



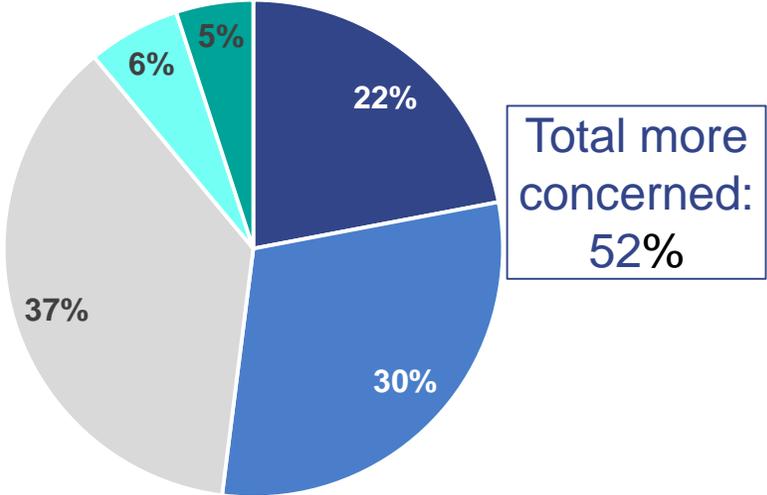
Our Age of Uncertainty

A ROAD MAP FOR UNDERSTANDING THE POLITICAL NEW NORMAL

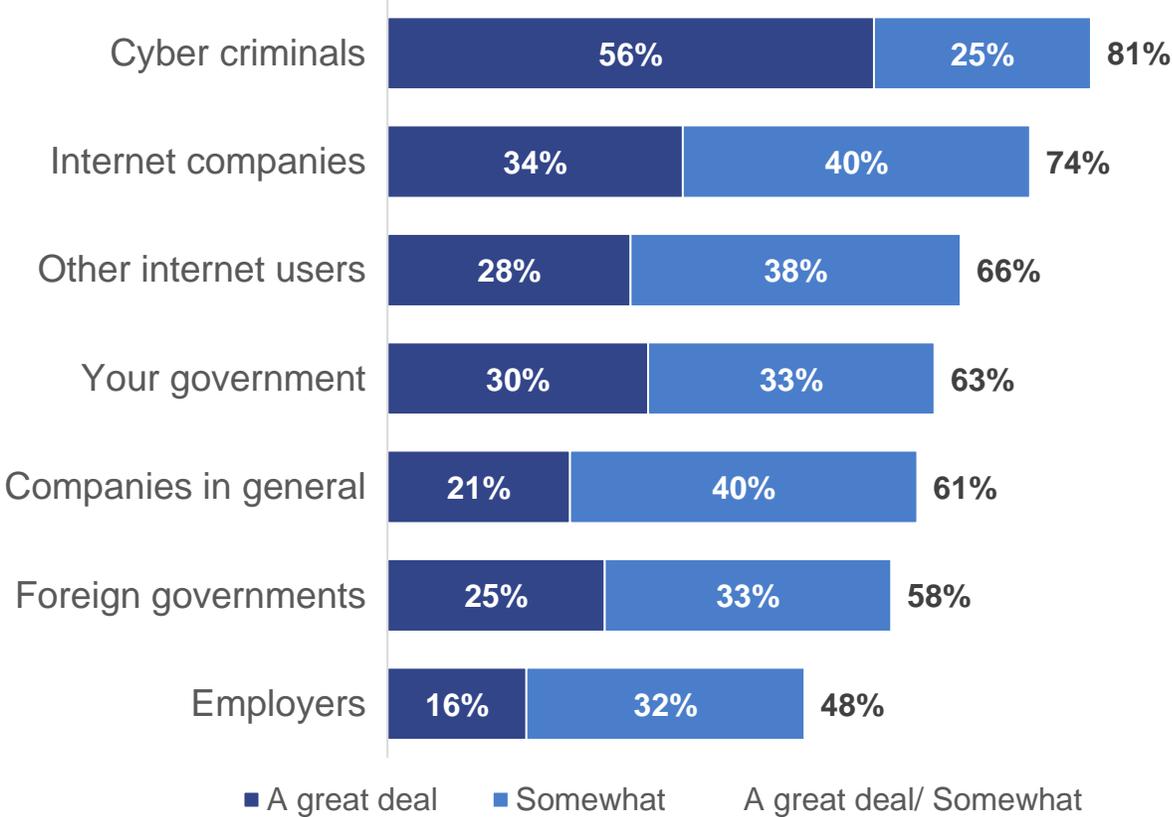
Consumer concern around data privacy is growing

Global Internet Users' Concern with Online Privacy

- Much more concerned
- Somewhat more concerned
- No more no less concerned
- Somewhat less concerned
- Much less concerned



Sources of Concern



Q. How concerned are you about your online privacy compared to one year ago? Base: All Respondents Total 2018 (n=24,750)

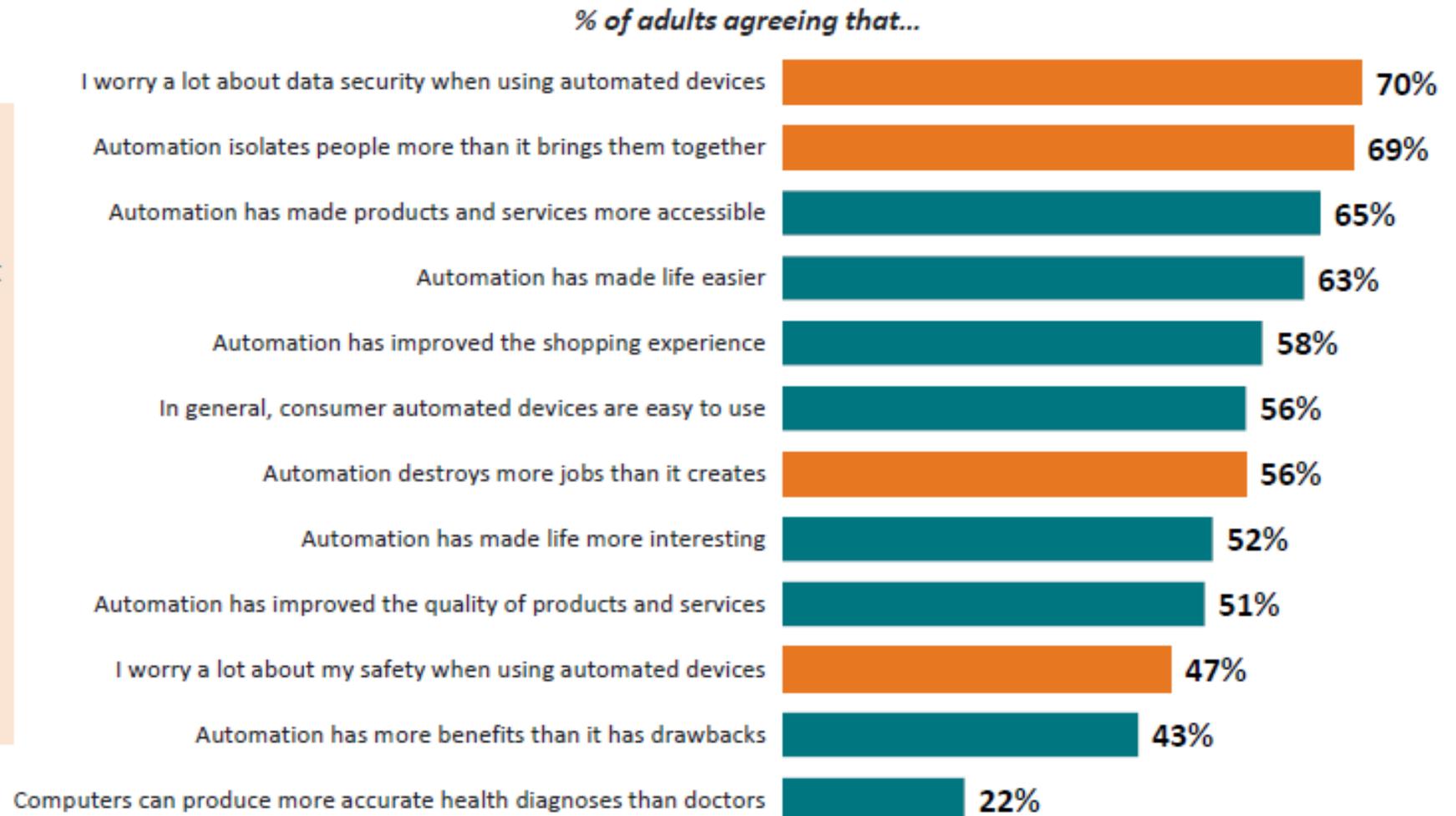
Q. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? Base: Much/ Somewhat More Concerned About Online Privacy 2018 (n=12,956)

Centre for International Governance Innovation (CIGI)-Ipsos Global Survey on Internet Security and Trust conducted in 25 countries, Dec. 2017-March 2018



Views about Automation

- U.S. consumers are ambivalent about automation.
- On the **negative side**, large majorities are concerned about data security, alienation, and job destructions brought about by automation.
- On the **positive side**, majorities associate automation with products and services being more accessible, easier to buy and use and of a higher quality, and with making life easier and more interesting convenience.

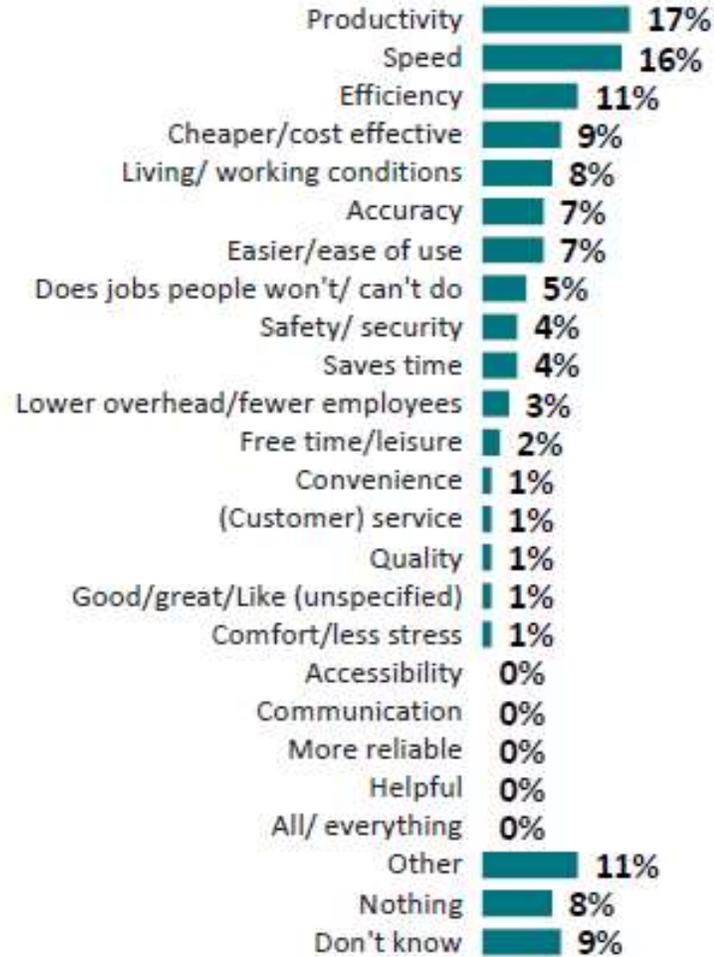


Q. How much do you agree or disagree with each of the following? Base (total) for each statement: ca. 1,490 U.S. adults aged 18+ interviewed online June 29 - July 3, 2017

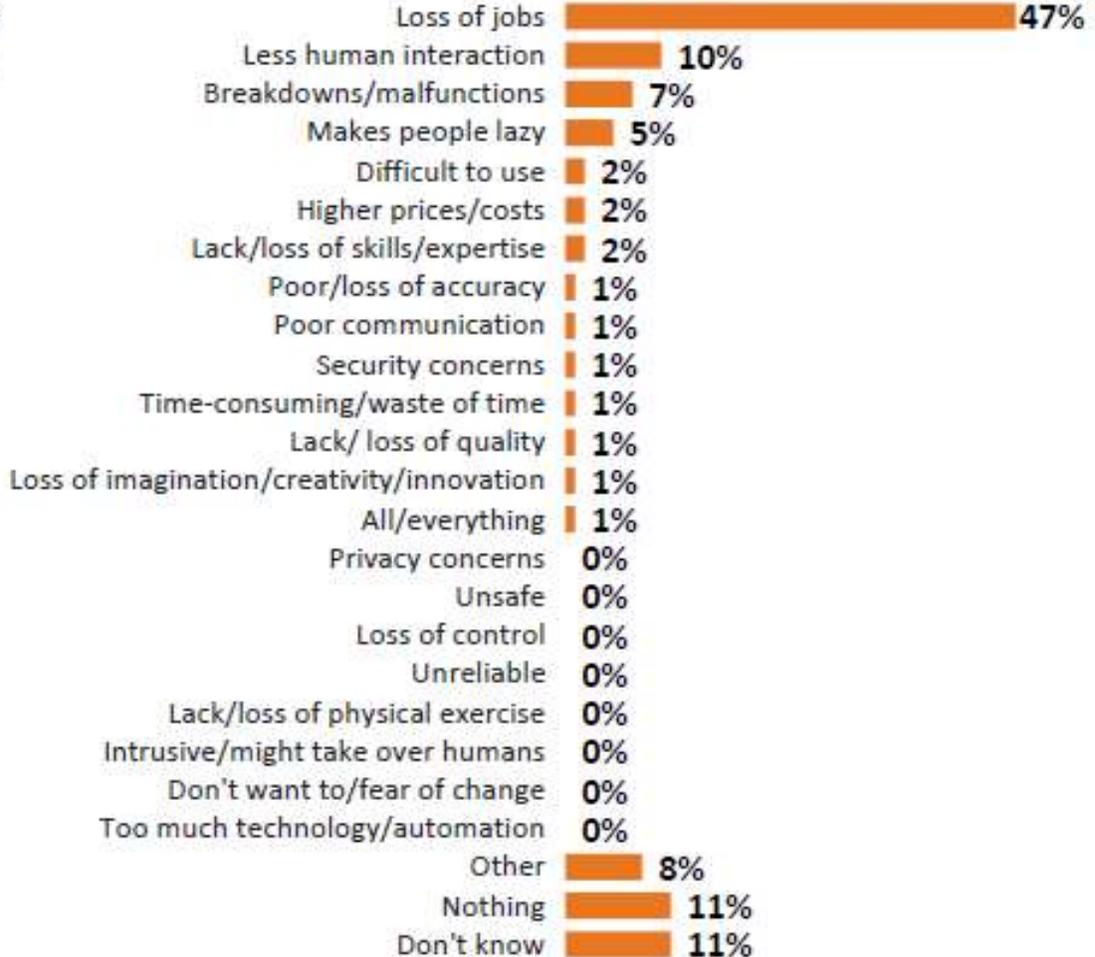
Perceived Benefits and Drawbacks of Increased Automation in the Workplace

- Key perceived benefits in the workplace are increased productivity, efficiency, speed, comfort, and accuracy as well as lower costs
- Top of mind, half of employed adults asked about main drawbacks cite the loss of jobs

% of employed adults saying benefits in the workplace are:



% of employed adults saying drawbacks in the workplace are:



Q. What are the main benefits of increased automation in the workplace? Q. What are the main drawbacks of increased automation in the workplace?

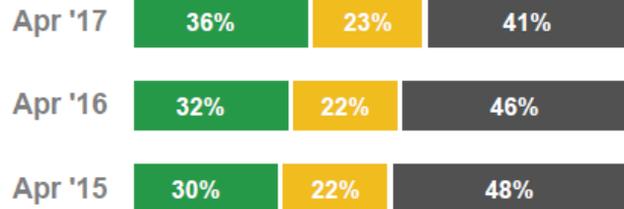
Base (total): 1,676 employed U.S. adults aged 18+ interviewed online June 29 - July 3, 2017

Mental health is deteriorating and young people are those most at risk

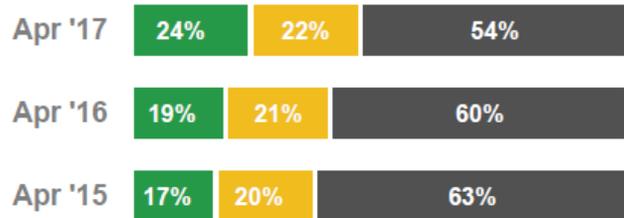
MENTAL HEALTH ISSUES EXPERIENCED PAST YEAR

■ Several times ■ Once ■ Never

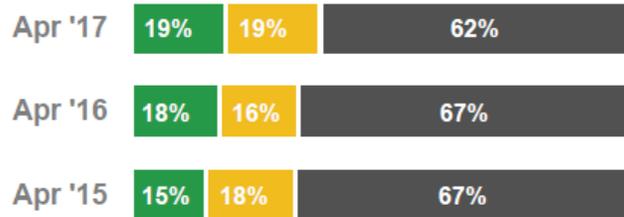
Felt stressed to the point where it had an impact on how you live your daily life



Felt stressed to the point where you felt like you could not cope with things



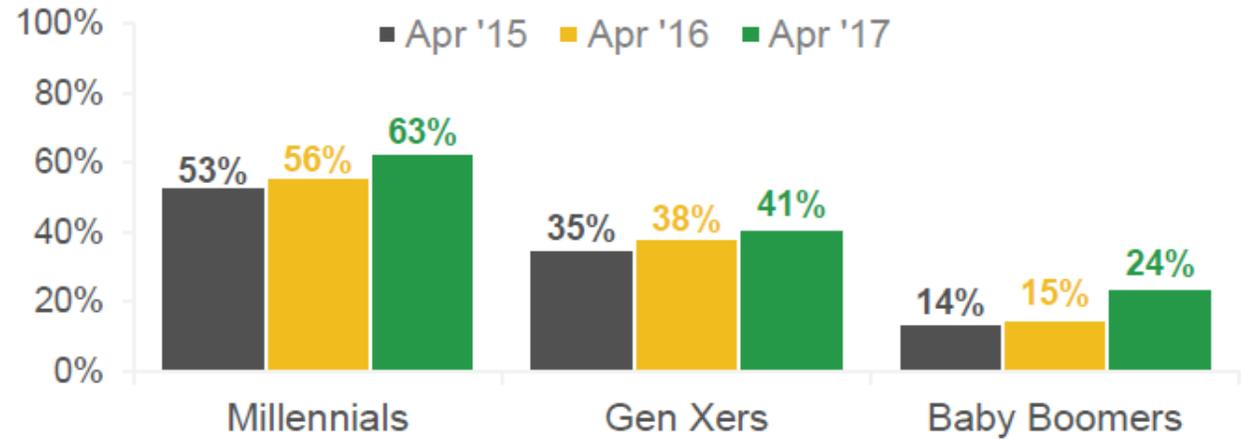
Felt depressed to the point that you felt sad or hopeless almost every day for a couple of weeks or more



Seriously considered suicide or self-hurt



HIGH RISK MENTAL HEALTH BY AGE



YOUNGER GENERATIONS ARE LONELIER THAN OLDER GENERATIONS



Annual Ipsos survey of 1,000 Canadian adults. "High risk" = experienced at least 3 of the 4 items at least once in the past year, or experienced at least 1 of the items several times and 1 other at least once.

Cigna U.S. Loneliness Index, Ipsos survey of 20,000 Americans (2018)



Thanks