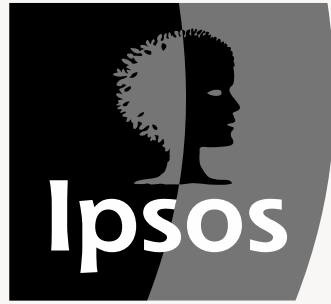




**IpsosCanadaNext**



Regulating the internet giants

## The world's most valuable resource is no longer oil, but data

*The data economy demands a new approach to antitrust rules*



## IBM's Watson is creating US Open tennis highlight videos

engadget

## Domino's wants to eliminate the pizza delivery guy

NO DRONE YET, BUT AN AUTONOMOUS FORD FUSION HYBRID ISN'T BAD PROGRESS

AUGUST 29, 2017

AUTOWEEK 

Harvard  
Business  
Review

TECHNOLOGY

## Smart Cities Are Going to Be a Security Nightmare

by Todd Thibodeaux

APRIL 28, 2017

## CULTURE HOW TO SURVIVE THE GREAT TECH PANIC OF 2017




WIRED STAFF



# CHANGE IS INEVITABLE BUT UNDER-ESTIMATED

Some Canadians are fearfully accepting change  
Some are eagerly anticipating the future

# MANY CANADIANS SEE A LACK OF PROGRESS OR THINGS GETTING WORSE IN THE NEXT 10 YEARS

BETTER (5-7)   
SAME (4)   
WORSE (1-3) 



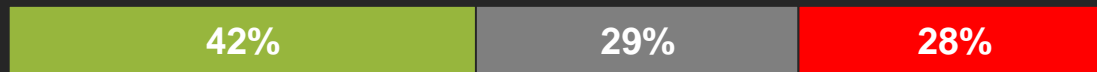
YOUR PERSONAL  
FINANCIAL SITUATION



YOUR OVERALL  
QUALITY OF LIFE



THE PROSPECTS FOR  
CANADA



THE PROSPECTS FOR  
YOUR COMMUNITY



THE PROSPECTS  
FOR THE WORLD





# TECHNOLOGY

## The Good, The Bad and Disappearing Jobs



70%

70% of Canadians agree the world is changing too fast

52%

52% of Canadians agree that they often feel overwhelmed by the choices they have to make in their lives

42%

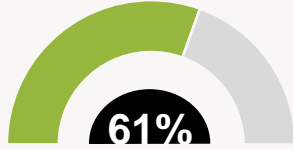
Only 42% of Canadians say they are excited about the future

41%

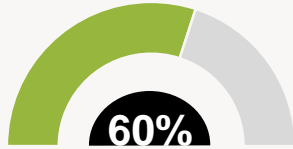
41% agree that new technologies will do more good than harm

# CANADIAN BUSINESSES KEEPING PACE BUT INDIVIDUALS AND THE PUBLIC SECTOR ARE FALLING BEHIND

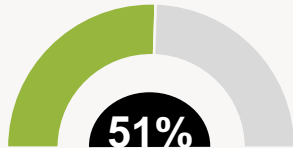
Agree



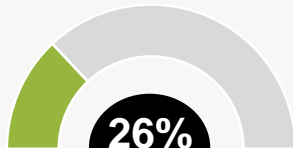
**Most Canadian companies** will take advantage of new technologies to improve the way they run their businesses



Law and **government policies** are not keeping pace with the changes in technology



Technology is changing so quickly these days and **I am having a hard time** keeping up

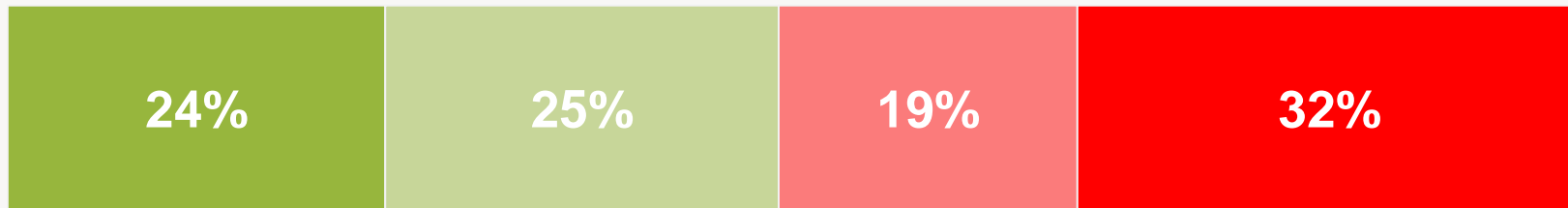


Today's **education system** is **doing a good job** of preparing students for the jobs of the future



# TECH-BELIEVERS (49%) VS TECH-SKEPTICS (51%)

STRONG BELIEVER ■  
LEANING BELIEVER ■  
LEANING SKEPTIC ■  
STRONG SKEPTIC ■





## BELIEVERS

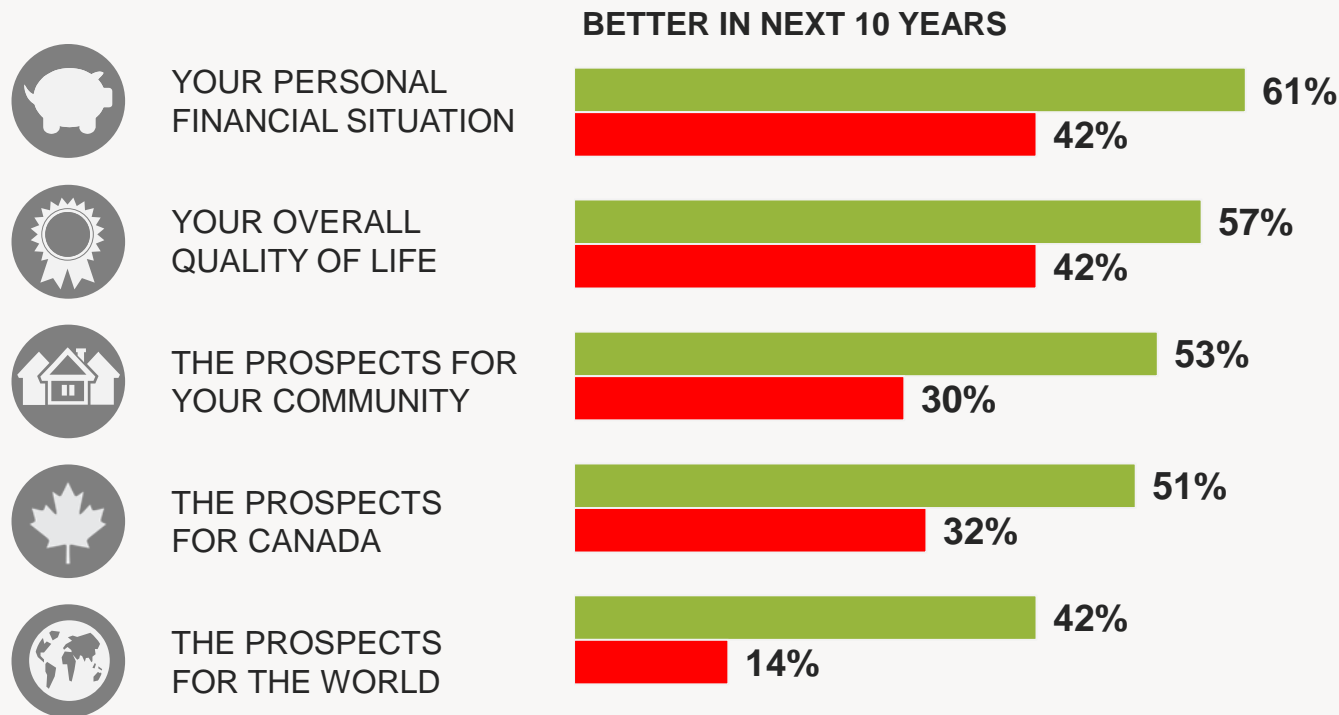
- More and better jobs
- People can and will overcome the downside (e.g. find a way to maintain in-person relationships)
- The benefits outweigh the risks

## SKEPTICS

- Fear job loss
- Concern over loss of privacy and personal info
- Concern over their own inability to keep up with pace of change

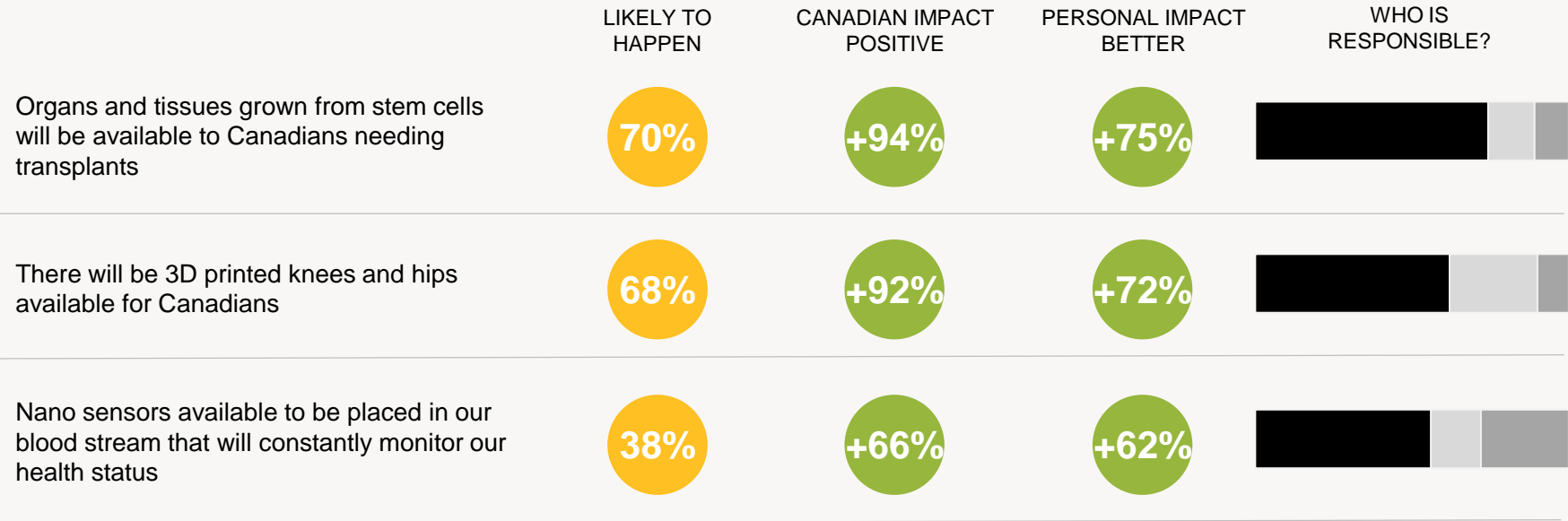
# THOSE WHO BELIEVE IN THE FUTURE OF TECHNOLOGY ARE ALSO MORE POSITIVE ABOUT OTHER ASPECTS OF THE FUTURE

STRONG BELIEVERS   
STRONG SKEPTICS 



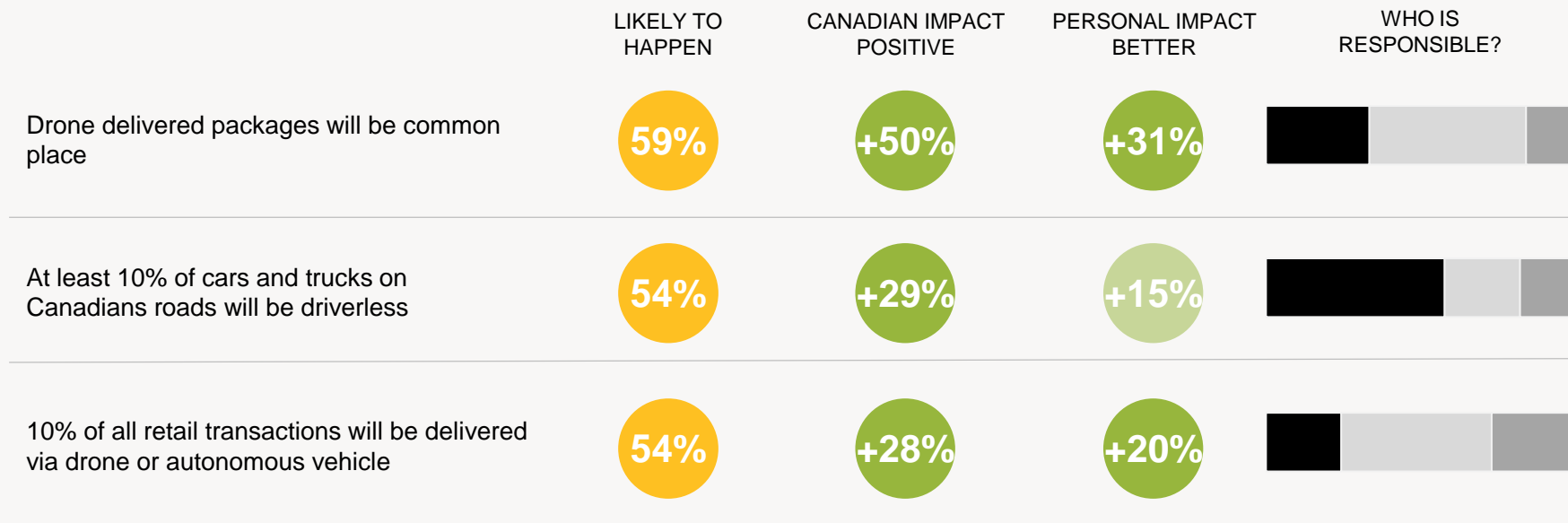
# HEALTHCARE

GOVERNMENT ■  
BUSINESSES ■  
CITIZENS ■



# AUTOMOUS VEHICLES AND DRONES

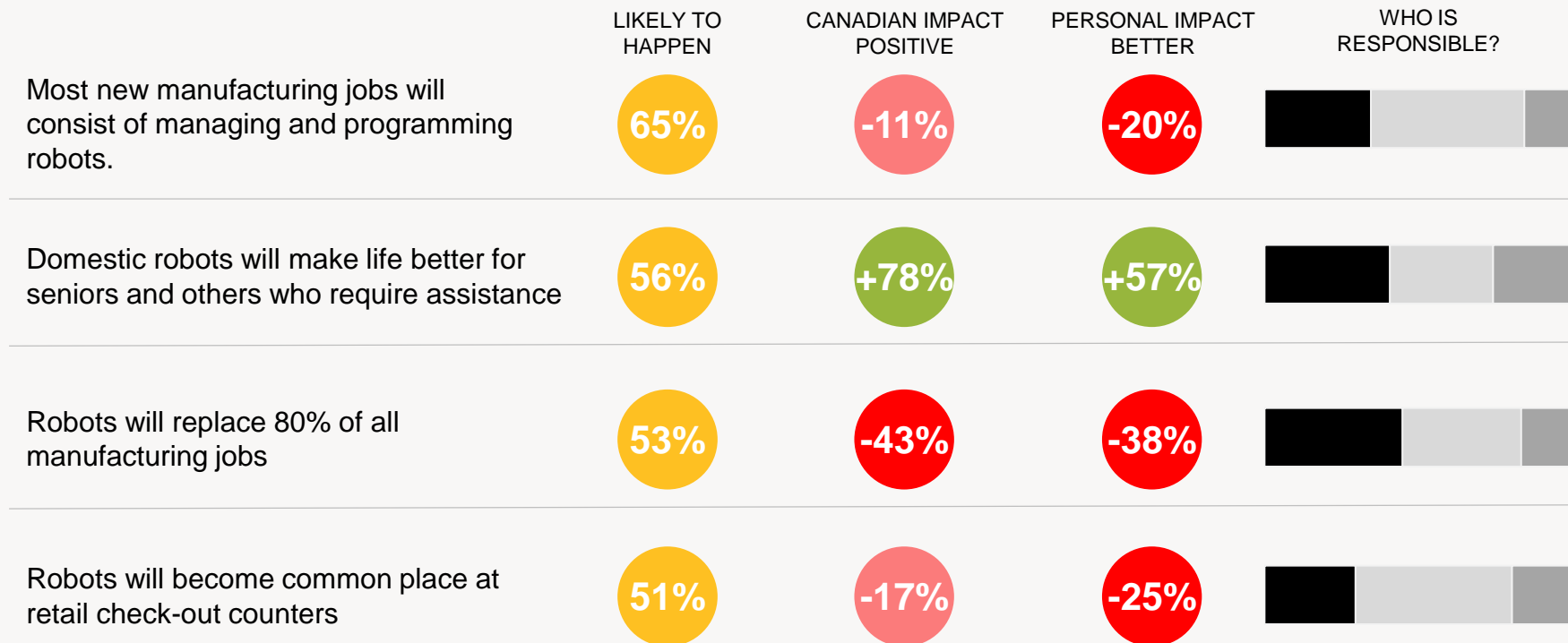
GOVERNMENT ■  
BUSINESSES ■  
CITIZENS ■



**32% agree that autonomous vehicles will make our roads safer**

# AI AND ROBOTS

GOVERNMENT ■  
BUSINESSES ■  
CITIZENS ■

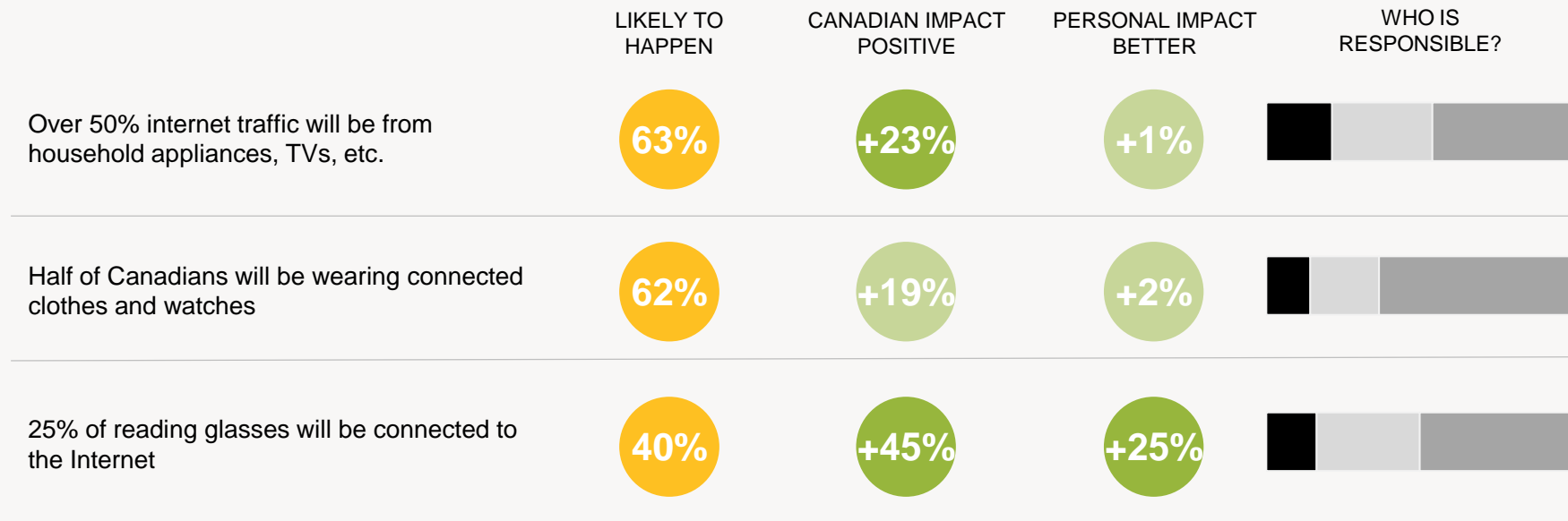




# THE WORLD RUNS ON DATA

# THE INTERNET OF THINGS = MORE DATA

GOVERNMENT ■  
BUSINESSES ■  
CITIZENS ■

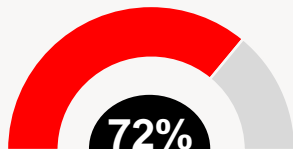


# THE DOWNSIDE OF BIG DATA & GREATER CONNECTIVITY

## LIKELY TO HAPPEN



There will be a massive personal data leak leading **to the demise of a top ten company**



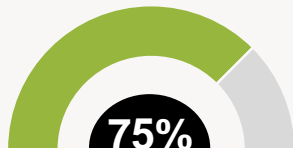
Canada will experience a major act of **cyber terrorism temporarily shutting down telecommunications, banking, electricity and transportation systems.**

**69% agree, that when they think about future advances in technology they are very worried about privacy and the security of their personal information**

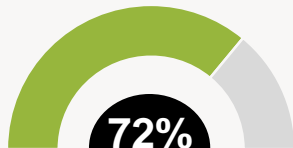


# GOVERNMENT DATA BELONGS TO CITIZENS

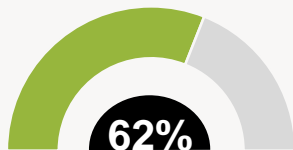
Agree



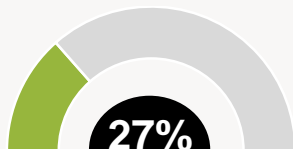
Data collected by governments should be owned by the citizens they collect it from.



Data generated by Canadians should be protected and regulated like a natural resource.



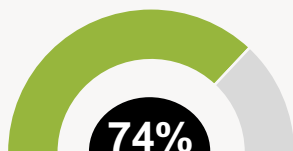
Private companies that use public data collected by governments should pay government a royalty fee.



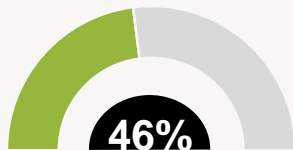
Data collected by government should be given freely to the private sector so that they can create products, services, jobs and economic growth.

# BUSINESS DATA BELONGS TO CITIZENS

**Agree**



Data collected by private companies should be owned by the citizens they collect it from.



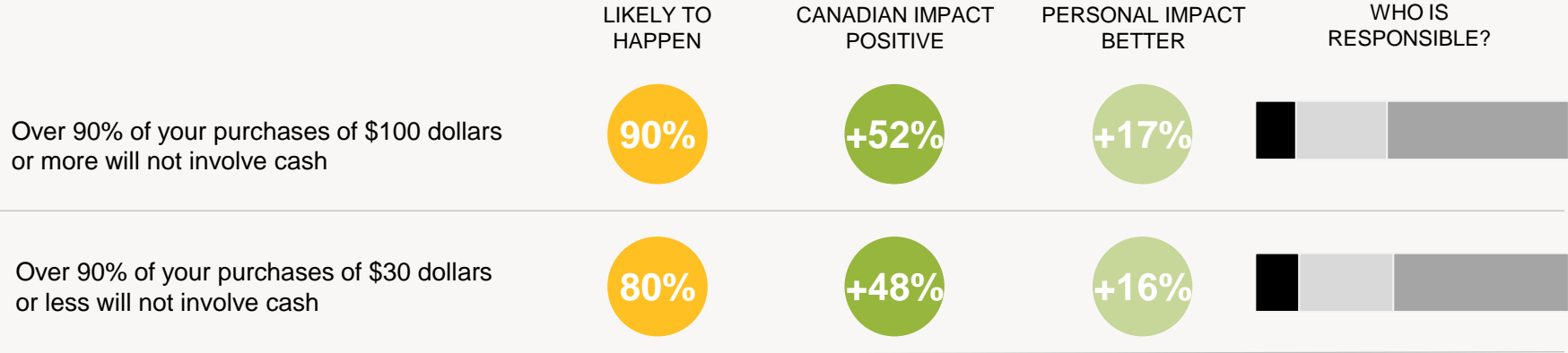
Data collected by private companies should be provided to governments so that they can use it to improve public services and benefit Canadians.



**WHATEVER HAPPENED  
TO THE CORNER STORE?**

# INCREASINGLY CASHLESS

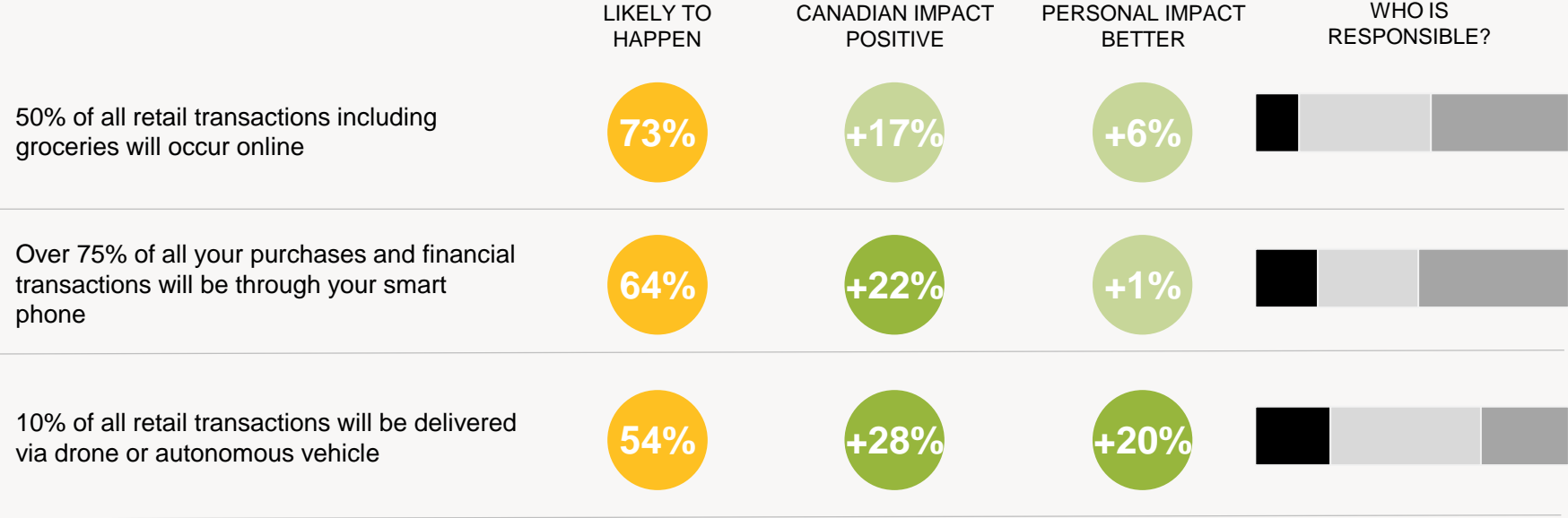
GOVERNMENT ■  
BUSINESSES ■  
CITIZENS ■



**28% AGREE** In the next 10 years paper money and coins won't exist anymore.

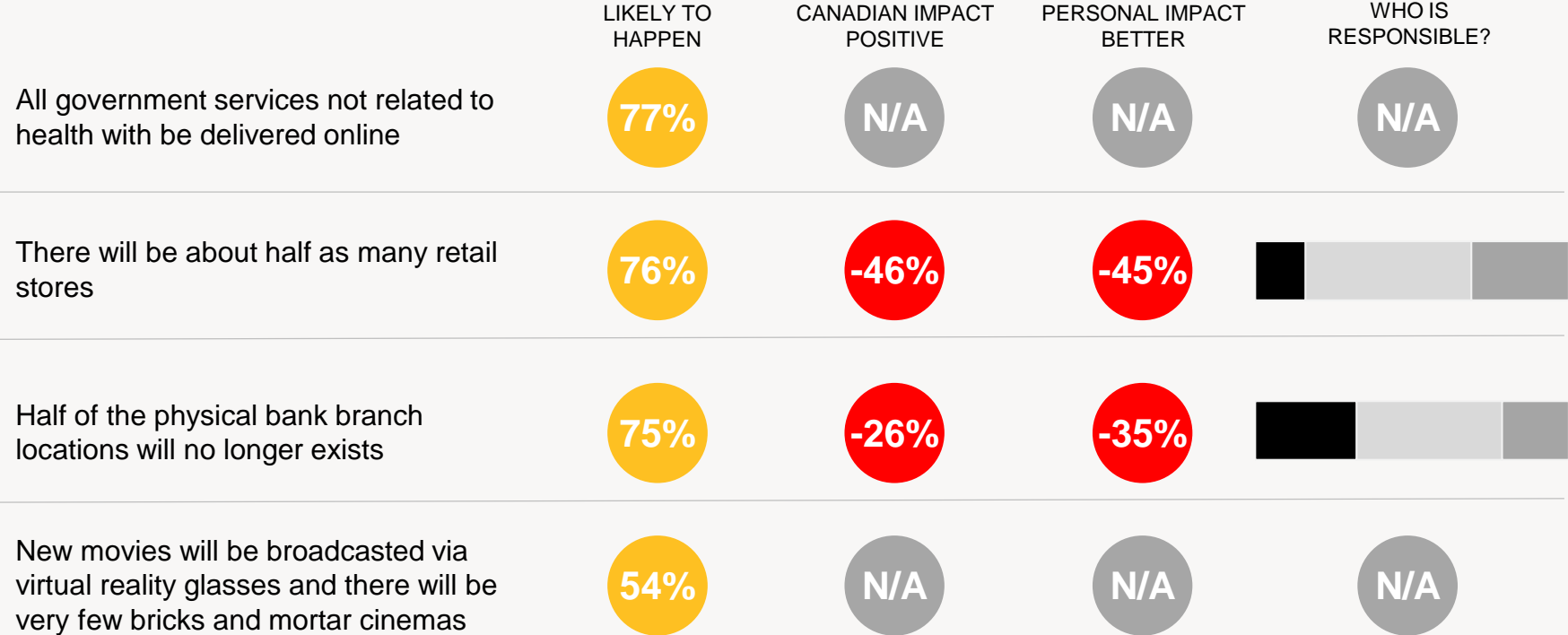
# RETAIL WILL NEVER BE THE SAME

GOVERNMENT ■  
 BUSINESSES ■  
 CITIZENS ■



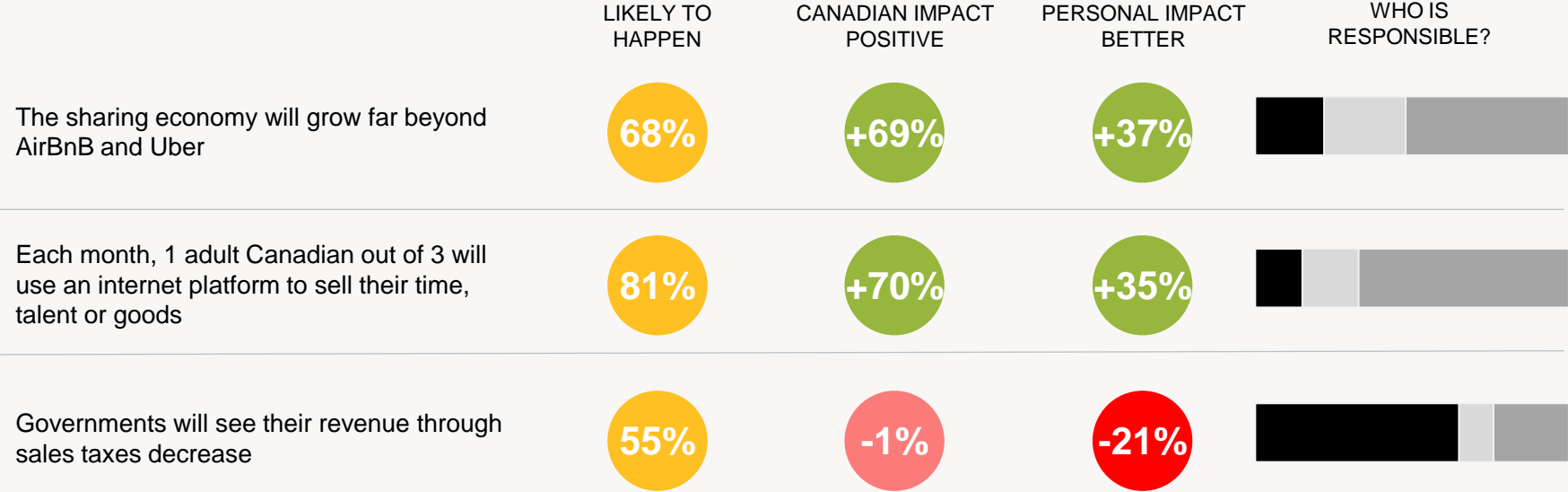
# ONLINE WILL KILL BRICKS AND MORTAR

GOVERNMENT ■  
BUSINESSES ■  
CITIZENS ■



# SHARING ECONOMY UPS AND DOWNS

GOVERNMENT ■  
BUSINESSES ■  
CITIZENS ■



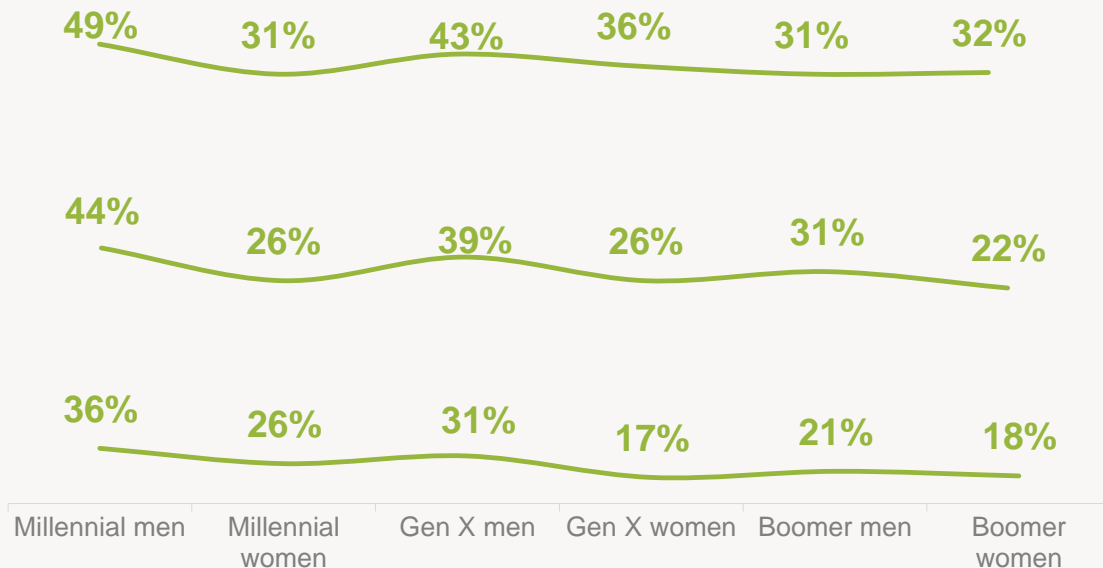
**19% AGREE** that because of efficiencies in the sharing economy people won't need to make as much money to maintain today's standard of living

# CHANGES TO BANKING AND INVESTING

**37% AGREE** : comfortable sharing health and personal data in order to lower insurance premiums

**31% AGREE**: comfortable doing banking, insurance, and investment with a technology based company like Google, Amazon or IBM

**24% AGREE**: feel confident in a system of money that is entirely digital

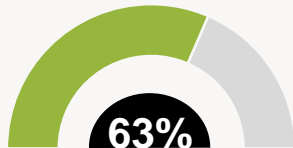


**56% say it is likely that within 10 years there will be an internationally recognized currency that is only available in the digital world**

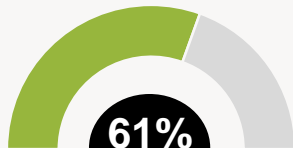


# THE NEW LABOUR MARKET

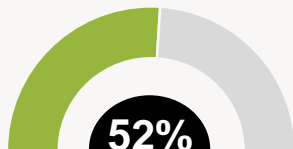
Agree



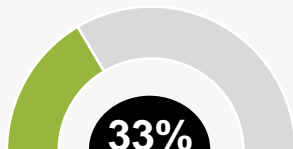
As Canadians have to switch careers more often in the future, having **money saved to go back to school or for training** will something almost everyone should do.



Most people will have more **numerous shorter term jobs** over their career.



More people will be performing **completely new jobs every five years** and very few people will have one-profession careers.



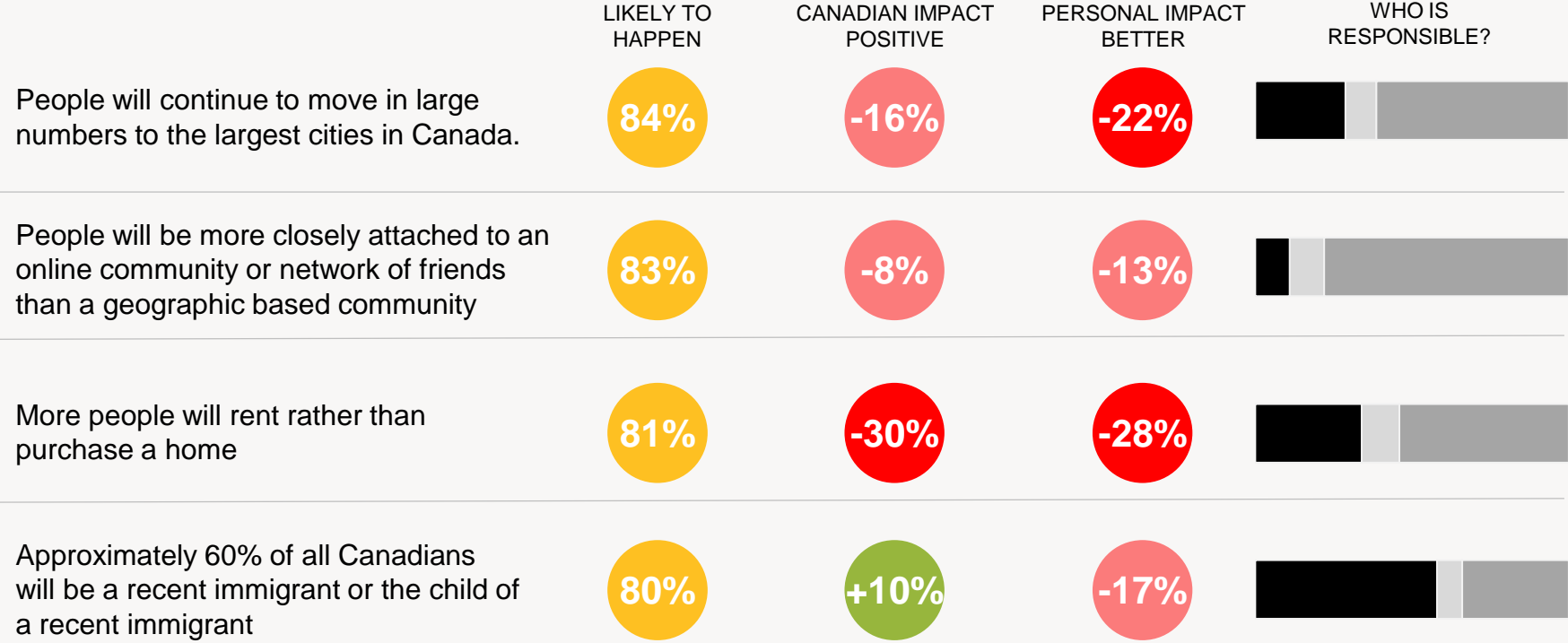
All things considered advances in technology are going to lead to **more and better jobs for Canadians.**



**DO WE NEED A NEW DEFINITION  
FOR COMMUNITY?**

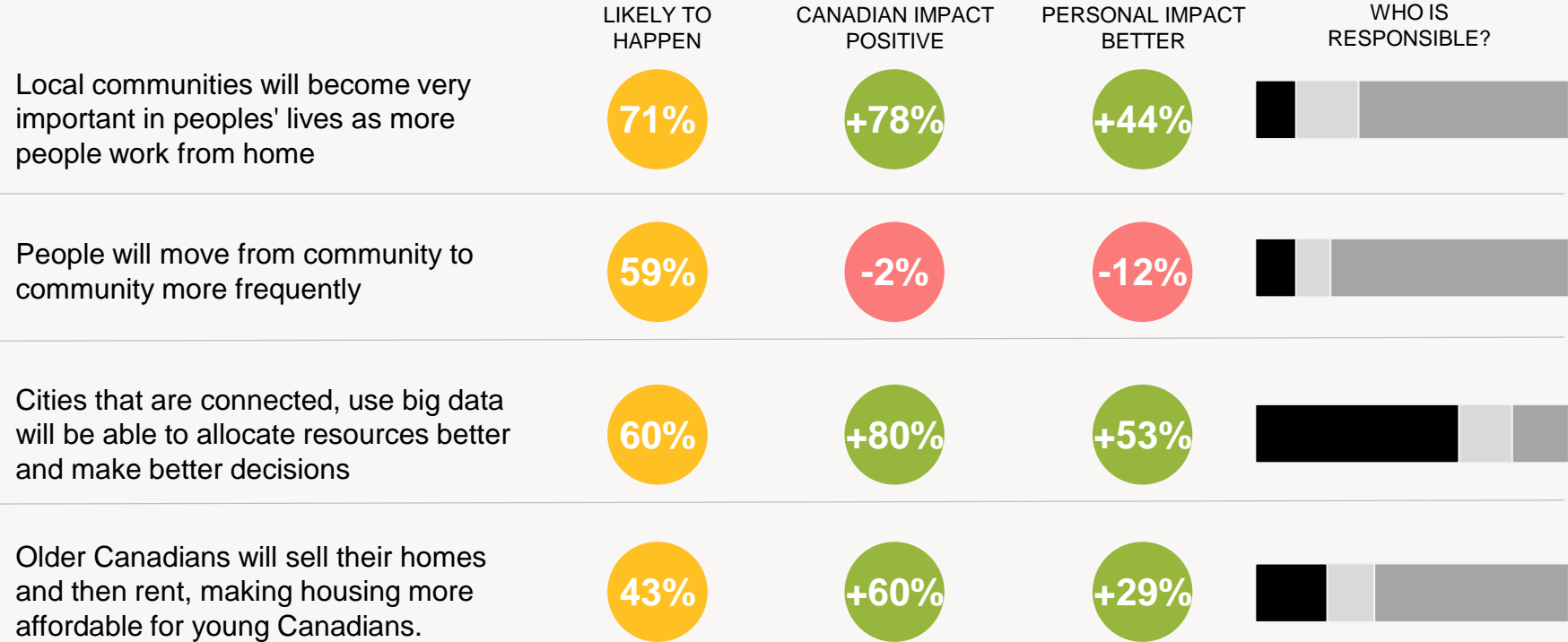
# COMMUNITIES

GOVERNMENT ■  
BUSINESSES ■  
CITIZENS ■






# COMMUNITIES

GOVERNMENT ■  
 BUSINESSES ■  
 CITIZENS ■

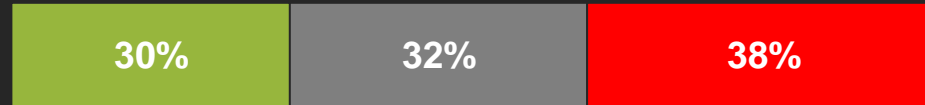


# THE BIGGEST CHANGES WILL LEAD TO LESS CONNECTION BETWEEN PEOPLE

MORE CONNECTED   
NO IMPACT   
LESS CONNECTED 



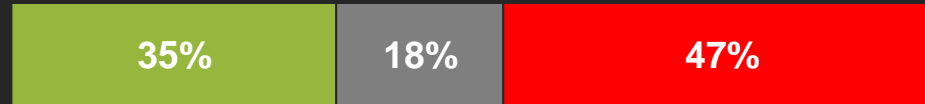
MORE ETHNICALLY  
DIVERSE POPULATION



NET MORE  
MINUS LESS  
**-8%**



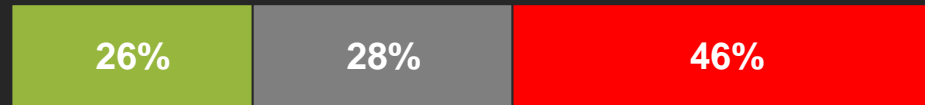
HIGHLY DIGITIZED  
SOCIETY



**-12%**



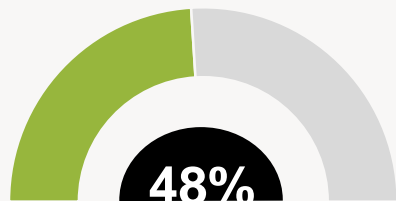
AN OLDER  
POPULATION



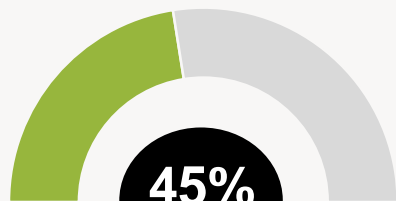
**-20%**

# WE DON'T FEEL ALL THAT CONNECTED TO BEGIN WITH

Generally speaking, do you think that your outlook on life, your opinions on issues that are important, etc. are the same or different than...?



Other Canadians



Other people in  
your community

Same



A low-angle, black and white photograph of three skyscrapers reaching towards a cloudy sky. A bright light source, possibly the sun, is visible behind one of the buildings on the right, creating a strong lens flare and illuminating the scene. The buildings have distinct architectural features, such as grid-like window patterns and rounded balconies.

# WHAT LIES AHEAD FOR CANADIAN BUSINESSES?

# THE SECTORS CANADIANS CONSIDER TO BE ON THE LEADING EDGE OF TECHNOLOGY



OIL & GAS



BANKING, FINANCE  
& INSURANCE



NEWS MEDIA



MANUFACTURING



COMMUNICATIONS  
& INFORMATION TECHNOLOGY



ENTERTAINMENT  
MEDIA



AUTOMOTIVE



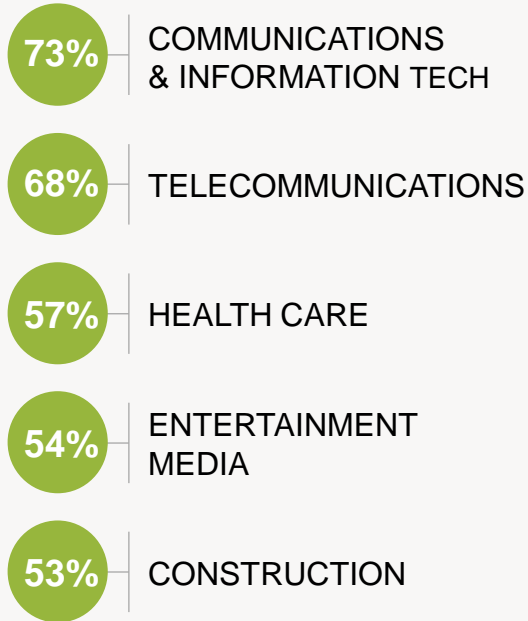
TELECOMMUNICATIONS

**Note: 23 Sectors were examined in the study re: their current and potential use of technology**

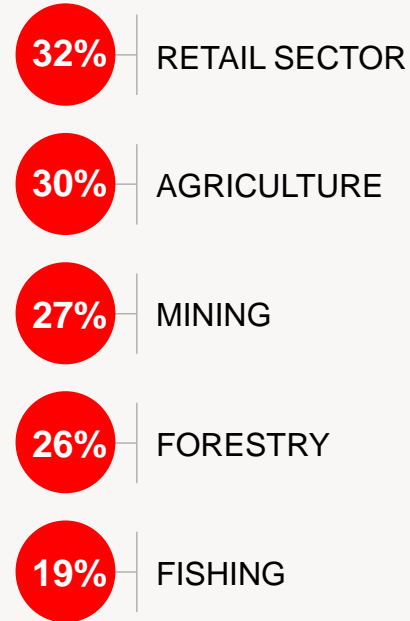


# WHERE WILL THE NEW JOBS BE IN THE NEXT 10 YEARS?

## TOP 5 SECTORS



## BOTTOM 5 SECTORS





**LOOKING AHEAD**

## LOOKING AHEAD ...

- Technology literacy gap will increase and today's excitement could give way to resentment and fear.
- Technology and the sharing economy will be a boon for businesses and consumers and will lead to improvements for our health. The flip side is job loss and continuous job transition.
- Data will grow new businesses and improve our communities. In return for use of their data Canadians want cheaper products and services. Government royalties on data may one day supplement taxes.
- Young Canadians are driving a retail revolution leading to drone/autonomous delivery, the decline of bricks and mortar, cashless commerce and digital currency.
- Demographic change and technology advancement will place strains on communities and lead to further declines in social cohesion.

# INTERESTED IN KNOWING MORE ABOUT CANADIANS VIEWS OF THE FUTURE?

---

This report highlights findings from a larger study on Canada's future.

Ipsos has the privilege of working with hundreds of Canada's leading private and public sector organizations. Our business is about bringing our clients a total understanding of Canada (looking at people as consumers and citizens).

Through CanadaNext we are helping our clients prepare for and engage with Canadians in a longer-term discussion about the future. Technology and demography are combining, the scope and pace of change is accelerating and Ipsos is well positioned to help with this conversation.

If you are interested in learning more about the study or how Ipsos can help please contact:



**Mike Colledge**

President, Canadian Public Affairs

✉ [mike.colledge@ipsos.com](mailto:mike.colledge@ipsos.com)

📞 613.292-0253

[@MikeDColledge](#)

All rights reserved. Contains Ipsos' confidential, trade secret and proprietary information.

Ipsos retains all right, title and interest in or to any of Ipsos' trademarks, technologies, norms, models, proprietary methodologies and analyses, including, without limitation, algorithms, techniques, databases, computer programs and software, used, created or developed by Ipsos in connection with Ipsos' preparation of this proposal. No license under any copyright is hereby granted or implied. The contents of this document are confidential, proprietary and are strictly for the review and consideration of the addressee and its officers, directors and employees solely for the purpose of information. No other use is permitted, and the contents of this document (in whole or part) may not be disclosed to any third party, in any manner whatsoever, without the prior written consent of Ipsos.