IMI

WAVE 1: COVID-19

In field March 2 – 12, 2020

Background: COVID-19 Study Overview Wave 1

Faced with continued uncertainty across Australia and the globe, NextWave™ by IMI is completing comprehensive quantitative online studies about consumer attitudes and behaviors: speaking to thousands of people 13+ years of age across Australia and the globe.

Wave 1: March 12, 2020

Wave 2: March 20, 2020

Wave 3: Early April

We encourage you to share this information with those who it can help make decisions and reach out to our team if you have suggestions or topics for the next round.

If you would like more information, please feel free to contact Devon Rick, drick@consultimi.com.

MARCH 2020

SUN	MON	TUES	WED	THURS	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Key Dates Reference

January 20	First Case in the United States
January 25	First Australian & first Canadian cases
March 6	First major event cancellations (e.g. SXSW)
March 11	US travel ban announced; WHO declares pandemic; major sports and events begin suspensions and cancellations
March 12	$17.6bn stimulus package unveiled North American school closures, large gathering bans
March 13	Trump declares a national emergency
March 16	2-week self-containment for all returning and arriving overseas travellers imposed

March 12, 2020: COVID-19 Perspective

OBJECTIVE

IMI's NextWave™ is focused on providing real-time clarity of people's perception (13+) during this challenging global health crisis to help mitigate some of the uncertainty we all face.

To form these insights, IMI completed over 15,000 global online interviews between March 7, 2020 and March 12, 2020.

CONTENTS: COVID-19 Consumer Report provides an overview of:

1. When people expect the Coronavirus will **no longer be a health issue in their country.**
2. What percentage of the population do not believe 'there is really any issue today.'
3. Unaided – what people have stopped doing in the wake of COVID-19.
4. Consumer intentions around travel, restaurant visits, events, shopping and getting together in the next 3 months.
5. The impact of the virus and day-to-day realities on people's lifestyle with comparisons to the 2008 recession for context.

People’s perception of when COVID-19 will no longer be a concern

People's perception on March 11, 2020 of when COVID-19 will no longer be a concern

IMI24™ : N=8,000 We asked: In how many months do you think it will be until the Coronavirus health issue ends - is no longer of any concern?

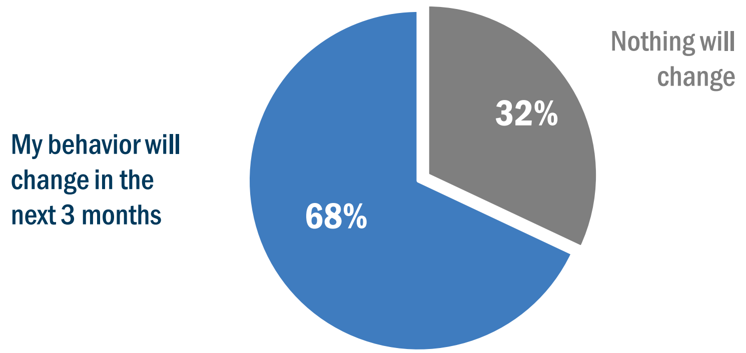
BASED ON PEOPLE'S PERSONAL OPINION OF WHEN COVID-19 WILL NO LONGER BE OF ANY CONCERN.

68% of Australians plan on changing behaviors in the next 3 months

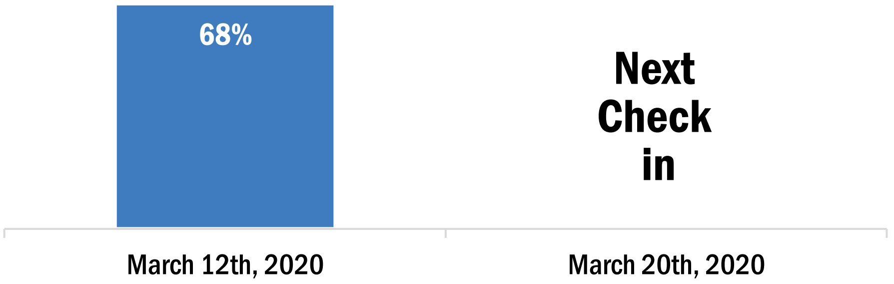
March 12th, 2020 : N=2000+ per country ; 13+ Years of age

- As of March 12th, 2020, in the next 3 months, approximately 2 in 3 people in the country will do specific 'out of home' activities **MUCH LESS** due to the Coronavirus. There has not been a large growth or decline in intended behavior.
- Findings are consistent across age and gender in the country.
- **The next sections of this overview will identify some of the activities that will be negatively impacted if Australians follow through on their intentions.**

Australian Intentions
March 12



Australian Behaviors
Will Change in the next 3 Months



COVID-19 Snapshot From March 12, 2020

IMI 24™ - Wave 2 : March 12th, 2020 : N=2,000+ Per Country and 15,000+ Globally

	USA	CANADA	AUSTRALIA	GLOBAL
When people expect the Coronavirus 'will no longer be a health issue	July/Aug 2020	July/Aug 2020	Aug 2020	July 2020
COVID-19's Impact on their current lifestyle – 'Major / Noticeable'	18%	17%	34%	
What % of the population do not believe 'there is really any issue today.'	16%	20%	23%	19%

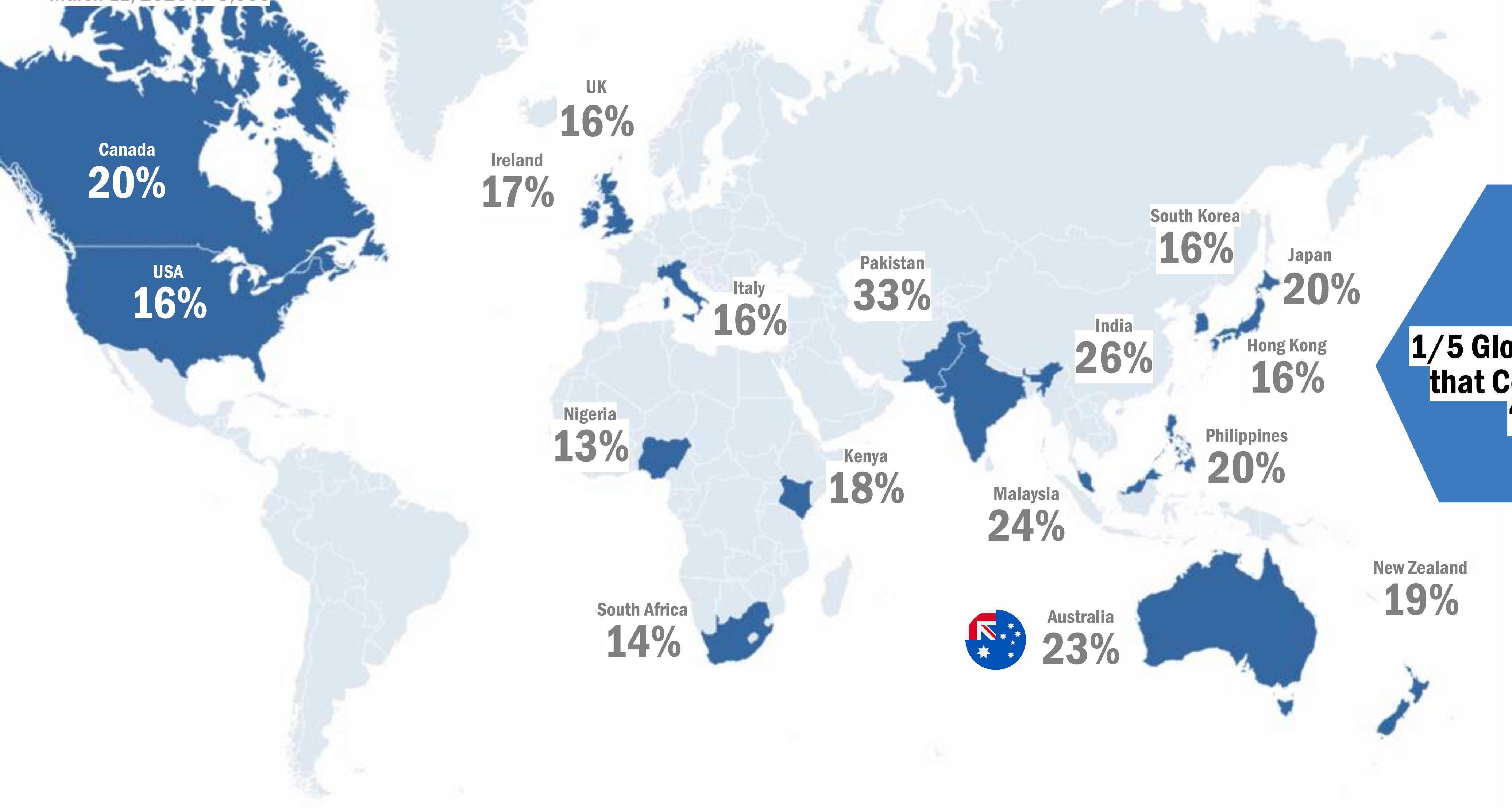
Activities People Intend to do Much Less in the next 3 months - Aided	USA	CANADA	10 Day NA Trend	AUSTRALIA
a. Travel outside of the country much less	-43%	-36%	▼ 8 to 11%	-31%
b. Travel by Plane much less	-29%	-31%	▼ 4 to 8%	-25%
c. Stay in a hotel much less	-10%	-15%	-3%	-9%
d. Go out of your home much less	-7%	-9%	Flat	-8%
e. Travel by Public Transportation much less	-25%	-25%	▼ 5 to 9%	-19%
f. Get together with family	-6%	-11%	Flat	-10%
g. Go to a community festival	-23%	-21%	▼ 1 to 8%	-18%
h. Go to a sporting event	-21%	-26%	▼ 10 to 12%	-19%
i. Go to a restaurant for dinner	-7%	-7%	Flat	-5%

▼ indicates the intention to do 'much less' is growing.

% of People that don’t believe COVID-19 is currently a real issue.

Percentage of people that believe that Coronavirus 'is really not an issue today.'

March 11, 2020 N=8,000



19%

1/5 Globally believe that Coronavirus is 'not really an issue today'.

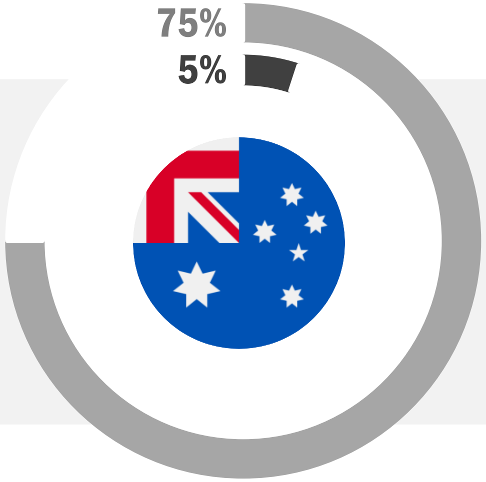
2020
11
MARCH

Unaided – What have you stopped doing due to Coronavirus?

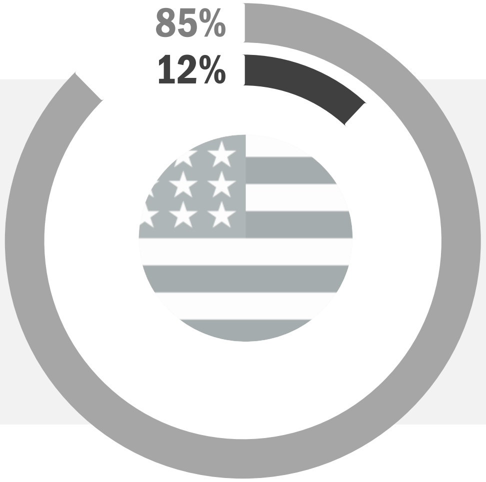
What have you **stopped or cancelled** doing due to the Coronavirus, if anything?

STOPPED DOING

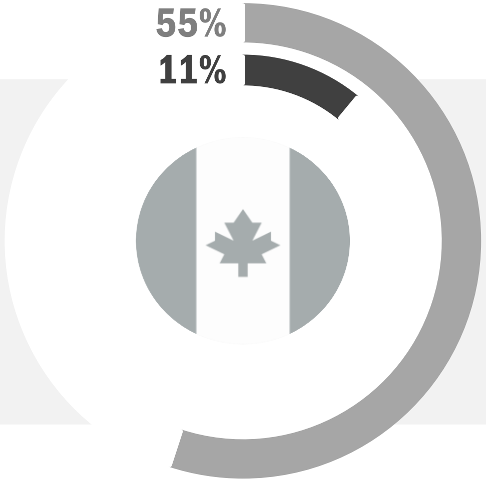
Nothing
Travel



Cancelled holiday
Going into crowds
Travel overseas
Holiday Plans
Restaurants
Public Places
Don't go out
Not buying
Chinese goods



Eating out
Travel
Going out in public less
Avoiding crowded places
Restaurants
Public Places



Cruise
China
Buffets
Olympics
Air Travel
Public Gatherings
Interacting with people
Buying from China

Intend to do MUCH LESS in the next 3 months

Completed March 12th, 2020

What are consumers <u>much less likely</u> to do in the next three months due to the Coronavirus?

IMI 24™ : March12th 2020, N=300+ per action per country per wave

THE IMPACT ON TRAVEL

Aided list on what they intend to do MUCH LESS

	March 12th, 2020			
	USA	Canada	Australia	
Travel outside of my country	43%	36%	31%	Significant IMPACT
Travel outside of my state/province	18%	18%	16%	Significant IMPACT
Travel outside of my city	10%	9%	9%	
Go out of my house	7%	9%	8%	

Implications

As expected, the greatest impact on travel will be suppressing travel outside of people's country . But there will also be significantly less travel outside of state/province, city and even outside of their home.

A third of Australians say travel considerations will be affected in the next 12 months, with stronger consistency among generations than North Americans

IMI 24™ : March 11th, 2020 : N=400+ per country

AUSTRALIA



What are you **much less likely** to do in the next year due to the Coronavirus?	13+	Gen Z Millennial	Gen X & Boomers
Consider going on a cruise	33%	30%	35%
Consider going to China	41%	38%	43%
Consider going to Europe	23%	18%	26%
Consider flying on a plane	23%	19%	26%
Consider staying in a hotel	8%	8%	7%
Nothing will change at this time	20%	16%	22%

What are consumers much less likely to do in the next three months due to the Coronavirus?

IMI 24™ : March 1st and 12th 2020, N=300+ per action per country

THE IMPACT ON MODE OF TRAVEL

Aided list on what they intend to do MUCH LESS

March 12th, 2020

	USA	Canada	AUS	
Travel by Plane	29%	31%	25%	Significant IMPACT
Use public transportation	25%	25%	19%	Significant IMPACT
Stay in a Hotel	10%	15%	9%	
Use a cab, Uber or Lyft	9%	14%	13%	

Implications

As expected, the greatest negative impact on mode of travel will be people MUCH LESS likely to travel by plane, but there is also significant downward pressure on using public transportation across all three countries.

In addition, the impact on Hotels and share riding services will also be significant.

What are consumers <u>much less likely</u> to do in the next three months due to the Coronavirus?

IMI 24™ : March 1st and 12th 2020, N=300+ per action per country

THE IMPACT ON GOING TO EVENTS

Aided list on what they intend to do MUCH LESS

	March 12th			
	USA	CANADA	AUS	
Go to a concert	28%	31%	24%	Significant IMPACT
Go to a community festival	23%	21%	18%	Significant IMPACT
Go to a sporting event	21%	26%	19%	Significant IMPACT
Go to a movie	11%	15%	20%	Significant IMPACT
Go to charity fundraiser - volunteer	14%	13%	8%	Significant IMPACT

Implications

As expected, people intend to do much less outside their home in the next 3 months. Whether it is people going to a concert, festival or sporting event people are MUCH LESS likely to do any of these activities.

The impact is far reaching, inhibiting people going also to movies and charity events.

What are consumers <u>much less likely</u> to do in the next three months due to the Coronavirus?

IMI 24™ : March 1st and 12th 2020, N=300+ per action per country

THE IMPACT ON GOING TO RESTAURANTS AND BARS

Aided list on what they intend to do MUCH LESS

	March 12th		
	USA	CANADA	AUS
Go to a bar to watch a sporting event	18%	19%	18%
Go out for lunch to a restaurant	9%	7%	8%
Go out for dinner to a restaurant	7%	7%	5%
Go out for breakfast to a restaurant	5%	12%	13%

Implications

In addition to people avoiding travel outside their city, there will be significant inner city impact with people intending to go much less to restaurants - during all day parts - for the next three months.

The largest negative impact will occur relative to watching sporting events at bars in the USA, Canada and Australia.

What are consumers are much less likely to do in the next three months due to the Coronavirus?

IMI 24™ : March 1st and 12th 2020, N=300+ per action per country

THE IMPACT ON PHYSICAL ACTIVITY OUTSIDE OF THE HOME

Aided list on what they intend to do MUCH LESS

	March 12th		
	USA	CANADA	AUS
Go to a gym or fitness facility	16%	14%	11%
Go out for a walk	5%	9%	7%
Get for a run or hike	4%	5%	7%

Implications

The impact on people's intention to do physical activity – their favorite things to do for exercise (walk, hike, run)– is only slightly inhibited as of March 12th 2020 due to the Coronavirus .

The negative impact on gym facilities will be greater due to the perception of public gatherings, which may require greater flexibility of access to times/openings.

Defining what People are much less likely to do in the next three months due to the Coronavirus?

IMI 24™ : March 1st and 12th 2020, N=300+ per action per country

THE IMPACT ON VISITING / GETTING TOGETHER WITH FRIENDS AND FAMILY

Aided List on what they intend to do MUCH LESS

	March 12th		
	USA	CANADA	AUS
Get together with friends	7%	11%	8%
Get together with family	6%	11%	10%

Implications

The impact on people socializing and getting together with friends and family – inside or outside their home - is inhibited as of March 12th 2020 due to the Coronavirus. This is very important with the knowledge of people's needs for human connection for mental and physical health.

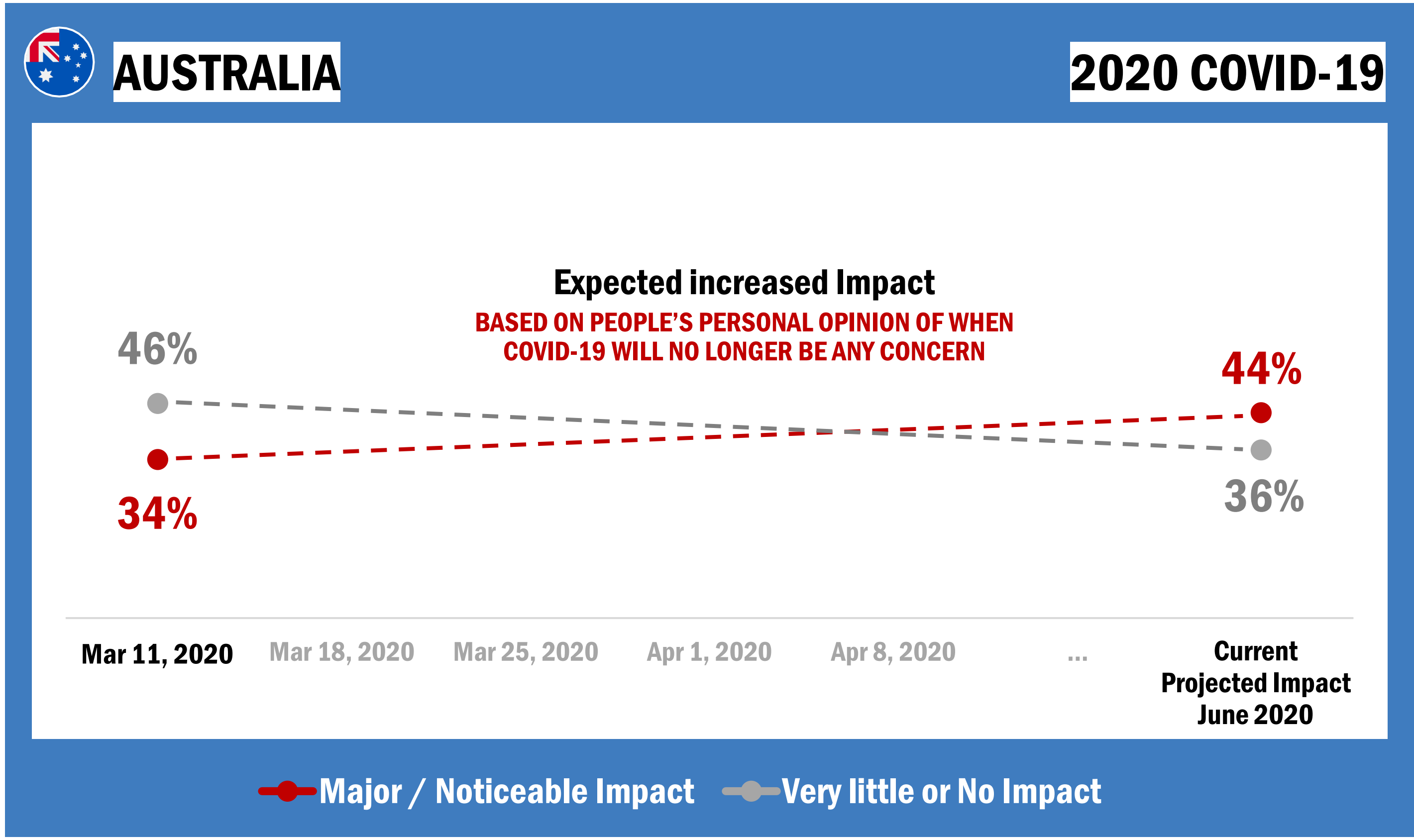
Perceived Impact of Covid-19 on People's Lives – 2020

Perceived impact on people's lifestyles

AUSTRALIA

In the current market – 1 in 3 people have felt a major or noticeable impact on their lifestyle, with the expectation that things will get slightly worse in the coming months, growing to nearly 1 in 2 feeling a major/noticeable impact by June.

These perceptions will be next updated for March 20, 2020 and tracked for the coming months.

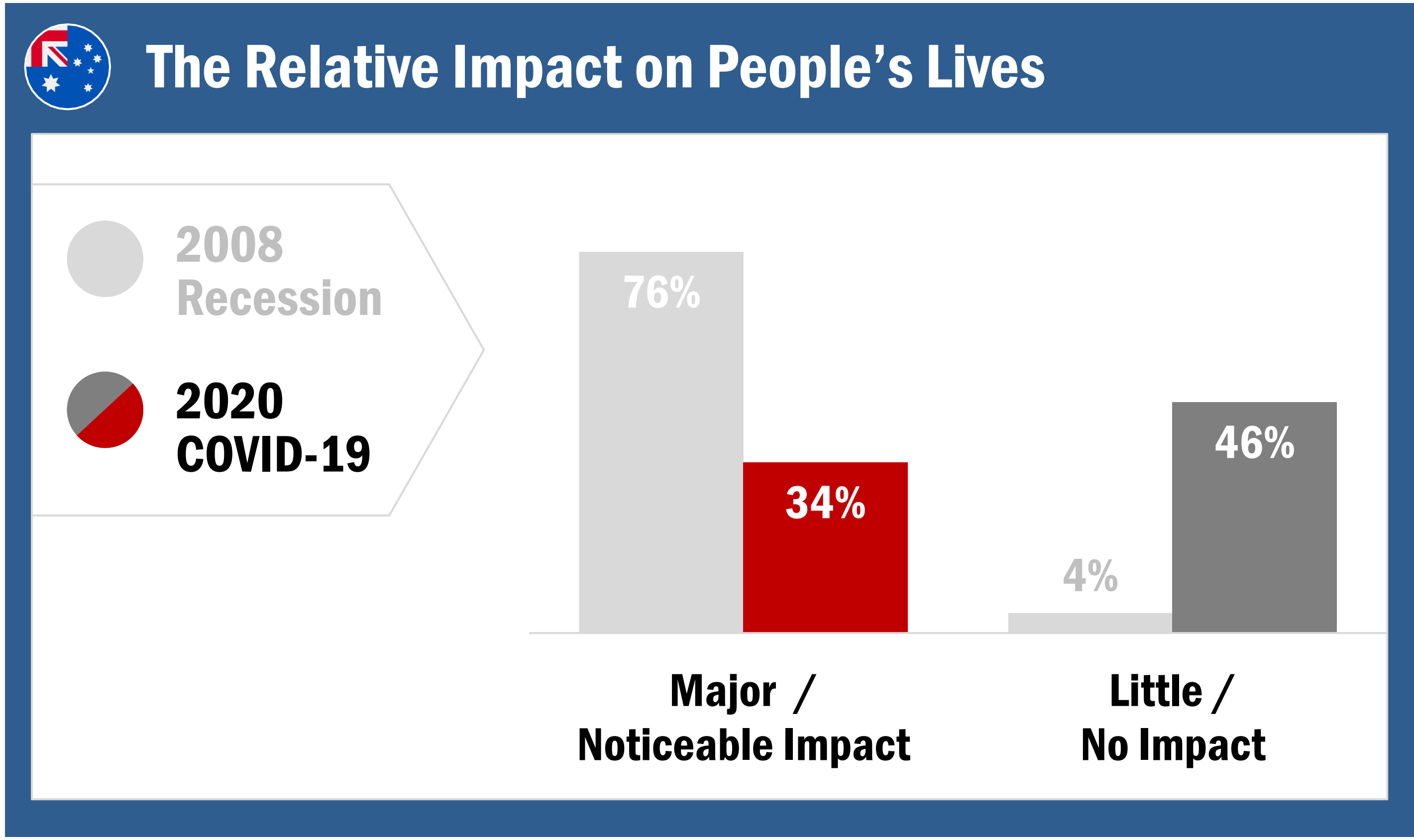


Perceived impact on people's lifestyles: Comparing the 2008 Recession to COVID-19

AUSTRALIA

In the current market – 1 in 3 people have felt a major or noticeable impact on their lifestyle, with the expectation that things will get slightly worse in the coming months, growing to nearly 1 in 2 feeling a major/noticeable impact.

Relative to the recession in 2008, the people affected to date is **much lower**.



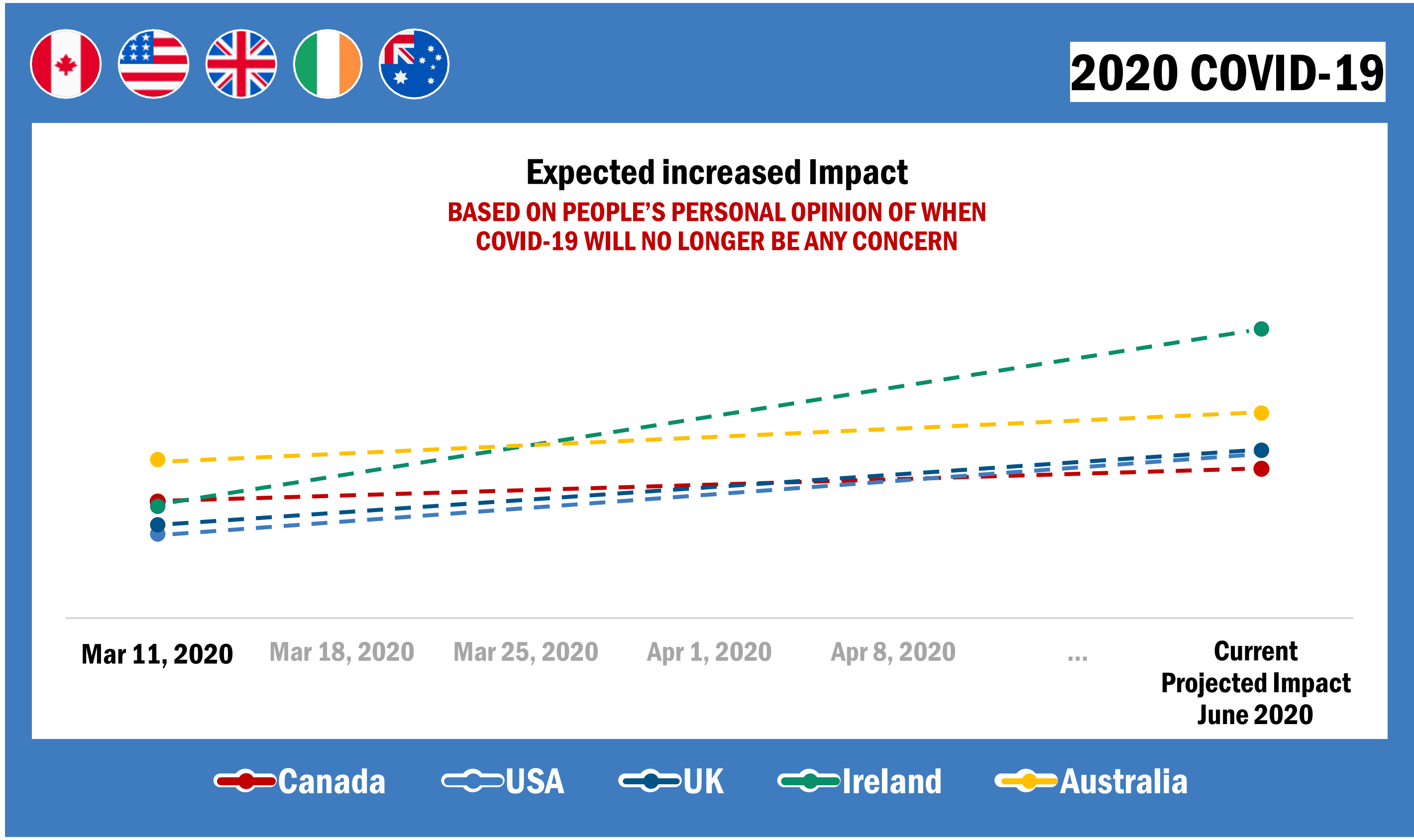
Perceived impact on people's lifestyles:

GLOBAL CONTEXT: MAJOR OR NOTICIBLE IMPACT

In the current market an average of 23% of people have felt a major or noticeable impact on their lifestyle, with the expectation that things will get slightly worse in the coming months, growing to nearly 42% feeling a major/noticeable impact.

- Ireland and Australia have felt most impacted to date and predict that by June the impact will grow in those markets most significantly.

These perceptions will be next updated for March 20, 2020 and tracked for the coming months.



Next Update – Late March 2020

If you would like more information, please feel free to contact Devon Rick drick@consultimi.com and for any North American insight, please reach out to Don Mayo, dmayo@consultimi.com.

IMI International Since 1971

CORE PURPOSE

INSIGHT
DRIVING
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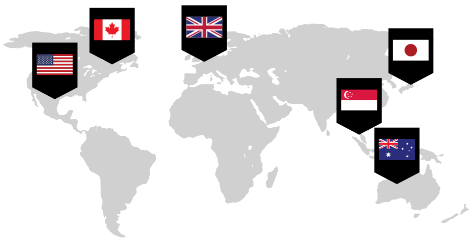
LOCATIONS



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

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24/7/365 insight.

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Deep dive with custom solutions.

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- Specific questions to drive your ROI
- Brand Strategy, Product, Messaging, Segmentation
- Event Activation
- Sponsorship
- Price Optimization etc.

COMMITMENT TO EXCELLENCE

If, for any reason, IMI International does not satisfy the objective defined in the agreed-to proposal, the project will be refunded in full.