



IpsosCanadaNext

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@MikeDColledge

THE NEW TECH WORLD IS ALREADY HERE AND PICKING UP STEAM

**Harvard
Business
Review**

TECHNOLOGY

Smart Cities Are Going to Be a Security Nightmare

by **Todd Thibodeaux**

APRIL 28, 2017

THE NEW TECH WORLD IS ALREADY HERE AND PICKING UP STEAM

The
Economist

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



THE NEW TECH WORLD IS ALREADY HERE AND PICKING UP STEAM

WIRED

The Great Tech Panic of 2017



CULTURE

How to Survive the Great Tech Panic of 2017

WIRED STAFF

THE NEW TECH WORLD IS ALREADY HERE AND PICKING UP STEAM

The end of an era -- pizza delivery could become automated.

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



THE NEW TECH WORLD IS ALREADY HERE AND PICKING UP STEAM



The CanadaNext Study

We presented Canadians with over 50 scenarios for change, grouped into 8 over-arching themes:

1. Bricks & Mortar
 2. Internet of Things
 3. Artificial Intelligence & Robots
 4. Community
 5. Autonomous Vehicles & Drones
 6. Nano Sensors
 7. Commerce & Money
 8. Healthcare
- 

For each scenario we asked Canadians:

- How likely is it to happen in the next 10 years
- If it does happen will it have a positive or negative impact on Canadians
- If it does happen will it have a positive or negative impact on them personally
- If it does happen, is it something that “you will want governments to regulate closely, something that you trust business to do or something you think that consumers and citizens will have to look after themselves”

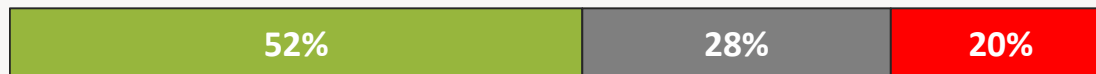
- Data is drawn from a representative, online survey among n=2000 Canadians, 18 years+, conducted in May 2017. The credibility interval for a sample of this size is +/-2.5%, 95% of the time. This was supplemented by a series of online focus groups conducted in August, 2017. For more information about CanadaNext, please visit our website: <https://www.ipsos.com/en-ca/knowledge/society/CanadaNext-2017>.

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**



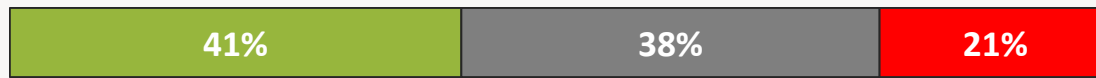
**YOUR OVERALL
QUALITY OF LIFE**



**THE PROSPECTS FOR
YOUR COMMUNITY**



**THE PROSPECTS
FOR CANADA**

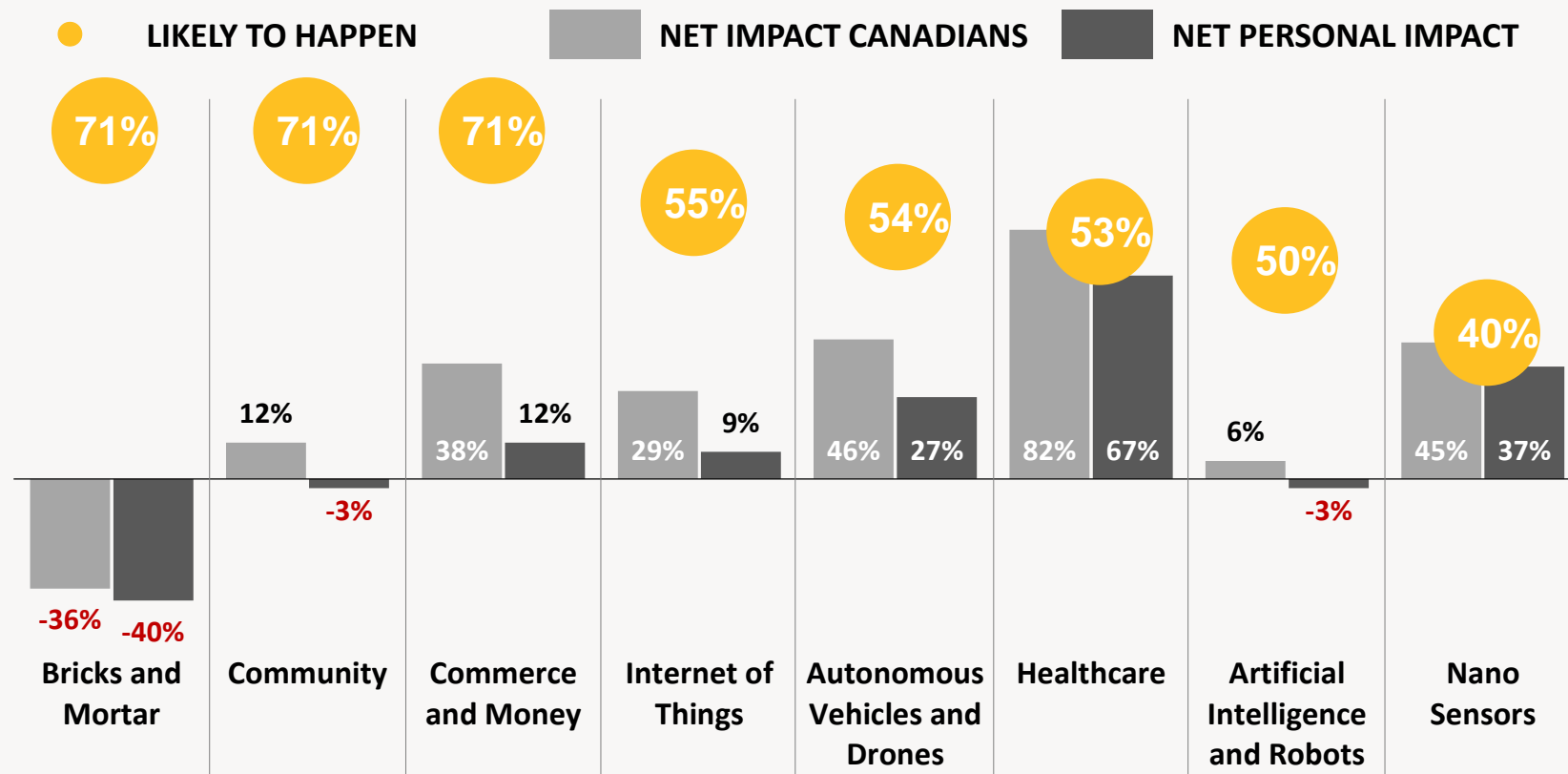


**THE PROSPECTS
FOR THE WORLD**



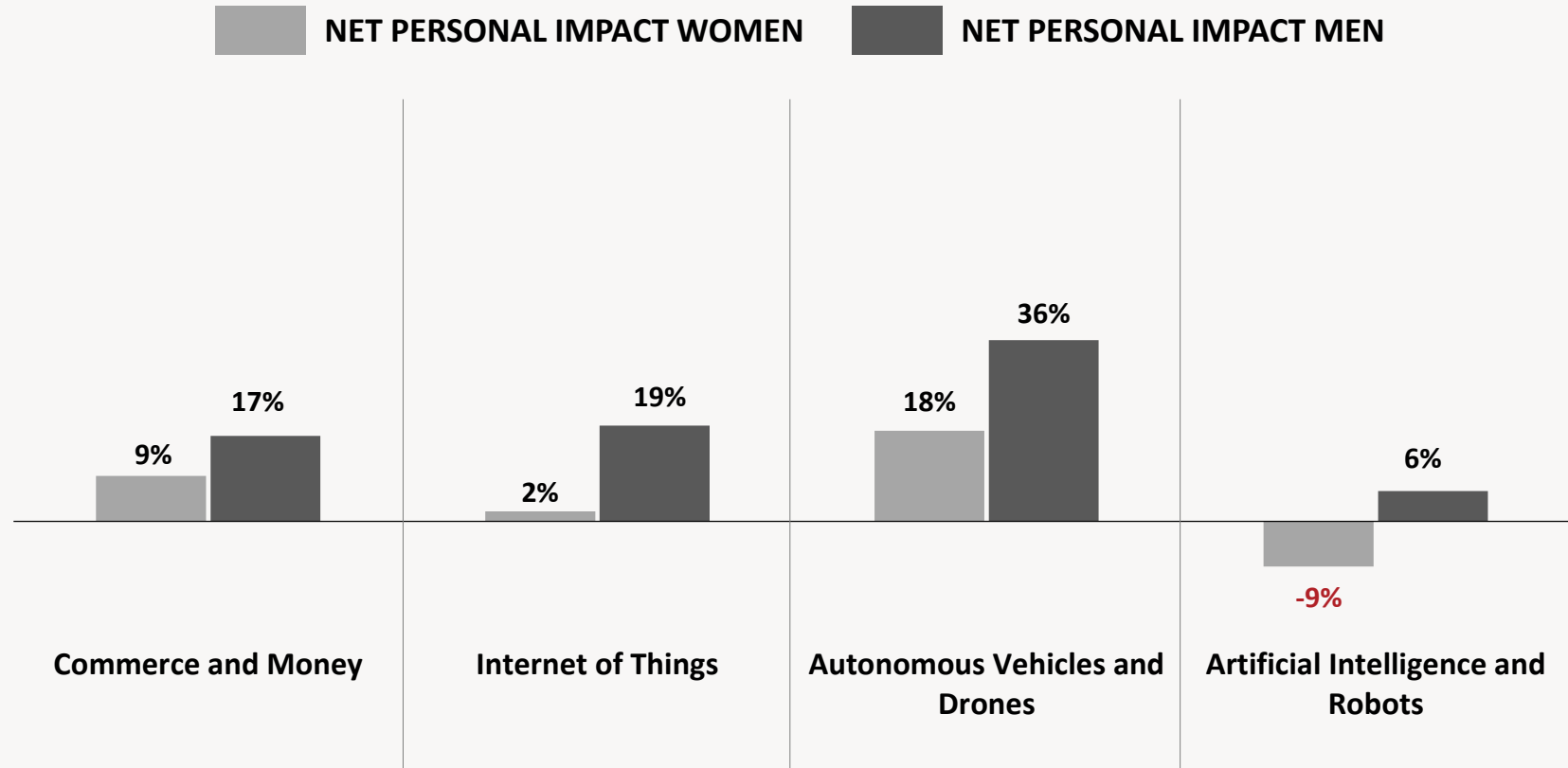
Change is Underestimated

Mixed assessment of impact on Canada and personal impact.

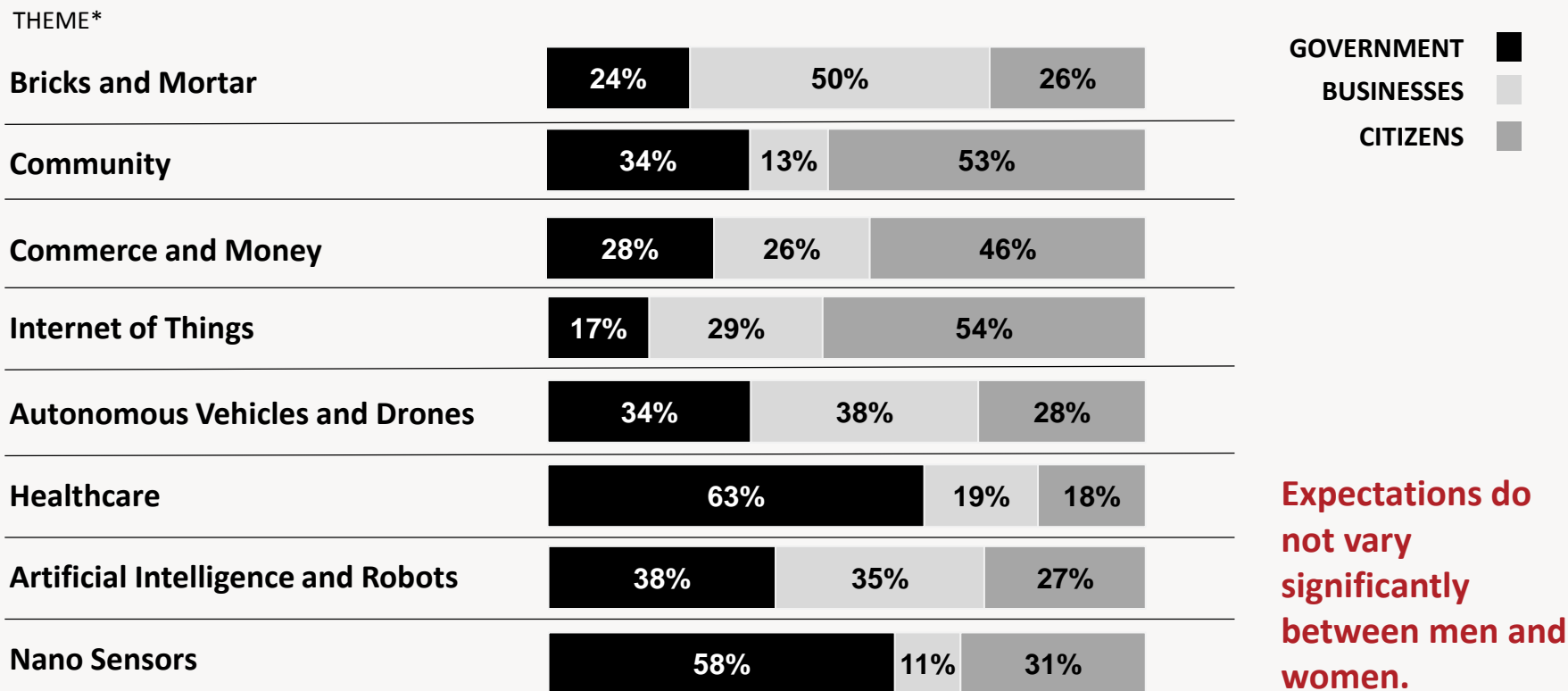


Gender and Perceived Personal Benefit

Men and Women have very different views re: the benefits of the impact of technology.



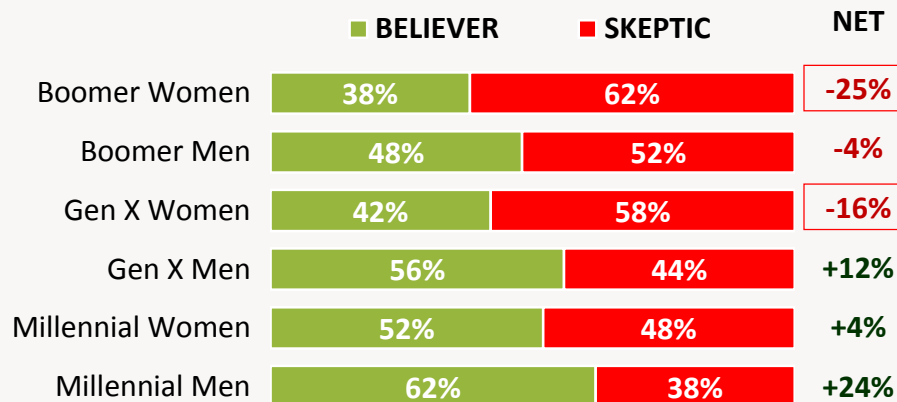
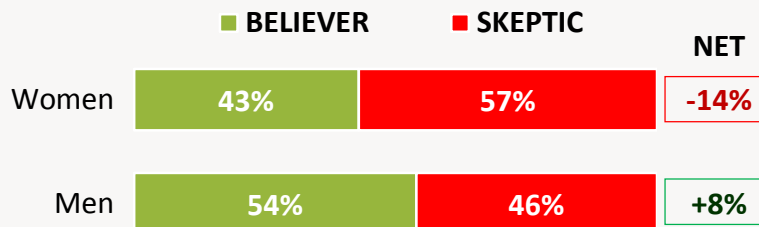
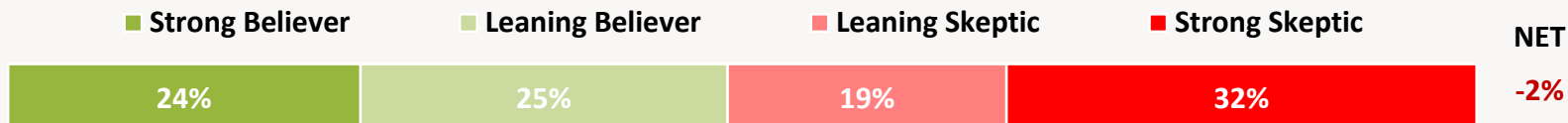
Who is Responsible



Gender and Tech Receptivity

Men, particularly Millennial Men, are much more receptive to new technology than women.

ALL CANADIANS

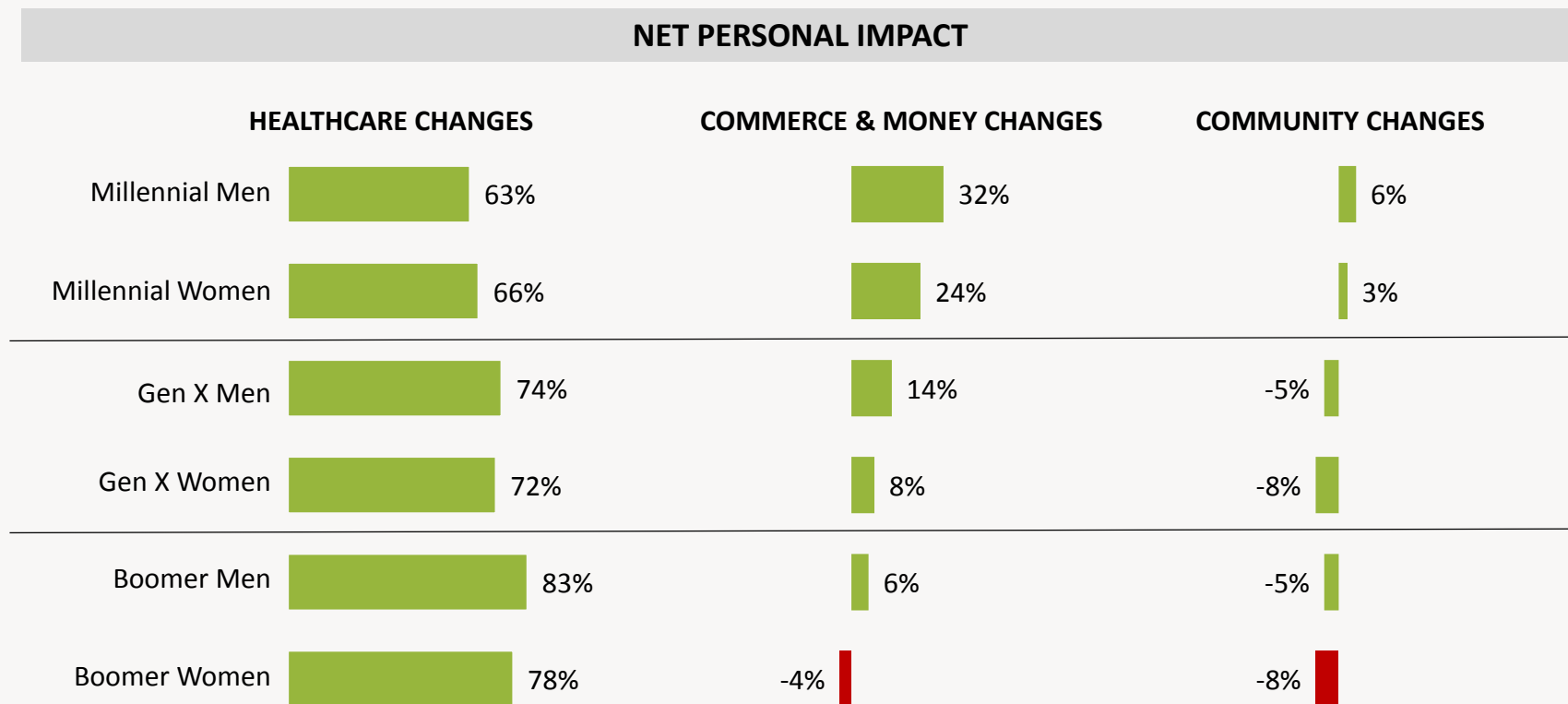


The **Tech Receptivity Index** was created based on the responses to numerous questions.

For more information please contact Ipsos.

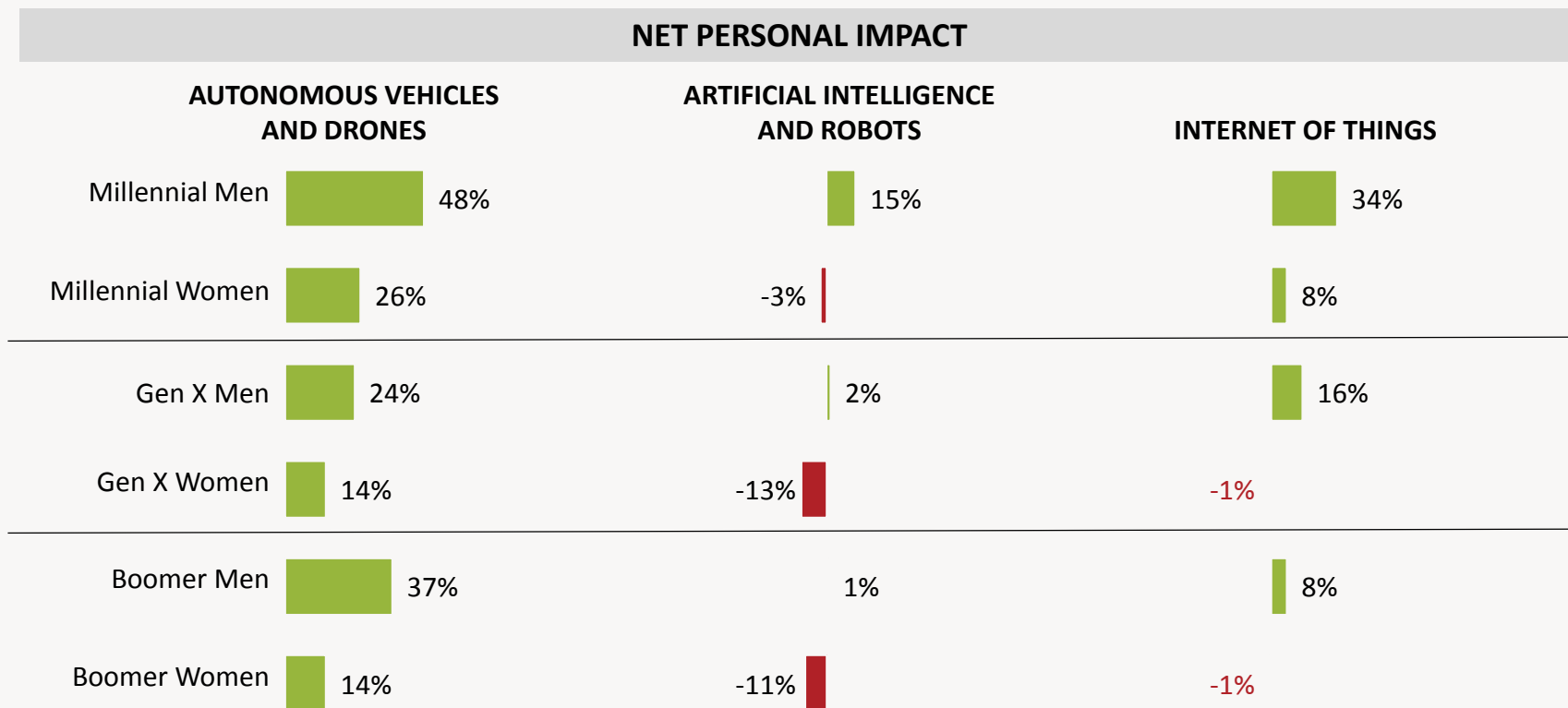
Genderation and Personal Benefit

Personal benefit from technology in healthcare increases with age. Personal benefit from changes in commerce/money and communities decrease with age and tends to be higher among men.



Genderation and Personal Benefit

Men in each age cohort are more likely than women to see a positive personal impact from autonomous vehicles, AI/Robots and the Internet of Things.



A black and white photograph of a car body on an automated assembly line. Several robotic arms are visible, some with bright sparks emanating from their welding heads. The scene is industrial and complex, with various mechanical components and wiring visible.

TECHNOLOGY

The Good, The Bad and Disappearing Jobs

58% agree that advances in technology are going to create mass unemployment.

- **Women, youth and less educated most likely to fear job loss to technology.**

Gender and Jobs/the Pace of Change

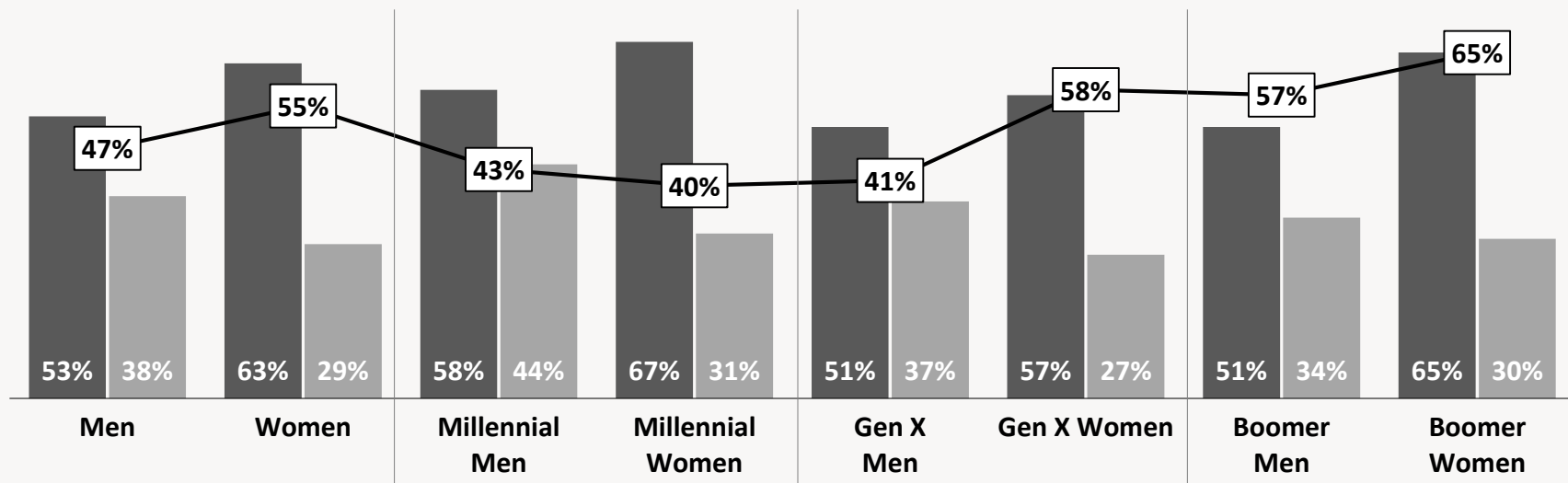
Women are more likely than men to see job loss and less likely to see job gains from new technology. Gen X and Boomer Women also report having a harder time keeping up with technology.

AGREE

■ Advances in technology will create MASS UNEMPLOYMENT

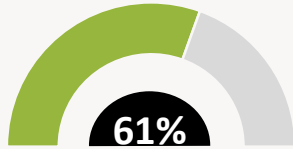
■ All things considered advances in technology are going to lead to more and BETTER JOBS for Canadians

— Technology is changing so quickly I'm having a HARD TIME KEEPING UP

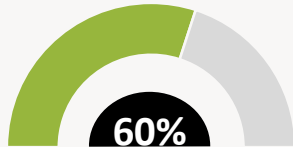


CANADIAN BUSINESSES KEEPING PACE BUT INDIVIDUALS AND THE PUBLIC SECTOR ARE FALLING BEHIND

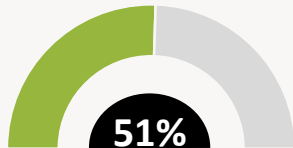
Agree



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



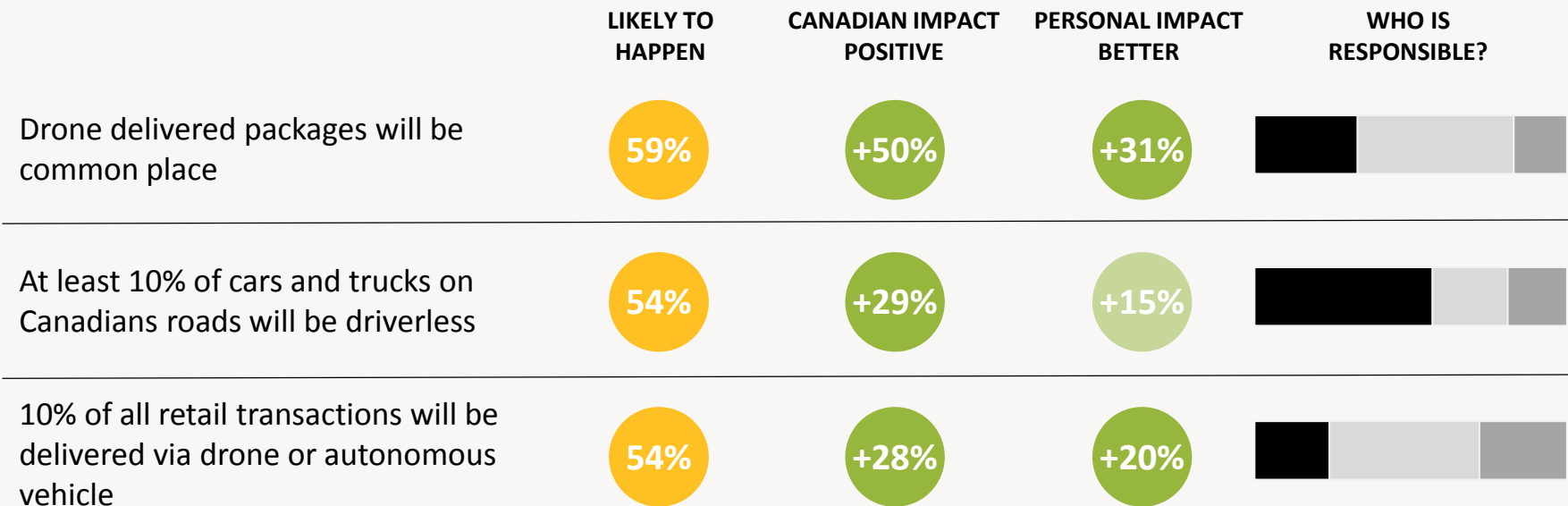
Law and **government policies are not keeping pace** with the changes in technology



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

AUTONOMOUS VEHICLES AND DRONES

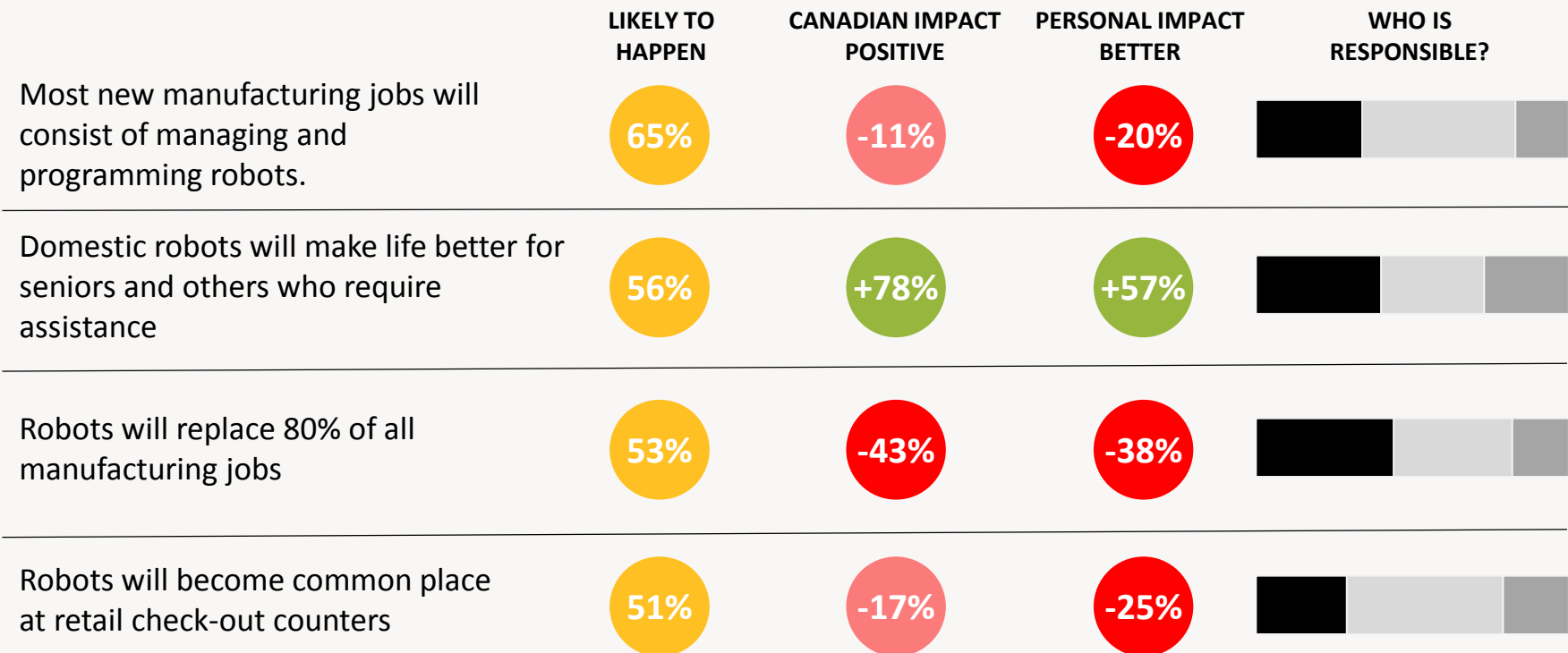
GOVERNMENT ■
BUSINESSES ■
CITIZENS ■



32% agree that autonomous vehicles will make our roads safer

AI AND ROBOTS

GOVERNMENT ■
BUSINESSES ■
CITIZENS ■

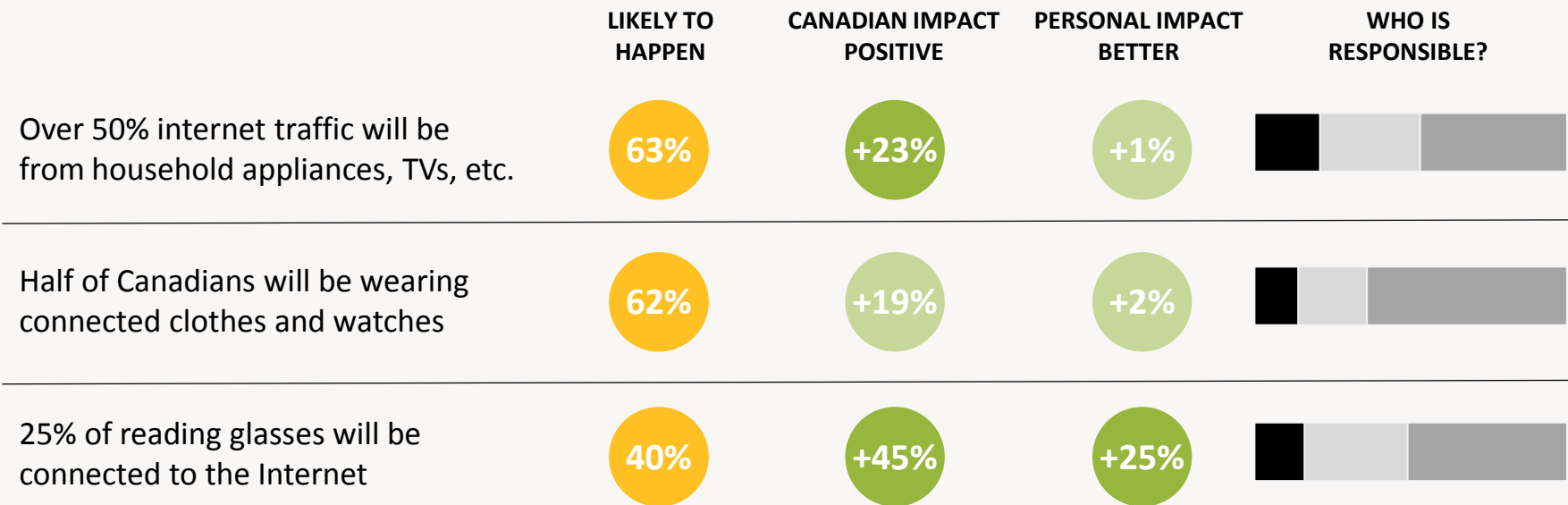




THE WORLD RUNS ON DATA

THE INTERNET OF THINGS = MORE DATA

GOVERNMENT ■
BUSINESSES ■
CITIZENS ■

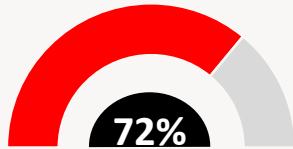


THE DOWNSIDE OF BIG DATA AND GREATER CONNECTIVITY

LIKELY TO HAPPEN



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

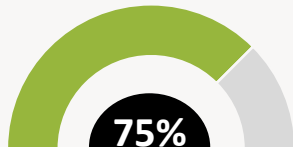


Canada will experience a major act of **cyber terrorism temporarily shutting down telecommunications, banking, electricity and transportation systems.**

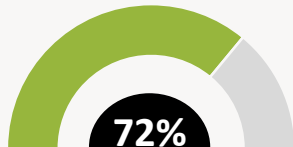
69% agree, that when they think about future advances in technology they are very worried about privacy and the security of their personal information

GOVERNMENT DATA BELONGS TO CITIZENS

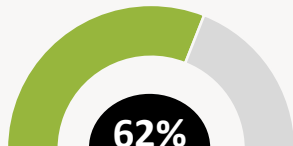
Agree



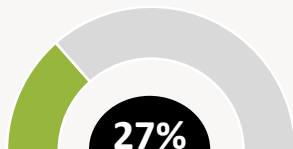
Data collected by governments should be owned by the citizens they collect it from.



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



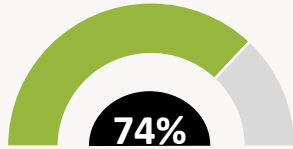
Private companies that use public data collected by governments should pay government a royalty fee.



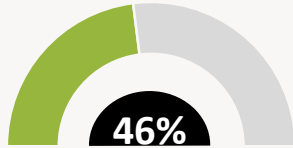
Data collected by government should be given freely to the private sector so that they can create products, services, jobs and economic growth.

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.



DO WE NEED A NEW DEFINITION FOR COMMUNITY?

COMMUNITIES

GOVERNMENT ■
BUSINESSES ■
CITIZENS ■

LIKELY TO
HAPPEN

CANADIAN IMPACT
POSITIVE

PERSONAL IMPACT
BETTER

WHO IS
RESPONSIBLE?

People will continue to move in large numbers to the largest cities in Canada

84%

-16%

-22%



People will be more closely attached to an online community or network of friends than a geographic based community

83%

-8%

-13%



More people will rent rather than purchase a home

81%

-30%

-28%



Approximately 60% of all Canadians will be a recent immigrant or the child of a recent immigrant

80%

+10%

-17%

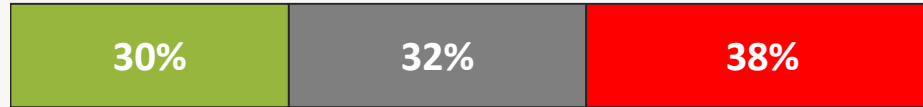


THE BIGGEST CHANGES WILL LEAD TO LESS OF CONNECTION BETWEEN PEOPLE

MORE CONNECTED ■
NO IMPACT ■
LESS CONNECTED ■



**MORE ETHNICALLY
DIVERSE POPULATION**

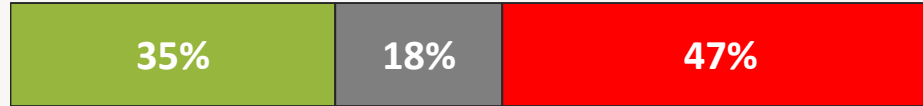


**NET MORE
MINUS LESS**

-8%



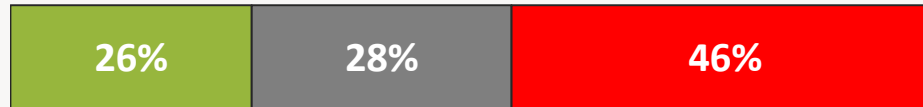
**HIGHLY DIGITIZED
SOCIETY**



-12%



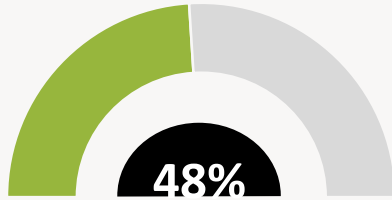
**AN OLDER
POPULATION**



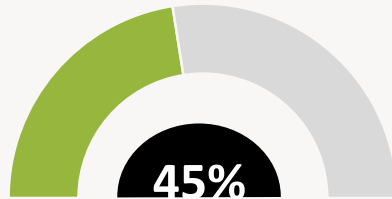
-20%

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

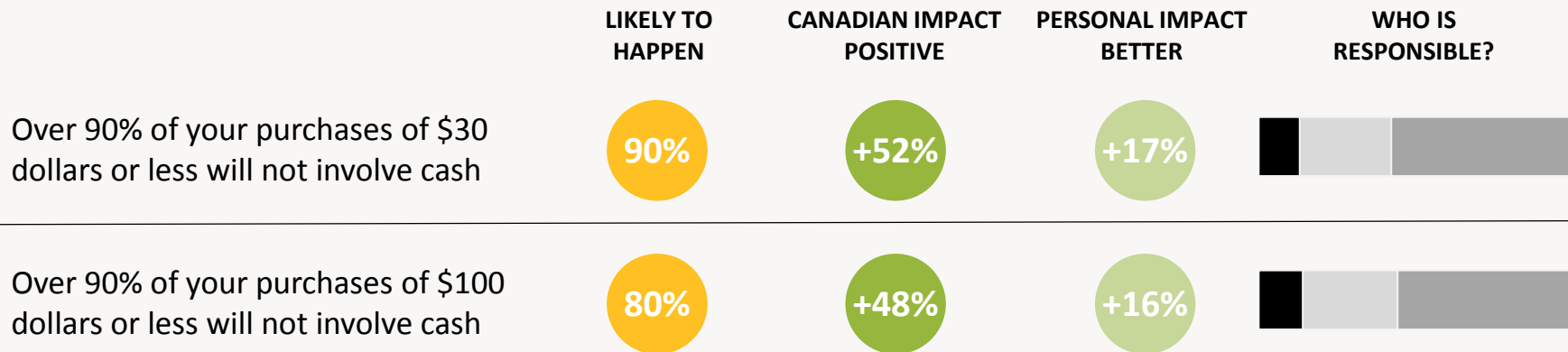




WHATEVER HAPPENED TO THE CORNER STORE?

INCREASINGLY CASHLESS

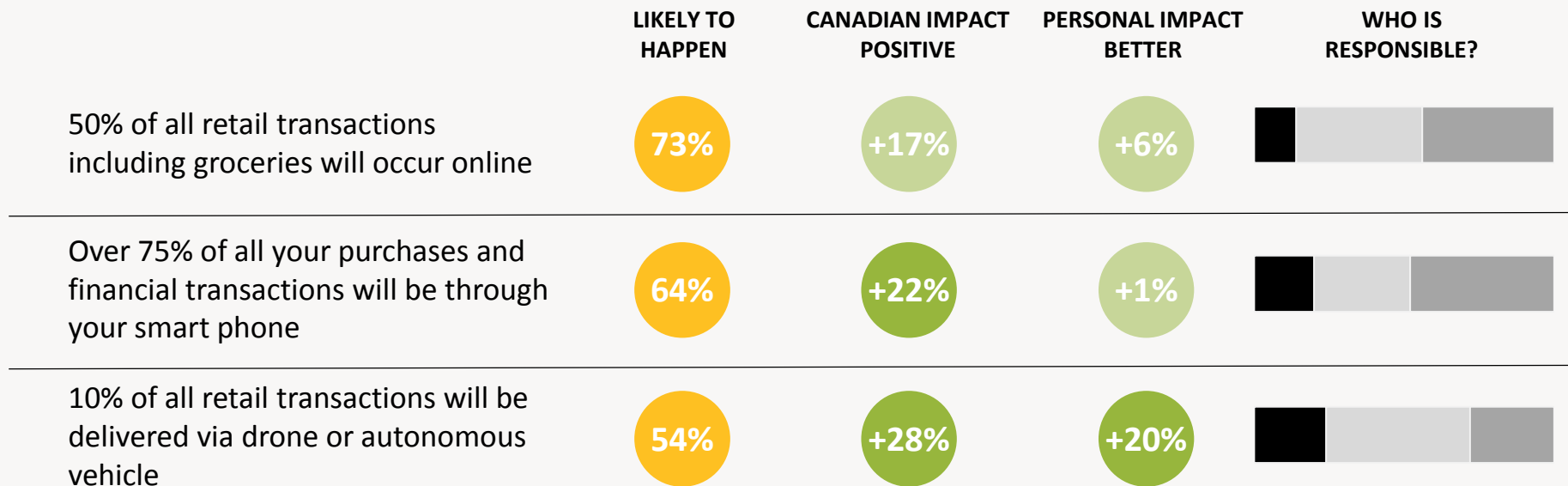
GOVERNMENT ■
BUSINESSES ■
CITIZENS ■



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

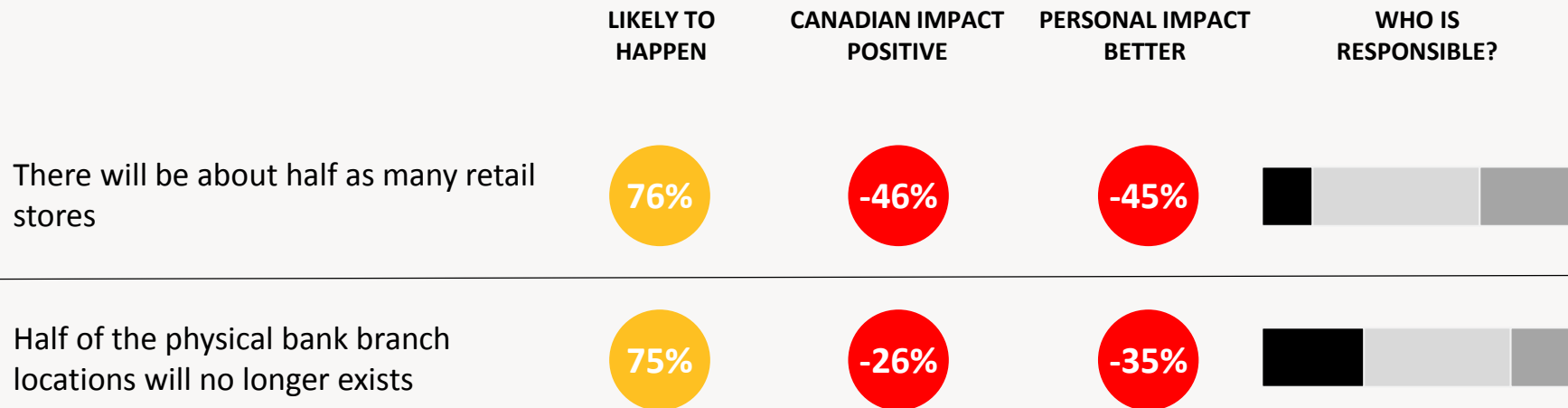
RETAIL WILL NEVER BE THE SAME

GOVERNMENT ■
BUSINESSES ■
CITIZENS ■



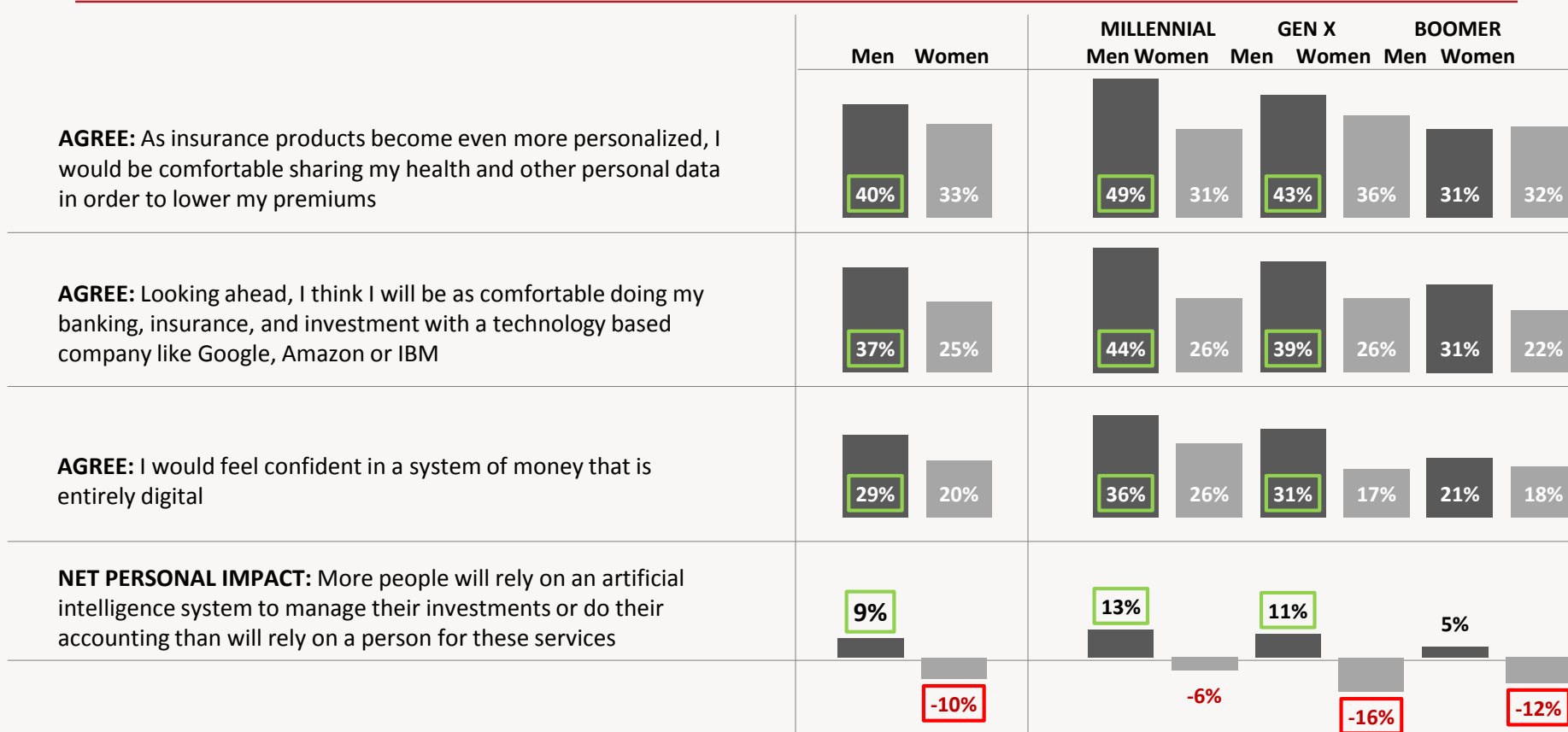
ONLINE WILL KILL BRICKS AND MORTAR

GOVERNMENT ■
BUSINESSES ■
CITIZENS ■



Gender and Money/Fin Tech

Men, particularly Millennial and Gen X men, are more receptive to the idea of giving up their personal information for monetary benefit, banking with non-traditional banks, a digital currency and AI for financial management.



SECTORS ON THE LEADING EDGE OF NEW TECHNOLOGY



79%

TELECOMMUNICATIONS



78%

COMMUNICATIONS
& INFORMATION TECH



70%

BANKING, FINANCE
& INSURANCE



65%

AUTOMOTIVE



65%

ENTERTAINMENT
MEDIA



54%

NEWS MEDIA



53%

MANUFACTURING



51%

OIL & GAS



50%

FOOD SERVICES,
RESTAURANTS, ETC.



48%

CONSTRUCTION



46%

ACCOMMODATION,
HOTELS, ETC.



45%

ARTS &
ENTERTAINMENT



44%

TRANSPORTATION



43%

AGRICULTURE



43%

RETAIL SECTOR



40%

HEALTH CARE



37%

WASTE MANAGEMENT



35%

EDUCATION



33%

FORESTRY



32%

MINING



30%

GOVERNMENT
SERVICES



22%

FISHING



16%

SENIORS' CARE

EXPECT SECTORS CREATE GOOD PAYING JOBS IN 10 YEARS



73%

COMMUNICATIONS
& INFORMATION TECH



68%

TELECOMMUNICATIONS



57%

HEALTH CARE



54%

ENTERTAINMENT
MEDIA



53%

CONSTRUCTION



46%

SENIORS' CARE



45%

AUTOMOTIVE



44%

TRANSPORTATION



43%

WASTE MANAGEMENT



43%

EDUCATION



43%

NEWS MEDIA



42%

FOOD SERVICES,
RESTAURANTS, ETC.



41%

BANKING, FINANCE
& INSURANCE



40%

ARTS &
ENTERTAINMENT



40%

ACCOMMODATION,
HOTELS, ETC.



39%

OIL & GAS



37%

GOVERNMENT
SERVICES



36%

MANUFACTURING



32%

RETAIL SECTOR



30%

AGRICULTURE



27%

MINING



26%

FORESTRY



19%

FISHING



LOOKING AHEAD

THE CURRENT PATH...

- Technology literacy gap will increase and today's excitement could give way to resentment and more fear.
- Men may adopt tech faster than women increasing inequality.
- Women may become the social conscience of the tech movement.
- Technology/sharing economy will be a boon for businesses and consumers and improvements for our health. The flip side: 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 data royalties 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.



IpsosCanadaNext

THANK YOU!

MIKE COLLEDGE

President

Canadian Public Affairs

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@MikeDColledge

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