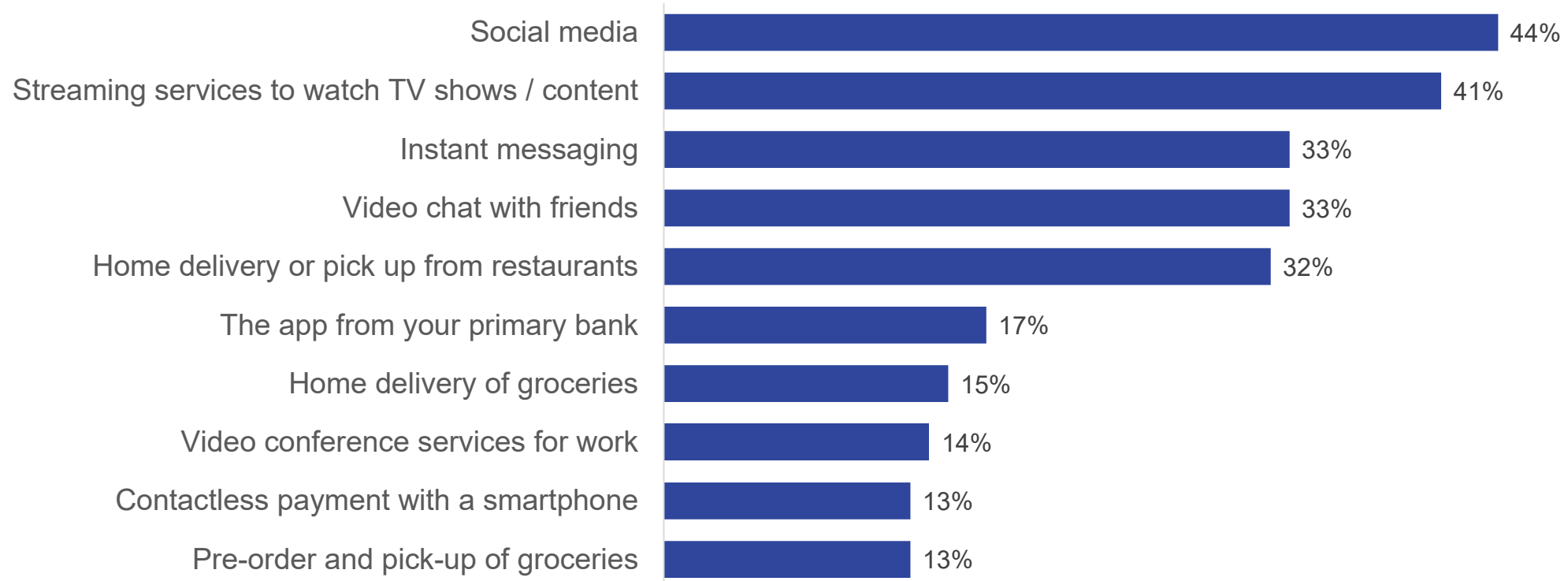


COVID-19 has driven consumers into using digital products and services



Which of the following are you currently using or doing more as a function of the COVID-19 crisis?

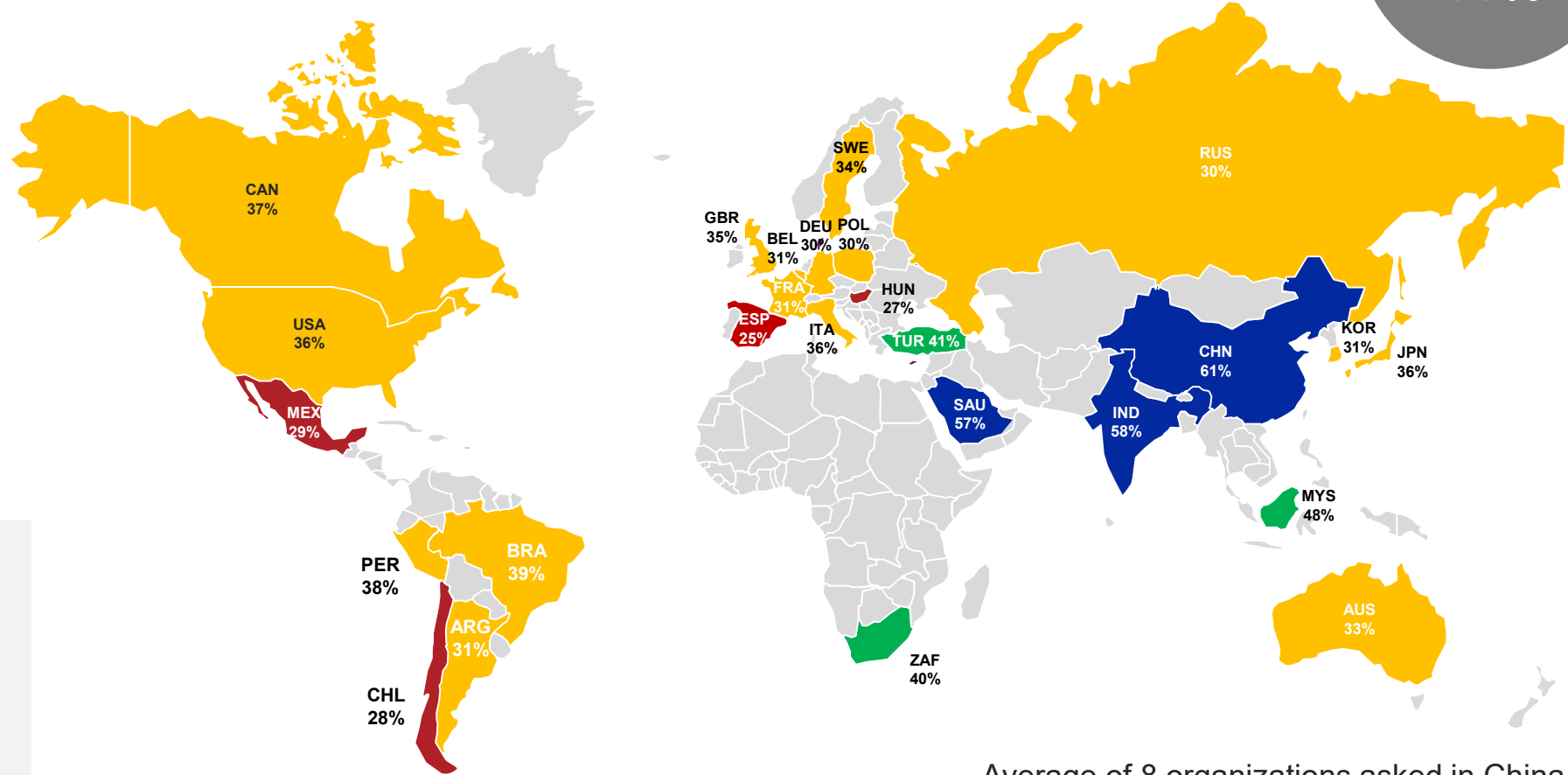
Wave 1: (Source: The Ipsos Coronavirus Consumer Tracker, fielded April 10 – 13, 2020 among 1,114 U.S. adults.)

Trust in organizations for use of personal information

Overall Average

GLOBAL
AVERAGE
36%

Mexico, Chile and Spain are least likely to trust organizations with their personal information.



% trust a great deal or fair amount (average for 10 organizations)

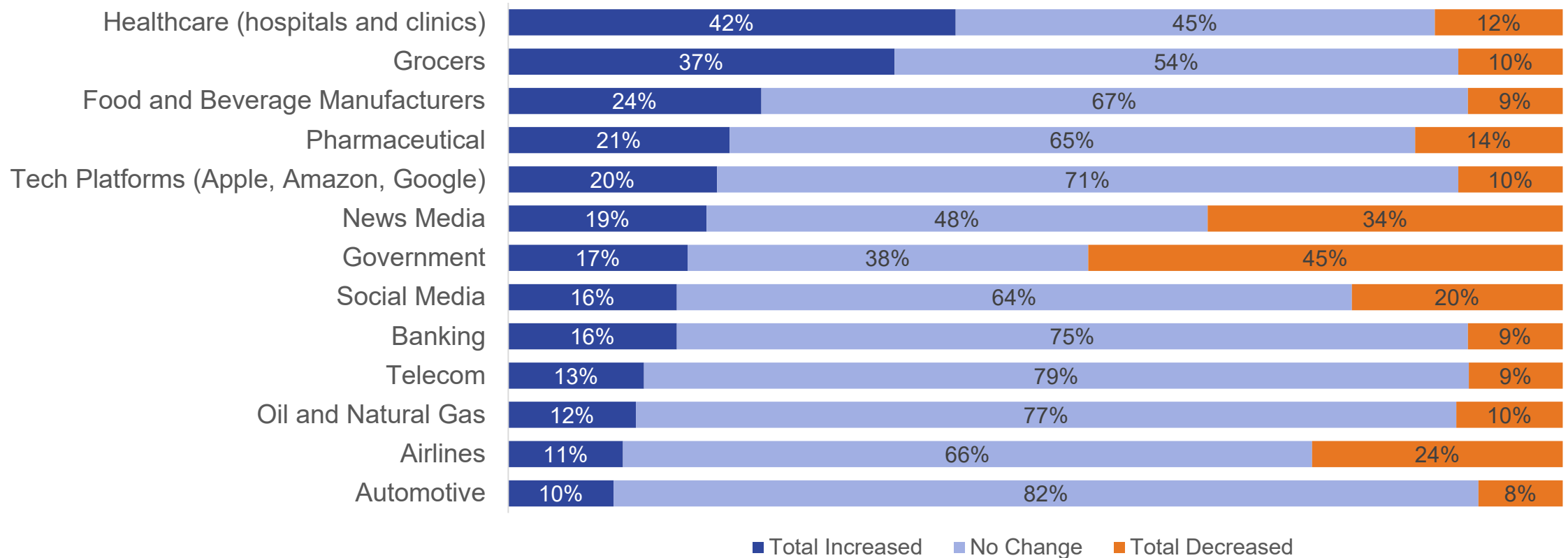
- 50% or more
- 40-49%
- 30-39%
- Less than 30%

Average of 8 organizations asked in China
Average of 7 organizations asked in Saudi Arabia

To what extent, if at all, do you personally trust the following to use the information they have about you in the right way?

2020 Ipsos Global Trends

COVID-19 has created shifts in the trust ecosystem

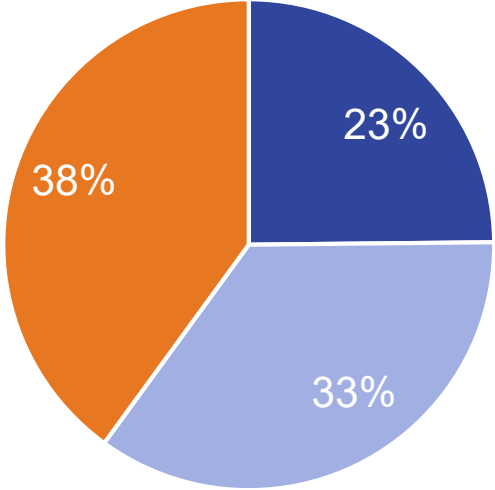


How much has your trust changed for the following industries as a result of COVID-19?

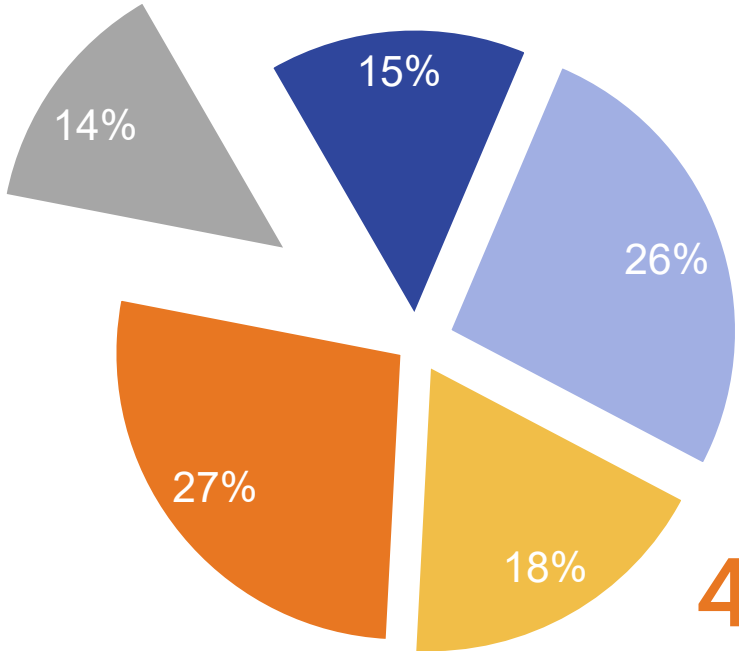
Wave 1: (Source: The Ipsos Coronavirus Consumer Tracker, fielded April 10 – 13, 2020 among 1,114 U.S. adults.)

Most are not familiar with location tracking

Participation remains mixed



■ Yes, Familiar ■ Yes, Not Familiar ■ No



41% | Would Participate

- Definitely would participate
- Probably would participate
- Probably would not participate
- Definitely would not participate
- Don't Know

45% | Would Not Participate

Location tracking can be used via people's mobile phones to help identify possible exposure to COVID-19. This helps identify those who may have had contact. Have you heard about this practice?

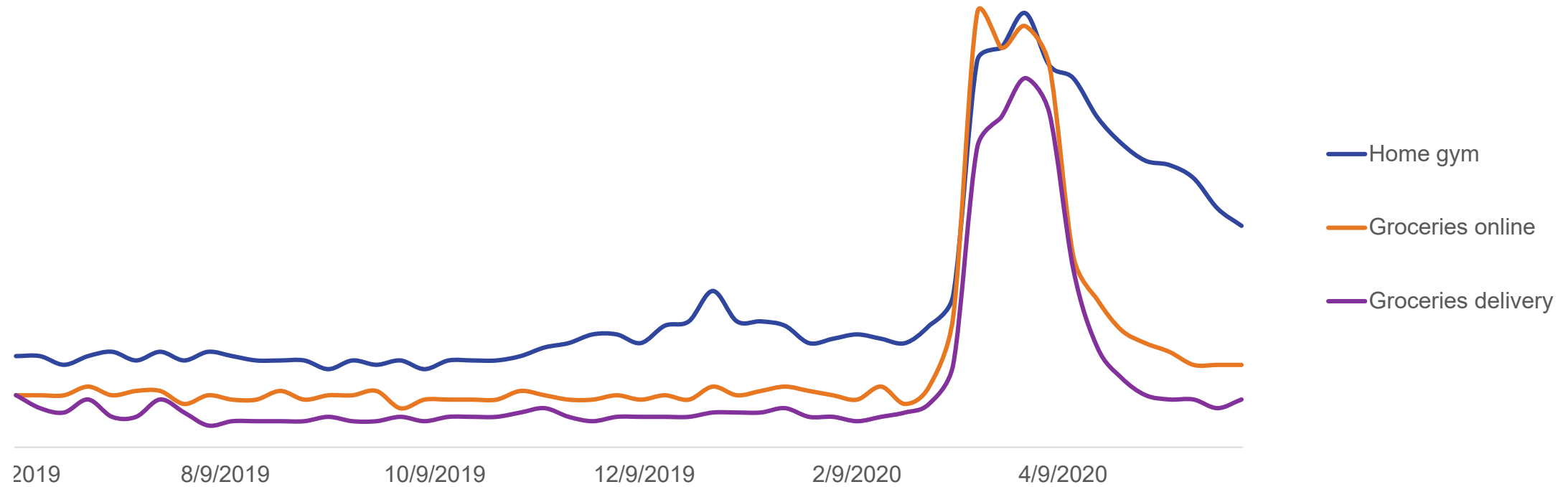
Thinking about using location tracking in the ongoing fight against COVID-19, how likely would you be to participate in this type of tracking on your mobile device?

Wave 2: (Source: The Ipsos Coronavirus Consumer Tracker, fielded April 17 – 20, 2020 among 1,111 U.S. adults.)



People have gone online to find ways to replace their traditional in person retail behaviors

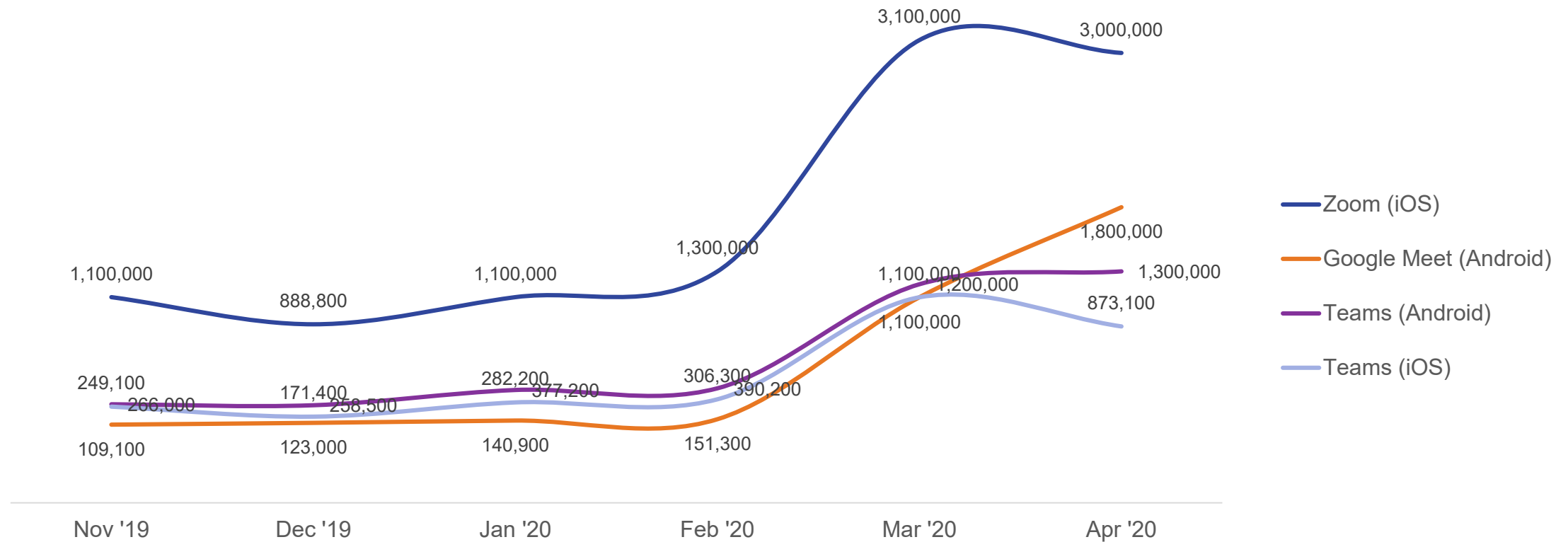
Online Search Term Intensity



Ipsos RAD: Digital Listening

Throughout COVID-19, there has been a 400% increase in video conference application downloads

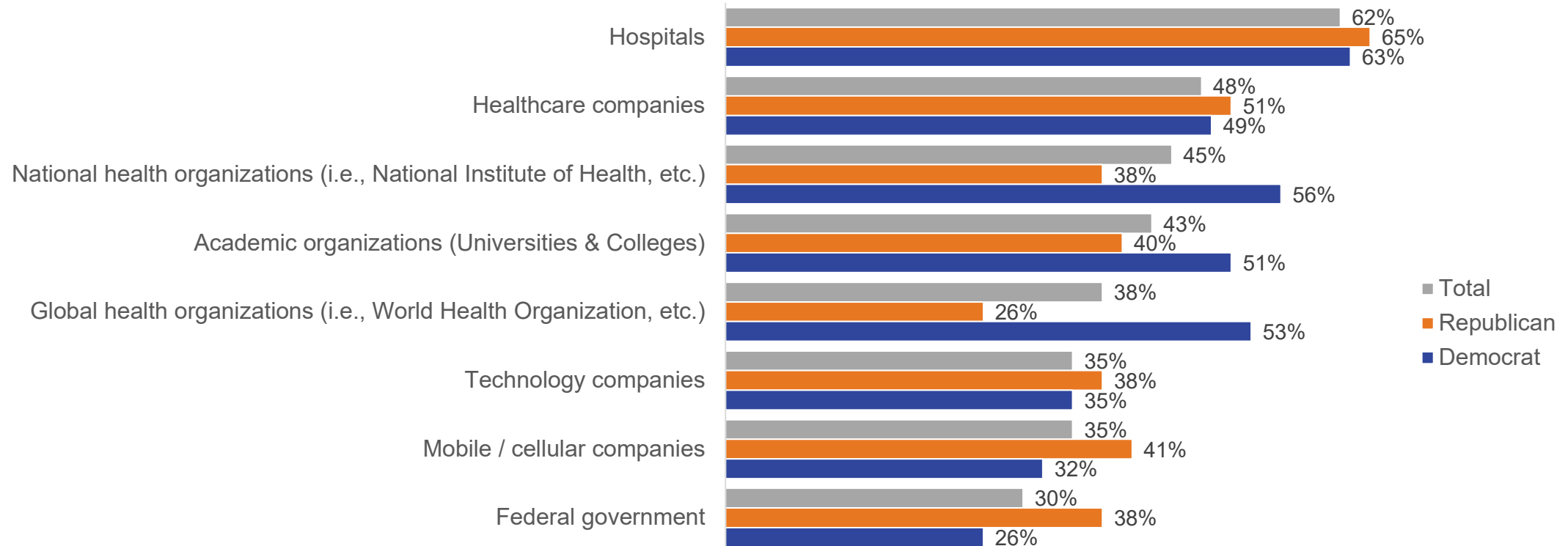
Number of Application Downloads



Ipsos RAD: Digital Listening

People more likely to trust healthcare and hospitals with their data

% Trust a great deal / little

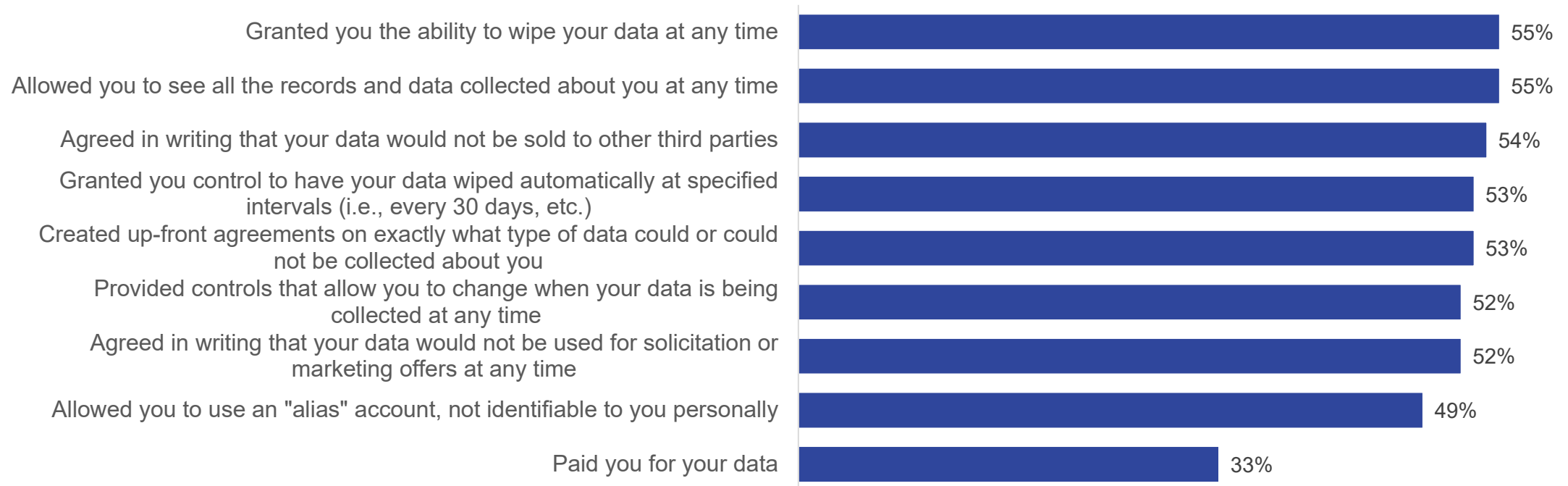


How much do you trust each of the following types of organizations to maintain the security and privacy of your personal data?

Wave 7: (Source: The Ipsos Coronavirus Consumer Tracker, fielded June 8 – 9, 2020 among 1,113 U.S. adults.)

There is no silver bullet, however several policies can help organizations build trust when collecting personal data

% Trust much / somewhat more



Location tracking via people's mobile phones can be used to identify if someone has had a possible exposure to COVID-19. This data could be used to help notify people of exposure so they can more quickly seek testing or treatment, and minimize the spread of COVID-19. What impact would each of the following have on your likelihood to trust an organization with your personal data??

Wave 7: (Source: The Ipsos Coronavirus Consumer Tracker, fielded June 8 – 9, 2020 among 1,113 U.S. adults.)