

J W T ANXIETY INDEX

JANUARY 2009

AGENDA

Methodology

What's making people anxious today?

U.S.

U.K.

Canada

Summary of Findings

METHODOLOGY

Quantitative survey using SONAR™, JWT's proprietary online research tool.

Data collected in late December/early January.

U.S.: 500 consumers age 18+ (data collected Dec. 19-22).

U.K.: 564 consumers 18+ (data collected Dec. 23, 2008-Jan. 5, 2009).

Canada: 500 consumers 18+ (data collected Dec. 19-22).

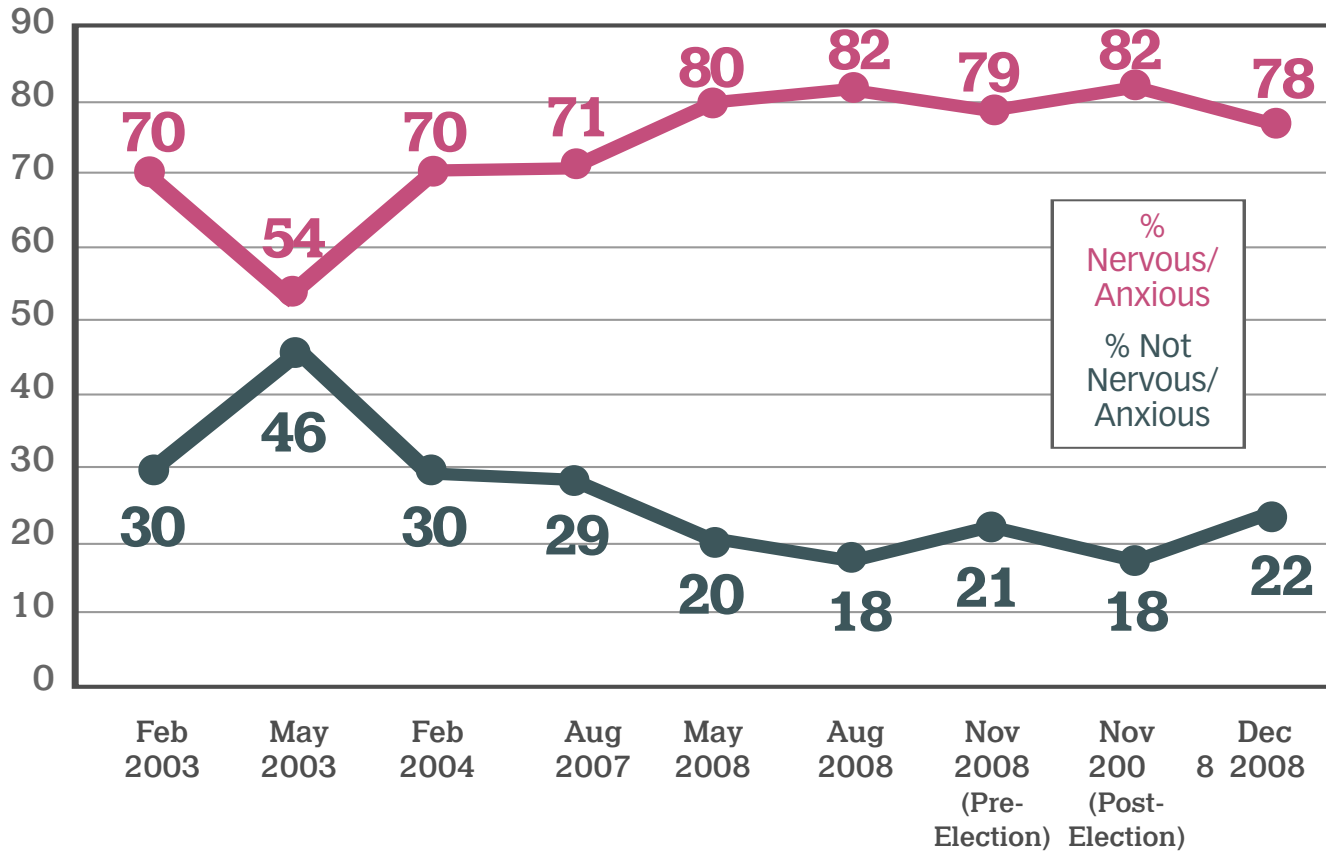
All data weighted by age, gender and income.

WHAT'S MAKING PEOPLE IN THE U.S. ANXIOUS TODAY?





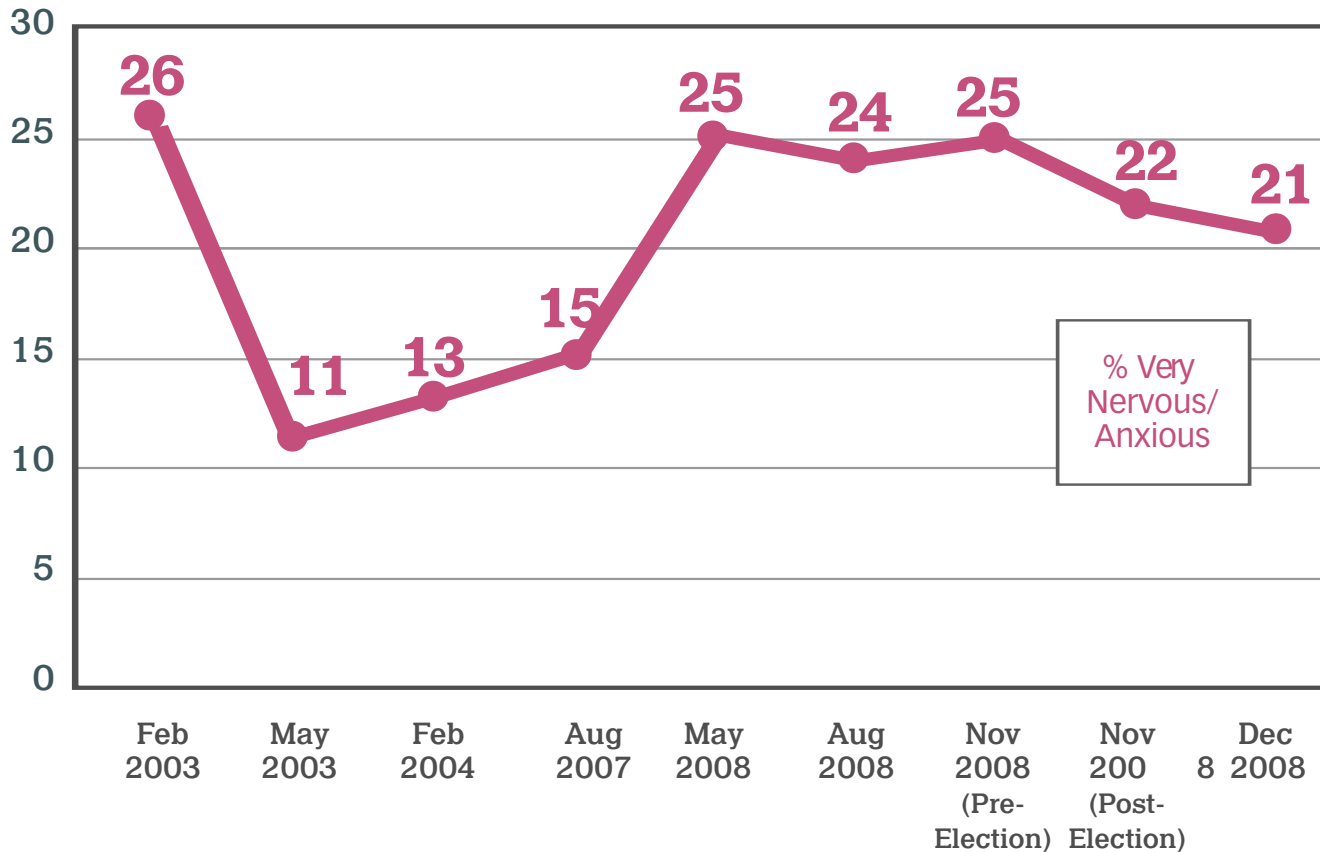
Anxiety levels remain high ...



Overall, given everything that is going on in the world, the country, and your family's life, how nervous or anxious would you say you currently are? (Select one)



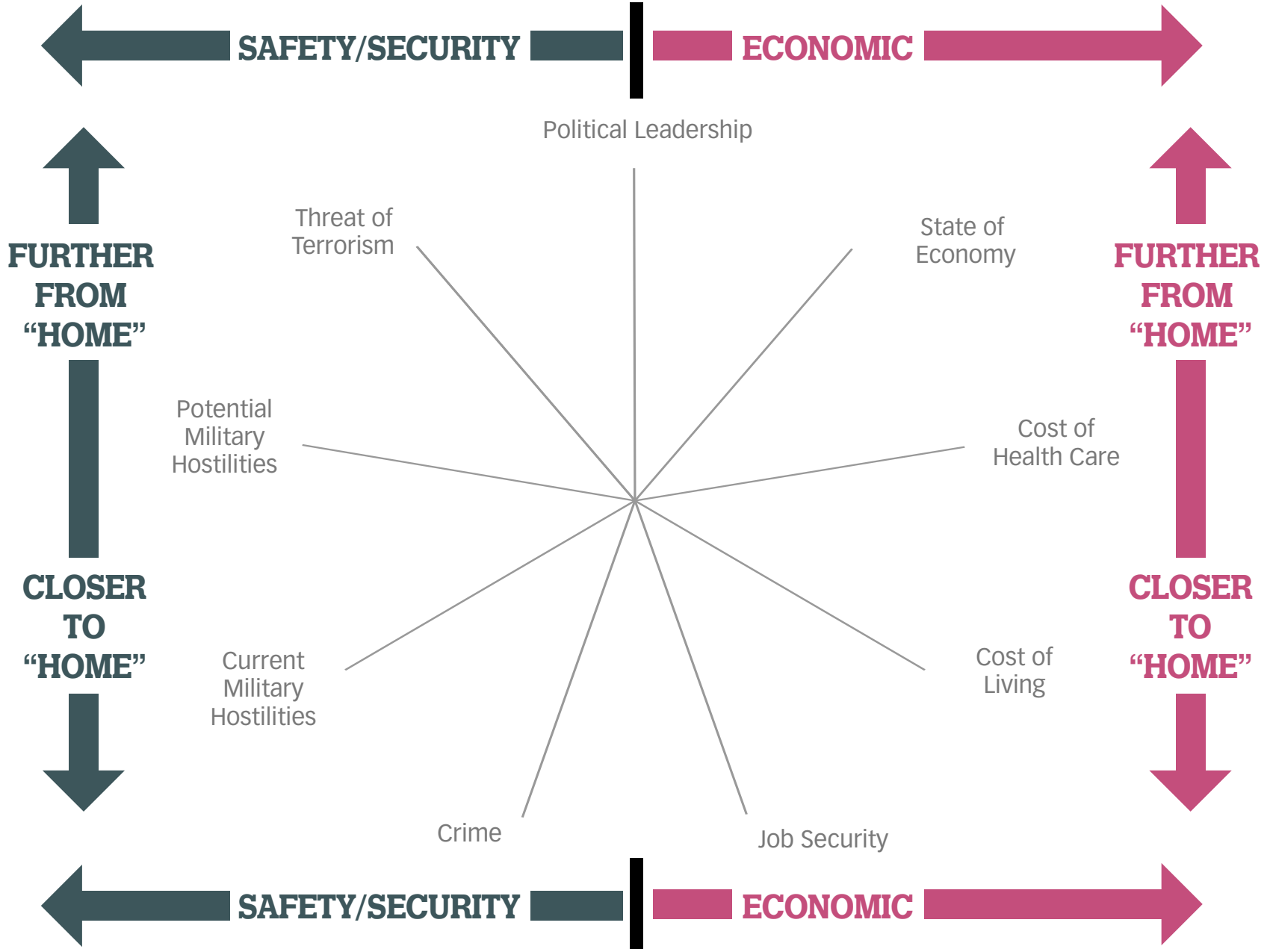
... though anxiety intensity has tapered slightly since the election.



Overall, given everything that is going on in the world, the country, and your family's life, how nervous or anxious would you say you currently are? (Select one)

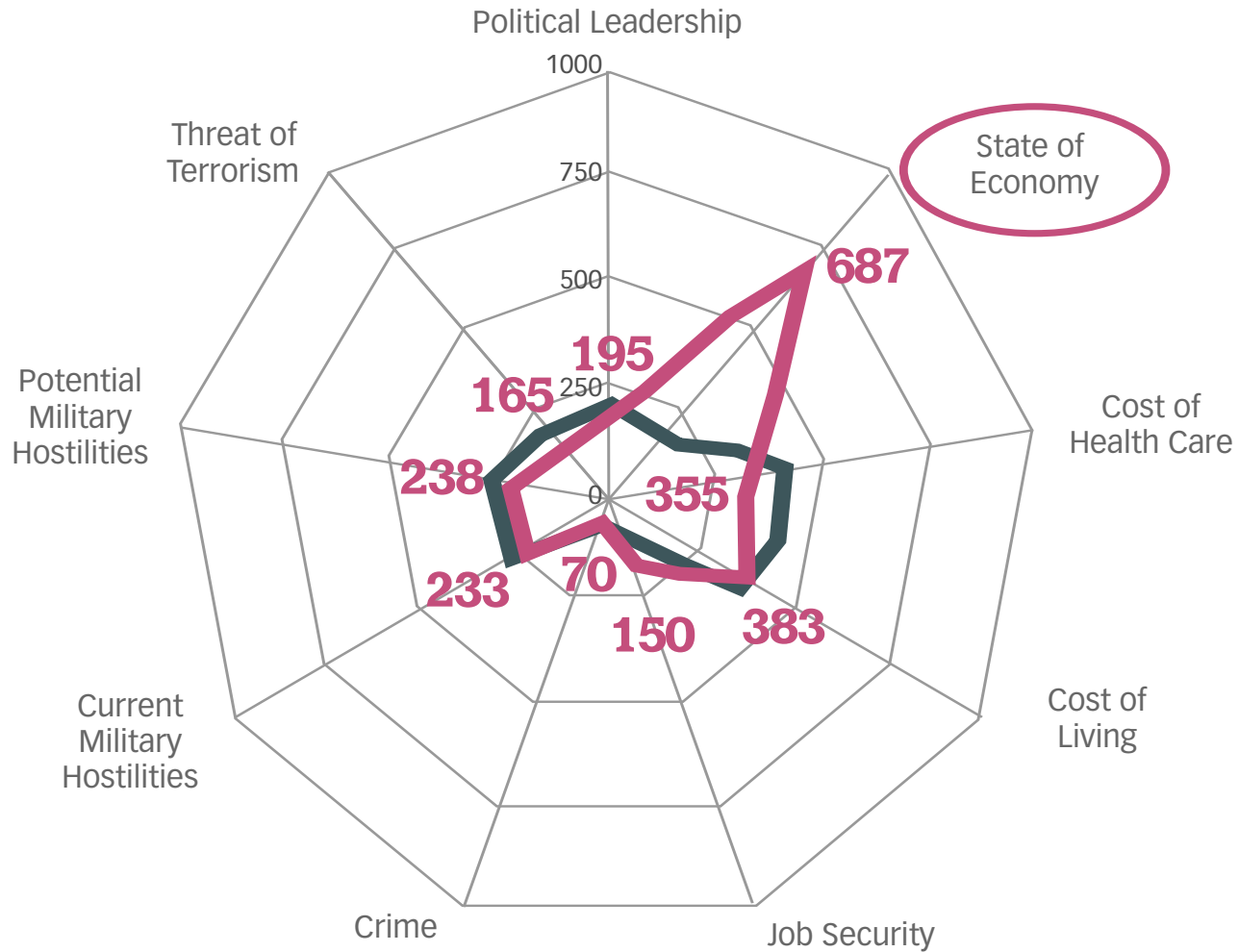
ANXIETY INDEX MAP

J W T





All eyes are on the economy.



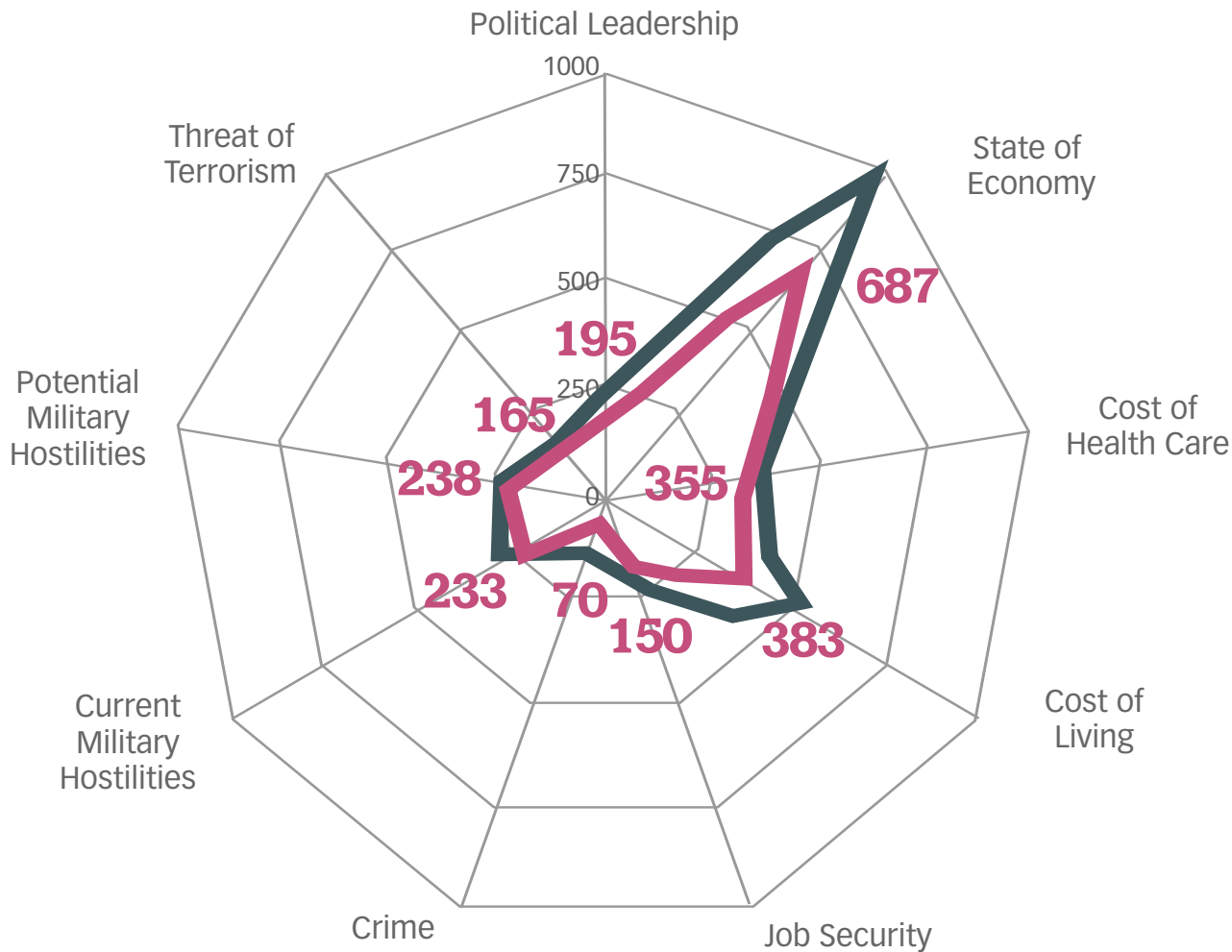
State of Economy

December 2008 August 2007

AnxietyIndex: % who are nervous or anxious/% who are not



Economic anxiety has lessened since last month—acceptance or optimism?

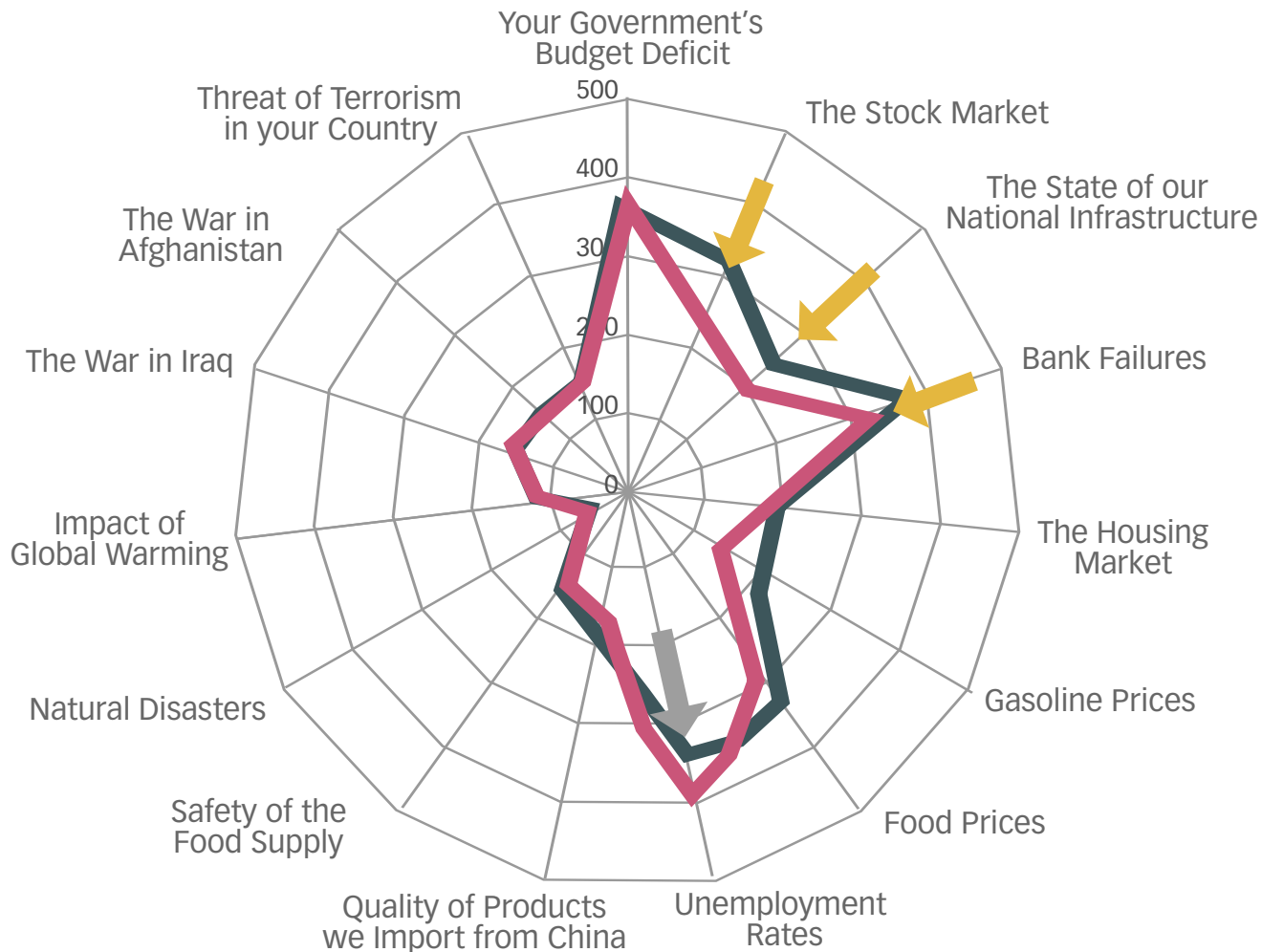


December 2008 November 2008

AnxietyIndex: % who are nervous or anxious/% who are not



Attention may start shifting from financial institutions to unemployment.

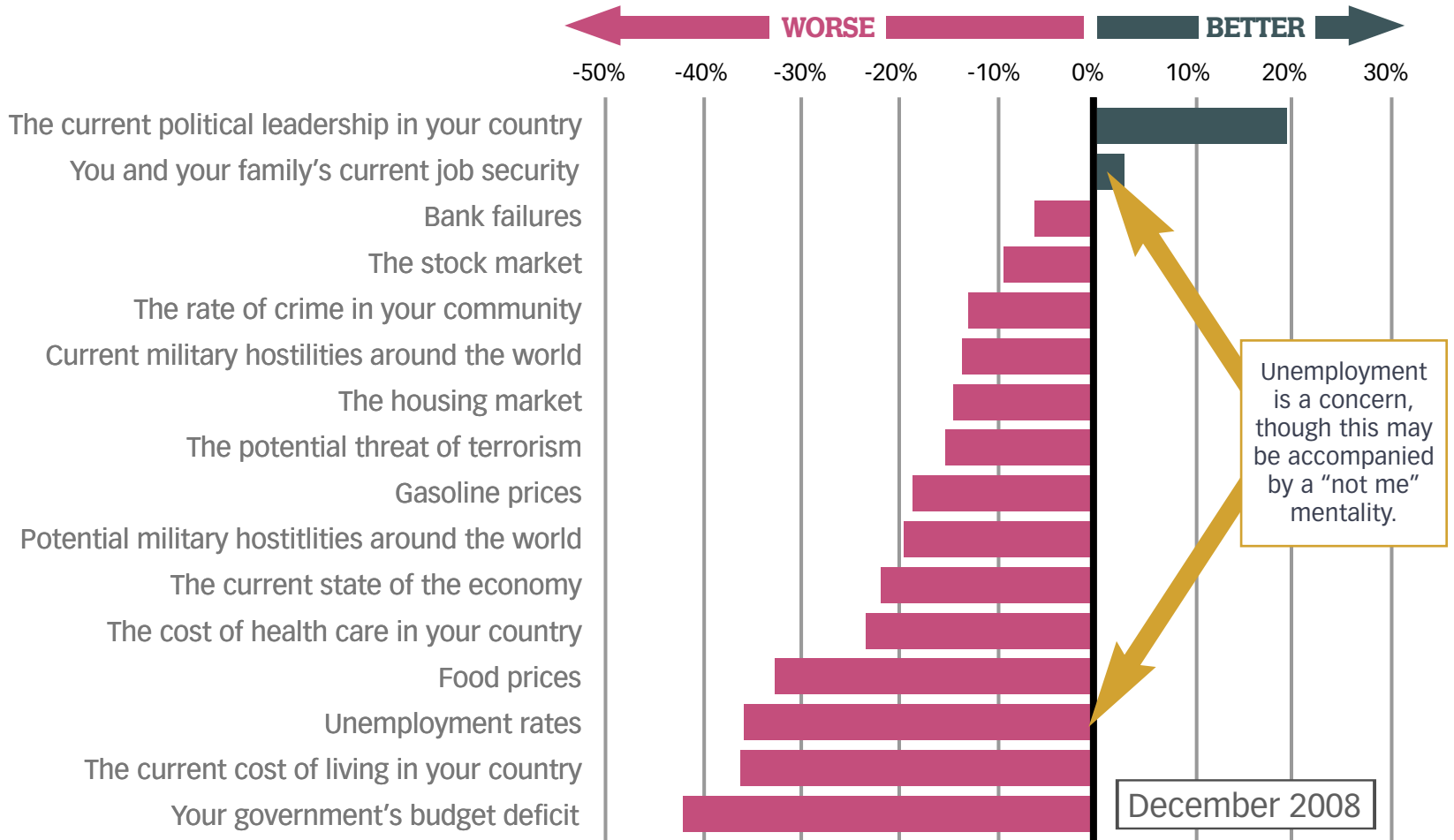


December 2008 November 2008

AnxietyIndex: % who are nervous or anxious/% who are not



Obama brings hope, which has yet to translate into reassurance.



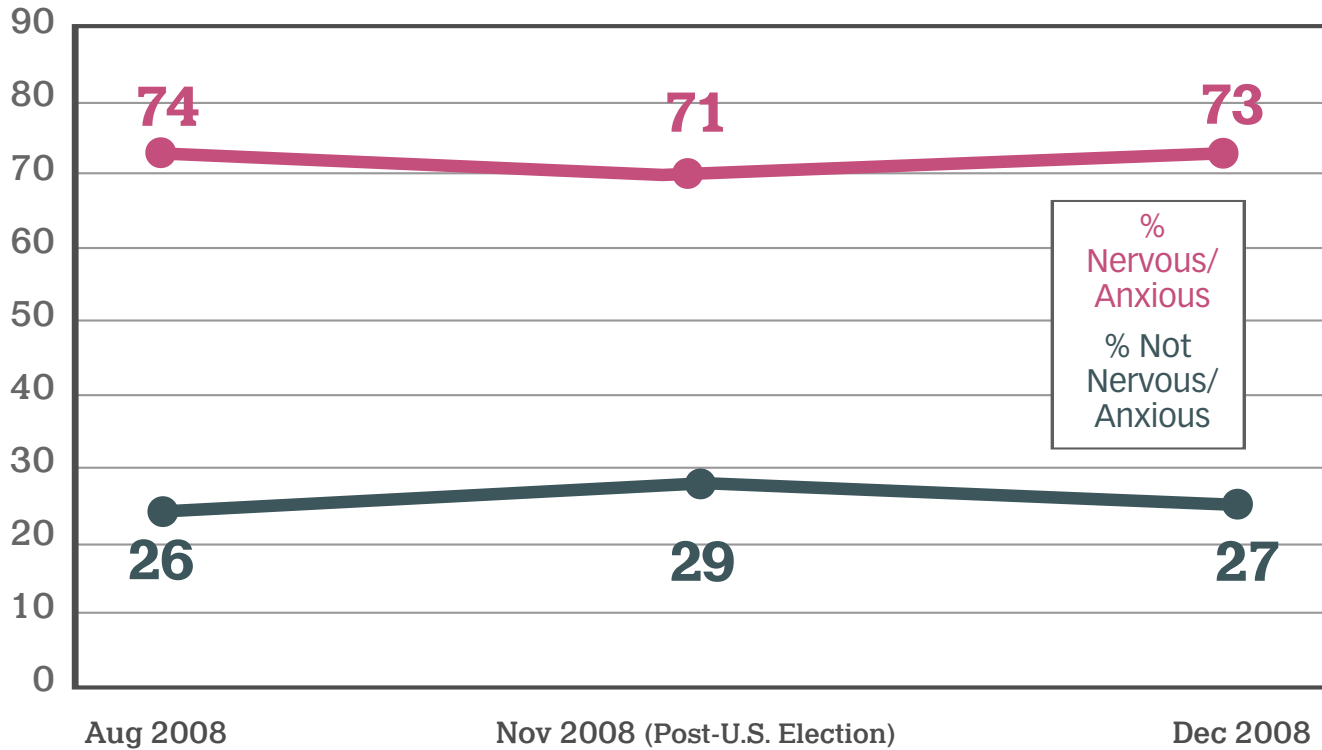
% who expect it will get better/% who expect it will get worse in the next six months

WHAT'S MAKING PEOPLE IN THE U.K. ANXIOUS TODAY?





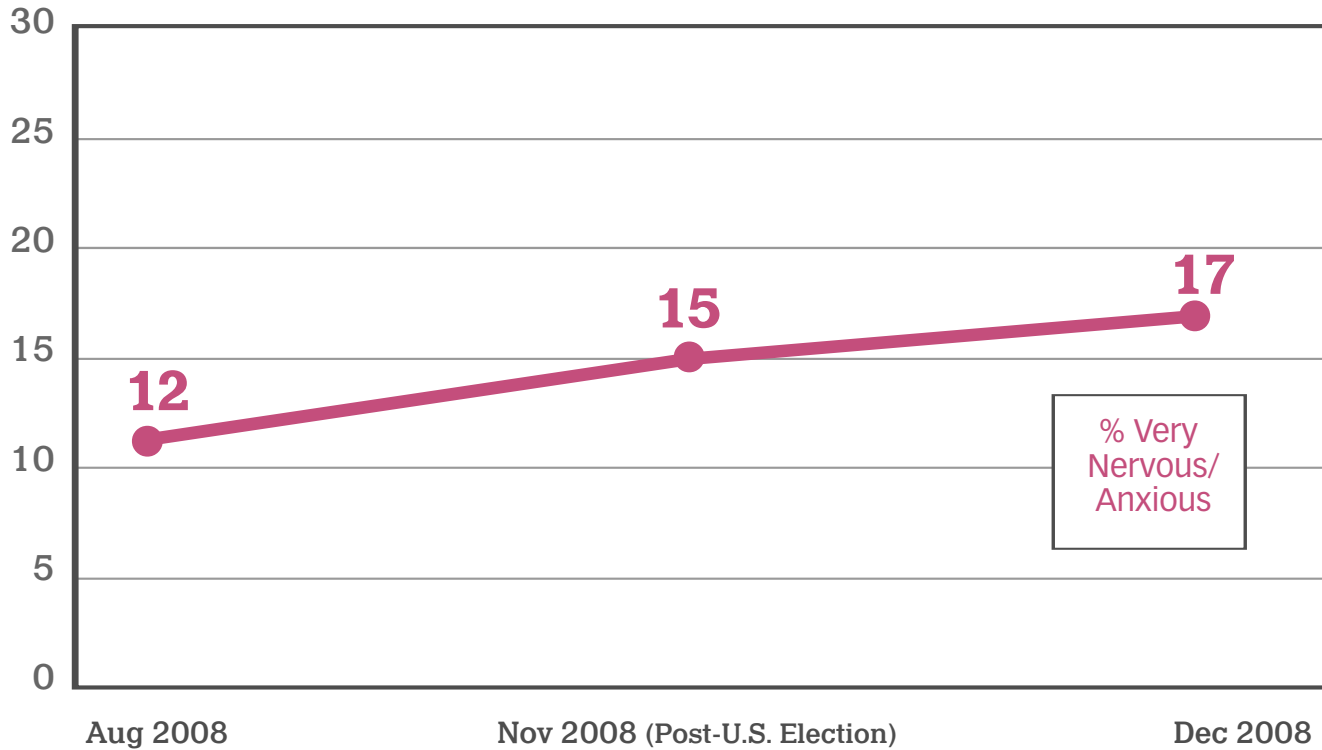
Anxiety levels remained high through the last quarter of 2008 ...



Overall, given everything that is going on in the world, the country, and your family's life, how nervous or anxious would you say you currently are? (Select one)



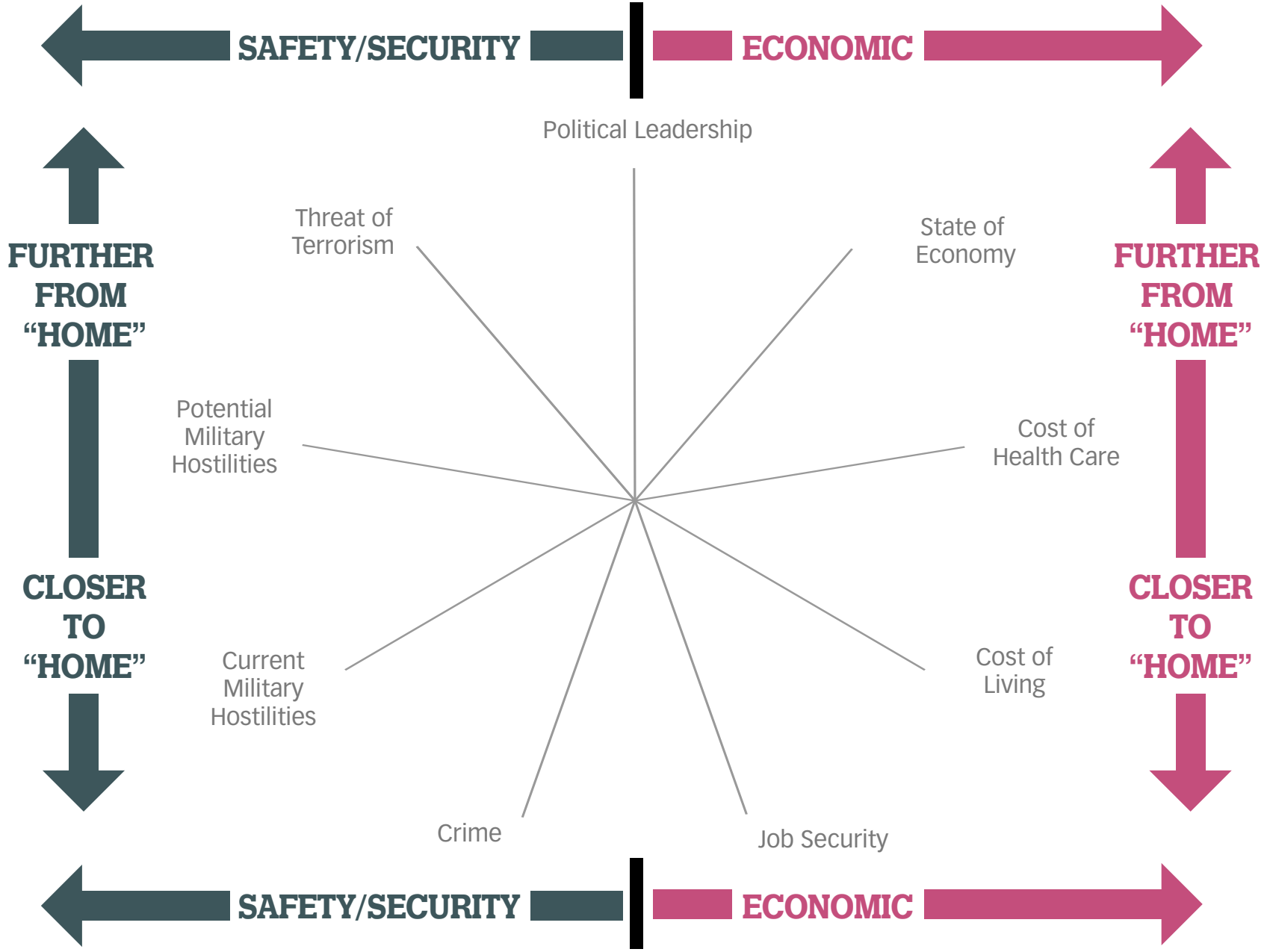
... while the intensity of that anxiety appears to be on the rise.



Overall, given everything that is going on in the world, the country, and your family's life, how nervous or anxious would you say you currently are? (Select one)

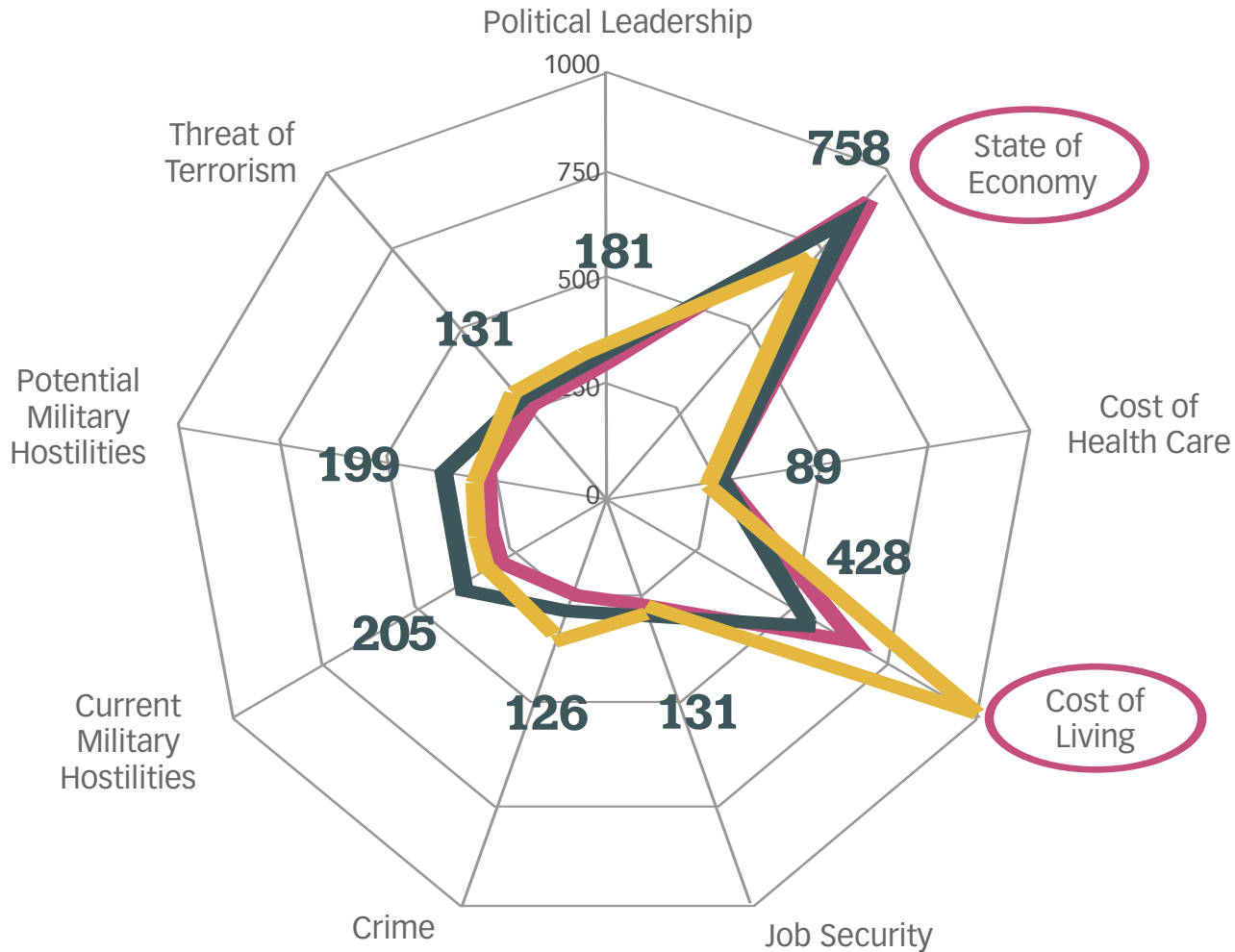
ANXIETY INDEX MAP

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Anxiety concerns have broadened from issues close to home for consumers (the cost of living) to the state of the U.K. economy.

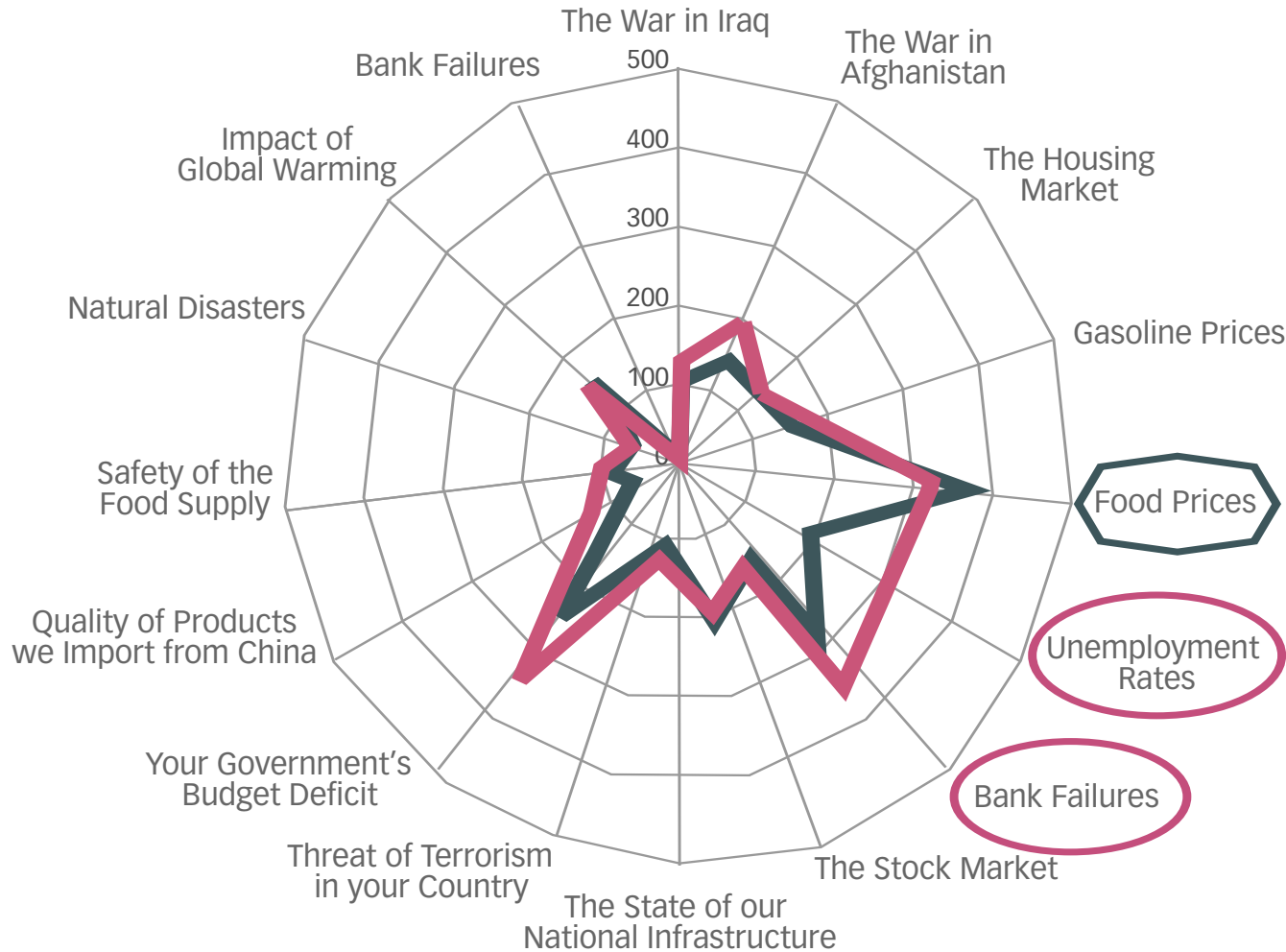


December 2008 November 2008 August 2008

AnxietyIndex: % who are nervous or anxious/% who are not



Concerns over bank failures and unemployment appear to be abating, while concern about food prices is nudging up.

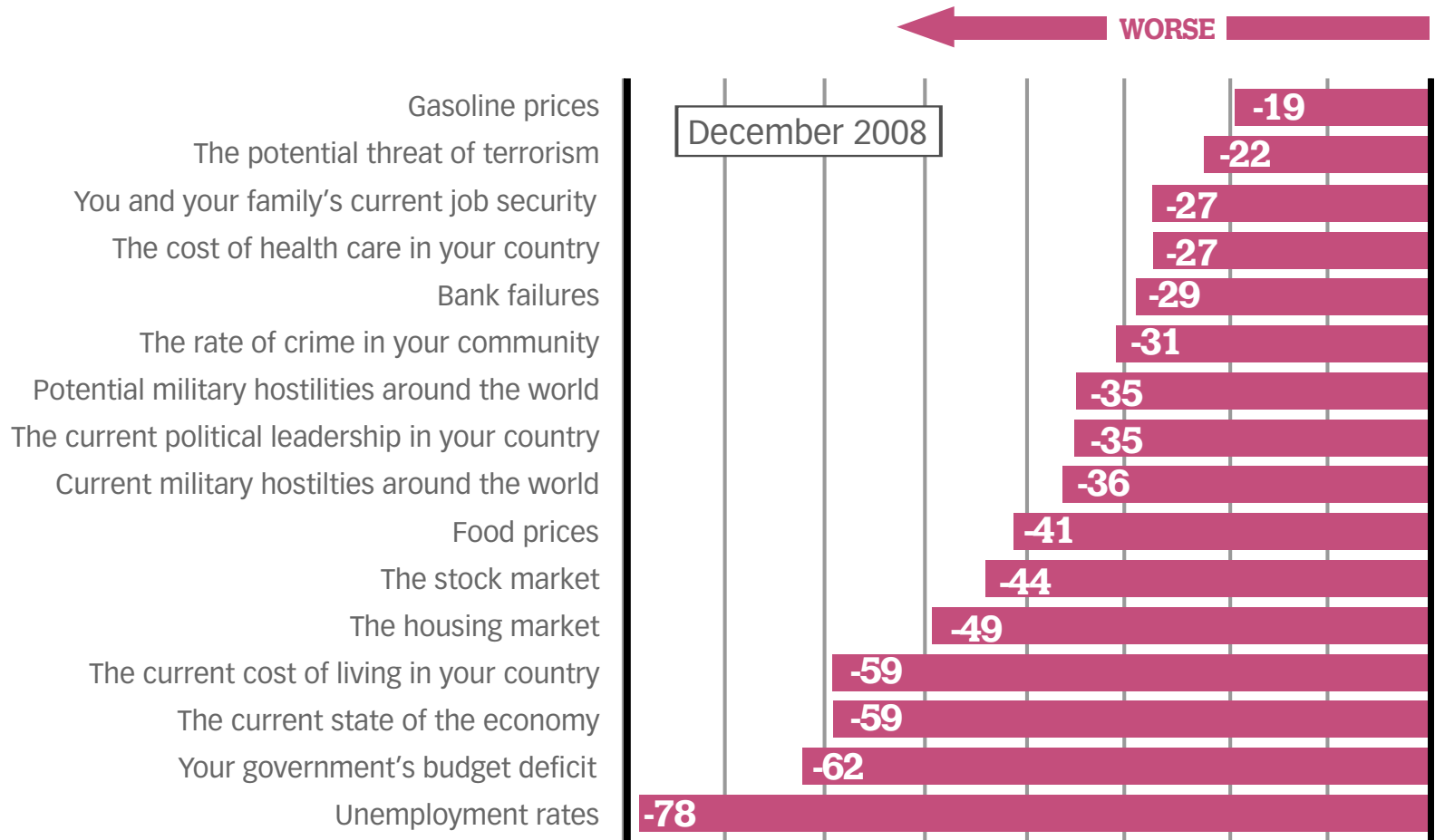


December 2008 **November 2008**

AnxietyIndex: % who are nervous or anxious/% who are not



In general, pessimism abounds, especially related to the economy at large.



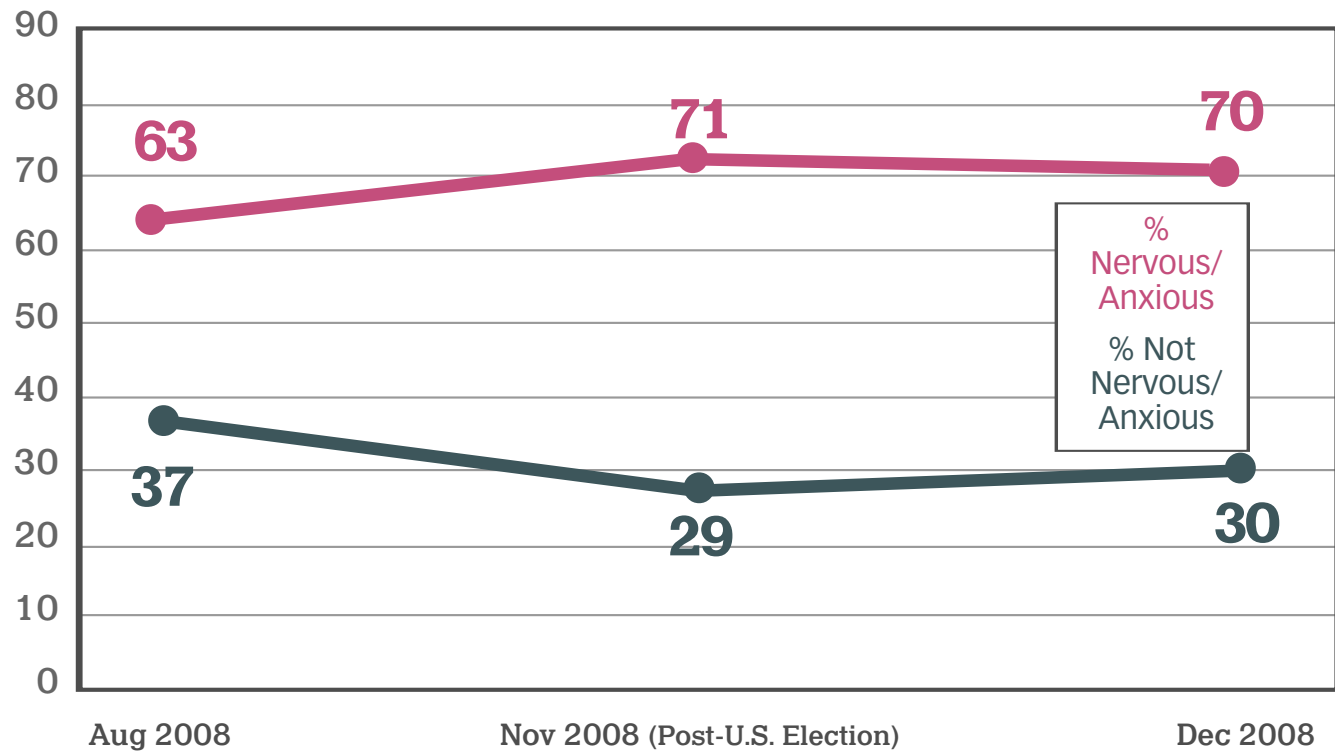
% who expect it will get better/% who expect it will get worse in the next six months

WHAT'S MAKING PEOPLE IN CANADA ANXIOUS TODAY?





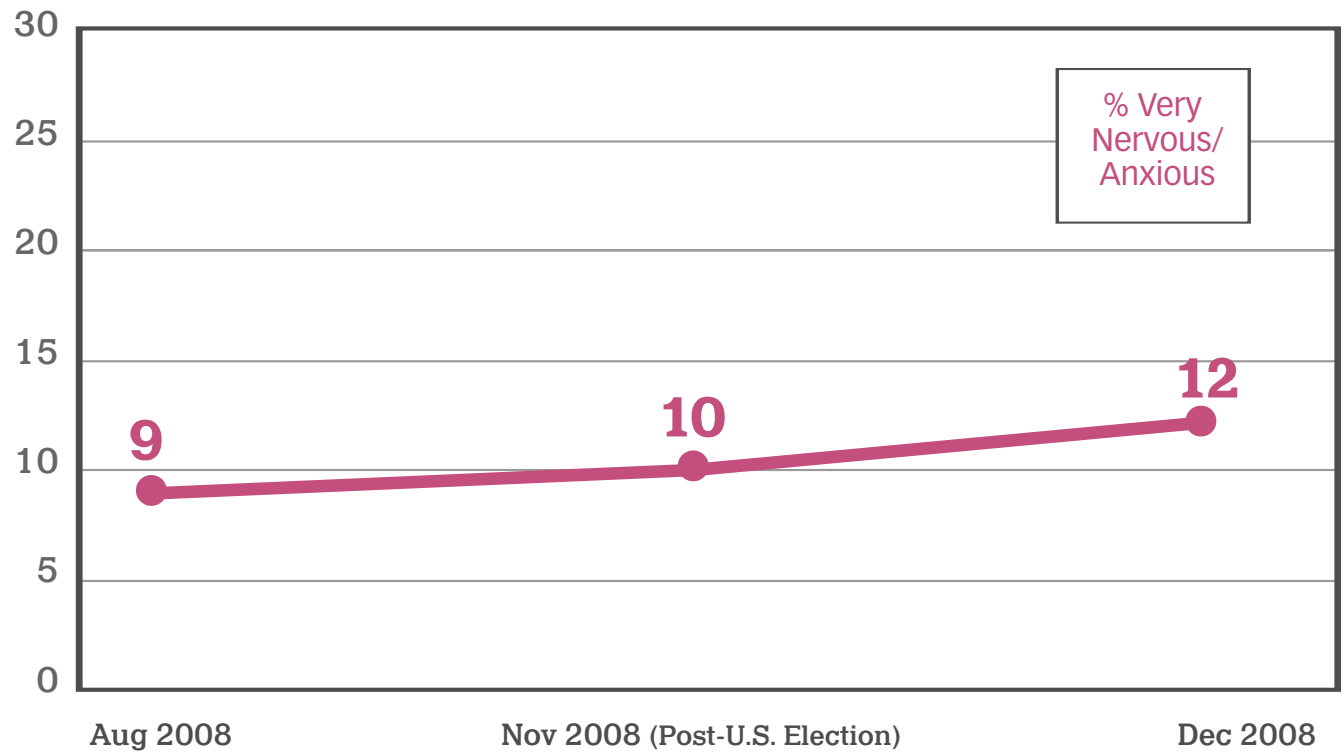
Anxiety levels are high ...



Overall, given everything that is going on in the world, the country, and your family's life, how nervous or anxious would you say you currently are? (Select one)



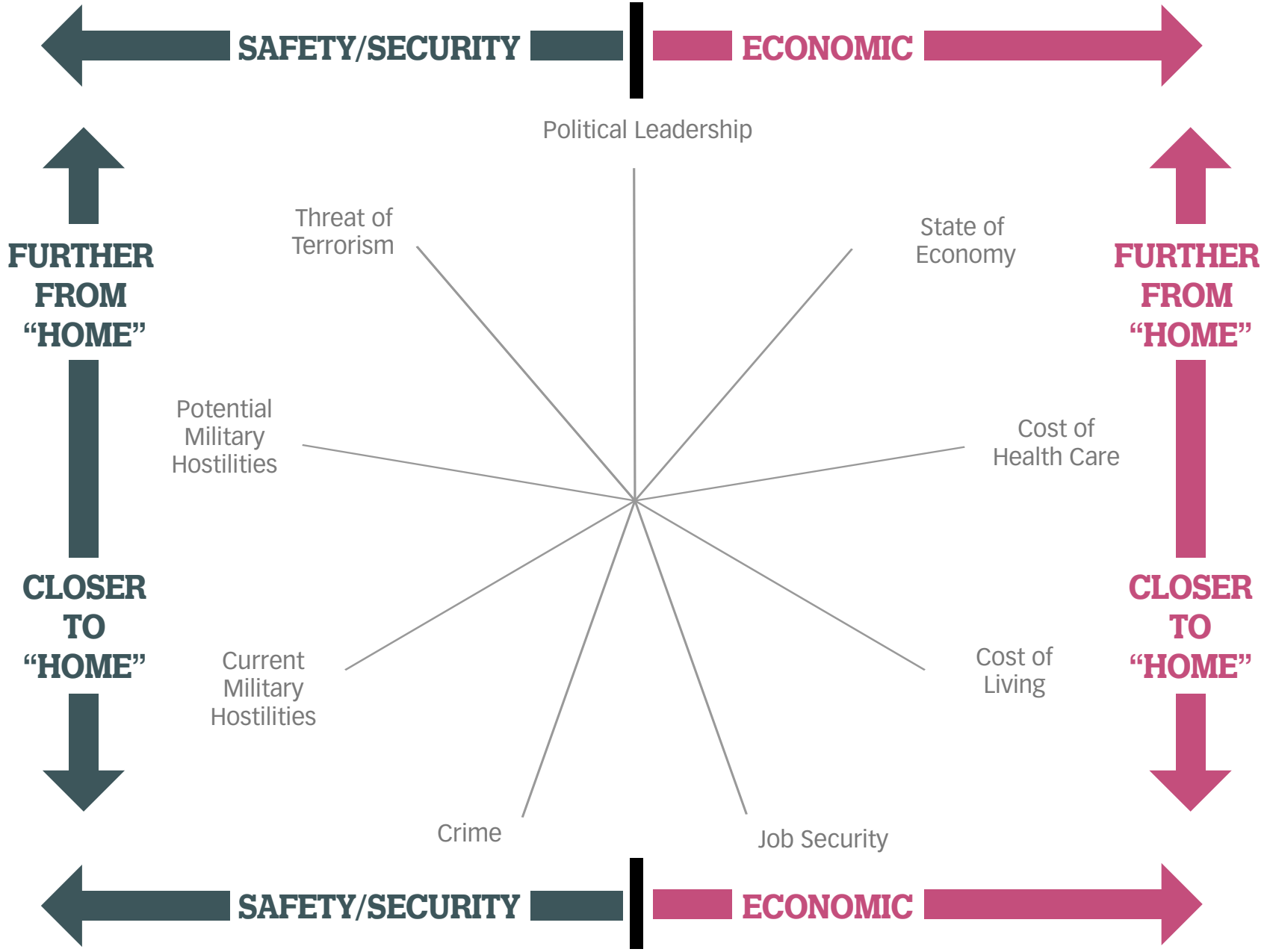
... though it is not very intense.



Overall, given everything that is going on in the world, the country, and your family's life, how nervous or anxious would you say you currently are? (Select one)

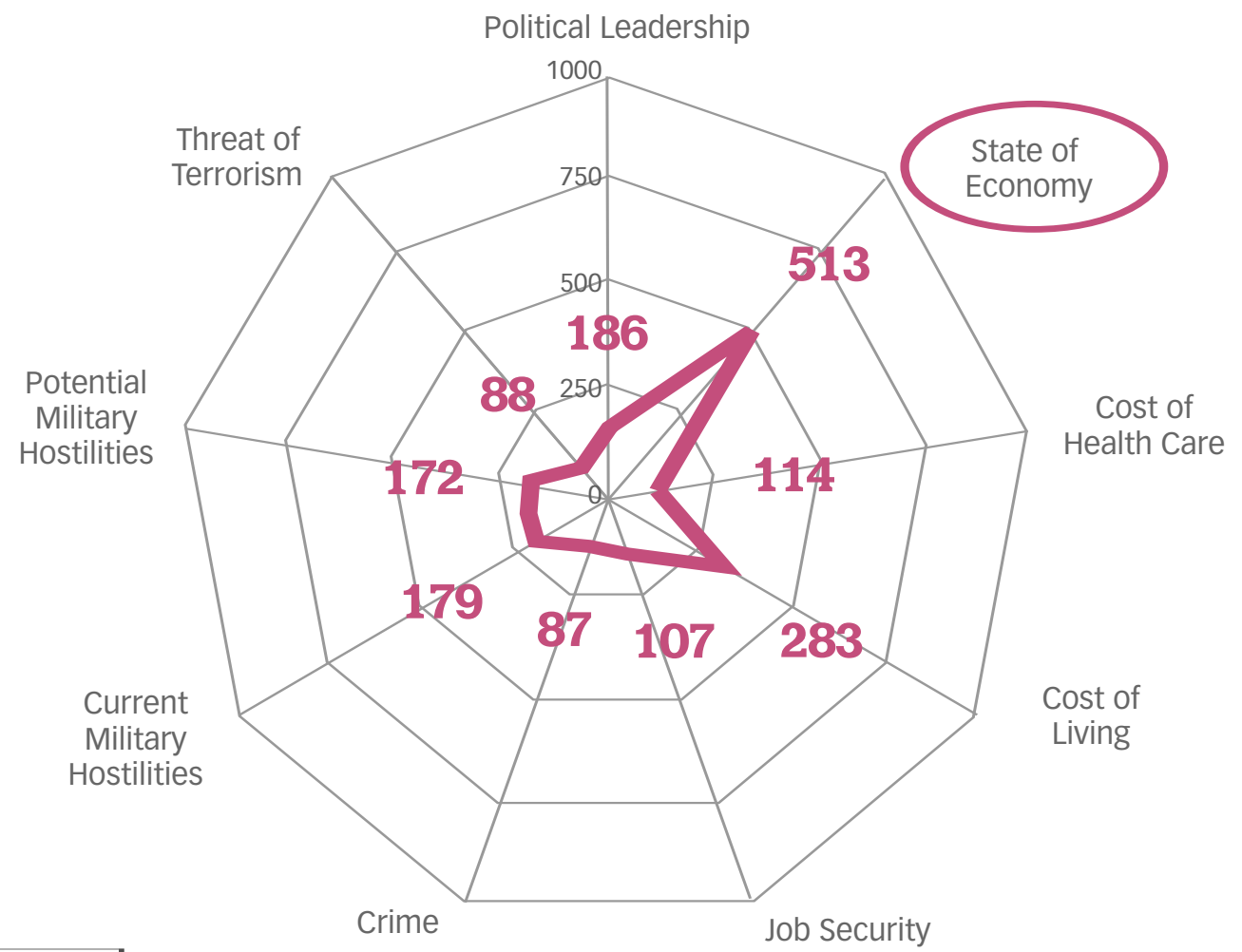
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All eyes are on the economy ...

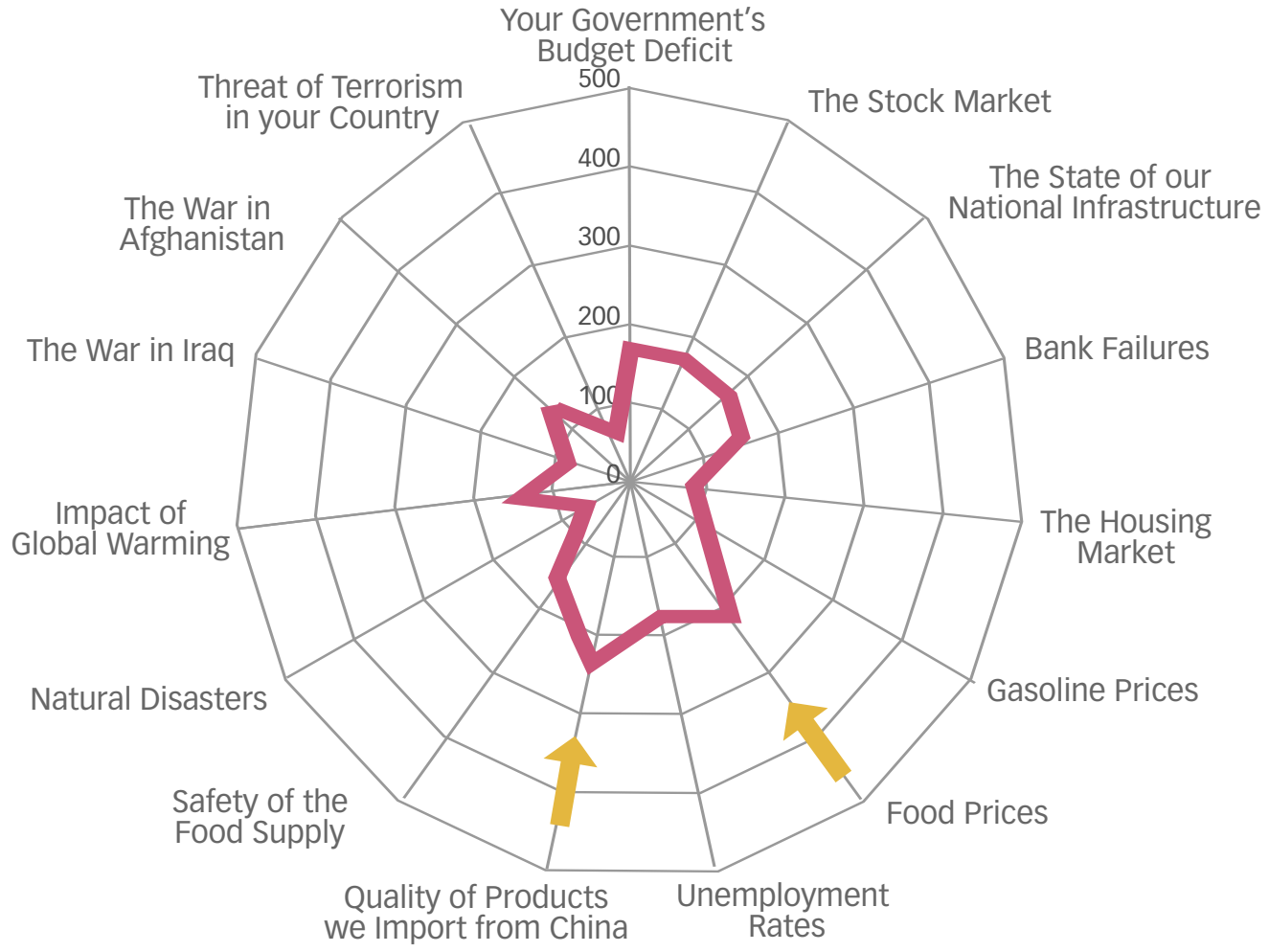


December 2008

AnxietyIndex: % who are nervous or anxious/% who are not



... though the cost and quality of food are also concerns.

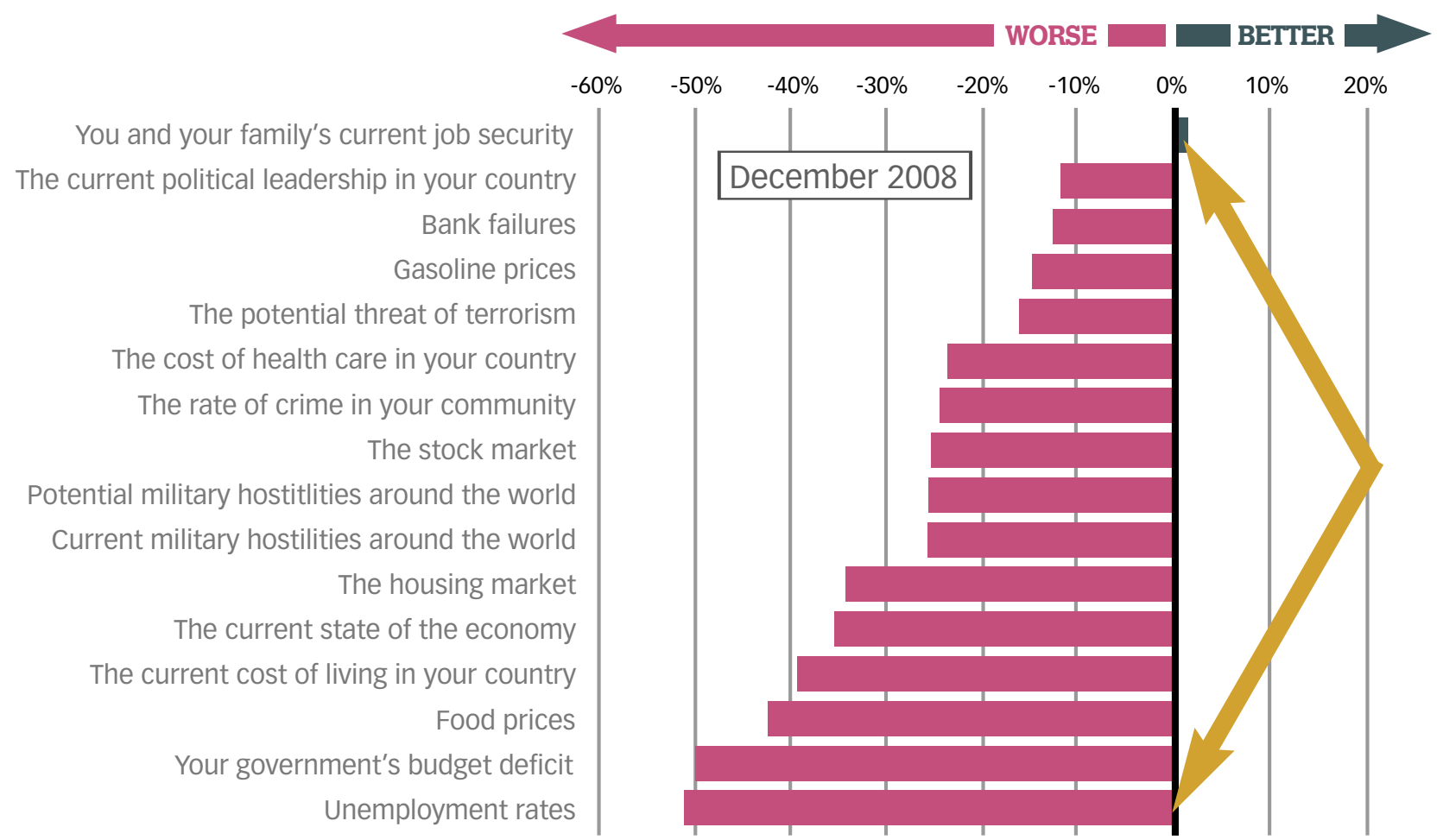


December 2008

AnxietyIndex: % who are nervous or anxious/% who are not



Canadians expect unemployment to get worse though this may be accompanied by a "not me" mentality.



% who expect it will get better/% who expect it will get worse in the next six months

SUMMARY OF FINDINGS

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In all three countries, survey respondents report feeling nervous or anxious about what's going on in the world, the country and their family's life.

In the U.S., where we've been tracking anxiety since 2003, anxiety remained consistently high in 2008—ranging from 82 percent in August to 78 percent in December.

In Canada and the U.K., anxiety levels were slightly lower, with 70 percent of Canadians and 73 percent of Britons reporting anxiety.

The U.S. is also experiencing the most intense anxiety: 21 percent report they are very nervous or anxious.

The U.K. falls 4 points behind the U.S., with 17 percent very nervous/anxious.

Canadians are more laidback: Only 12 percent say they are very nervous/anxious.

SUMMARY OF FINDINGS (cont'd.)

Not surprisingly, respondents' anxieties are clustered around the economy, with the specific focus varying by country:

Americans are chiefly worried about unemployment rates.

Britons are most concerned about the high cost of food.

Canadians are anxious about the cost of food and the quality of Chinese imports.

The outlook is pessimistic in all three countries: Large pluralities of respondents fear that unemployment rates and their government's deficit will worsen over the next six months.

THANK YOU

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