

WE NEED TO TALK ABOUT GENERATIONS

KEYS - A WEBINAR SERIES BY IPSOS

21 Sept 2023

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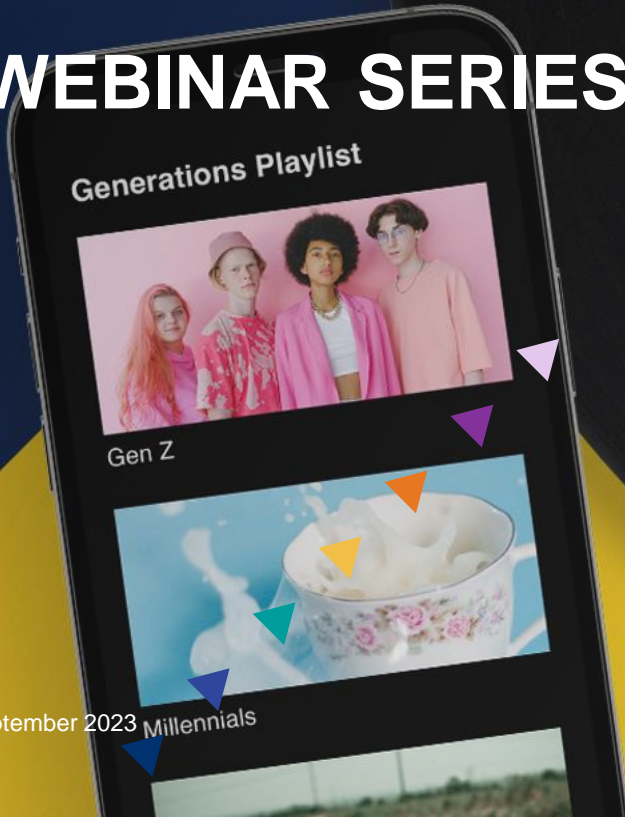


A thumbnail for a webinar recording. It features a vertical stack of four video call windows on the left. The main area contains a smartphone displaying a 'Generations Playlist' with images of Gen Z and Millennials. To the right is a blue vinyl record with the text 'TALKING ABOUT OUR GENERATIONS' and a white cassette tape. The Ipsos logo is in the bottom right corner.

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21 Sept 2023

[Watch the recording](#)



AGENDA



01

Generation Myths & Demographic Realities

Simon Atkinson

Chief Knowledge Officer,
Ipsos

02

Beyond the Stereotypes: The Importance of Time & Place

Geeta Lobo

Chief Client Officer,
Ipsos in India

03

Letting the Data Tell the Story: Drilling deeper

Naumi Haque

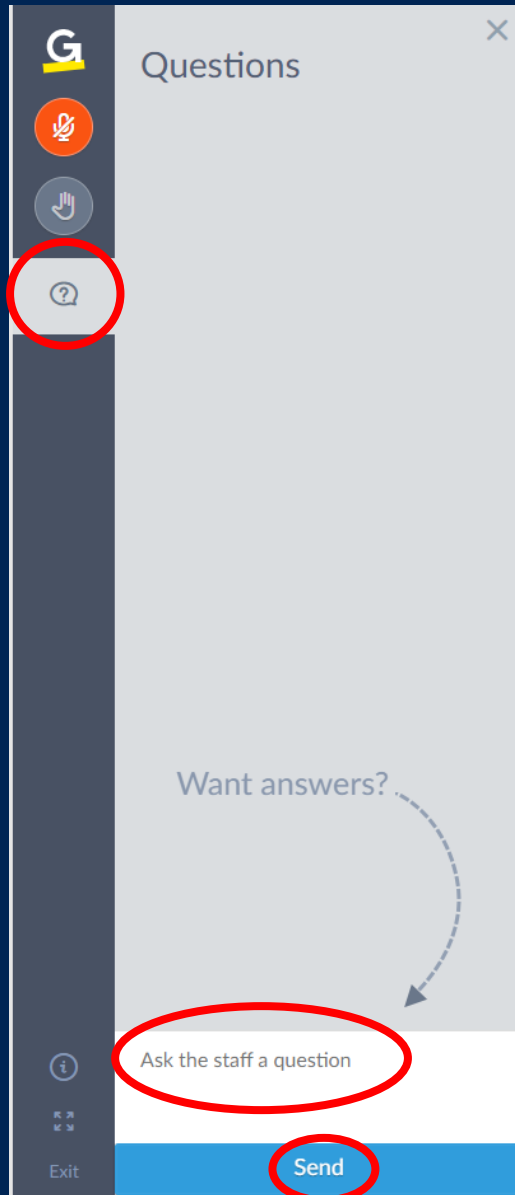
Head of Global Essentials
Behavior Tracking, Ipsos

04

Questions for Brands: Oh Boomers, Where Art Thou?

Chris Murphy

Global Head, Market Strategy
& Understanding, Ipsos



QUESTION TIME

Do you have questions for our panellists?

Please send them by clicking on the  on the left panel.

You can ask your question at any time during the session.



GENERATION MYTHS AND DEMOGRAPHIC REALITIES

Simon Atkinson

Fig.1 – Generations in the news

OPINION 8 AUGUST 2022

GEN Z: ENGAGING THE SILENT MAJORITY

Scott Ashew

Millennial marketing exec shares the 'bizarre and informal' ways her Gen Z colleagues sign off their emails and out of office - sparking heated debate

COMMENT

Antsy Gen Zs want wellness rooms, pronouns and lots of time off

Don't count on this generation turning into their parents as they age.

WILLIAM LEWIS JOHN ROMEO

8 January 2022 - 6:00am

EMPOWERMENT
These are Gen Z's career non-negotiables - including a 5pm leave and regular pay rises

Career experts give us the low down.

The GRINCH generation! Gen Z tries to ruin Christmas by CANCELING Santa - claiming stories about the festive figure are 'traumatizing' children... while slamming adults who 'lie' about his existence

Gen Z Are Officially Less Straight Than Any Other Age Group

NICK LEVINE
LAST UPDATED 1 DECEMBER 2021 9:55

COMMENT

Workshy Gen Z staff who can't be bothered to read their emails need a reality check

Gen Z need to understand that reading emails is part of the job - as is working hard



BEN MARLOW
CHILD CITY COMMENTATOR

18 January 2022 - 6:00am

HOW WE WORK

Gen Z: The workers who want it all



SHOULD WE STOP TALKING ABOUT GENERATIONS?

The Washington Post
Democracy Dies in Darkness

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Opinion | Generation labels mean nothing. It's time to retire them.

By Philip N. Cohen

July 7, 2021 at 9:55 a.m. EDT

TALKING ABOUT GENERATIONS CAN REALLY HELP US

Using a generational lens is an effective way of understanding **how** and **why** societies and consumers change



Lifecycle effect

People tend to be more physically active or date more **when they are young**



Period effect

Impacts on all Generations.
Case study = **Covid Pandemic**



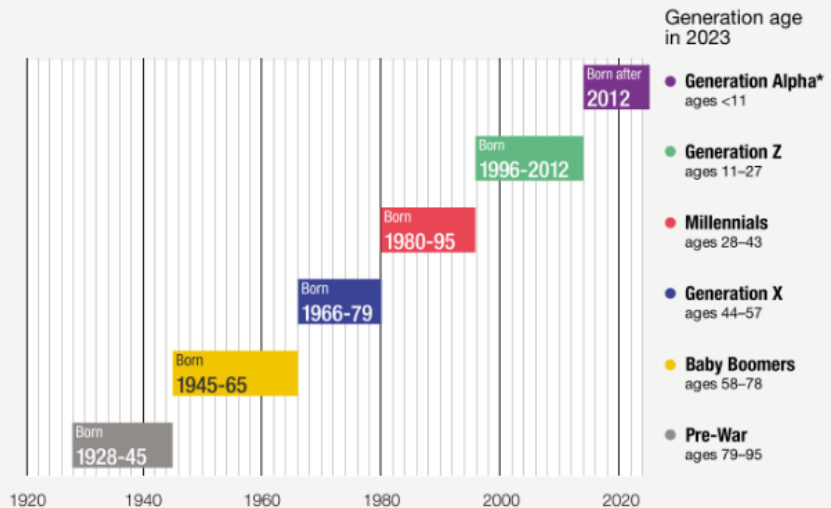
Cohort effect

A particular generation is different **and is staying different**

GETTING OUR ANALYSIS RIGHT: SOME CONSIDERATIONS

Definitions

Defining the Generations



Context

When and where you were born matters

- 1980s vs the 2000s
- Country A vs Country B



Take care in the language & labels we use

“Gen X” or “aged 40-59”?

Data

In search of numbers

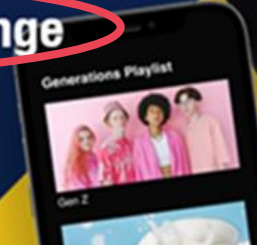
- Genuine **longitudinal data** is rare
- **Tracking data** doesn't always go back that far
- What was important 10-20 years ago **may be less so today**

THE BIGGER PICTURE...

WE NEED TO TALK ABOUT GENERATIONS

The Realities of Population Change

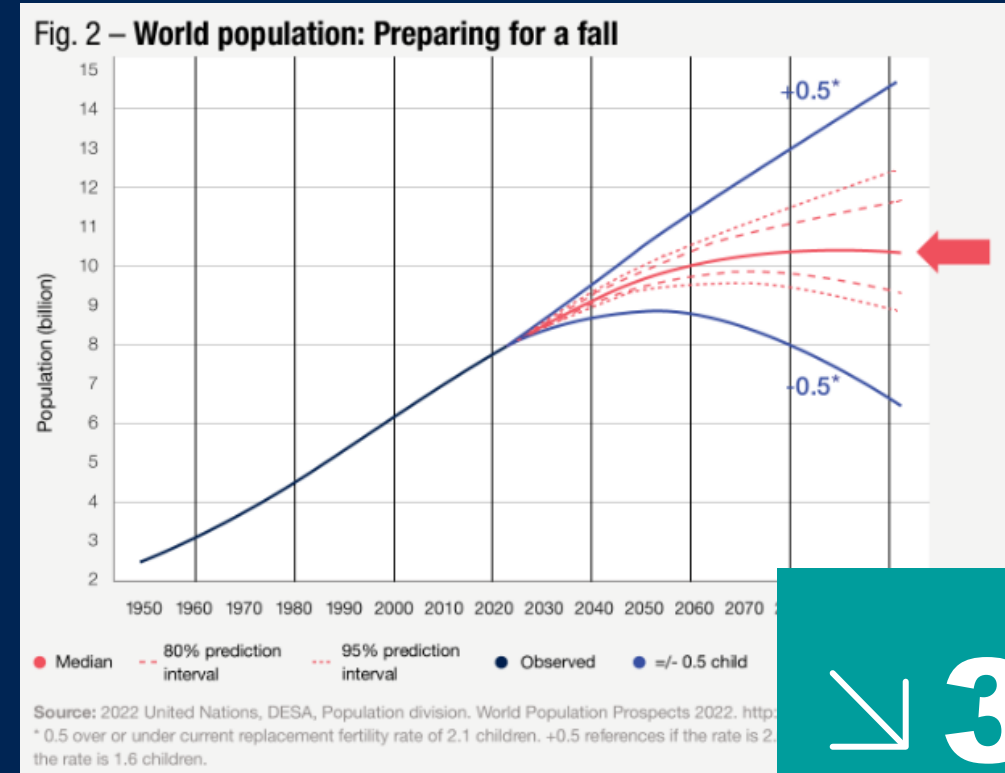
KEYS - A WEBINAR SERIES BY IPSOS



THE BIGGER PICTURE: DEMOGRAPHIC REALITIES



The Headlines



The Reality

↘ **36**

Countries are already seeing their population decline

WE ARE STARTING TO SEE THE PRACTICAL EFFECTS

36

Countries are already seeing their population decline

Thursday, September 07, 2023
10:05 am (Paris)

Le Monde

NEWS INTERNATIONAL WAR IN UKRAINE ENVIRONMENT FRANCE OPINION FRENCH DELIGHTS

Sponsored by: Parc Aulné
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JAPAN - LETTER FROM


In rural Japan, schools are closing due to population decline

The country was deeply troubled by the closure of a school in Fukushima prefecture, whose last two students finished their three years of secondary school at the end of March.

By Philippe Meamer (Tokyo (Japan) correspondent)
Published on April 18, 2023, at 6:00 am (Paris) · 3 min · Lire en français

Subscribers only

LETTER FROM TOKYO




Etta Sato, 15, and Aoi Hoshi, 16, the only two students at Yumoto Junior High School, and their family members leave the school after their graduation and the institution's closing ceremony in Tenet Village, Fukushima Prefecture, Japan, March 18, 2023. ISSAI KATO / REUTERS

It's the beginning of the school year in Japan. Like every April, students start a new year under the cherry blossoms. Normally it is a festive occasion, but this year it is overshadowed by disappointing news of school closures due to population decline and uncertainties about the future of many educational institutions. Japan was troubled by the closure of Yumoto middle school, in Tenet, Fukushima prefecture, in the Northeast of the country. The last two students, Etta Sato and Aoi Hoshi, finished their three years of study there at the end of March. "There were rumors of closure in the second year, but I couldn't believe it," said Sato. "I entered the school suspecting that it might close, but I still have more wonderful memories than I thought," added Hoshi.

https://www.lemonde.fr/en/japan/article/2023/04/13/in-rural-japan-schools-are-closing-due-to-population-decline_6022773_230.html

thejapanimes

School closures continue as Japan's population declines



Aoi Hoshi (left) and Etta Sato, both 15, were the last students to graduate from Yumoto Junior High School in Tenet, Fukushima Prefecture, before the school closed its doors for good last month. | REUTERS

BY ISSEI KATO, EIMI YAMAMITSU AND TOM BATEMAN
REUTERS

SHARE Apr 9, 2023

Listen to this article
0:00 / 4:45 1x

TENET, FUKUSHIMA PREF. - As Etta Sato and Aoi Hoshi walked toward their junior high school graduation ceremony, their footsteps echoed in polished halls once crowded and noisy with students.

The two were the only graduates of Yumoto Junior High — in a mountainous part of northern Japan — and the last. The 76-year-old school closed its doors for good when the school year ended on March 31.

SCHOOLS

Source: [IlSole24h](#)

Scuola Calo demografico, nei prossimi cinque anni chiuderanno 1.200 scuole

Il 75% dei laureati in Italia trova lavoro entro un anno

Dal ministero 1,5 miliardi per gli Enti e le Istituzioni di ricerca

Servizio | Perdiamo 110-120mila studenti l'anno

Calo demografico, nei prossimi cinque anni chiuderanno 1.200 scuole

Negli ultimi 10 anni già chiusi 2.600 istituti nel segmento infanzia e primaria. Emorragia al Sud. Ricerca Tuttoscuola: a breve effetti anche a medie e superiori. Riorganizzare la rete scolastica

di Claudio Tucci
28 maggio 2023



Lapresse

I punti chiave

- Nei prossimi cinque anni chiuderanno 1.200 istituti
- Emorragia al Sud
- Si ritira l'offerta privata (ma anche quella statale)
- Tutti gli effetti dell'attuale trend demografico
- Alcune proposte per affrontare il problema

Le culle vuote degli ultimi anni sono già diventate banchi vuoti ed edifici scolastici chiusi. Per ora soprattutto nelle scuole dell'infanzia e della primaria. Ma l'ombra lunga della denatalità si sta già allungando anche alle medie, e a breve interesserà pure le superiori. I numeri della denatalità li ha ricordati nei giorni scorsi, Giuseppe Valditara, evidenziando come tra 10 anni dai 7,4 milioni di studenti del 2021 si scenderà a poco più di sei milioni, al ritmo di 110-120mila ragazzi in meno ogni anno. E tutto questo sta avendo effetto sugli istituti scolastici. Una ricerca della rivista specializzata Tuttoscuola fa i primi calcoli (e sono drammatici).

Nei prossimi cinque anni chiuderanno 1.200 istituti

Negli ultimi dieci anni, è scritto nello studio, elaborato su dati ufficiali pubblicati sul sito del ministero dell'Istruzione e del merito, in Italia sono state sbarrate le porte di oltre 2.600 scuole, solo nel segmento delle scuole dell'infanzia e primaria (che, come noto, interessano gli alunni tra i 3 e gli 11 anni di età). E nei prossimi cinque anni si può stimare che ne chiuderanno almeno altre 1.200, tra statali e paritarie.

Population decline has caused 2,600 Italian kindergartens & primary schools to close down in the past 10 years and will lead 1,200 others to the same fate within next 5 years.

There are now almost 1.5 million fewer school students in Italy than 10 years ago.

The region most affected is the South.

UNIVERSITIES

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'Zombie universities' face drastic action as births fall

SOUTH KOREA
Government slashes university intake as population falls

ASIA
Declining populations point to a sombre future for HE

SOUTH KOREA
South Korea could lose half its universities within 25 years 
Aimee Chung 08 December 2021

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South Korea could lose up to half of its universities within 25 years due to acute demographic decline, according to a report by Seoul National University and the Korea Institute for Health and Social Affairs, which provides a long-term outlook on already dire short-term predictions for higher education institutions.


The report, on population change and future prospects for the regional universities sector, predicts that just 190 out of a current 385 universities will still exist in 25 years' time, with "competition for survival in non-metropolitan areas likely to be fierce", according to the report released on 5 December 2021.

Outside the capital Seoul, the outlook is even more grim, with just 44% of existing universities – 146 out of 331 – expected to survive, compared to the over 80% likely to survive in Seoul. It is followed by Sejong City, where around two thirds of universities are expected to still exist in 25 years' time.

[South Korea could lose half its universities within 25 years \(universityworldnews.com\)](https://www.universityworldnews.com/news/south-korea-could-lose-half-its-universities-within-25-years)

RESEARCH IN
Comparative & International Education

Article

Research in Comparative & International Education
2020, Vol. 15(2) 136–157
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Higher education in a depopulating society: Survival strategies of Japanese universities

Yushi Inaba
International Christian University, Japan

Abstract
Internationally and domestically, depopulation and the decrease of student enrollment caused are becoming an issue of interest in higher education, especially in regions such as east Europe, south Europe, and East Asia. This article analyzes strategies of Japanese universities to tackle depopulation issues in Japan. The 18-year-old bracket population has been halved for the last quarter century, and steep depopulation currently occurs in Japan. Such demographic changes strongly affect the Japanese higher education system. Through document and secondary data analysis, five major strategies were identified: subject diversification; merger (vertical and/or horizontal integration); campus relocation; take-over by local authorities; and closure. From these findings, a framework to describe the strategic decision-making of Japanese universities that consisted of environmentally determined exogenous factors, endogenous factors of university, and strategic options in managing the contraction of student enrollment was proposed. Finally implications on each strategy were discussed both in domestic and international contexts.

HEALTHCARE

Obstetrics &
Gynecology
Science



Review Article (Invited)

Obstet Gynecol Sci 2021;64(5):407-418
<https://doi.org/10.5468/ogs.21138>
eISSN 2287-8580

After 20 years of low fertility, where are the obstetrician-gynecologists?

Se Jin Lee, MD, Lan Li, PhD, Jong Yun Hwang, MD

Department of Obstetrics and Gynecology, Kangwon National University School of Medicine, Chuncheon, Korea

Korea has entered a stage of low fertility, with a total fertility rate of 1.178 in 2002 and 0.92 in 2019. The low birth rate has led to the closure of obstetric hospitals and clinics from 1,371 maternity health facilities in 2003 to 541 in 2019, which is 39.5% compared to 2003. Since 2011, the Ministry of Health and Welfare has been operating an “Obstetrically Underserved Areas Support Project,” however, a shortage of obstetrician-gynecologists (OB/GYNs) who can participate in labor and delivery is a major problem. In 2019, there were 5,800 OB/GYNs practicing. Of these, 4,225 (72.8%) were working in obstetrics-gynecology hospitals, each responsible for 2,855 fertile women. Their average age was 51.8 years. A total of 2,659 (45.9%) worked in clinics and 3,110 (73.6%) were working in metropolitan districts. Only 124 OB/GYNs (2.9%) worked in vulnerable rural areas. OB/GYNs working in obstetric hospitals were responsible for 113.8 newborns in 2019. Their average age was 50.1 years. Of them, 67.4% were working in hospitals, 74.1% in urban areas, and only 60 specialists (2.3%) were working in rural areas. To establish a safe childbirth environment during an era of low fertility, it is important to have obstetricians in charge of childbirth. The government should establish a comprehensive long-term plan to resolve the shortage of OB/GYNs.

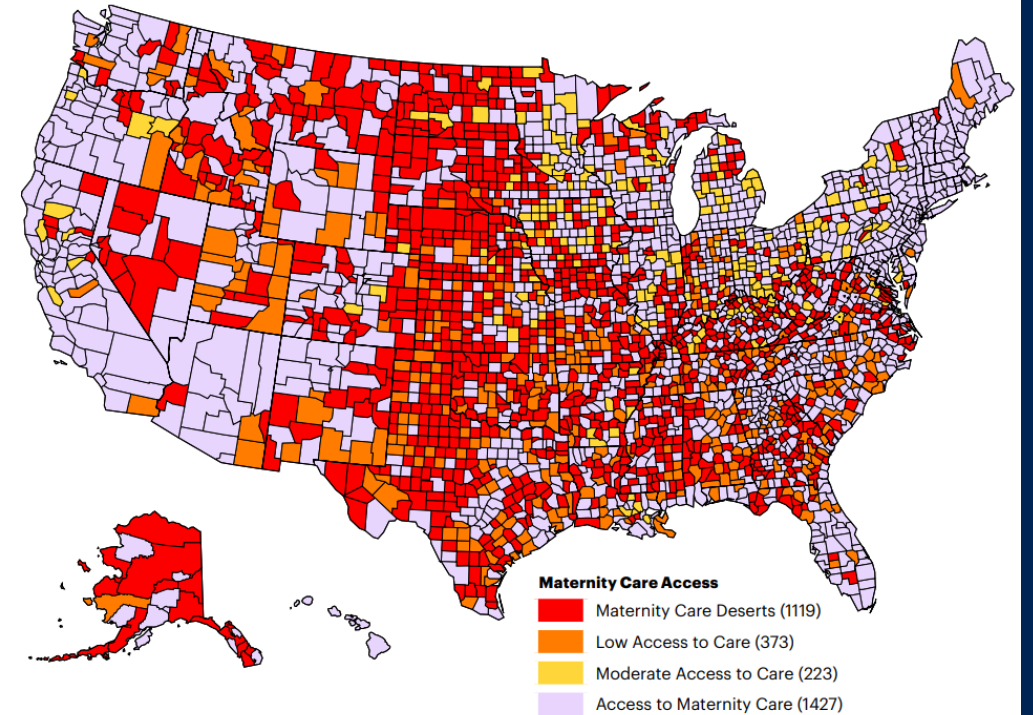
<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8458616/>

HEALTHCARE



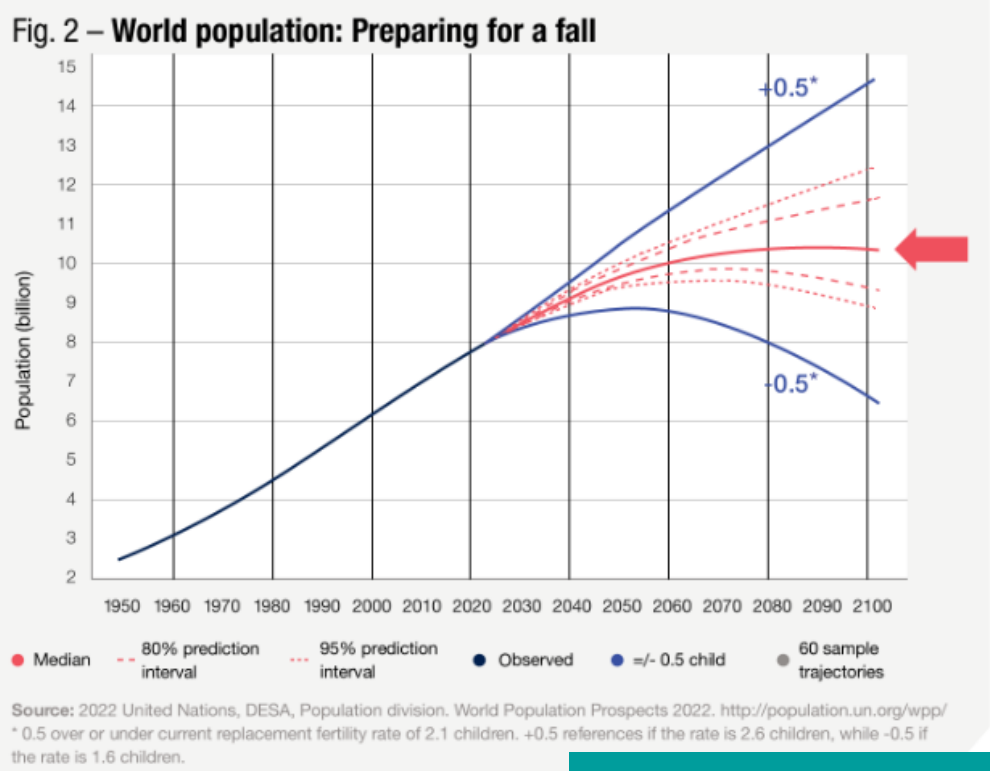
<https://www.nytimes.com/2023/02/26/health/rural-hospitals-pregnancy-childbirth.html>

Figure 1: Maternity Care Deserts, 2020



<https://www.marchofdimes.org/maternity-care-deserts-report#map>

WHAT DOES THE BALANCE SHEET LOOK LIKE?



Good for the environment

Lower unemployment, higher wages

Boost to investment & productivity

Public service “deserts”

Fewer doctors, innovators, consumers...

Increased burden on the young

↘ **36**

Countries are already seeing their population decline

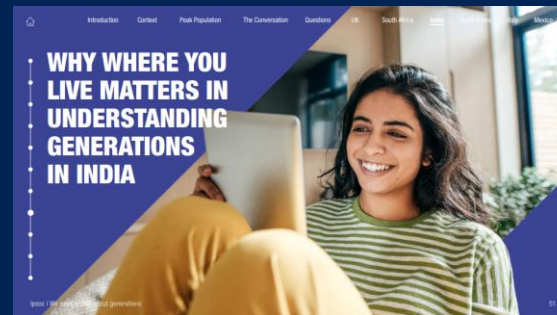
MORE OF THIS IN OUR REPORT



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Understanding generations

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Ipsos | We need to talk about generations



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& Demographic
Realities**

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WHERE AND WHEN MATTERS

**Beyond the Stereotypes: The
Importance of Time and Place**

Geeta R Lobo

80'S EVENTS THAT SHAPED GEN X MINDSETS



GERMANY
1989



US
1980



INDIA
1984

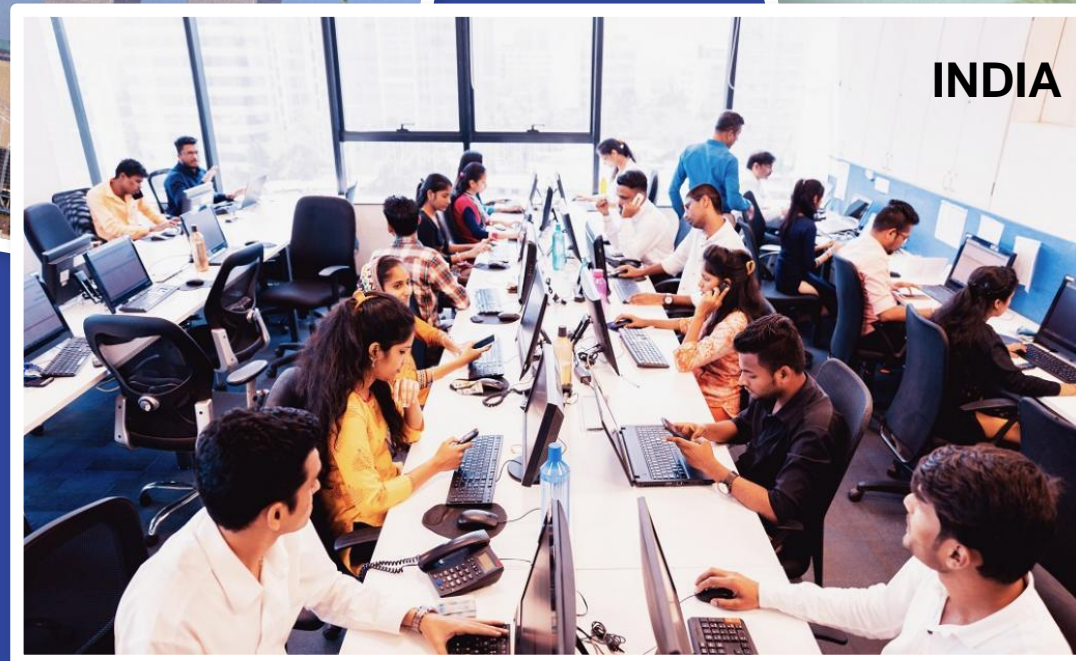


ARGENTINA
1986

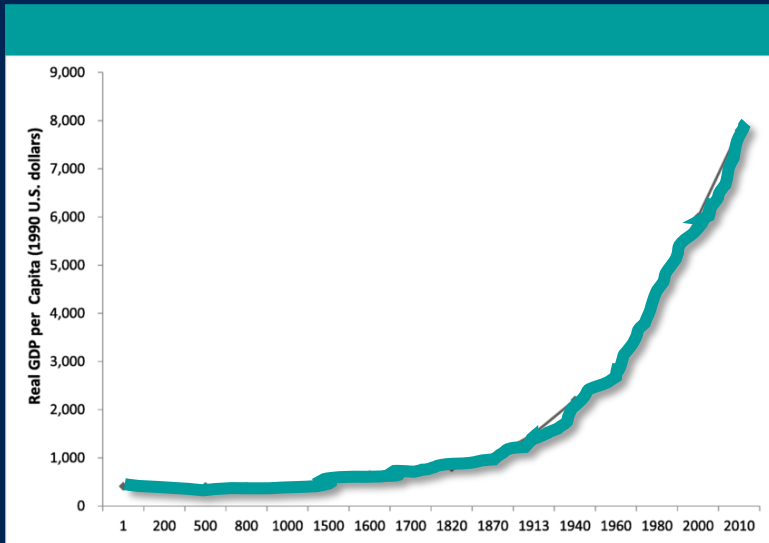


S AFRICA
1990

THE MILLENNIALS ALSO GREW UP VASTLY DIFFERING REALTIES



COMMON THREADS THAT RUN THROUGH THE MOSAIC OF DIFFERING REALITIES



**Affluence
Growth**



**Science
Advancement**



**Information
Access**

IS THERE A **TRUE** GENERATIONAL EFFECT?



GOING BEYOND LIFE-STAGE EFFECTS

1

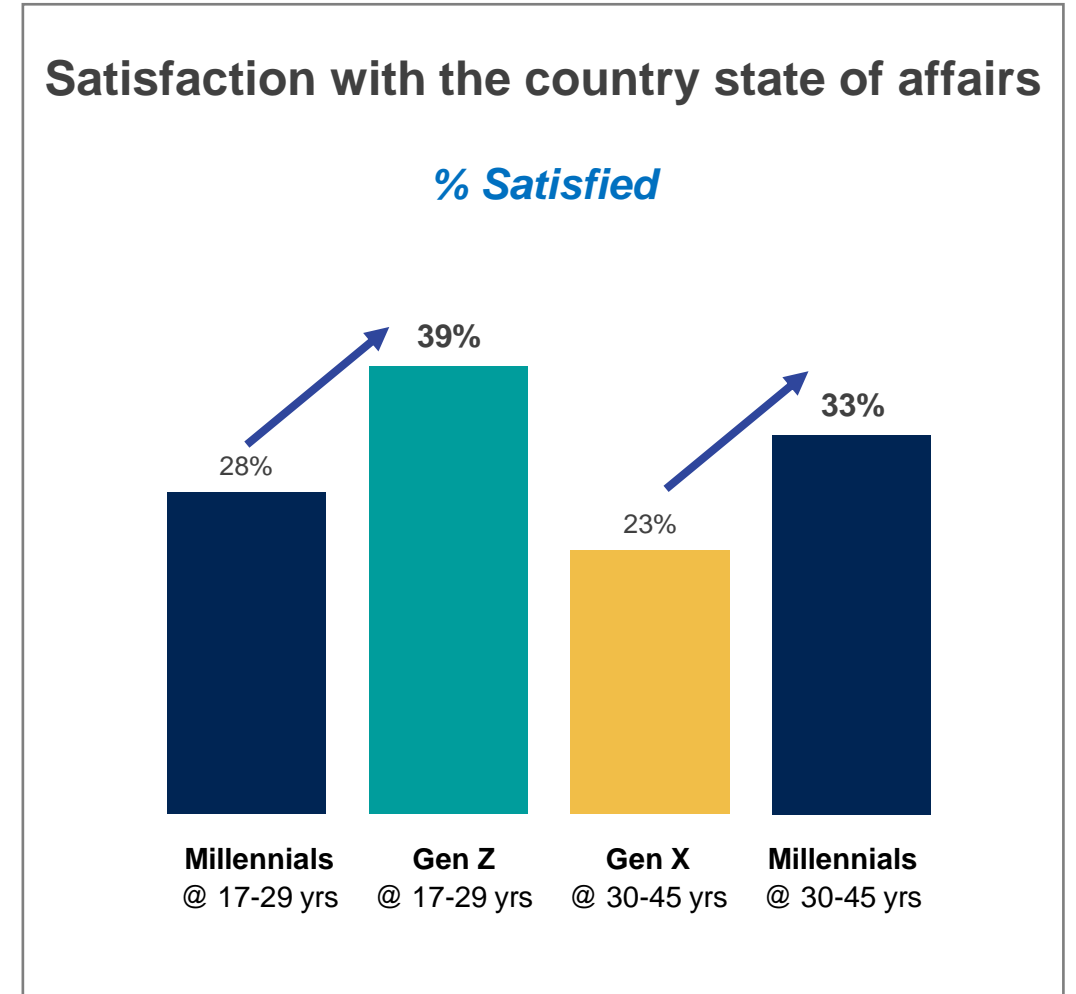
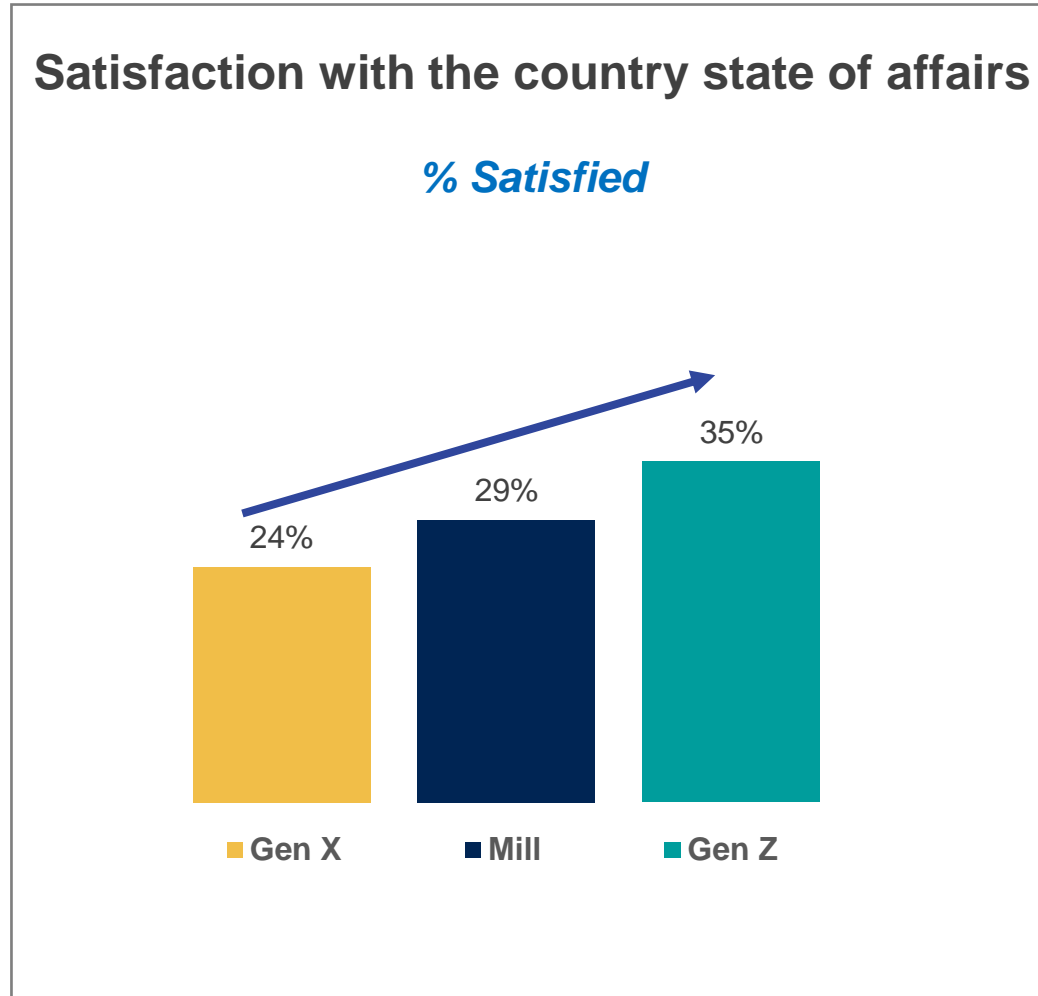
CORE
COHORTS

| Boomers | | Gen X | | Millennials | | Gen Z | |
|---------|------|---------|------|-------------|------|---------|------|
| 1946 | 1964 | 1965 | 1980 | 1981 | 1996 | 1997 | 2012 |
| | | | | | | | |
| 1951-56 | | 1970-75 | | 1986-91 | | 2002-07 | |

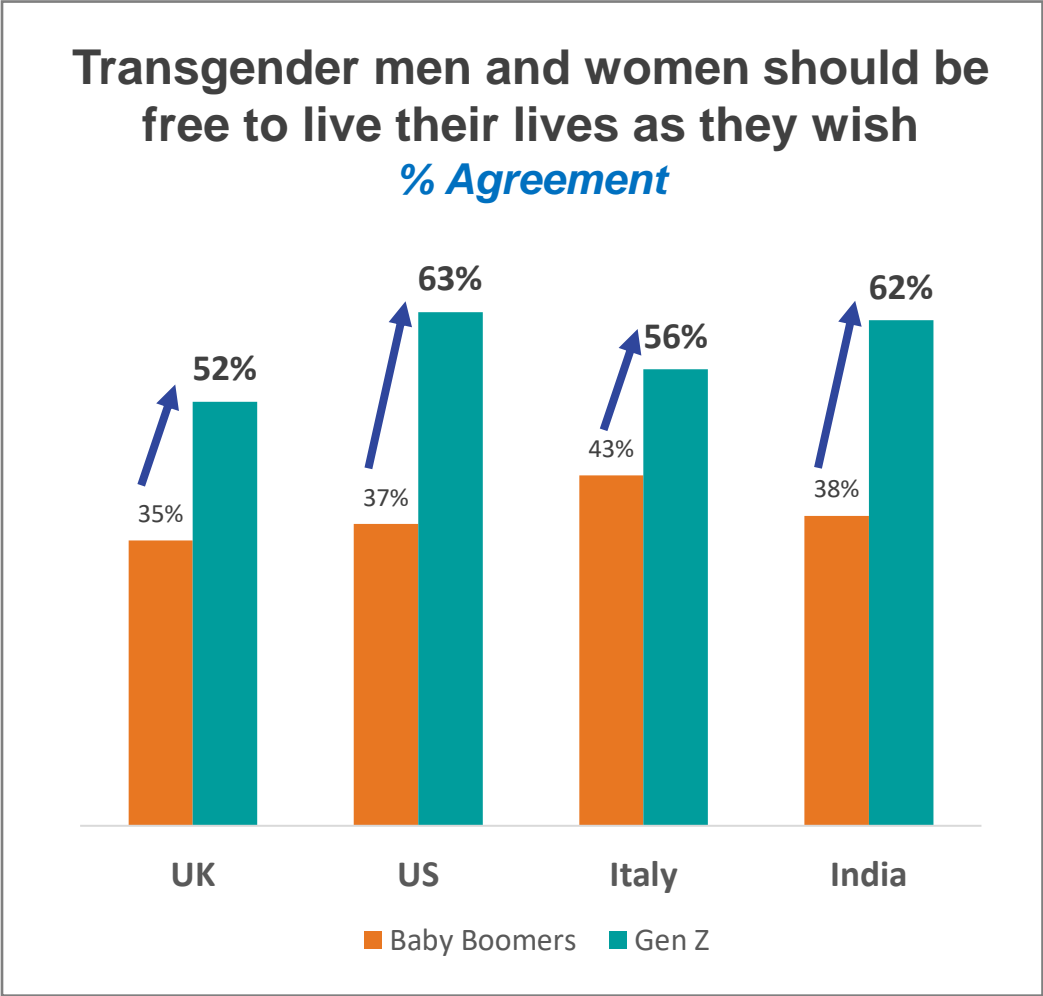
2

COMPARE THEM AT THE SAME LIFESTAGE

GENERATIONAL EFFECTS ARE REAL



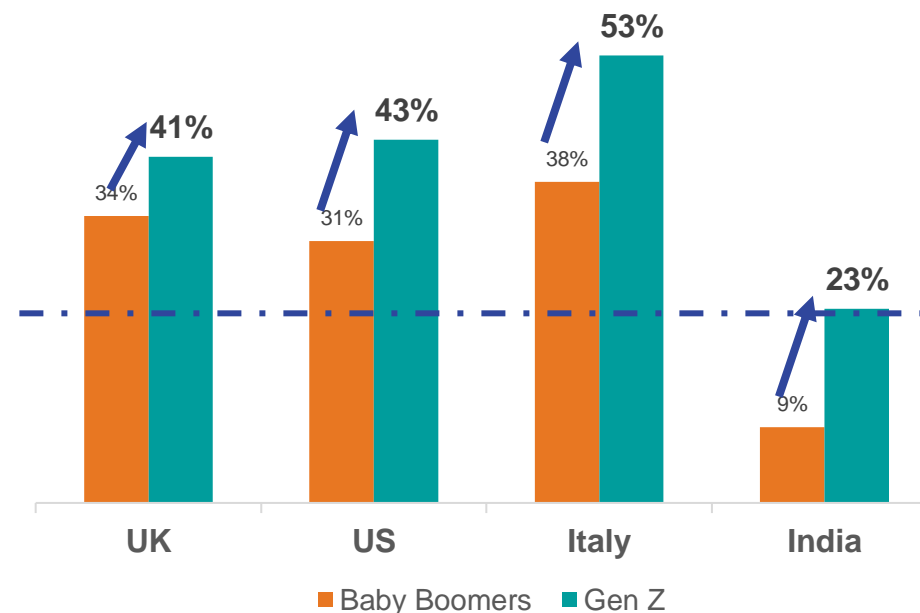
CLEAR SIGNS OF CHANGING VALUES...BUT



...CONTEXT STILL MATTERS MUCH MORE



The role of women in society is to be good mothers and wives
% Disagreement



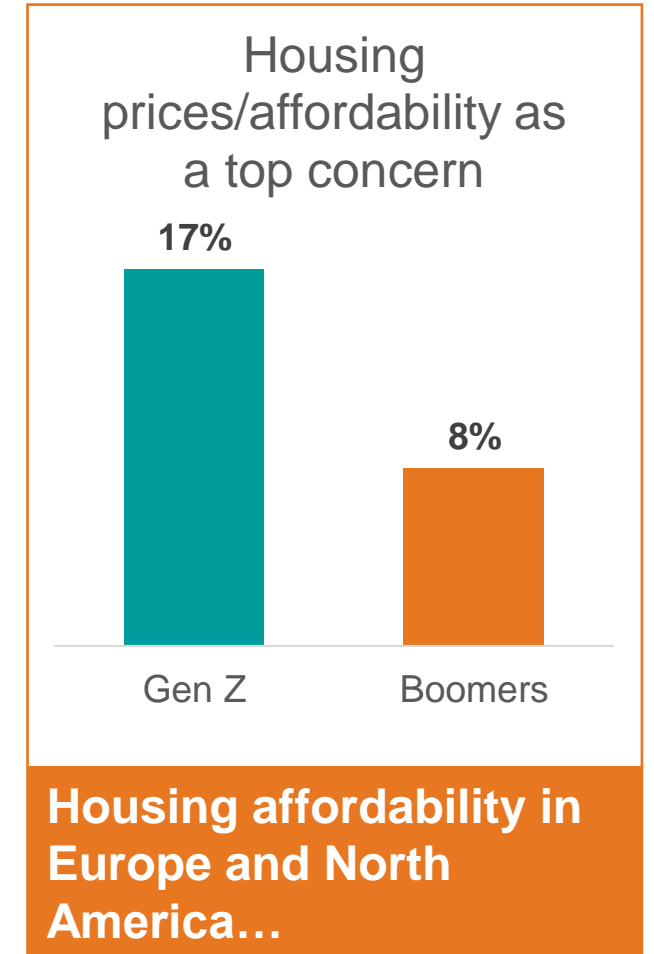
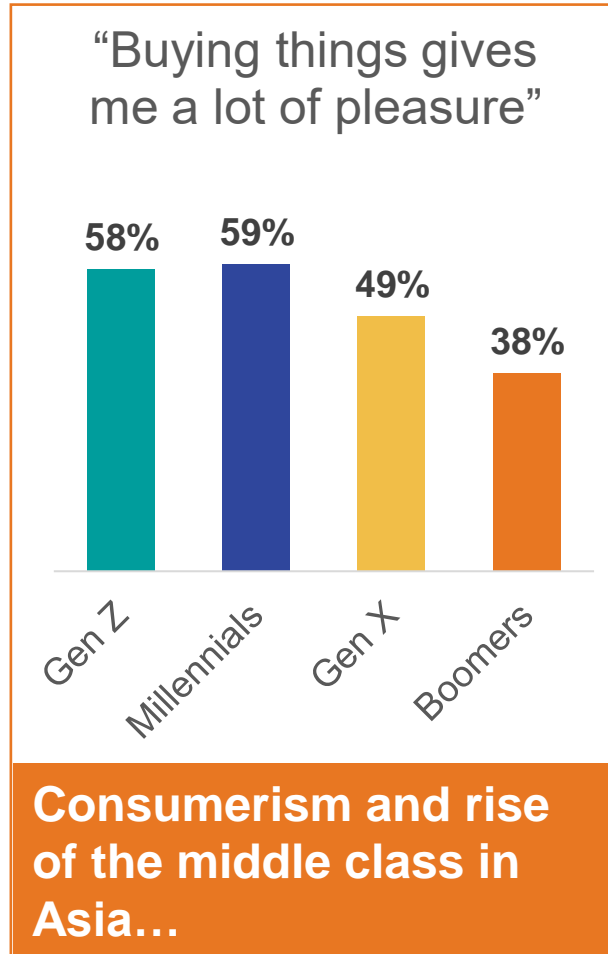
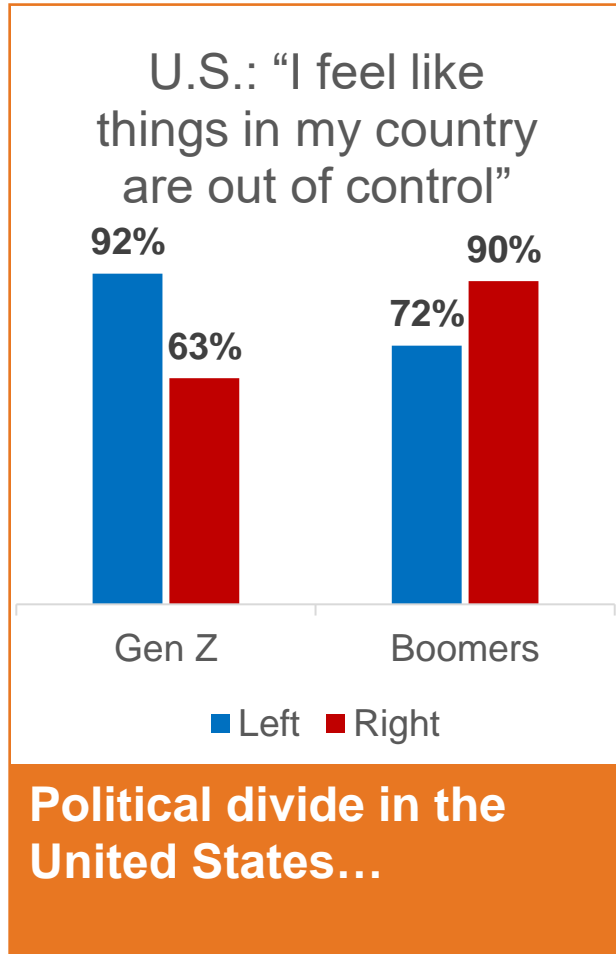
GEN Z THE FIRST TRUE GLOBAL GENERATION?



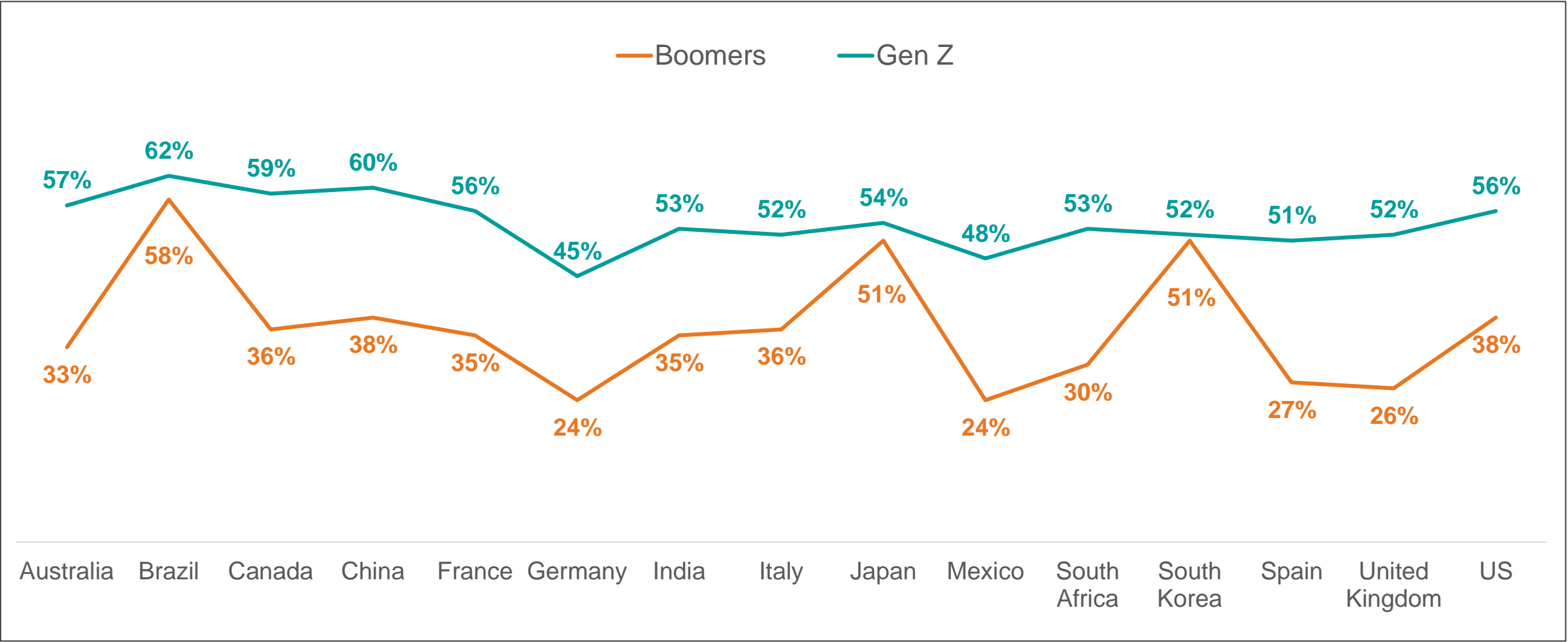
LETTING THE DATA TELL THE STORY

Naumi Haque

GENERATIONAL CONSTRUCTS CAN BE USEFUL...



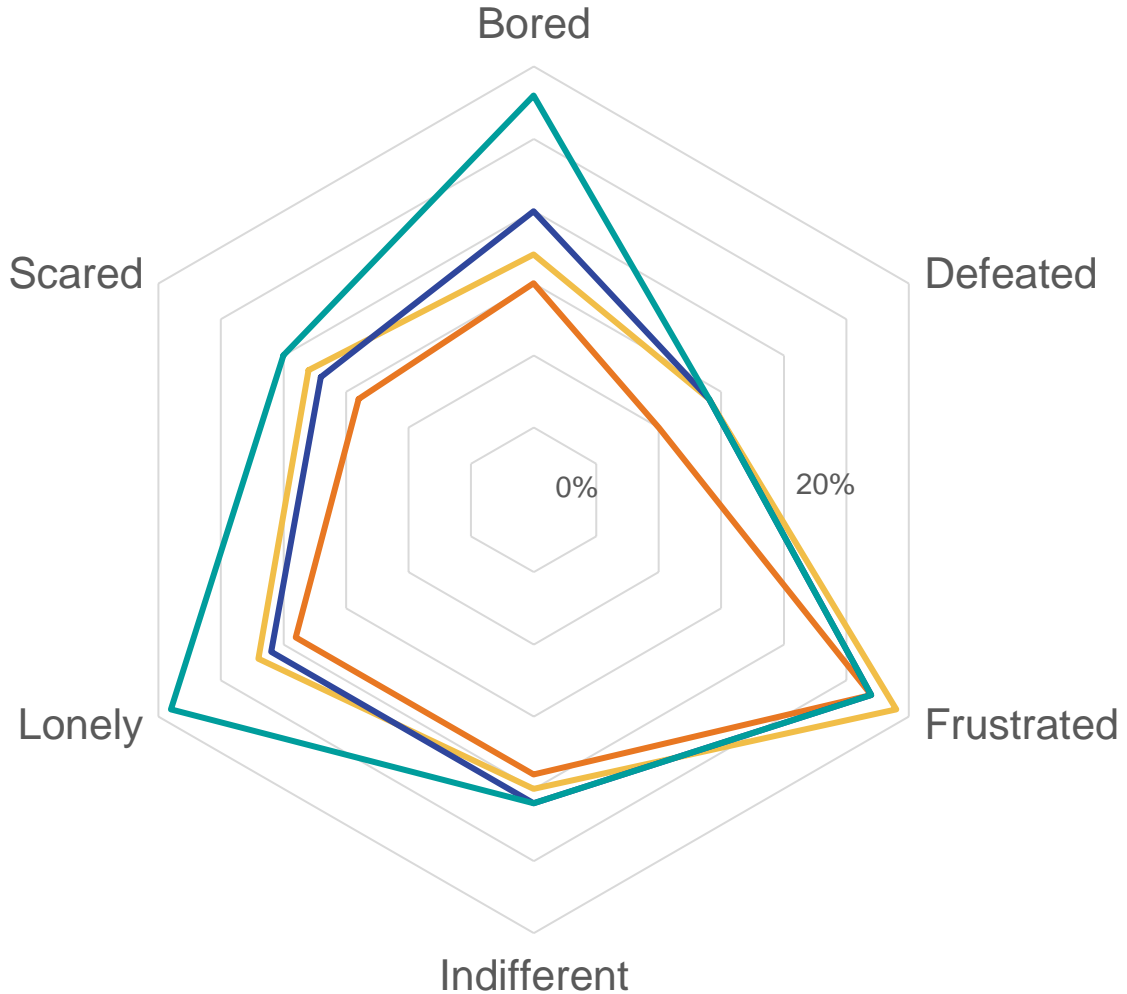
IS GEN Z IS THE FIRST TRULY GLOBAL GENERATION? THEY ARE GLOBALLY **STRESSED**



IS GEN Z IS THE FIRST TRULY GLOBAL GENERATION? THEY ARE GLOBALLY STRESSED, LONELY, AND BORED



Gen Z
Millennials
Gen X
Boomers

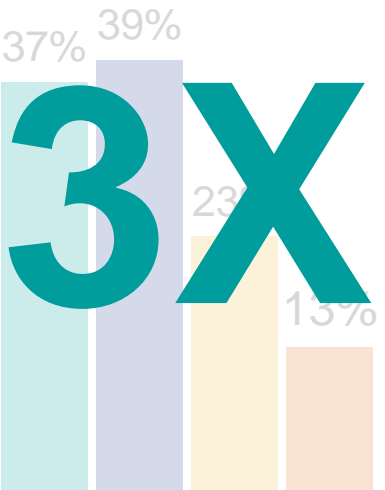


DO YOUNGER GENERATIONS MAKE FRIENDS DIFFERENTLY IN THE 'POST-PANDEMIC WORLD'?

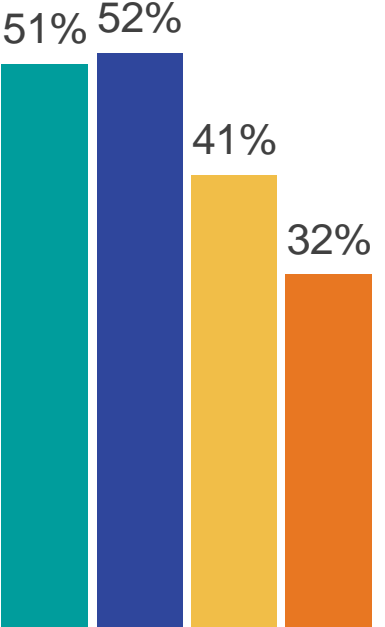
■ Gen Z ■ Millennials ■ Gen X ■ Boomers



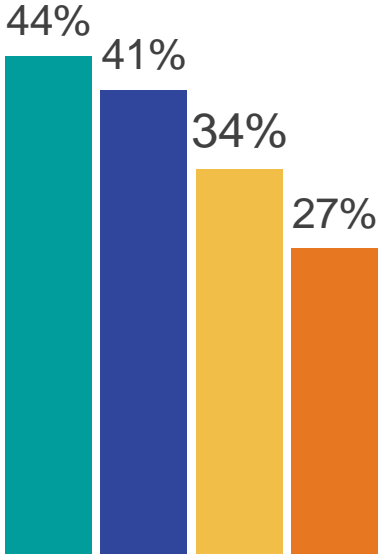
“I spend more time interacting with friends online than in-person”



“I am more likely to form relationships online than in-person”



“I would like to make new friends and expand my social circle”



“I find it more difficult to connect with people now compared to before the pandemic”



ENVIRONMENTAL ACTIVISM IS NOT SYNONYMOUS WITH YOUTH



Disengaged Denialists



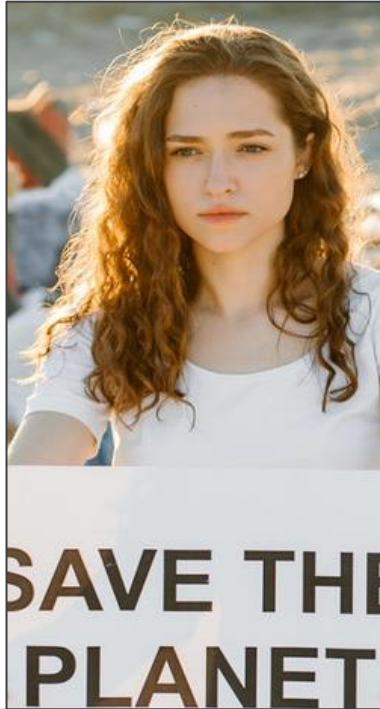
Busy Bystanders



Conflicted Contributors



Pragmatists



Activists

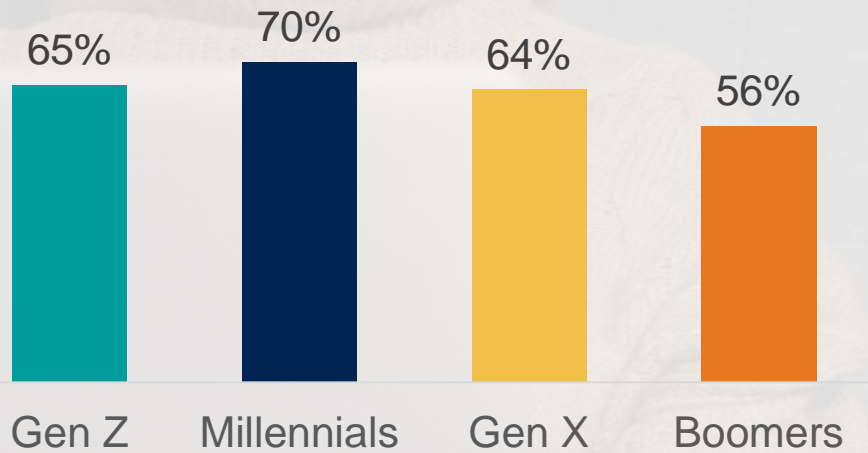
Less Active



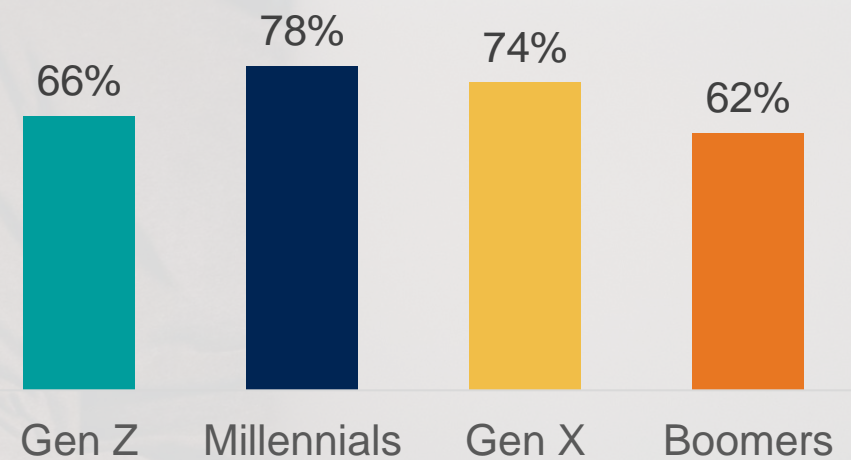
More Active

OMNI-CHANNEL IS OMNI-GENERATIONAL

“I tend to research products online even if I intend to buy it in store”

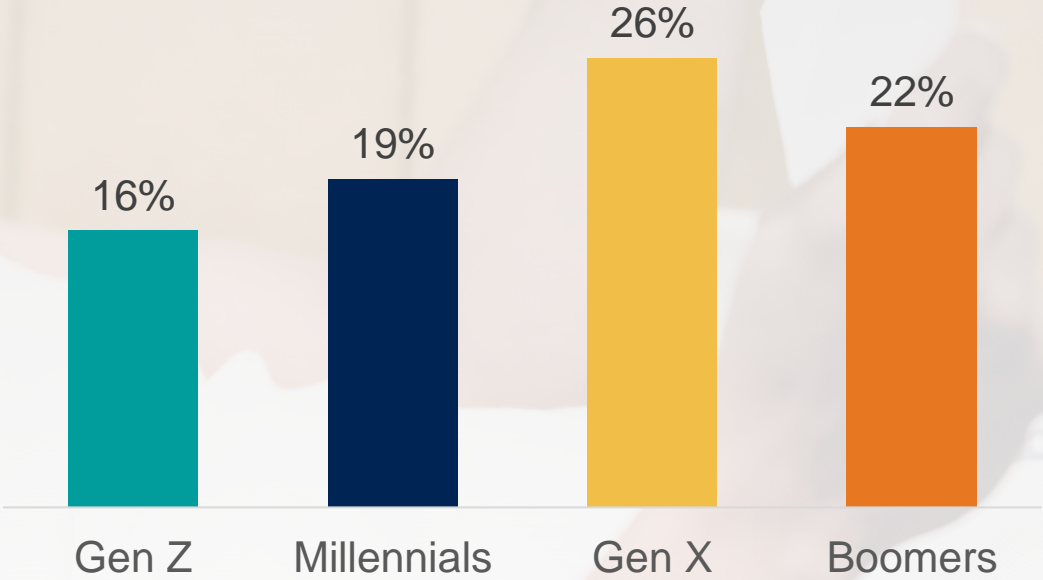


Find it important to be able to buy something online and have it delivered



GEN X IS STUCK IN THE MIDDLE & FINANCIALLY SQUEEZED

“I’m living paycheque-to-paycheque and find it difficult to save anything”





**EMOTIONS &
ATTITUDES**



BEHAVIOURS



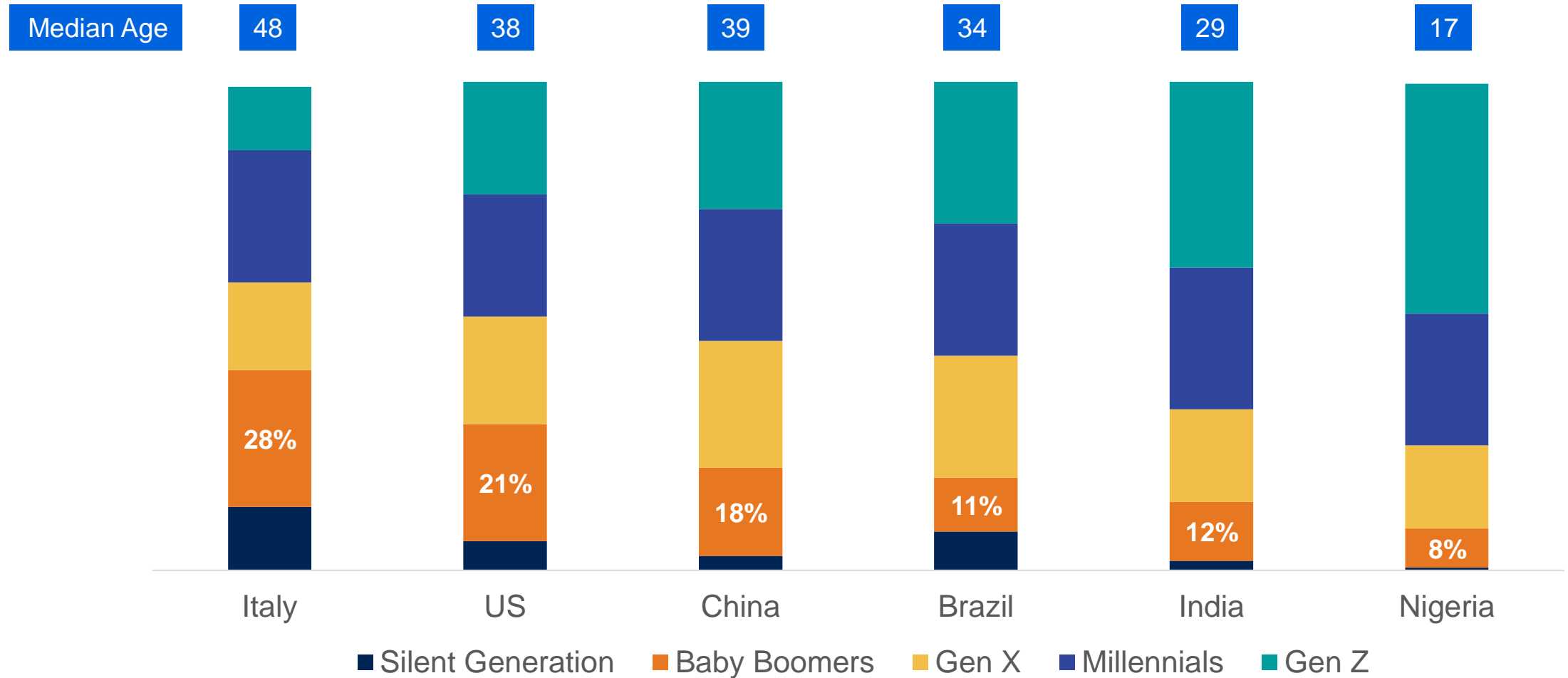
RESOURCES

OH BOOMERS, WHERE ART THOU?

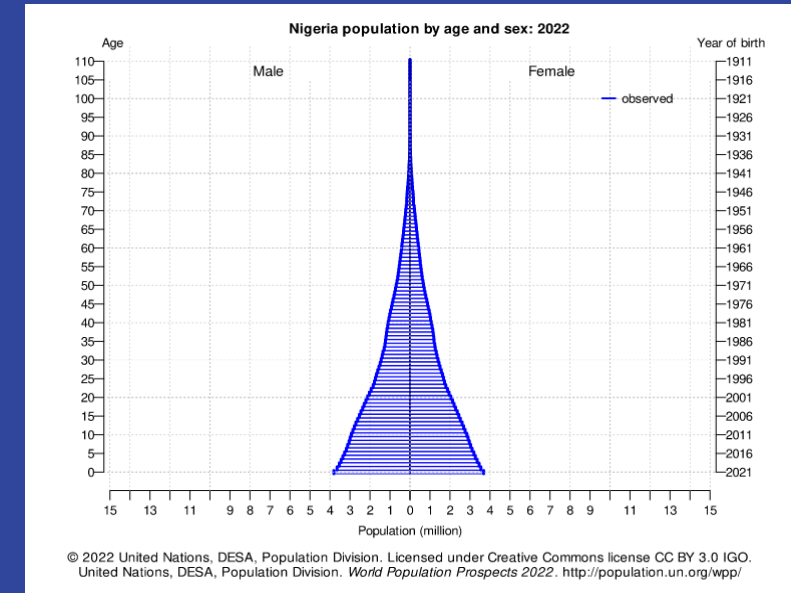
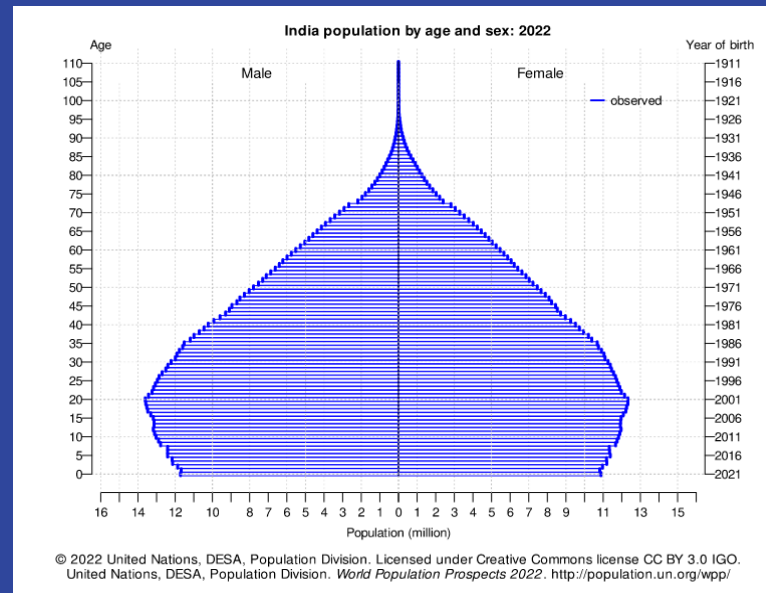
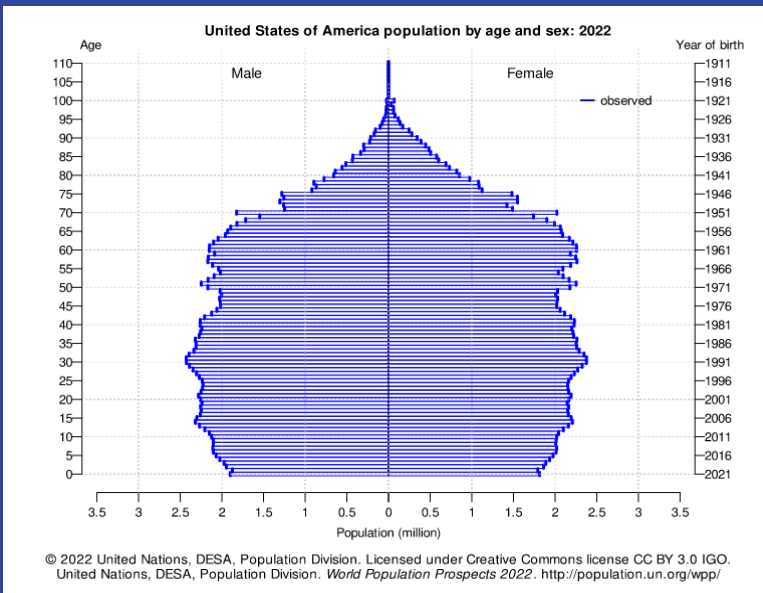
Chris Murphy

Global Boom? If defined as 'born 1946-1964'....

Generations by Country



Population booms have occurred in different places at different times



Baby Boomers or...Mature Adults? Older Adults? Adults of a Certain Age?

MATURE ADULTS

A STORY OF CONTENTMENT, ASSET ACCUMULATION ...AND NEGLECT

Mature Adults are just as likely to feel good physically and mentally as Millennials

“I feel good both physically and mentally” -

Millennials

57%


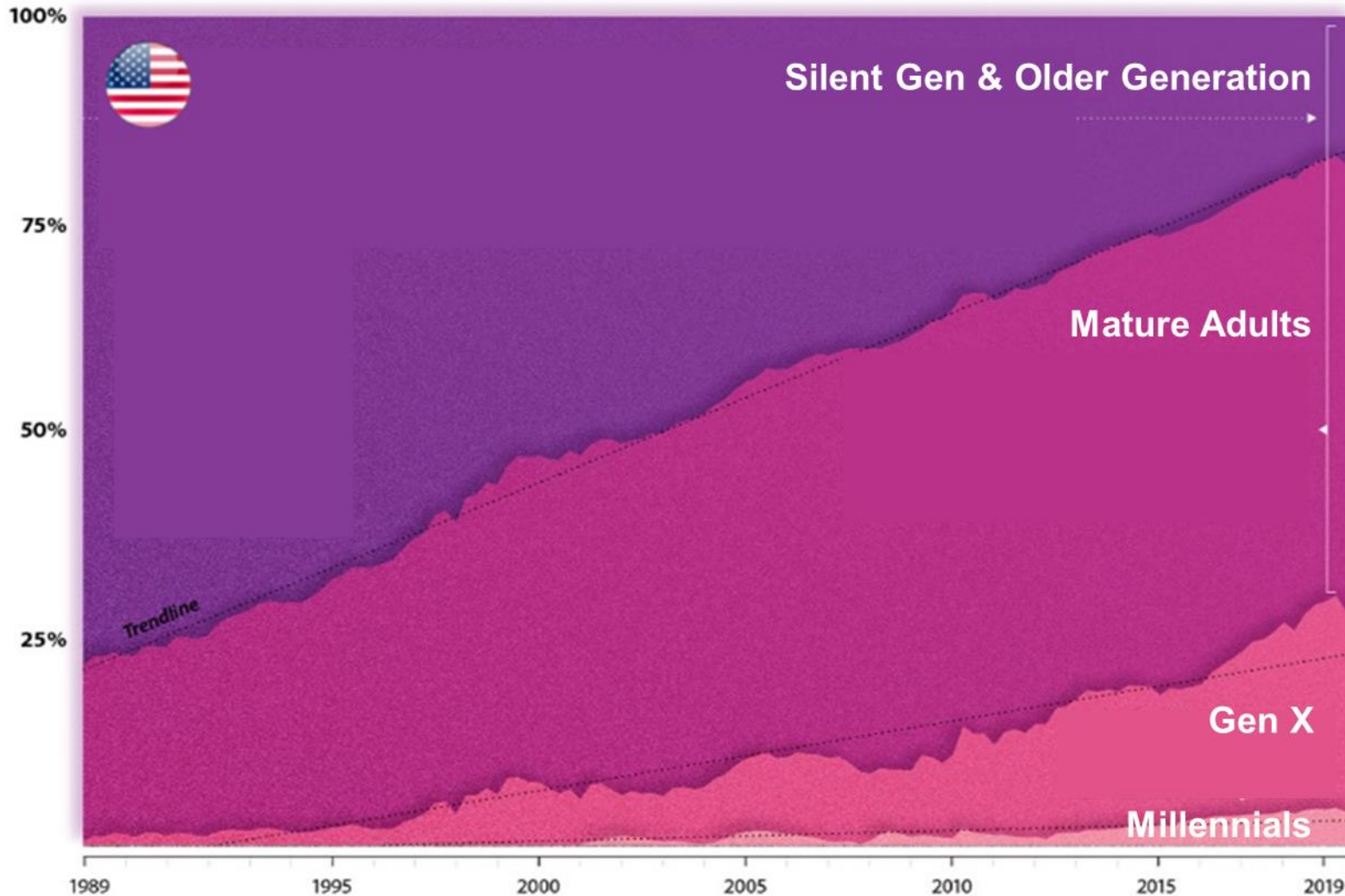
Mature Adults

56%



In the US, Mature Adults are largely in charge

U.S. Share of Household Wealth by Generation



% of Mature Adults Who
Feel Financially Stable

77%

Mature adults and their elders make up...

27% of people



70% of assets



8% of global advertising casting



...and they have noticed

Millennials

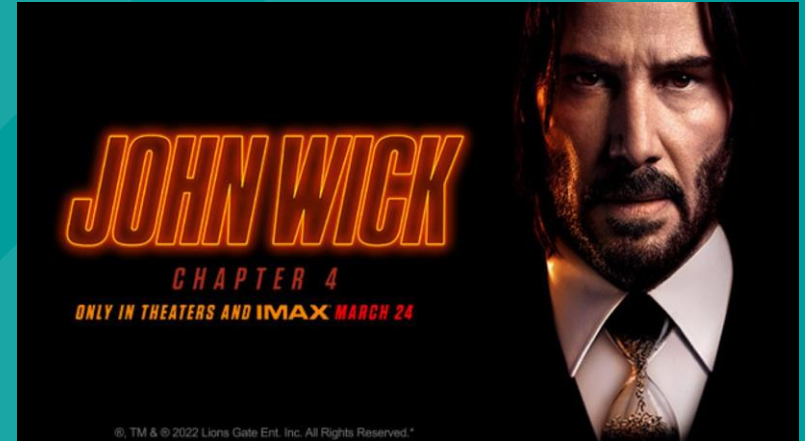
56%

Mature Adults

34%

“My generation is well represented in the ads I see”

80% of Mature Adults agree “it is important to age gracefully”



**ON THE SURFACE, THOSE CASTING RATIOS
SEEM NUTS.**

**THERE ARE SOME NATURAL LIFE STAGE
ELEMENTS AT PLAY HERE.**

Despite their bank balances, Mature Adults are more likely to focus their purchases on simple necessities

Compared to Millennials...

Mature Adults

30% “I usually buy only the things I need”
more likely to say

Mature Adults

20% “I try to keep my life simple as far as possessions are concerned”
more likely to say



More Millennials express pleasure in buying things

“Buying things gives me a lot of pleasure”

Millennials

59%

Mature Adults

38%



Many Millennials aspire to have expensive possessions – while most mature adults don't care

“I admire people who own expensive homes, cars and clothes”

Millennials

46%

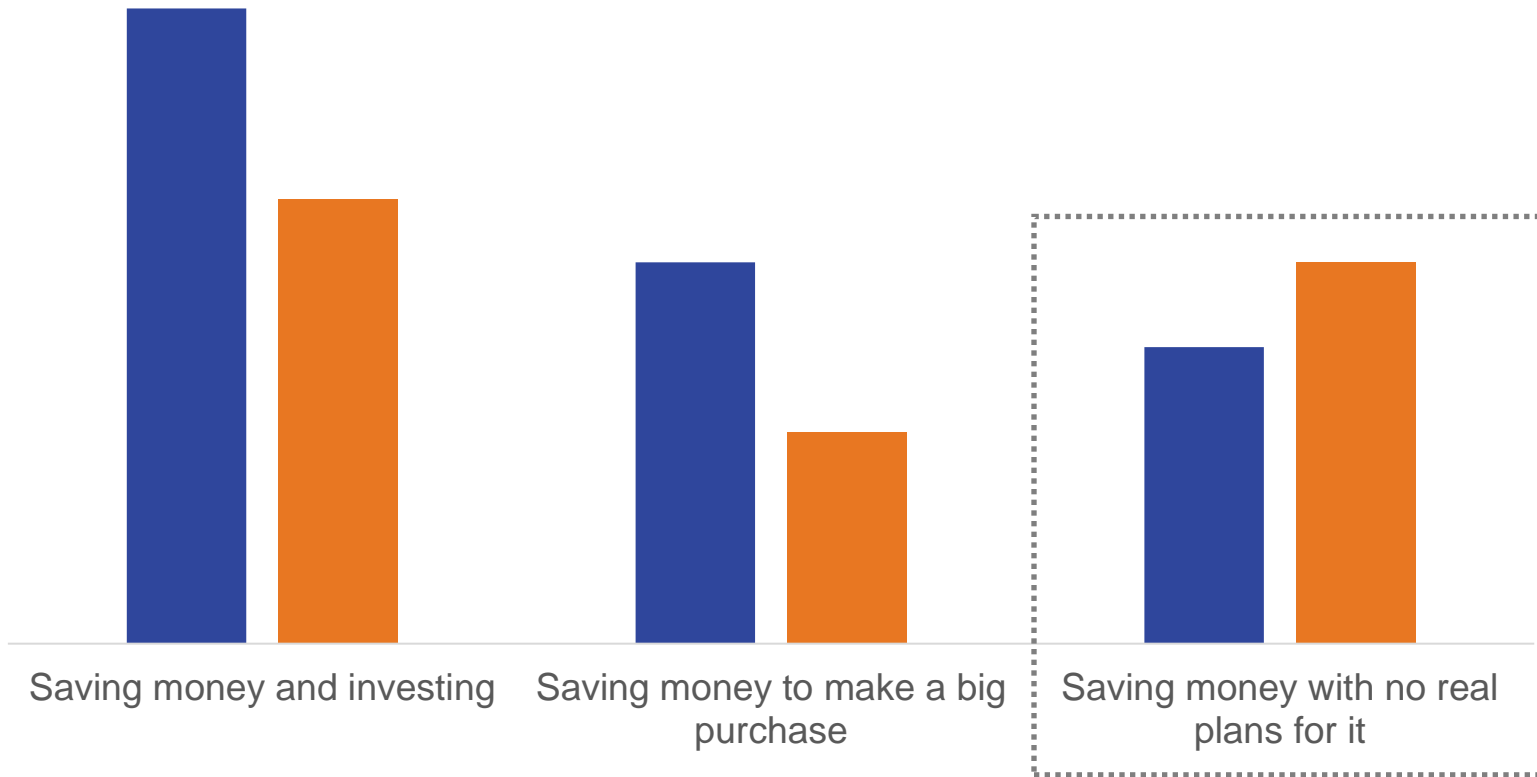
Mature
Adults

14%



... and while Millennials tend to save with a purpose, Mature Adults are more likely to save for no particular reason

■ Millennials ■ Mature Adults



....and with the exception of Home Improvement, we see this play out in actual purchase behavior in numerous sectors

Compared to Mature Adults, Millennials purchased...

1.1x

more Alcohol

1.3x

more Personal Care / Beauty Products

1.5x

more Clothing

2.7x

more Home Electronics



These activities help us understand that a bit more

Compared to Mature Adults, Millennials engaged ...

1.2x

more in going to restaurants

1.4x

more in socializing outside their home

1.8x

more in socializing in a bar or lounge

2.1x

more in going to the movies

2.4x

more in going to sporting events

2.5x

more in going to the gym



ALL OF THIS BRINGS US TO SOME GLOBALLY RELEVANT QUESTIONS

Aging, Hoarding, & Buying

What is the relationship between asset **accumulation** & economic **participation** by generation?

If we combine sector tendencies with aging/population trends and new wealth transfer realities, what does this mean for the **future of consumption**?



“Have you ever tried buying lots of stuff?”



IT'S TIME TO **ENGAGE**

ACCUMULATION...

WILL ONLY GIVE WAY TO **PARTICIPATION...**

THROUGH RELEVANT, EMPATHETIC **STIMULATION**

Challenges for Brand Leaders & Insights

Adjusting our Language

- Are we speaking of generations in broad brush strokes?
- Globally, should we refer to mature adults as Boomers?

Brand Leaders

- How much do we know about different types of mature adults?
- What will it take to engage them & tap into their buying power?

Researchers

- Do we make generational comparisons in a disciplined way?
- At what age do we cap survey participation?

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