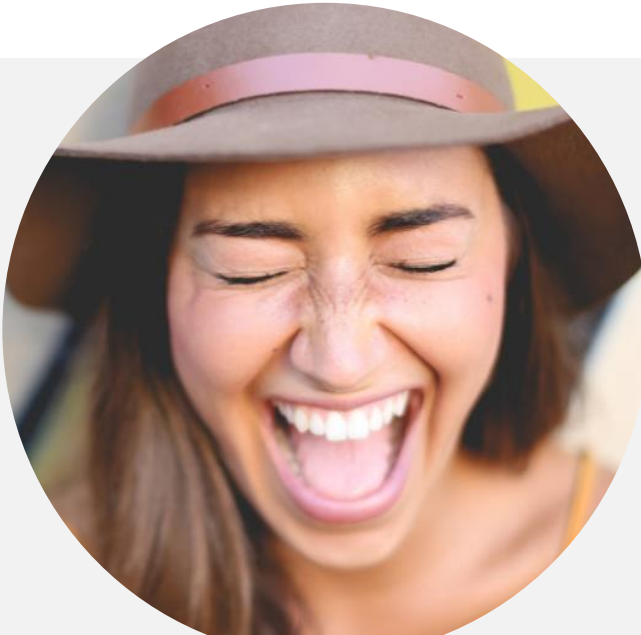
	CANADA	USA
	MOST CONCERNED IN MY LIFETIME	MOST CONCERNED IN MY LIFETIME
My ability to afford living day-to-day	16%	24%
Rising interest rates	15%	15%
Israel-Hamas War	7%	14%
Losing my job	7%	10%
Personal safety in my city	4%	14%

FOR PERSPECTIVE:
 in April 2020, financial and personal health
 concern was double the current levels



NOV 2023 : N=800/400 per country

Emotions felt in the past week...



The negatives don't outweigh the positives



HAVE FELT IN THE PAST WEEK

HAPPINESS	56%
LOVE	47%
EXCITEMENT	37%
PASSION	19%

HAVE FELT IN THE PAST WEEK

STRESS	59%
ANXIETY	44%
DEPRESSION	27%
FEAR	21%



Let's dive a little deeper...



In the News:

Two years of talk of a recession, ensuring our financial stress.

How crushing is it?

What is the impact now and in the near future?



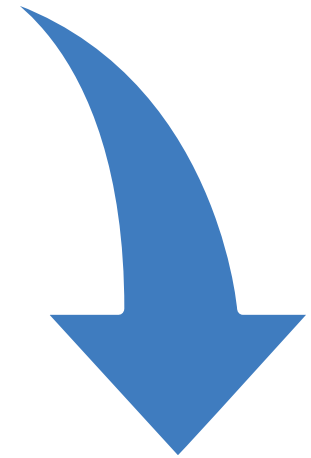
DIVING INTO CANADIANS' FINANCIAL HEALTH

The level of **SEVERE CONCERN** is small
(1 in 7) and declining since Feb 2023.

MOST CONCERNED IN MY LIFETIME - Financial Health

15%

(-8% from Feb 2023)



'Most Concerned Ever' for the Ability to Afford to Live Day to Day

NOT SURPRISING THAT THE LOWER INCOME GROUP ARE THE MOST CONCERNED about the day to day.

But it is surprising that 75% don't have the same concern.

HHI \$100K+

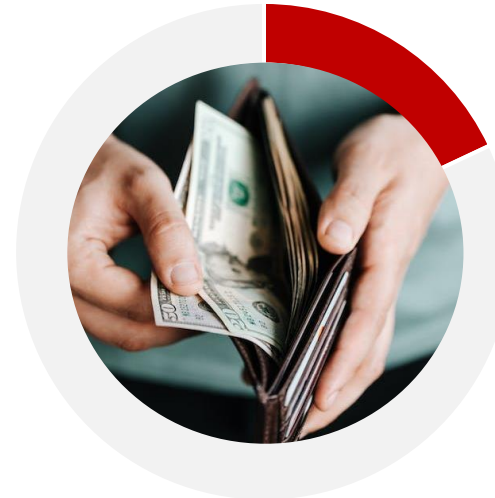


**Nov
2023**

14%

-2% vs July

\$50k to \$99K



20%

+3% vs July

UNDER \$50k



26%

-3% vs July

REALITY IS

4 in 5

are **NOT** CURRENTLY SEVERELY
concerned by their financial reality

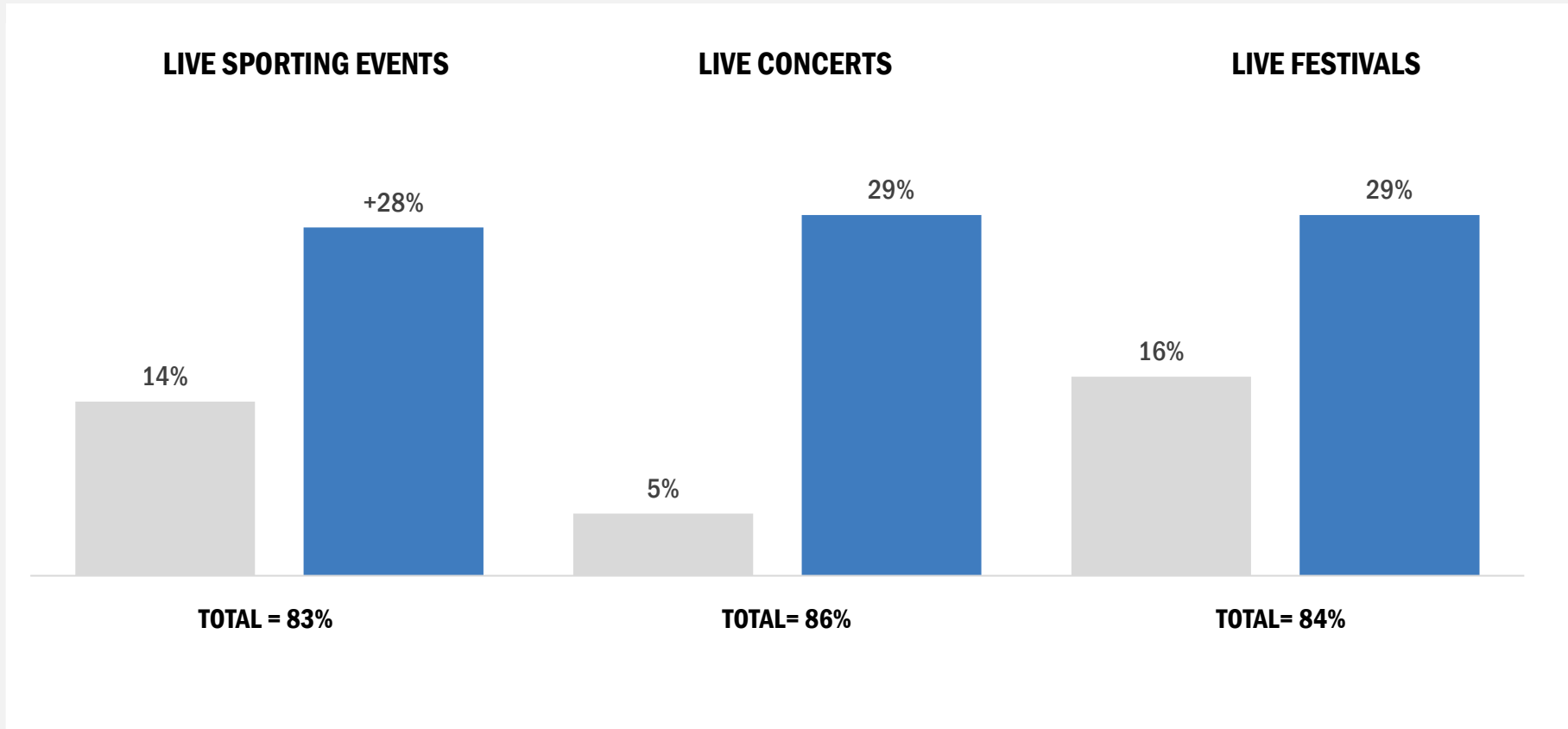


People are going out and experiencing life

INTEND TO DO IN THE N12 MONTHS JULY 2020 VS JULY 2023

There's strong continuous demand for attending events

Continuous acceleration should be expected for 'live' if the economy stays stable



NET INCREASE
= Increase minus decrease

IMI 24™ : N=800 per country in 2020, N=800+ in July 2023 We Asked: Intention Increase, Decrease, Not Change in the next 12 months

Exemplified by the attendance and engagement in LIVE events

LEAGUES AND GOVERNING BODIES
NHL draws regular season attendance of 22.4 million
The NHL drew 22.4 million fans to the arenas this season, up 79% over the 2021-22 season. The elimination of the pandemic-related capacity restrictions that had hampered much of the sport since March 2020 was a big reason for the surge: the seven Canadian clubs were up a collective 26% (+1.05 mil...



HOME > MUSIC > NEWS May 4, 2023 3:40pm PT

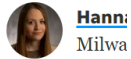
Live Nation Posts \$5.1 Billion in Revenue, Record Attendance as Global Touring Returns

By Jem Aswad



FESTIVALS

Milwaukee PrideFest 2023 breaks its three-day attendance record, has its highest number of vendors



Hanni Milwa

Published 6:04 p.m.

HOME > FILM > NEWS

'Super Mario Bros. Movie' Box Off Records Smashed on Opening Weekend

By Rebecca Rubin

College football attendance rose in 2022 with largest year-over-year increase since 1982



2023 Montreal Grand Prix breaks all-time attendance record



BREAKING

'Mission: Impossible' 7 Takes Top Box Office Spot With \$80 Million 5-Day

F1's Australian GP achieves record crowd in Melbourne

Four-day crowd of 444k tops 2022

Posted: April 4 2023

By: Cian Brittle



Taylor Swift performs for an audience of people who were lucky, devoted or well-heeled enough to get tickets. (John Shearer / Getty Images for Disney)

FIFA TOURNAMENTS WATCH ON FIFA+ PLAY LIVE SHOP NEWS INSIDE FIFA

The highest attendances in FIFA Women's World Cup history

Published 7 Jul 2023

From the first Women's World Cup fixture to some of the tournament's most iconic matches, here are the most attended games in the history of the global finals.

NFL per-game attendance makes big jump. The average NFL crowd grew by 3.25% to 69,442 per game in 2022, the second-largest figure in the last 19 years.



CTV News ... 18 hours ago

CALGARY STAMPEDE ATTENDANCE

2023 Attendance: **1,384,632**

2012 Record Attendance: **1,409,371**

ticketmaster Sport

RECORD-BREAKING WOMEN'S SPORT

They want to travel



INTEND TO DO IN THE N12 MONTHS

Travel intentions show acceleration

Continuous acceleration should be expected for 'live' if the economy stays stable

TRAVEL INSIDE YOUR COUNTRY



TOTAL = 91%

TRAVEL OUTSIDE YOUR COUNTRY



TOTAL = 88%

NET INCREASE
= Increase minus decrease

People are branching out - recall 2021 and 2022 when travelling inside the country was the focus

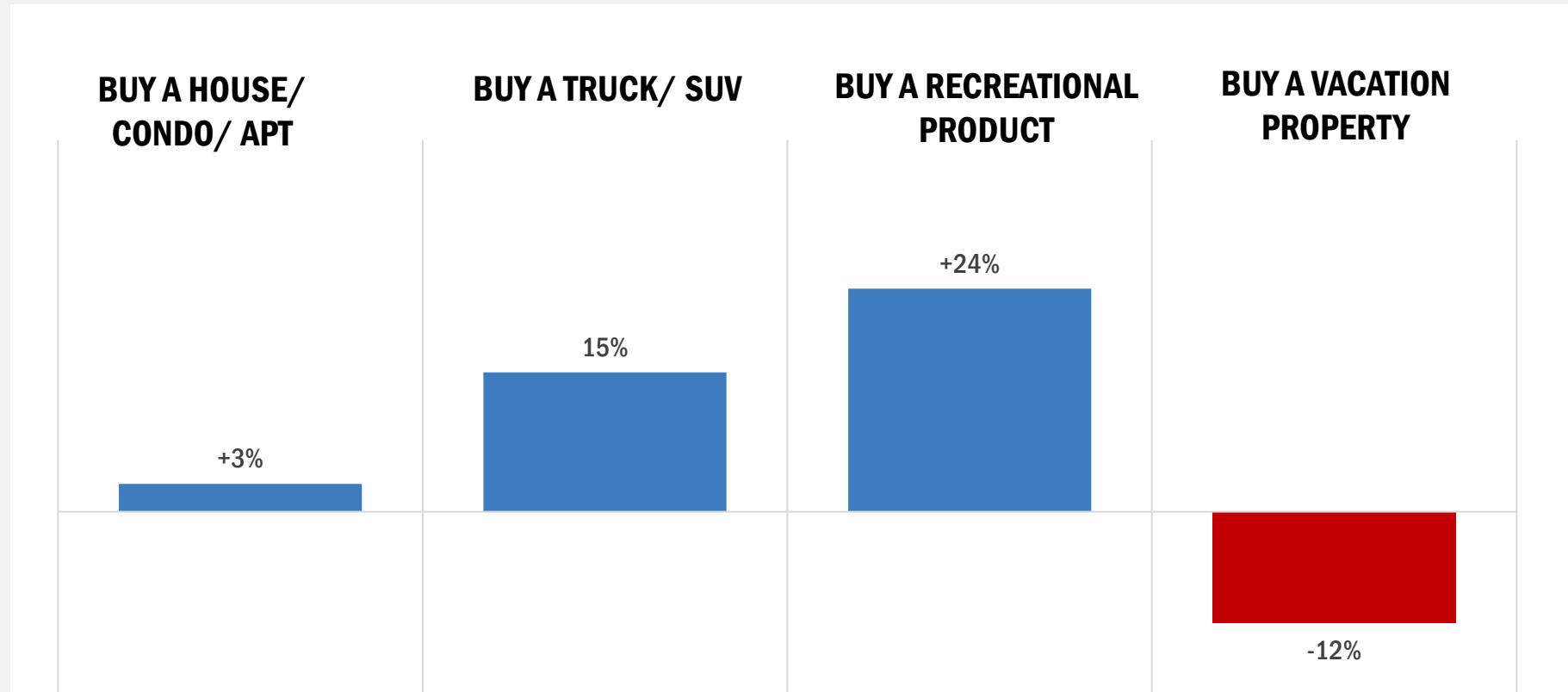
And the reality is that people are purchasing, spend is there.



INTEND TO DO IN THE N12 MONTHS

Intention to purchase continues, but declines the larger the burden.

The larger the 'ticket' the lower the intentions. Economy and interest rates will have much influence.



IMI 24™ : N=1,600+ in July 2023 We Asked: Intention Increase, Decrease, Not Change in the next 12 to 24 months Recreational product ATV/UTV/PWC/Scooter?Boat



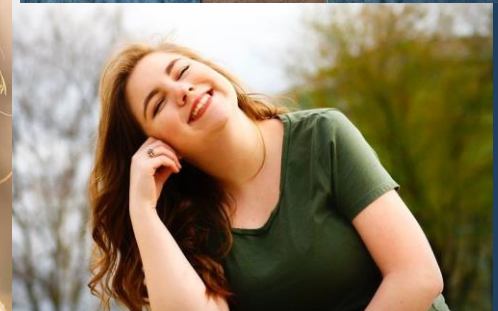
Key insight?

Financial stress is not excessive. Spend is there and people are excited to LIVE!

WHAT IS YOUR BRAND, PRODUCT, SERVICE DOING TO CONNECT AND BRING THEM IN?

People intending to do a lot more in the next 12 to 24 months will be:

**UNDER 45 YEARS OLD
HIGHER INCOME - \$100,000+**





THE POINT IS

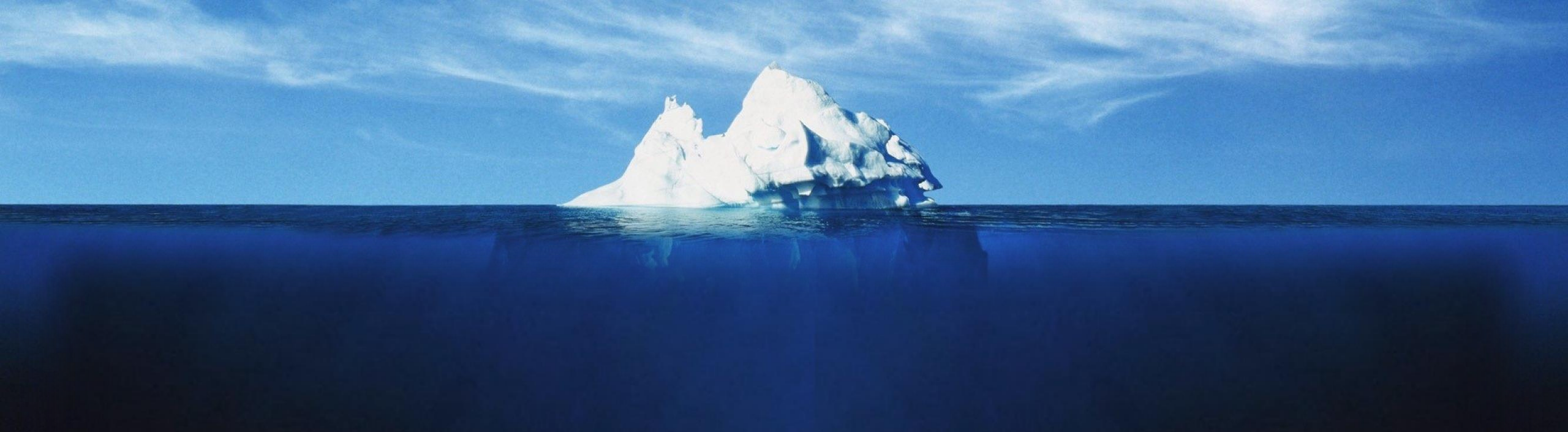
THINGS ARE NOT ALWAYS

WHAT WE THINK OR HEAR

It's the loudest in the room that tends to take over

**HEALTH SCARES, FINANCIAL TURMOIL & LOCKDOWNS
DURING COVID HELPED REPROGRAM AND ACCELERATE OUR
INDIVIDUAL AND COLLECTIVE RESILIENCY.**

**IN 'THE NEWS' TODAY IS NOT DRIVING DESPERATION LIKE
WE EXPERIENCED IN 2020-2022.**



**WHEN UNDERSTANDING HOW TO CONNECT,
DIVE BELOW THE SURFACE TO UNCOVER WHAT
TRULY MATTERS.**

How IMI unlocks the mind of the consumer: An unbiased approach analyzing what's on people's minds – in their words.



- Over 2M interviews since February 2020, open ended discovery
- An ongoing process to uncover trends and issues affecting consumers today

QUESTIONS ASKED GLOBALLY AND LOCALLY

- 1 Unaided - 3 Most important issues in your life?
- 2 Unaided - 3 Most important issues in your family's life?
- 3 Unaided - 3 Most important issues that face your community?
- 4 Unaided - 3 Biggest challenges you face TODAY?
- 5 Unaided - 3 Biggest challenges you will face in the next 12 months?

ALL OF THE ISSUES and THEMES STEM FROM STATEMENTS MADE BY THE CONSUMER

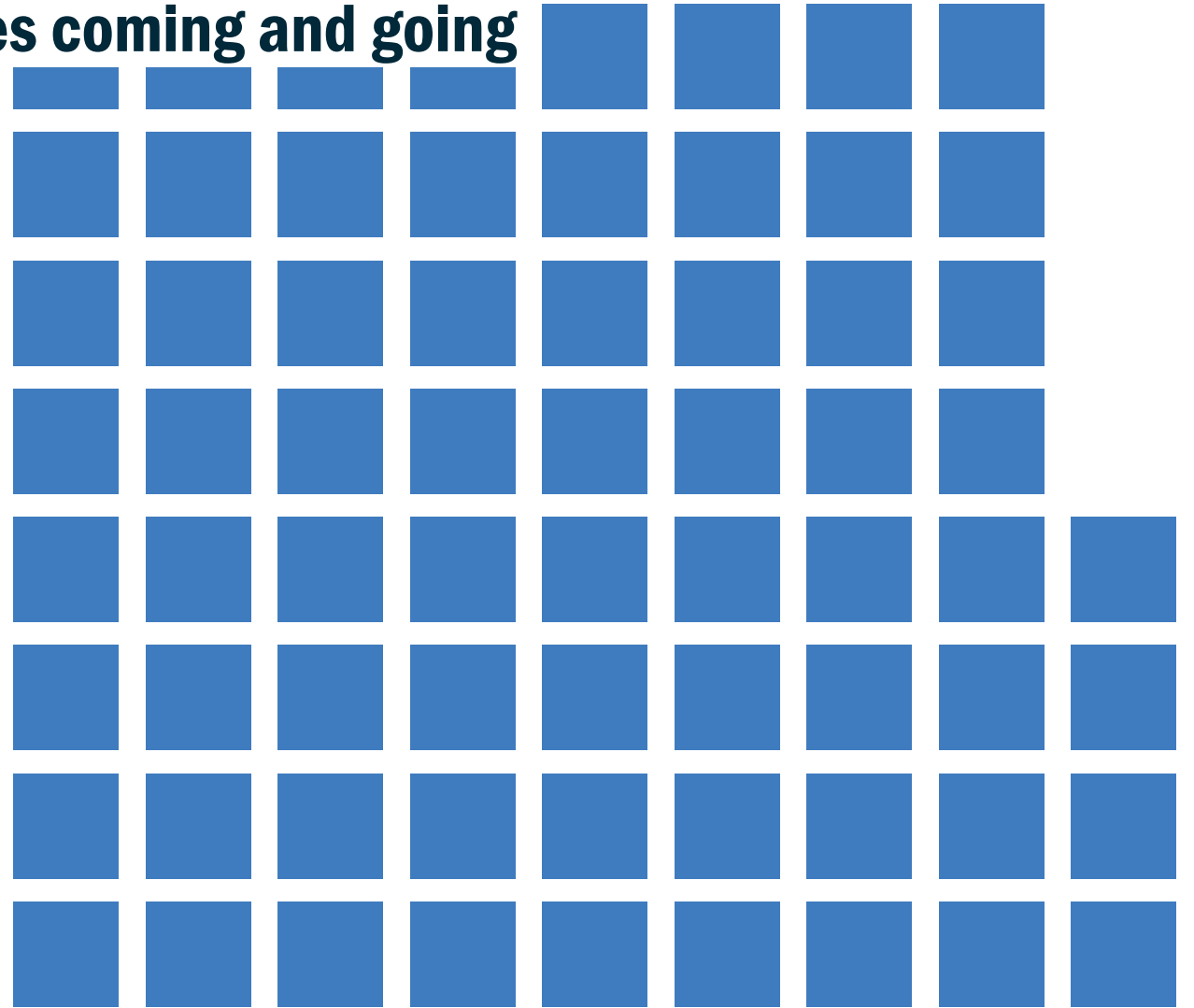
MONEY/ECONOMY	HEALTH	SOCIAL	DIGITAL/TECHNOLOGY	ENVIRONMENTAL
My financial health	Heart/Stroke	Black Lives Matter	The overuse of smartphones	Access to clean drinking water
Economic Stability	Obesity	Bullying	The reliance on social media	Climate Change
Corporate Profits/Big Business	Physical Fitness	Discrimination	Overuse of technology	Conservation of fresh water
Affordable Housing	The health care system	Financial support of the arts	Social Media induced anxiety	Global Warming
Poverty	Access to health care services	Gay Rights	Cyberbullying	Government committed to reducing carbon emissions
Income Disparity	Cancer (any kind)	Gender Equality	Video game obsession	Policy to reduce carbon emissions
Unemployment	Breast Cancer	Government desire to implement stricter gun laws	Online Privacy	Greenhouse gas emissions
Job Security	Children's Cancer	Homelessness	Excess screen time	Natural Catastrophes (Flood, Fires etc.)
Retirement/Lack of Pension	Heart Disease	Hunger / Food Scarcity		Pollution
Financial Wellness	Diabetes	Pay equality - equal pay of visible minorities		Recycling
Paying Rent/Mortgage	Mental Health	Police treatment of minorities		Resource Availability (energy, water.)
	Suicide	Racism		Sustainability
	The aging population	Reducing gun violence in our community		
	Lack of social distancing in my community	Supporting women's right to choose		
	Substance Abuse	The poor quality of our roads		
	Big Pharma	Transit delays		
	COVID-19/Coronavirus	Work/Life Balance		
	Health of my grandparents			
	Health of my parents			

Sample of sub-themes stemming from consumer statements

The list continues to evolve with issues coming and going

TODAY, WE EVALUATE 68 DIFFERENT
SUB THEMES ON PEOPLES MINDS

68
SUB-THEMES



**Rolled-up into
5 CORE THEMES**

**MONEY/
ECONOMY**

HEALTH

SOCIAL

DIGITAL/ TECHNOLOGY

ENVIRONMENTAL

On people's minds at any one time is **A LOT** (THANKFULLY IT'S NOT ALL IN THE NEWS)



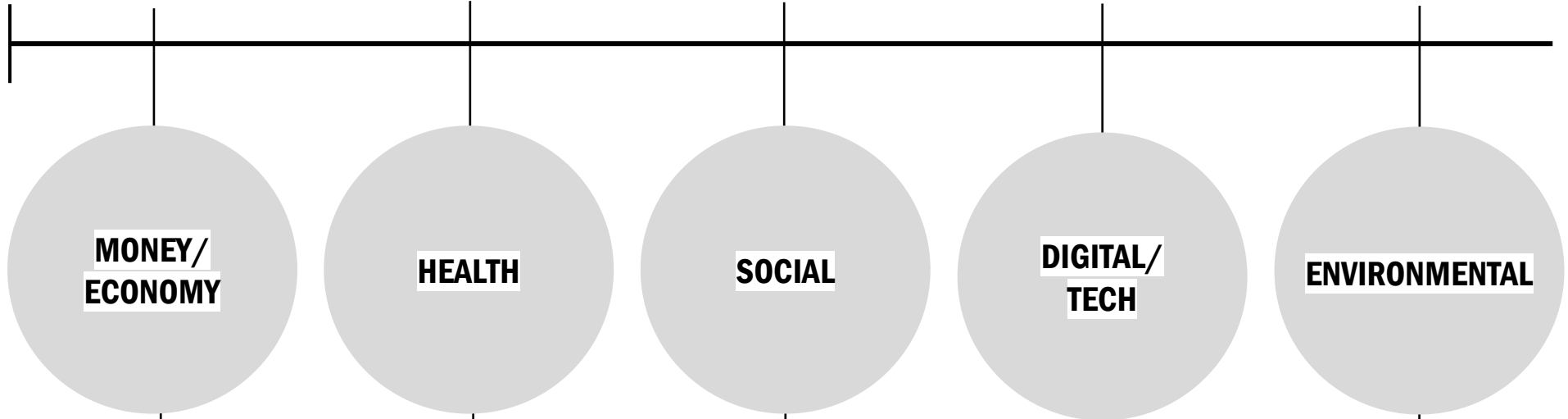
91%

92%

90%

88%

89%



90% of people have concerns and issues on their minds across all themes, not just one.



91%

90%

90%

86%

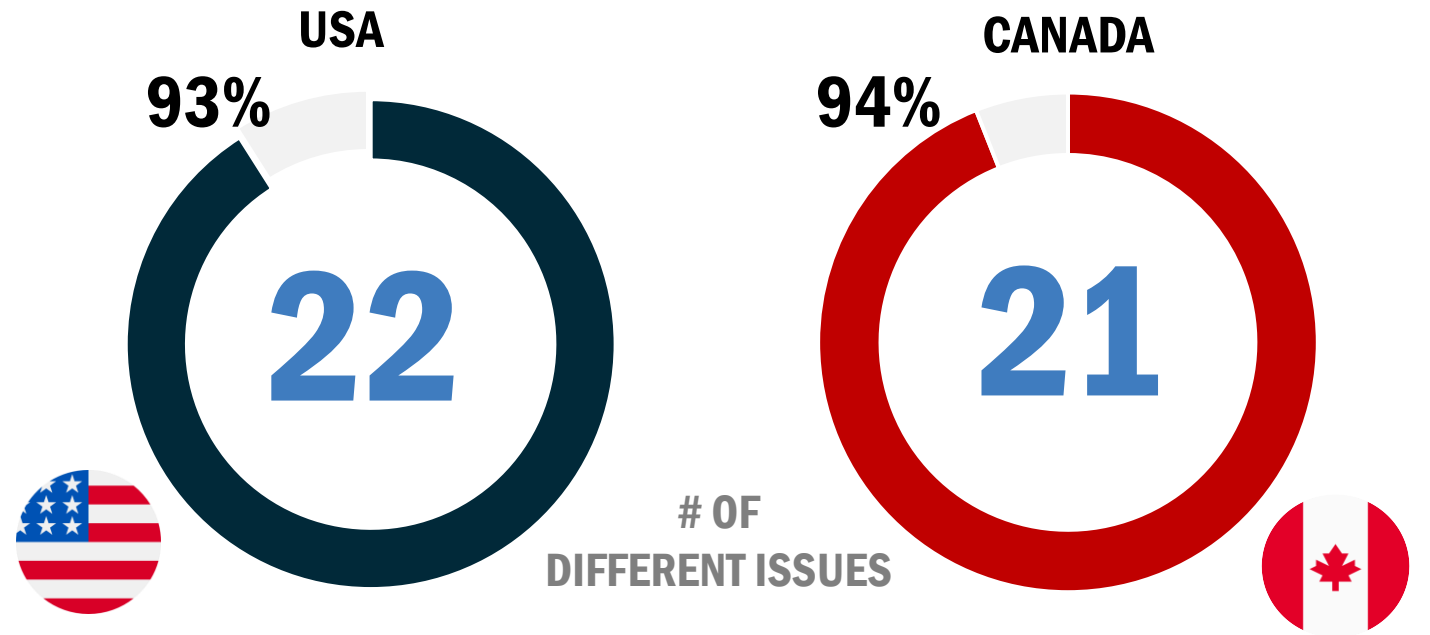
86%



Q: How long until yo8u are comfortable attending...IMI24™, USA, N=1500

The reality is that each person has over 20 issues that they think and care about

**OVER 90% HAVE OVER 20 ISSUES
THAT ARE IMPORTANT TO THEM
THAT THEY SUPPORT**





This number of issues generally doesn't change by demographics



AVERAGE ISSUES BY DEMOGRAPHIC	
13-18 years (younger Gen Z)	20
19-24 years (older Gen-Z)	22
40-55 years (Gen X)	23
56-64 years (Boomers)	24
Born in USA	22
Foreign Born	21
HHI Under \$70K	24
HHI Over \$100K	20

The number of issues generally doesn't change by demographics in Canada either



AVERAGE ISSUES BY DEMOGRAPHIC	
13-24 years (Gen Z)	21
25-39 years (Millennials)	21
40-55 years (Gen X)	22
56-64 years (Boomers)	23
Born in CANADA	22
Foreign Born	19
HHI Under \$70k	23
HHI Over \$100K	19

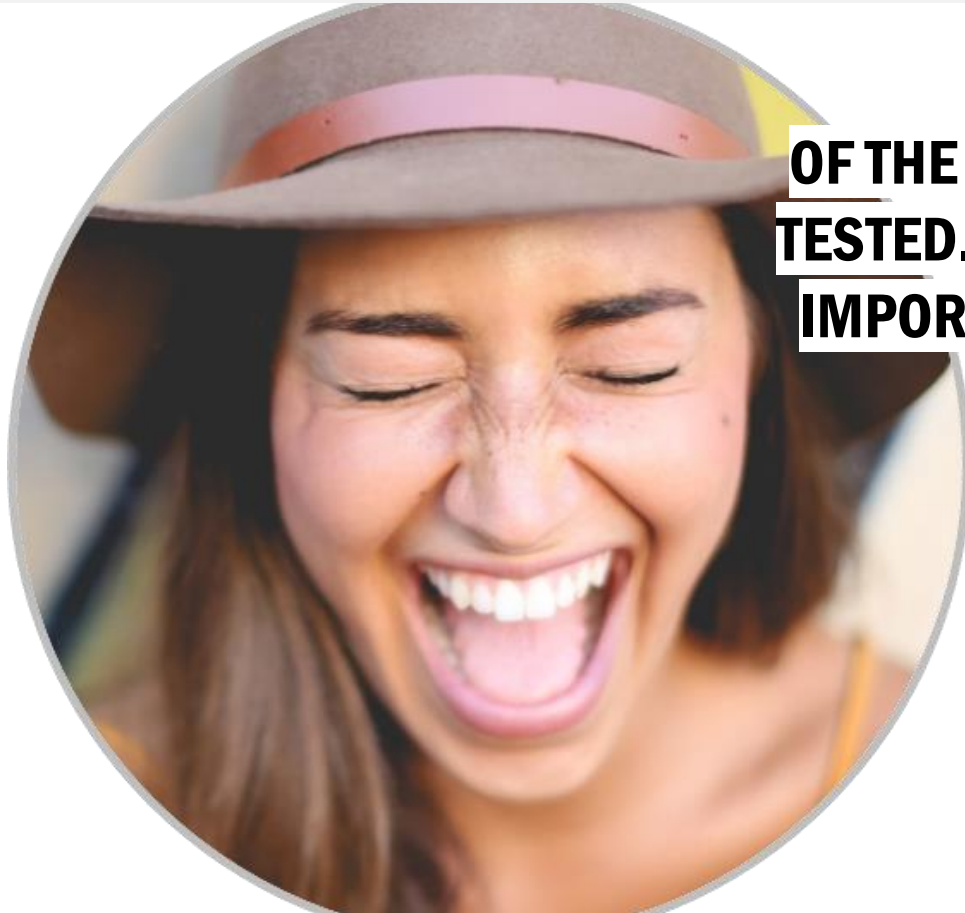
Younger Gen-Z have 18 issues on their minds. The older you get the more issues you're thinking of.

Gender Difference between women and men specifically

IN CANADA

**OF THE 68 DIFFERENT ISSUES
TESTED. HOW MANY ARE MORE
IMPORTANT TO WOMEN THAN
MEN?**

- A) 34**
- B) 51**
- C) ALL 68**



Gender Difference between women and men specifically

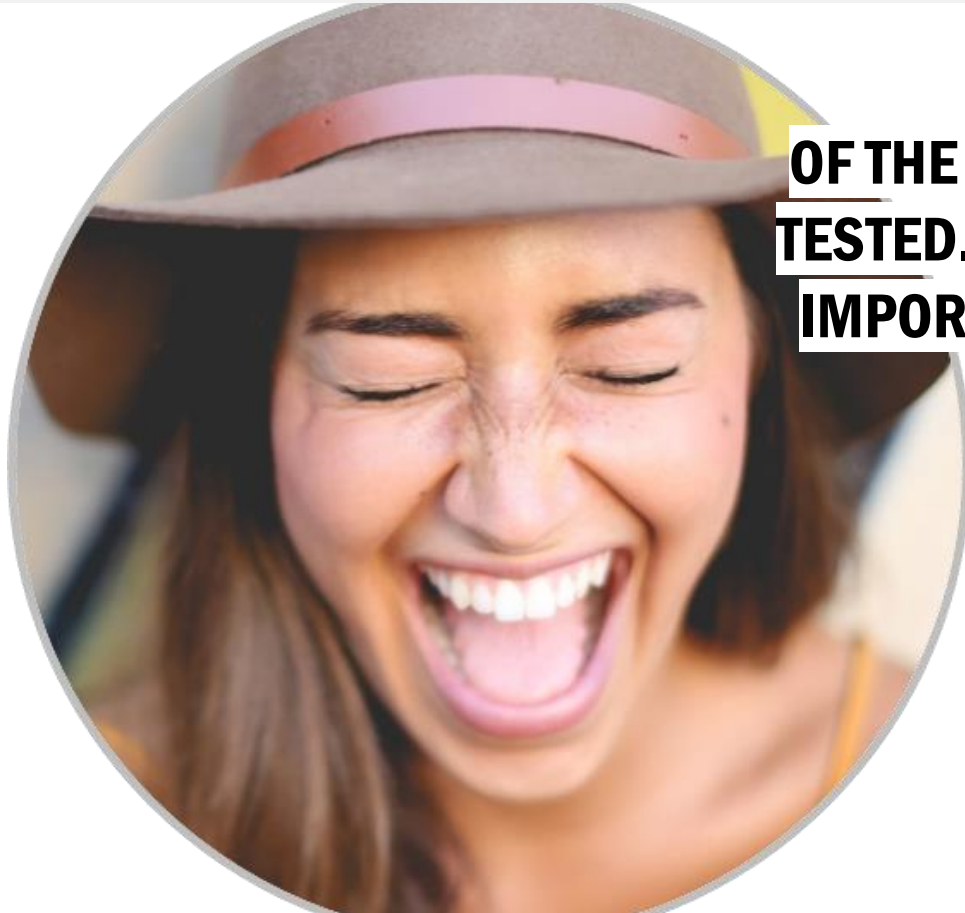
IN CANADA

**OF THE 68 DIFFERENT ISSUES
TESTED. HOW MANY ARE MORE
IMPORTANT TO WOMEN THAN
MEN?**

A) 34

B) 51

C) ALL 68 (100%)



Women do care more than men ...but how much more?





17%

Women care more about all issues about 17% more than men

The point is that you need to understand what's on the minds of the people you care about.



People just don't care about 'the environment' or 'money' or 'homelessness'.

They're thinking about a sea of issues – including ones that keep bubbling below the surface.

▶▶ INSIGHT

Now, think about how and why it is so difficult to break through with your brand message.

**Although the number of issues doesn't
change there ARE nuances depending
on your vantage point**

What are the top issues for Canadians today?

TOP ISSUES



AFFORDABLE HOUSING (52%)
CORPORATE PROFITS/ BIG BUSINESS
ECONOMIC STABILITY



MENTAL HEALTH (51%)
THE HEALTH CARE SYSTEM
ACCESS TO HEALTH CARE SERVICES



HOMELESSNESS (42%)
HUNGER/ FOOD SCARCITY
BULLYING

What are the top issues for Canadians today?

TOP ISSUES



CYBERBULLYING (45%)
ONLINE PRIVACY
EXCESS SCREEN TIME



CLIMATE CHANGE (51%)
GLOBAL WARMING
POLLUTION



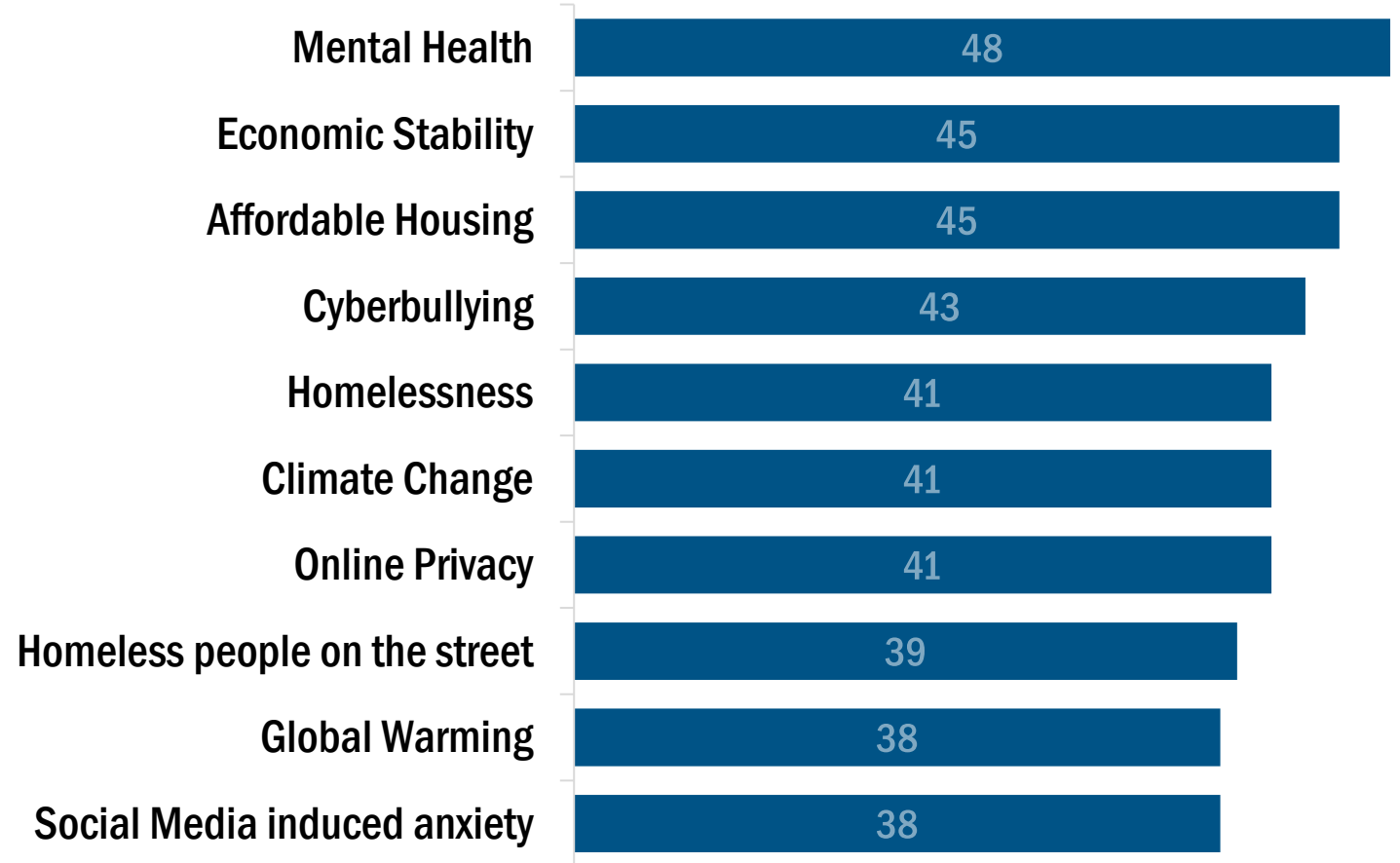
What are the top issues for Americans today?

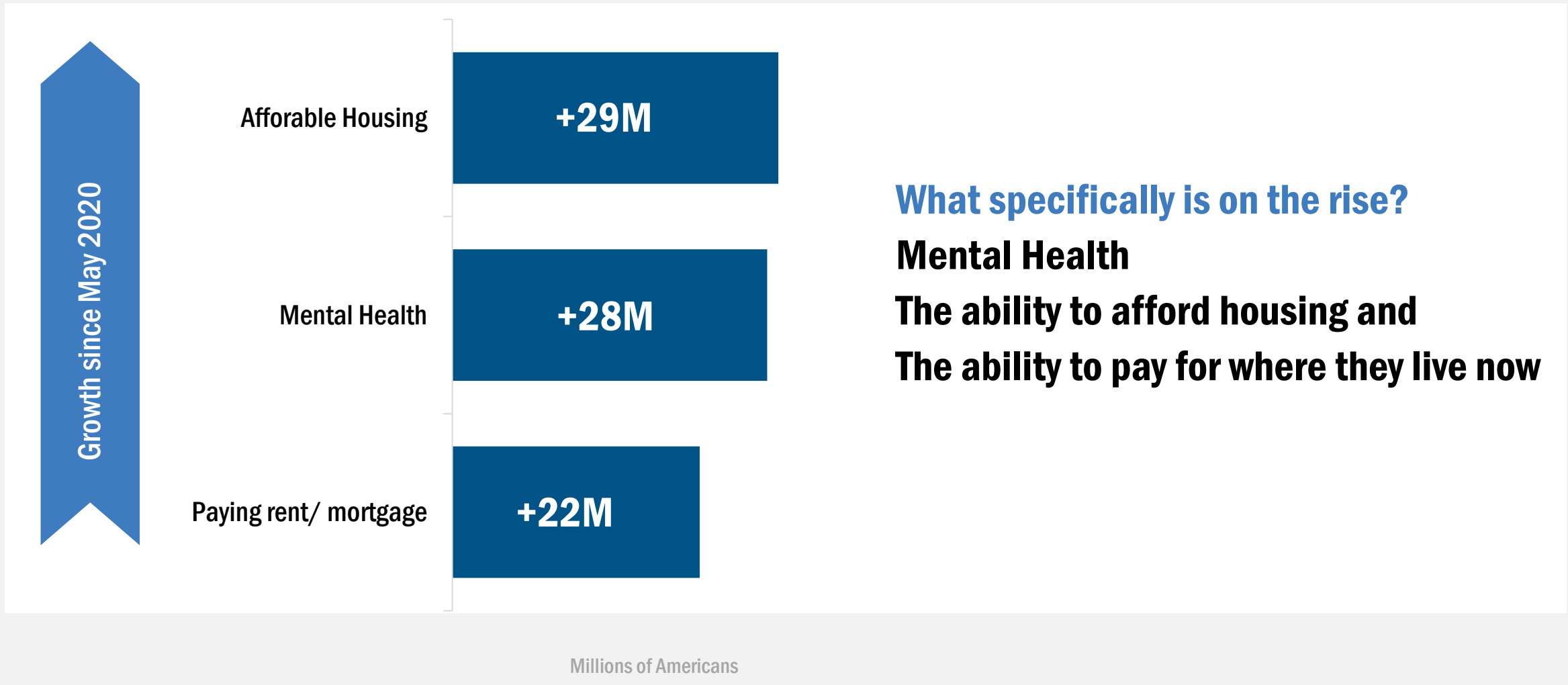


2023

Top 10 Issues

OUT OF 68 DIFFERENT ISSUES
ARTICULATED BY CONSUMERS
THIS IS WHAT'S ON THEIR MINDS





Globally, we are not all concerned about the same thing.

TOP HIGHLIGHTS BY COUNTRY



Mental Health (49%)
Recycling (49%)
Cyberbullying (45%)
Homelessness (43%)
Cancer (42%)



Work/Life Balance (34%)
Sustainability (33%)
Income Disparity (32%)
Video Game Obsession (32%)
Reliance on Social Media (31%)



Bullying (32%)
Cyberbullying (29%)
Income Disparity (29%)
Financial Health (25%),
Retirement/Lack of Pension (24%)



Job Security (45%)
Access to Clean Drinking Water (43%)
Social Media Induced Anxiety (43%)
Hunger/Food Scarcity (40%)
Work/Life Balance (39%)

Know what's on the minds of the people you care about



TOP ISSUES

- MENTAL HEALTH (56%)
- AFFORDABLE HOUSING
- CYBERBULLYING
- ECONOMIC STABILITY
- HOMELESSNESS
- CLIMATE CHANGE

SUICIDE

POVERTY

DIFFERENCE BETWEEN WOMEN AND MEN

There are many similarities to what women and men worry about

However, suicide and reliance on social are two key differences



TOP ISSUES

- ECONOMIC STABILITY (41%)
- MENTAL HEALTH
- AFFORDABLE HOUSING
- CLIMATE CHANGE
- ONLINE PRIVACY
- HOMELESSNESS

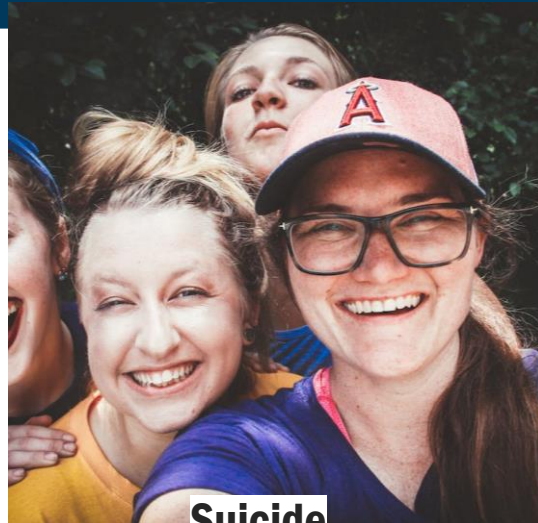
THE RELIANCE ON SOCIAL MEDIA

CYBERBULLYING

Dive deep to uncover what matters to those you are looking to connect with



Top of mind more so for Gen Z vs Total CDA



Suicide

Racism

Social media induced anxiety

Not Born in Canada



Consistent with all Canadians EXCEPT FOR COVID-19 is heightened with this specific cohort.

It's not picking the issue...it's picking the theme that aligns with your brand and demonstrating your consistent approach to this theme

ALIGNING WITH WHAT MATTERS, COMMITTING TO 3+ YEARS AND ACTIVATING CONSISTENTLY IS THE ONLY WAY TO CONNECT AND BUILD YOUR BRAND

**“Care about” about is one dimension
but it’s also about cross referencing and understanding
what drives purchase**

Attitudes and emotions don’t always translate into behavior

There is a SAY/DO GAP

4 CORE THEMES THAT ARE DRIVING PURCHASE RIGHT NOW.

Made Locally/ Support Local

Country/Region – does not
have to be city.

▶▶ INSIGHT

Healthy Fits Desires

Cause/Charity Reasons

Focus in and elevate 1 or 2
themes.

Influence

See a friend buy or use

NORTH AMERICA – 125,000 CONSUMERS INTERVIEWED

BUT WATCH out for the SAY/ DO GAP. Intentions aren't always aligned with reality.



PEOPLE WANT TO EAT HEALTHIER AND ONLY EAT HEALTHY FOODS, BUT IT DOESN'T ALWAYS PLAY THROUGH.

	CANADA	GEN Z	MILLENNIALS	GEN X	BOOMERS
	N=5000	N=879	N=1546	N=1589	N=986
ONLY EAT HEALTHY FOODS	64%	76%	60%	64%	62%
EAT CANDY	77%	82%	77%	77%	73%
EAT FAST FOOD	82%	84%	85%	79%	77%

The younger cohort are the worst offenders

And unfortunately, there are **gaps** in attitudes & behaviors in charity too



93%

Of Canadians believe it is important to support causes

SAY

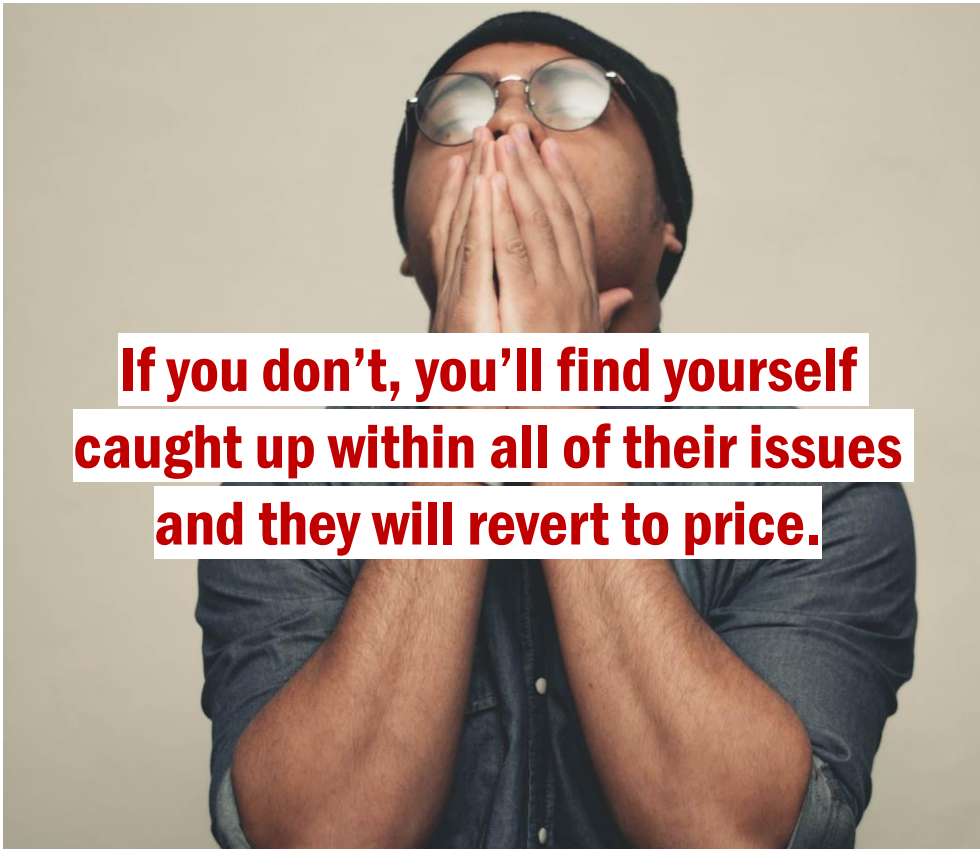
45%

Of Canadians have supported charities in the past 12 months

DO



The reality is that people will buy when you align yourself with an issue, but you have to amplify, make it easy for them and make it relevant so that they pay attention.



PURCHASE BECAUSE...		
	%	%
The Product Supports Causes that make me feel good	65	58
The Products Are Environmentally Friendly	48	53
It Supports The Local Community	48	50
The Products Support Sustainability	46	44
A Brand Supports Health And Wellness	47	42
A Brand Helps Raise Money for a Cause I Support	46	42
A Brand Supports Children Charities	40	35
The Products Support Eliminating Climate Change	36	35
A Brand Supports Cancer Charities	38	35
A Brand Supports Mental Health Initiatives	36	32
A Brand supports Veterans	40	23

Who do you think most actively 'BUYS' to support causes or themes they care about?

GEN-Z
(18-26)



MILLENNIALS
(27-42)



GEN-X
(43-58)



BOOMERS
(59+)



It's Millennials who most actively 'BUY' to support causes or themes they care about

Average # of Causes or Themes
Millennials purchase because of

10

And it's the younger millennials 25-33 that are leading the charge.
Bringing them in early will drive loyalty for years to come.



What's essential is to:

- 1. Understand who your high-value target is**
- 2. Understand the doers**
- 3. Dissect intentions vs behavior**

**THEN UNCOVER and CONNECT IN WITH
THE 1 OR 2 THINGS THAT WILL DRIVE
YOUR BRAND FORWARD.**



Get REALLY TIGHT on

WHO TO FOCUS ON



HOW TO CONNECT



WHERE TO BE



WHAT TO SAY





At the end of the day...

It's about ME

How does this affect ME?

What's the benefit to ME?

You're probably looking to relate this content to your world right now!

This guy!

© The Office

- 
- 1. Don't be swayed by everything you hear**
 - 2. Study the people you care about**
 - 3. Understand attitudes and intentions BUT study behavior**
 - 4. Define your message**
 - 5. Amplify it**
 - 6. Build your brand**

**Now, after you've thought about
all of the issues on your mind...**

**What's the 1 thing you took away or might look at a little
differently upon seeing the insight in this report?**





IMI NEXTWAVE™

The Power of Brand: Unlocking the Mind of the Consumer

Presented by Vanessa Toperczer | November 16th, 2023