

# WHAT THE FUTURE: GENDER

How technology can help us understand each other and ourselves PAGE 10

How gender shapes commercial representation for athletes PAGE 14

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Six tensions that will drive change PAGE 23

**+** Experts including a filmmaker and virtual reality creator, a sports agent, and a researcher discuss what shifts in gender identity, equality and power mean for consumers, brands and media

GAME CHANGERS





# Understanding of gender is fluid. Will definitions be, too?

Imagine it's 2020. Wait, this is *What the Future*, not *What the Past*. But the past provides some needed context, because in March 2020 we dropped our first *What the Future: Gender* issue. And then the world changed.

In early 2020 we released our first [Gender](#) issue. The topic was in the spotlight in the #MeToo era. The world changed first with COVID-19 as the pandemic refocused people's attention. The world changed again in 2022 with the Supreme Court's *Dobbs v. Jackson* decision. That effectively reversed *Roe v. Wade*, redefining reproductive rights and shifted the political landscape in 2022 and beyond.

While our 2020 issue focused on changing definitions of gender, the 2023 issue finds us amid a sizable shift as states pass legislation aimed at solidifying gender as binary that you are born and locked into, at least legally.

That definition is one most agree on today even if the (need for) legislation is a fierce debate. While the long-term vector of gender rights is toward equality and expansion, trends don't always move in a direct line, in one direction.

We acknowledged but perhaps didn't lean hard enough into the potential for this shift, writing then that "In an Ipsos survey of men, 31% said they feel excluded from the gender spectrum discussion. A similar number are actively angered by the conversation. Perhaps because 44% feel they will be attacked if they say what they're thinking."

This is a fraught landscape for brands to navigate in terms of their marketing and their products. Yet one thing was true three years ago, and, if anything, seems more so today. America's youth and young adults have very different ideas than older Americans.

Because the conversation we wrote about then is ongoing, many plausible outcomes and scenarios exist. Of course, there is much more to say about gender than this cultural debate. We get into several of those topics as well.

A close-up, vertical photograph of a young child's face, likely a baby or toddler, sleeping peacefully. The child has dark skin and curly hair. The image is partially obscured by text on the left side.

# 47%

of Americans ages 18-34 say gender is a spectrum, compared to 37% of all Americans.

(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)

This is why we chose our cover image. It's unclear what sex the child is. There are no blue or pink clues. Will our cover baby grow up in a world with a fluid or binary definition of gender?

How will this child express itself in fashion? Growing up, will this child feel represented and reflected in media and in advertising? How will this child represent itself in an era where social media both shapes and reflects our identities?

## In essence, every foresight project is an exercise in asking what kind of worlds might our children grow up in.

Today, a sizable group think gender is a fluid construct, not determined by your biology — even if a very small proportion identify their gender fluidly. A majority think gender is a binary you're born into. Most people think gender stereotypes in media are a problem, as is objectification/sexualization of women. Few think these problems will get better. But as the tensions driving the future shift, will things improve, or worsen?

Most think that their gender is important to their work, life and relationships. Cashing in on identities can potentially level the playing field for athletes and influencers. But there are often trade-offs to be made in how people of different genders portray themselves and the reactions they get from others.

Gender equality for women athletes and women's sports are just part of this conversation. So is the opportunity for trans athletes to compete, which is an outsized conversation today given how few people it directly affects. But it does affect something many people care about: sports.

And where do men fit into all this discussion? It's a question men seem to be having as hard a time answering as anyone. Some are allies in efforts to promote equality. Some think we have reached equality. Some men think they are now the oppressed gender. And as the historical gender roles have changed in the home, workplace and in the entertainment and political spheres, men are struggling to understand their place.

For brands, every case is unique. Every step features potential backlash, and potential backlashes to the backlash. Backlash whiplash, if you will. Yet keep stepping brands must, because even if you want the future to look more like the past, it won't be *in the past*. The future is always in the future, and it could look something like ... everything we talk about in this issue.



*Matt Carmichael is editor of What the Future and head of the Ipsos Trends & Foresight Lab.*

A close-up, high-angle photograph of a young Black child's face. The child is sleeping peacefully with their eyes closed. The skin is a rich brown tone, and the hair is dark and curly. The lighting is soft, highlighting the contours of the face.

# 71%

of Republicans agree that gender being described as more than two genders or something outside of male and female is changing too quickly. Just 29% of Democrats agree.

(Source: Ipsos Consumer Tracker conducted May 9 -10, 2023, among 1,117 U.S. adults.)

# Contents



## 1. Territory map

The future of gender will be driven by forces coming from six directions. We map them out.

## 2. By the numbers

We start with the state of gender today through Ipsos data about how Americans and global citizens feel about gender identity and equality.

## 3. The lay of the land

We talk with experts including a filmmaker and virtual reality creator, a sports agent, an economist and a researcher of women and girls in media and marketing about changing expectations about gender identity, equality and power and what that could mean for consumers, brands and media.

## 4. Tensions

Is gender binary or a spectrum? Has the U.S. reached gender equality or not? Would the world be better off or worse off if people followed traditional gender roles? How people lean on these opinions today could shape what we watch, buy and relate to in the future.

## 5. Future destinations

Based on our data and interviews with experts, we plot out a potential future — a plausible port in our future journey. Then, thinking of our tensions, we consider what happens if one of them shifts. We use that as a waypoint to ponder how that might send us to a different scenario, plausible port two. Then, we outline the Future Jobs to Be Done, giving you a new way to think about the future. Finally, we explore the optimism gap between what we hope to see in the future versus what we expect to see in the future.

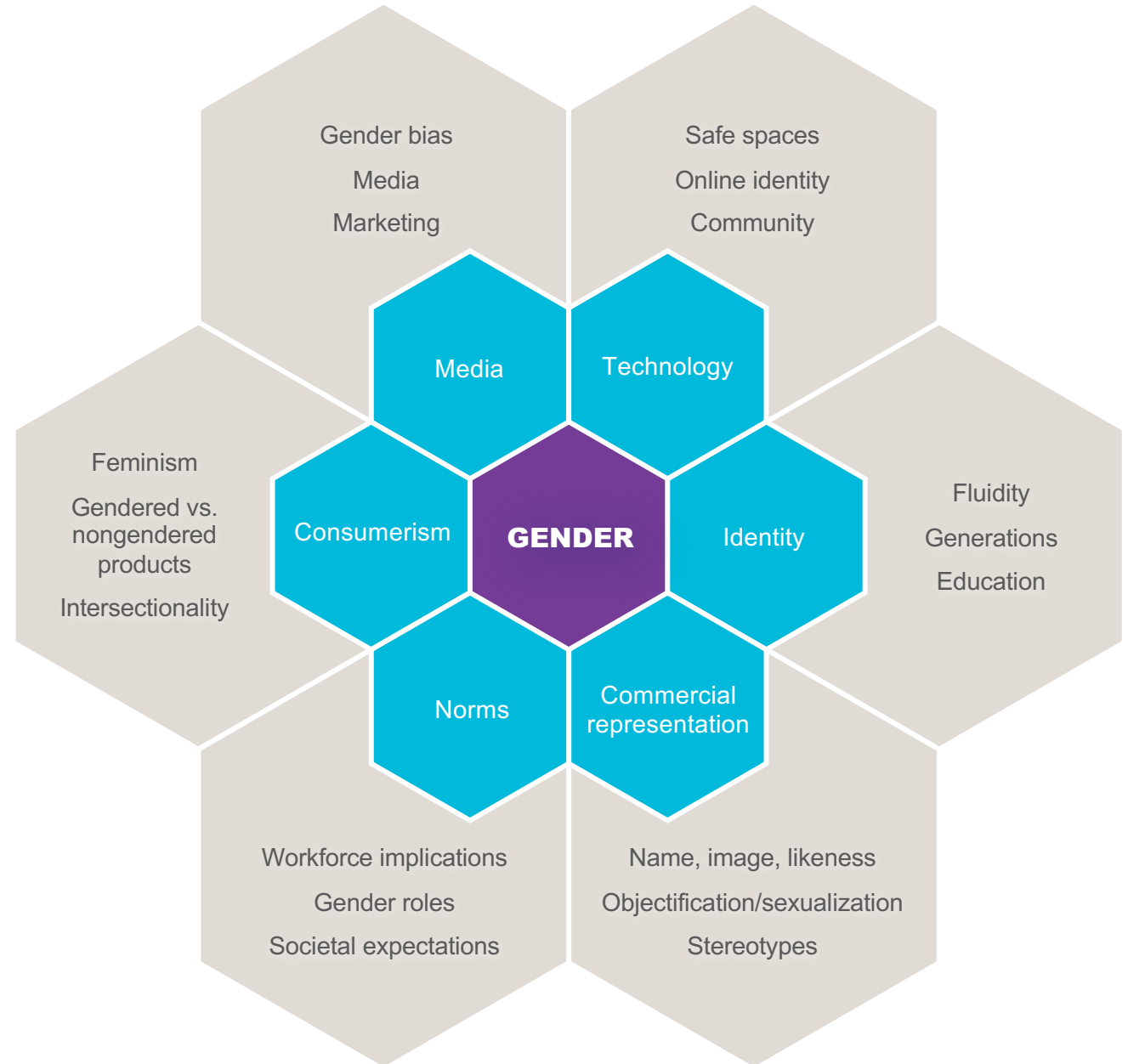
## 6. Appendix

Want more? We show our work, including the full text of our expert interviews, plus our contributors and links to what we're reading today that has us thinking about tomorrow.



# Territory: What will drive the future of gender?

The future of gender will be shaped by generational differences in definitions, fluidity, equality and power, and how gender is represented in media, marketing, online communities and society. The ways brands leverage or respond to changes in technology and media could help pave new opportunities or limits for how and where they connect with people and how people see and express themselves.

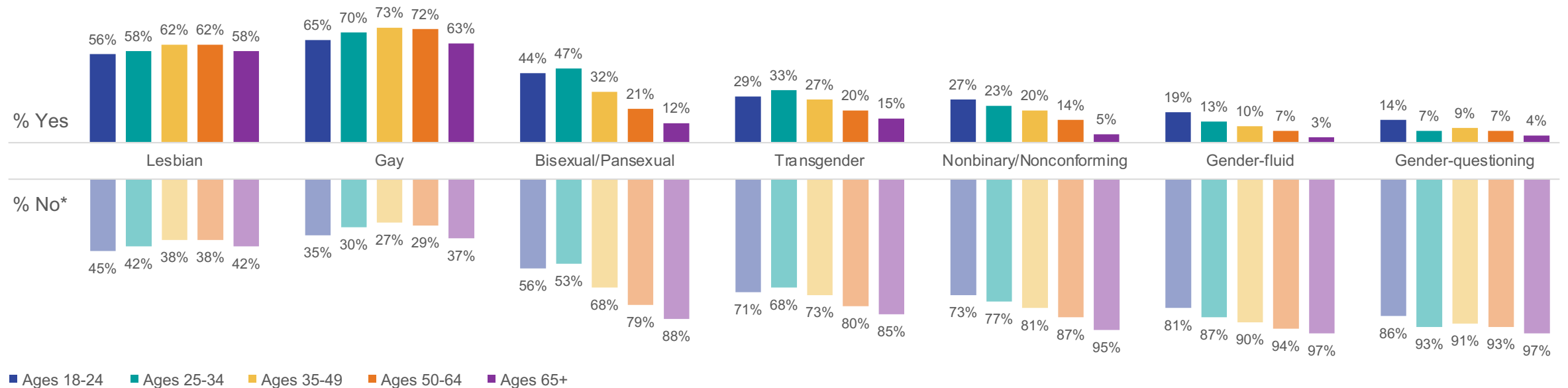


# Gender by the numbers

How awareness shapes understanding of gender differences

Few Americans know someone who identifies their gender outside of the binary male or female

Q. Do you know someone in your life who is ... (% Selected)



(Source: Ipsos Knowledge Panel survey conducted Apr. 14-16, 2023, among 1,029 U.S. adults. \*No includes no, not sure and refused responses.)

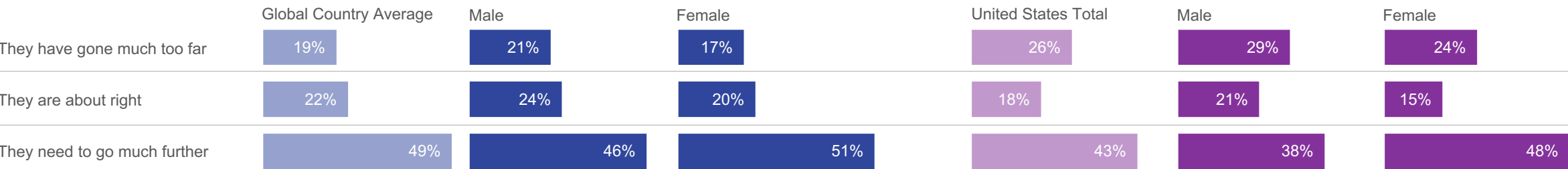


# Gender by the numbers

How far away we are from gender equality and who’s responsible for taking action

Fewer Americans than the global average say efforts to promote equality need to go further

Q. Thinking about attempts to promote equality for all groups of people in [my country], do you think that, overall: (% Total)



(Source: Ipsos Global Advisor survey conducted Feb. 17-Mar. 3, 2023, among 26,259 adults in 33 countries.)

Americans most expect the government or themselves to act to reduce inequality in the U.S.

Q. Which of these, if anyone, do you think should be primarily responsible for taking action to try to reduce inequality in [the U.S.] (% Selected)



# Emerging global trends



## What it will take to keep gender equality progress going

**There are signs that the progress on gender equality between women and men is in danger of stalling.**

Just over half of people globally and one in three Americans say things have gone far enough in their country to give women equal rights with men, according to an Ipsos Global Advisor survey in 32 countries. The survey found that nearly six in ten men think men are asked to do too much to support equality. This sentiment has edged up since 2019. More than half of men say efforts to promote women's equality are causing discrimination against men. This is where the movement is most at risk, as it will take men's continued allyship to reach gender parity, say nearly seven in ten women globally.

Yet there are also signals of hope. Six in ten men and women agree equally that they can take actions to promote gender equality. More than half agree that gender equality benefits both women *and* men. These points are key for keeping men in the game.

People globally have mixed feelings about gender equality

Q. Below is a list of statements. For each, please indicate whether you strongly disagree, somewhat disagree, somewhat agree, or strongly agree. (% Agree)

**64%**

Women won't achieve equality in [my country] unless men take actions to support women's rights too

**62%**

There are actions I can take to help promote equality between men and women

**55%**

Equality between men and women will be achieved in my lifetime

**53%**

Men are being expected to do too much to support equality

**51%**

When it comes to giving women equal rights with men, things have gone far enough in my country

**48%**

We have gone so far in promoting women's equality that we are discriminating against men

**41%**

I define myself as a feminist

**25%**

A man who stays home to look after his children is less of a man

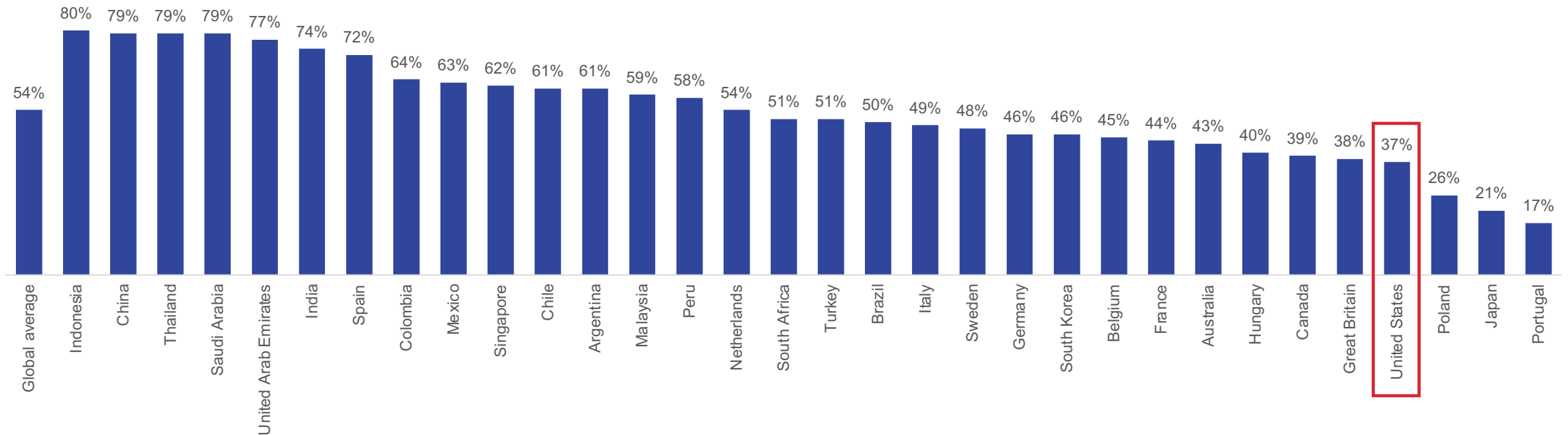
(Source: Ipsos International Women's Day survey, conducted Dec. 22, 2022-Jan. 6, 2023, among 22,508 adults across 32 countries.)



# A big crack in the movement toward gender equality

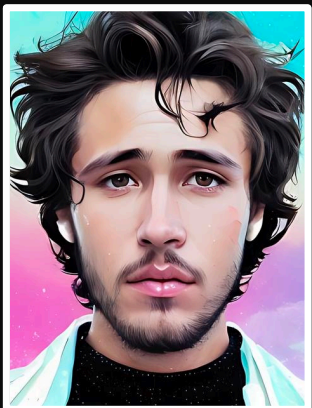
## Many globally have had enough with equal rights for women

Q. Please indicate whether you strongly disagree, somewhat disagree, somewhat agree, or strongly agree [with this statement]. When it comes to giving women equal rights with men, things have gone far enough in my country. (% Agree)



(Source: Ipsos International Women's Day survey, conducted Dec. 22, 2022-Jan. 6, 2023, among 22,508 adults across 32 countries.)

# How technology can help us understand each other and ourselves



Cameron Kostopoulos

Filmmaker, Creator, Body of Mine VR

When Cameron Kostopoulos' family learned he is gay, they essentially cut ties. That painful journey made him wonder if he could use his skills as a filmmaker to create an experience that would help people understand what it feels like to be someone with a different gender identity. Using the Unreal Engine gaming engine and special hardware for body, face, eye and hand tracking, he created the award-winning Body of Mine immersive VR experience.

60%

of men versus 51% of women say their gender identity is important to their relationship to institutions like banks, educational and religious institutions.

(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)



Body of Mine uses cutting-edge immersive storytelling tools to create an experience where you literally see yourself in someone else's skin and hear interviews with people with different identities about *their* experience. Kostopoulos' goal is to move beyond empathy to understanding. That wouldn't work in the same way with traditional film.

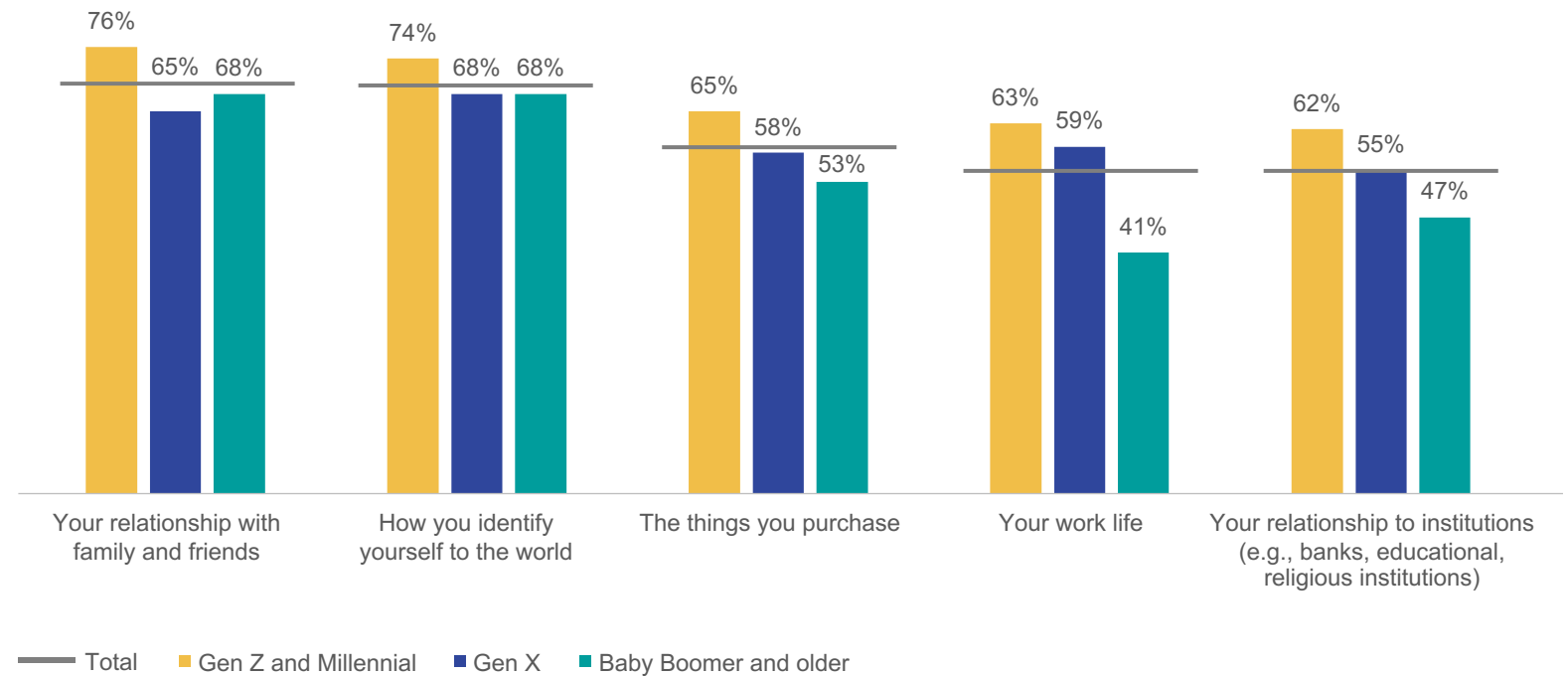
**“Seeing yourself in the body of a gender you don’t identify with makes you wonder ‘What if I was born with a different gender?’ That puts you in a more accepting state of mind to hear these stories.”**

He's not naïve. He understands not everyone will take part in something like this and that not everyone will be moved by it. But he thinks even those who are uncomfortable with the experience might find that the experience makes them ultimately more comfortable with their own identity as well as other people's.

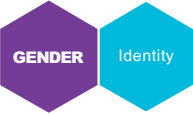
[Read the full Q&A on page 35.](#)

## Younger Americans say their gender identity matters more across relationships

Q. How important, if at all, is your gender identity to each of the following? (% Important)



(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)



# How behavioral science can boost understanding about gender

**The discourse around transgender people is divisive. How can we turn down the temperature? Building on prior research, new Ipsos research shows when people take transgender people's perspectives into account, it can result in more accepting attitudes toward gender-fluidity.**

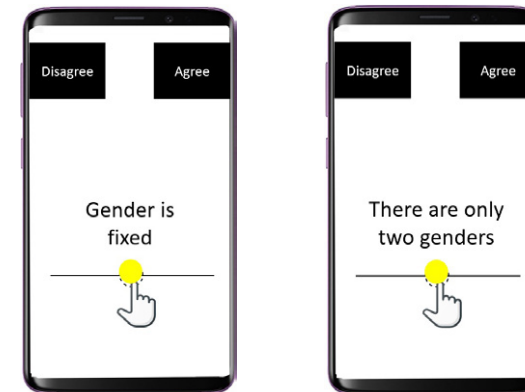
By using its proprietary tool called Nonconscious Process Tracing, Ipsos measured how much conflict people feel in their opinions about gender. The study showed that when people with negative views about transgender people were given statements that offered an empathetic view, it created more conflict in their gender beliefs than when they simply read about transgender people's behaviors, says Luke Nowlan, Ph.D, a director in Ipsos' Behavioral Science Center.

**“The more conflict people feel in their choice, the more likely they are to change their mind.”**

For marketers, policy makers and others who are discussing gender issues, using messages that encourage others to put themselves into trans people's perspective may broaden their beliefs about gender-fluidity.

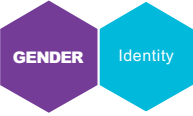
## How empathy can change perspectives

People were asked to quickly agree or disagree with a series of statements on gender. Among those who agreed that gender is fixed, those who had received empathetic statements about trans individuals had a 12% increase in internal conflict with their agreement; that is, they became less convicted in their belief.



(Source: Ipsos BSC Gender Study conducted Apr. 25-27, 2023, among 1,020 U.S. adults.)



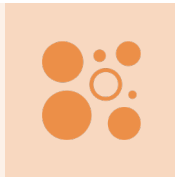


# How we think about generational attitudes

When we think about generational shifts, it's helpful to think about them in three ways: cohort, life stage and period. For research on Gen Z and younger people, gender-fluidity is a fascinating topic because we likely won't know for decades what effect we will be looking at, says Matt Carmichael, head of the Ipsos Trends & Foresight Lab.

**“There are several plausible scenarios, and each will take ongoing research to understand.”**

The important part for marketers is to realize that each of these generational responses is possible and each needs to be considered for planning purposes for next quarter, next year and further into the future.



## Cohort

### EFFECTS

A cohort has different views and these stay different over time: Will today's younger generations always view gender differently from other generations?



## Life stage

### EFFECTS

People's attitudes change as they age — attitudes are shifted by life stages or events. For example, part of coming-of-age becomes declaring your pronouns for this and coming generations.



## Period

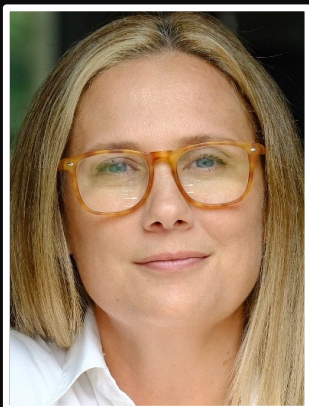
### EFFECTS

Attitudes of all cohorts change in a similar way over the same period: Legislation forces the binary as the legal definition of gender and the fluidity conversation retreats from public discourse.

# How gender shapes commercial representation for athletes

GENDER

Commercial representation



Erin Kane

Vice president, women's sports, Excel Sports Management

In the nearly two years since the NCAA adopted new rules allowing college athletes to profit from their name, image and likeness (NIL), the floodgates have opened for commercial representation of student athletes, along with the hopes for gender equality in sports. While the rule shift gives women athletes more opportunities to catch up to their male counterparts, veteran sports agent Erin Kane says it could take a while to close the profitability gender gap.

76%

of U.S. adults say gender stereotypes in the media are a problem.

(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)



Already, NIL has made millionaires out of a slew of college athletes. Kane represents some of the world’s top college moneymakers, including University of South Carolina basketball’s Zia Cooke and Chloe Kitts. But Kane is unsure how long it could take to close the gender pay gap in sports.

**“Men’s sports have a 75- to a 100-year head start. So, closing that gap is certainly a challenge. There will be individual female athletes that are standouts that are able to do that. But in general, it’s going to take time.”**

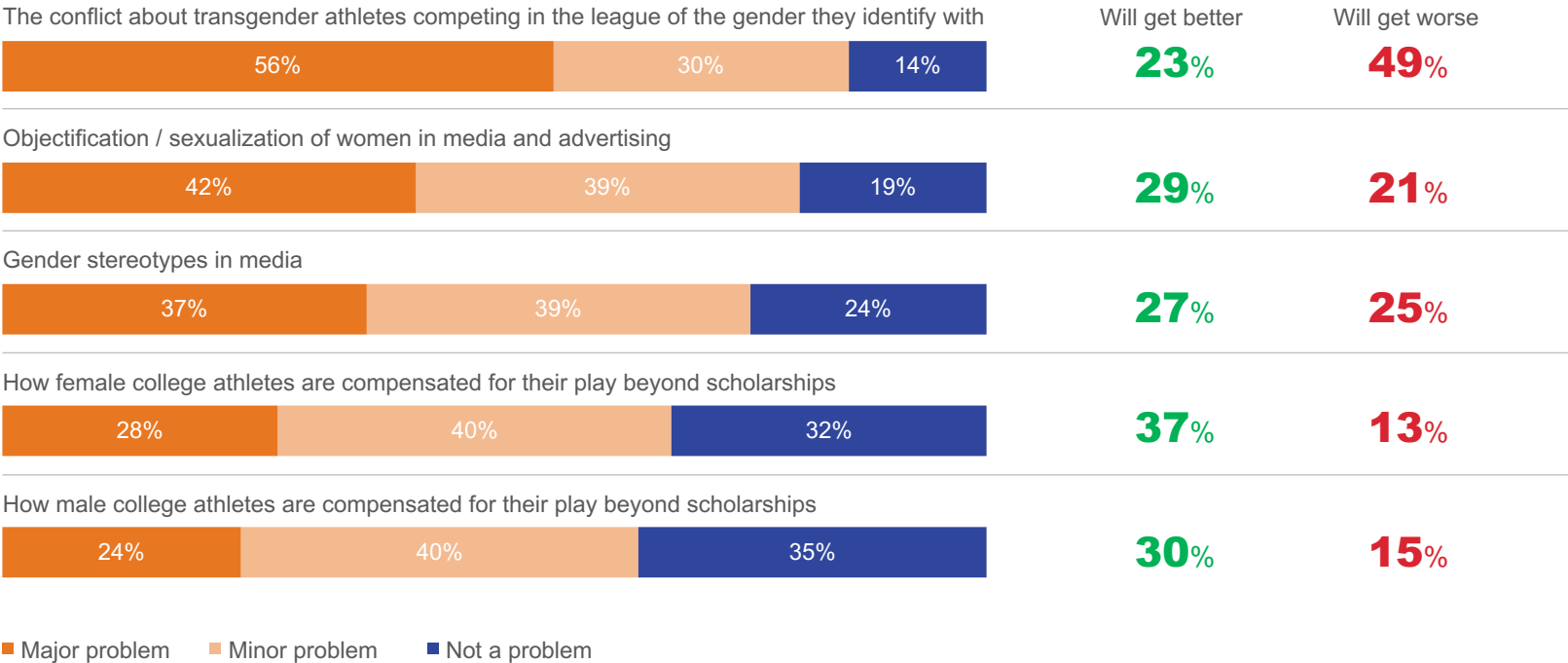
Even with this new NIL playing field, issues of gender representation will persist, especially in how athletes represent themselves on social media and how brands represent them in advertising. This is an issue that is especially fraught for female athletes.

[Read the full Q&A on page 37.](#)

## How Americans view gender in sports and media today and tomorrow

Q. Currently, are each of the following a major problem, minor problem, or not a problem at all? (% Selected)

Q. Looking into the next few years, based on what you may know or feel, do you think the following will get better or worse? (% Selected)



(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)



# How men can find new purpose as a gender in 'crisis'



Ariel Binder

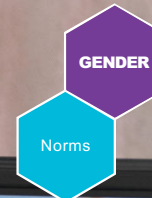
Economist

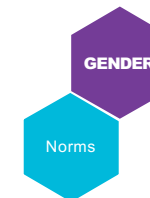
The decline of younger men in the workforce has led some people to declare a crisis or even a war on men. Over decades, fewer men have been getting post-high school education or been a part of the workforce. Men are also less likely to be in committed or married relationships, shifting their long-standing role as breadwinners. Why and what comes next is a topic economist Ariel Binder has long researched. There is no simple answer.

# 46%

of American men believe that we have gone so far in promoting women's equality that we are discriminating against men, compared to 34% of women who share this sentiment.

(Source: Ipsos International Women's Day survey, conducted Dec. 22, 2022-Jan. 6, 2023, among 1,001 U.S. adults.)





Binder isn't sold on the crisis or war framing and thinks men have some responsibility here, too. He says women have changed and adapted to the world around them, and that men should adjust, too.

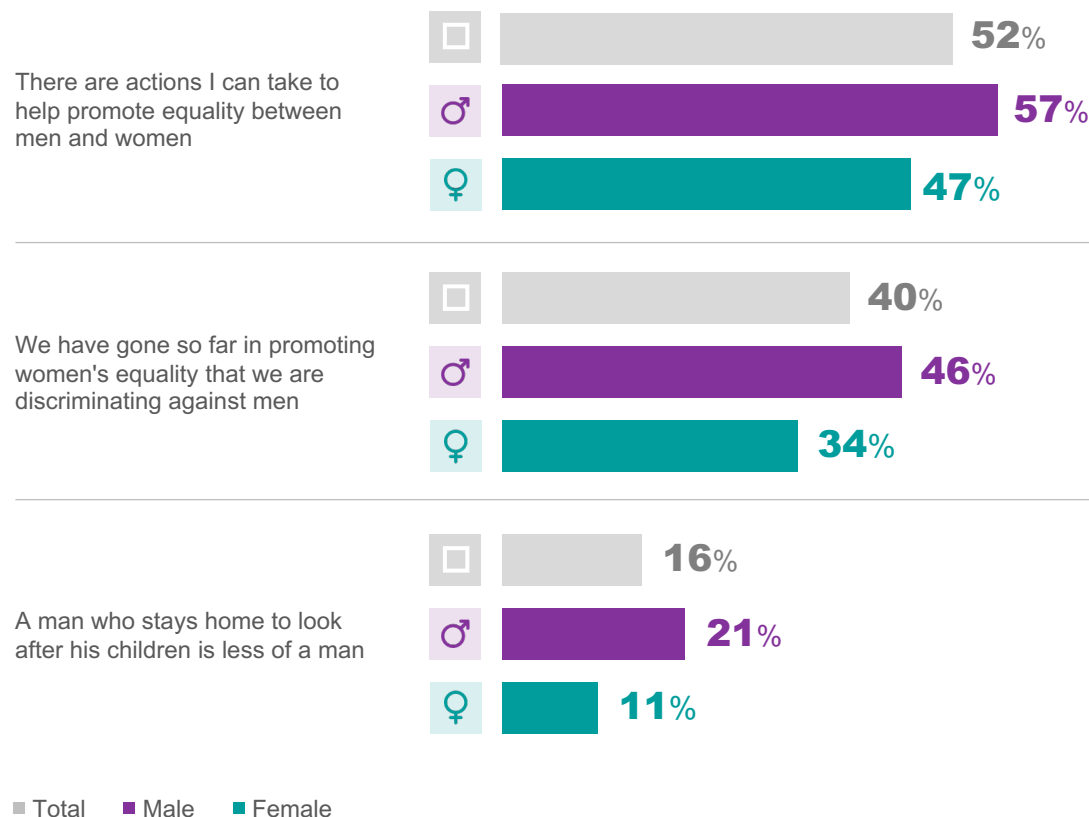
**“Men ought to be held to the same narrative. Situations have changed, and they should be thinking about how they spend their time and skills and vocations that they invest in.”**

But women's growing role is empowering while men's shrinking role is the opposite of that and, he says, that could be leading to men feeling unmoored and unsure of their purpose. So, the questions become what else can men do with their time, if they're not working a full-time job. And how can society support that as it once supported the idea of women in full-time domestic roles?

[Read the full Q&A on page 39.](#)

## Nearly half of men say the women's equality movement is costing them

Q. Below is a list of statements. For each, please indicate whether you strongly disagree, somewhat disagree, somewhat agree, or strongly agree. (% Agree)



(Source: Ipsos International Women's Day survey, conducted Dec. 22, 2022-Jan. 6, 2023, among 1,001 U.S. adults.)

# Why brands need to include men in the conversation about gender equality



Half of American men agree that women won't reach equality unless men take actions to support women's rights, according to a recent Ipsos survey. Yet 40% of them think efforts toward gender equality have gone far enough, or too far. Notably, just five percentage points separate women from men on this opinion. The gap by party identification is more dramatic.

It's often said that men can benefit from shifting gender norms. But the data indicates that many Americans don't see it that way, says Mallory Newall, a vice president in Ipsos' Public Affairs practice.

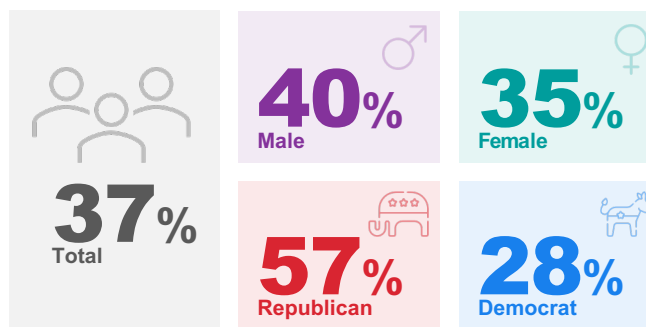
**“We all need to play a part in gender equality. That means men need to see what they stand to gain, too.”**

When it comes to gender equality, brands and businesses need a vision that includes men. After all, they'll play a role in creating that world.

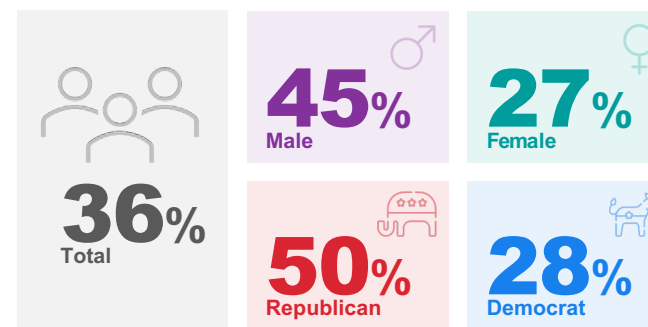
## American men and women see room to improve on women's equality but disagree on men's role

Q. Below is a list of statements. For each, please indicate whether you strongly disagree, somewhat disagree, somewhat agree, or strongly agree. (% Agree)

When it comes to giving women equal rights with men, things have gone far enough in my country



Men are being expected to do too much to support equality



(Source: Ipsos International Women's Day survey, conducted Dec. 22, 2022-Jan. 6, 2023, among 1,001 U.S. adults.)





# Why brands can no longer treat women as a monolith

Politics have catalyzed a polarizing divide about human rights in the U.S., turning the debate into a red vs. blue issue. However, feminism's history shows that female-identifying people have been strongly unified in pursuing the many rights unequally withheld from them.

However, as women continue to fight against pay inequality, gender-based health care inaccessibility, harmful social norms, and gender-based violence, one-third of U.S. women say they don't believe there is inequality between women and men.

Moreover, we have entered the fourth wave of feminism, which is defined by intersectionality as many now recognize the variance — and relative disparities — of the female experience. In recent years, society has acquired a more progressive understanding of the diversity of gender and the interconnection of gender across race, but research still falls short in reflecting that interconnection.

To continue to appeal to or advocate for women to acquire these rights, brands should evaluate if and how they seek to understand the gaps in perception across the intersections of women, who all experience inequality to varying degrees daily, says Mercedes Bender, a principal in Ipsos Strategy3.

**“By treating women as a monolith, brands risk truly understanding their unique relationships with womanhood and connecting them in resonant ways.”**

# 32%

of U.S. women do not believe there is an inequality between women and men in social, political and/or economic rights in the U.S.

(Source: Ipsos International Women's Day survey, conducted Dec. 22, 2022-Jan. 6, 2023, among 1,001 U.S. adults.)

# How better customer experience can support stressed caregivers



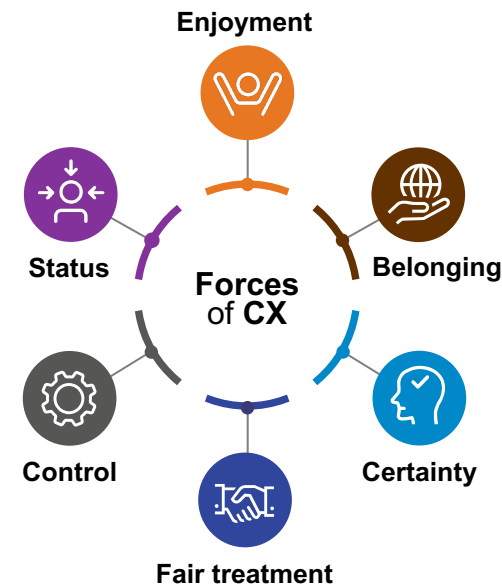
While women continue to drive for equality in the work world, moms shoulder a disproportionate amount of household tasks, like shopping.

Some problems for moms that complicate shopping are non-standard work schedules, parental stress and a lack of helping hands. Retailers are overlooking this important customer when collecting customer feedback. By prioritizing busy caregivers, retailers can get a better return on their customer experience investment (ROCXI), says Sarah Morrow, a director in Ipsos' Customer Experience practice.

**“Women have unique and evolving needs when shopping, so creating distraction-free and accessible shopping is increasingly important.”**

Focusing on what matters most to caregivers can build customer loyalty

Retailers can identify and validate the strongest predictors of brand loyalty for caregivers. Then by focusing improvements on these drivers, retailers can adapt customer experiences to address what truly matters, differentiate from competitors and give moms and dads more reasons to shop with them.





# Signs that media is shifting gender perceptions



Latha Sarathy

EVP, analytics, insights and measurement, SeeHer ANA

Women won't realize gender equality for another 132 to 300 years, depending on who's doing the measuring. It's an economic, educational and access issue, and it shapes societal perceptions overall, says Latha Sarathy, EVP, analytics, insights and measurement at SeeHer, a division of the Association of National Advertisers. But so can media and marketing. Sarathy says new research signals potential shifts for how media depicts gender and how brands will target and communicate with people in the future.

# 60%

of married adults agree that TV and movie plots often keep men and women in their traditional gender roles, while 47% of unmarried adults agree.

(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)



With almost 100,000 marketing and media messages bombarding people daily, Sarathy contends how women are represented in media is not only fundamental to understanding how women are showing up in our society, it also can be a catalyst for change. She says new research reveals that Gen Zers are not only more aware of gender-fluidity they've also embraced it more than other generations, which shapes their buying behavior and brand perceptions.

**“It also impacts how we talk to this generation. If we need to rethink how we target male, female, age and gender like we used to, we have to unpack those paradigms and think differently.”**

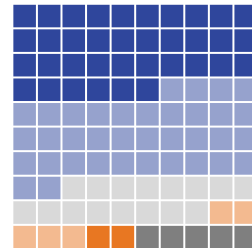
That could affect everything from survey questionnaires to how people are depicted in media.

[Read the full Q&A on page 41.](#)

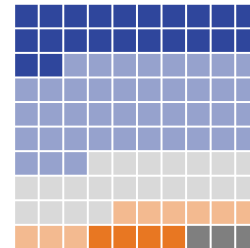
## How people think media shapes gender norms

Q. Please indicate the extent to which you agree or disagree with the following statements. (% Total)

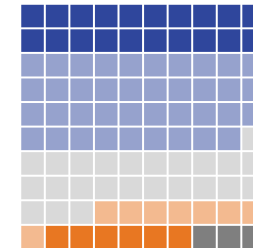
I see more nonbinary or transgender characters in TV and movies now than in the past



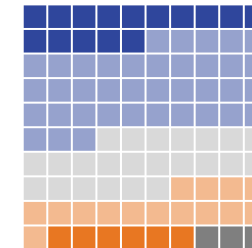
TV and movie plots can change how we perceive traditional gender roles



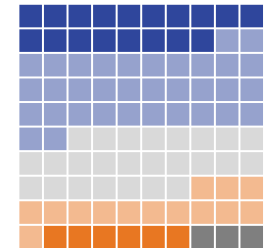
Advertisements and commercials can change how we perceive traditional gender roles



TV and movie plots often keep men and women in their traditional gender roles



Advertisements and commercials often keep men and women in traditional gender roles



■ Strongly agree   ■ Somewhat agree   ■ Neither agree nor disagree   ■ Somewhat disagree  
 ■ Strongly disagree   ■ Don't know

(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)

## Six tensions that will drive change:

# 1. People do or don't feel represented by media

We're in a period of flux when it comes to gender roles and, to an extent, gender identity. As tightly defined gender roles have loosened, it's more incumbent upon content creators and advertisers to depict *everyone* well, says Latha Sarathy, EVP, analytics, insights and measurement, SeeHer ANA. Representing everyone will be key to help people feel included, while also helping them learn new norms. "Thinking about traditional gender identities, we have to be very thoughtful about how we depict men as much as how we depict women. For women, the point is that we still have not leveled the playing field," she says. "But for men, how can we nuance their portrayal as well so that there is true equality?" This tension shows we're not there ... yet.

## Two in three people don't see themselves in popular culture

I identify with people I see in popular culture (movies, TV shows, etc.)

35%

65%

I don't identify with people I see in popular culture (movies, TV shows, etc.)

Q. For each of the pairs of statements, please select the statement that comes closest to your view, even if neither statement is exactly right. (% Total)

(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)



## Six tensions that will drive change:

# 2. Gender equality is achieved — or not

Empirically, we know that the U.S. has not achieved gender equality, at least in terms of pay if not in many other aspects of society and the economy. So, what does it say that one in three people overall (and four in ten men) think we have? Or that more 18- to 34-year-olds think we have reached equality than those over 55? How will that affect efforts to reach that milestone? It would seem that while the two-thirds of people today who say we haven't gotten there might be incentivized to move the needle, one-third will be less intentional about that or perhaps work counter to it, if they think we're already there. This is one of the central tensions in the discussion of gender, and if or how opinions shift will matter.

### Most people think we haven't reached gender equality in the U.S.

We have reached gender equality in the U.S.

32%

68%

We haven't reached gender equality in the U.S.

Q. For each of the pairs of statements, please select the statement that comes closest to your view, even if neither statement is exactly right. (% Total)

(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)



## Six tensions that will drive change:

# 3. Is gender binary or fluid?

Many cultures in the world believe that gender is a spectrum. Even in the U.S., there has historically been fluctuation in our gender norms. Today almost two in three think gender is binary, although almost half of those under age 35 think it is a spectrum. For people on that spectrum, mental health can be a struggle, as they try to understand themselves while also coping with a lack of understanding from others. Filmmaker and interactive storyteller Cameron Kostopoulos wants tech to move this tension. “I believe that virtual reality can be used as a tool for powerful storytelling and for generating not just empathy, but action and understanding,” he says.

### Two-thirds of U.S. adults believe that gender is binary

Gender is a spectrum

37%

63%

There are just two genders, male and female

Q. For each of the pairs of statements, please select the statement that comes closest to your view, even if neither statement is exactly right. (% Total)

(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)



## Six tensions that will drive change:

# 4. Would traditional gender roles make the world better or worse?

Most people believe in traditional gender roles. But those have been shifting for decades and today this is more of a 50/50 split for those under age 35. Plausibly the shift will continue, although there is considerable backlash happening right now. Women have reinvented their role, pushing the glass ceiling higher and sometimes breaking through. Men, it can be argued, are not adjusting as well. But they should, argues economist Ariel Binder. “Men ought to be held to the same narrative,” he says. “Situations have changed, and they should be thinking about how they spend their time and skills and vocations that they invest in.”

### A majority of people say the world would be better under traditional gender roles

The world would be worse off if people followed traditional gender roles

42%

58%

The world would be better off if people followed traditional gender roles

Q. For each of the pairs of statements, please select the statement that comes closest to your view, even if neither statement is exactly right. (% Total)

(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)



## Six tensions that will drive change:

# 5. Use sexuality for self-promotion or not?

Most people think that if people use their sexuality to promote themselves, it limits their value in other ways. And yet, as the saying goes, “Sex sells.” Today more women are embracing sexy images for self-promotion as an expression of female agency and empowerment. There are likely a lot of gender double standards hiding in this data. But sports agent Erin Kane thinks people should be able to appear on social media or elsewhere without penalty. “I can’t fault women for expressing themselves the way they want to,” she says. “That’s the No. 1 principle of self-actualization and realization and having the freedom to be a woman [means] defying the cultural constructs or engaging with them in whatever way you choose.” As generations who have grown up with social media become a larger share of the population, this tension could likely shift.

### Most people say using sexuality for self-promotion limits someone’s value

People who use their sexuality to promote themselves do not affect their value in other ways

31%

69%

People who use their sexuality to promote themselves limit their value in other ways

Q. For each of the pairs of statements, please select the statement that comes closest to your view, even if neither statement is exactly right. (% Total)

(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)



## Six tensions that will drive change:

# 6. Does someone else's trans identity affect your values?

Fewer than 1% of Americans identify as transgender, according to Ipsos data. A sizable majority (71%) of Americans don't have an acquaintance let alone a friend or family member who is trans. The numbers are even smaller for people who know people who identify as nonbinary or other forms of gender-fluid. Yet a sizable minority think that this tiny percentage of the population is threatening their values — these numbers are consistent across age ranges. In 2023 you see headlines reflecting this daily. Much of this tension has arisen in the past few years as a reaction to a growing discussion of gender as a spectrum. So, what will this tension look like in five years? In 10?

### Most people say others' trans or nonbinary identities don't affect them

People who are transgender or who identify as something besides male or female have nothing to do with how I live my life

73%

27%

I worry that my values are being threatened by people who are transgender or who identify as something besides male or female

Q. For each of the pairs of statements, please select the statement that comes closest to your view, even if neither statement is exactly right. (% Total)

(Source: Ipsos survey conducted Apr. 13-14, 2023, among 1,119 U.S. adults.)

# Plausible port one:



## A fraught decade forces brands back to the gender binary

**Imagine it's 2035. "Gender identity" isn't a phrase that's used anymore in much of the U.S. It's just "gender." More people believe that gender is binary, whether or not laws define it as such. People are either male or female, legally and in allowable public discourse.**

**This is a hopeful future for some who find the idea of gender-fluidity farcical or even harmful. This is a woeful scenario to others who either for themselves or for others want to live and let live.**

The acceptance by many (and court decisions) around gender-fluidity, same-sex marriage, women's reproductive rights and gender equality in the 2010s and early part of the 2020s arguably peaked with the #MeToo movement. Back in 2023, Ipsos' global data (page 8) showed that men were a flight risk in their support of gender equality. This led to a swift and powerful recoil with reactions, such as dress codes for female legislators in Missouri and bans on medical care and treatment for transgender people. But other changes had been building for decades culminating with the Supreme Court's Dobbs decision overturning Roe v. Wade.

Brands spent the decade hopelessly caught in the middle of polarized workforces and endless consumer boycotts and backlashes. As time progressed, despite polls that these policies were unpopular, legislators continued to pass law after law restricting gender identity and roles. Some states went further than others. The federal government passed some laws, too. This largely restricted mobility for a sizable part of the population that found themselves or their friends essentially illegal in many states. A predictable mental health crisis ensued. Legislation is one thing, but social and personal reality are another. The disparities that ensued did not help the U.S. economy. It didn't help the U.S. geopolitically either, as the nation was largely, but not entirely, alone in moving back toward a more historical view of these issues.



# Waypoints

**Today about two in three people in the U.S. consider gender to be binary (with a considerable falloff among younger generations). What if the younger generations' views become more prevalent?**

There are two critical waypoints for gender, and this is one: Is gender a spectrum or binary? The other is the question of whether or not we have reached gender equality. Today about two in three say that gender is binary. A similar number say that we have not reached gender equality. But say those points shift toward an increased acceptance of gender-fluidity. Will that make “equality” a harder thing to judge and measure? What if more people think we have reached equality? Will that make it harder for people to continue fighting for those who aren’t treated equally? In the U.S., gender issues are never simple.





## Plausible port two:



## Brands thrive with new gender norms

Imagine again that it's 2035. But in this future, the generational shift seen in data about gender-fluidity continues. The young adults of 2020s are now in their 30s. And like same-sex marriage before it, gender-fluidity is a concept that is fought and fraught until suddenly it just isn't anymore.

While the older generations were in power in the early 2020s, laws were passed in conservative states restricting definitions and behavior around gender. But at the same time, the youth were largely reacting with a collective shrug. A small but growing part of the population identified as nonbinary or transgender. But everyone else decided that those individual decisions had no bearing on their own lives, accepted each other and moved on. As younger generations increased their voting power and share of the population, it turned out this wasn't a cohort effect but that we were entering a new period of gender theory and practice. As part of going through adolescence, American kids started hosting their own gender-reveal parties to announce their authentic identities.

New products and services around gender thrived. Brands shifted with the times in their creative, packaging and messaging. Brands in relevant spaces moved away from gendered products, which simplified research and development and production in many ways. There were growing pains in the workplace and the courtroom, where the generations coexisted. Over the decades, gender identity became less a focus of discourse and polarization and more one of policy in creating structures to support everyone's identity and equality. Men, especially, were required to adapt and change, which they did either willingly or begrudgingly, but they got there.

# Future Jobs to Be Done



Ipsos spins the traditional “Jobs to Be Done” framework forward with **future Jobs to Be Done (fJTBD)**. This builds on the theory that people buy products and services to fulfill certain needs or accomplish specific tasks. For example, we don’t buy a taxi ride; we hire one to get us where we want to go. We don’t buy body wash; we hire it to bathe and smell good.

To bring it into the future, we envision powerful and plausible scenarios through strategic foresight. While many needs are enduring and do not change over time, the context of that job will change along with the potential solutions and alternatives. These scenarios help us define the circumstances in which people may find themselves, like in a retail store with gendered fitting rooms. For nonbinary shoppers, how could retailers update to be more inclusive? We use fJTBD to tie these scenarios to actions that organizations can take to help people meet future needs.

While it’s typical in foresight to create fJTBD clusters, we’re sharing one scenario here as an example.

*Jennifer Bender is an associate partner at Ipsos Strategy3.*

## Help me to live in and express my gender identity

In a world where more people express gender fluidly, brands can help by offering safe, gender-expansive products and services.

Potential fJTBD:

- Help me find products by promoting benefits rather than gender cues
- Help me be myself by using gender-expanded imagery and staff badges
- Help me feel safe and included with all-gender, locked changing rooms

Imagine a world where ... A retailer makes it easy to shop for and try products that fit across a gender spectrum to express whatever you feel.

# Future optimism gaps

**We say we want gender equality, but we are less likely to think we'll get it. However, while 51% of people say they want gender to be a spectrum, 59% think that's the future we'll wind up in.**

When it comes to gender, there is a high level of agreement on the future we want. When it comes to gender identity, there is less so. But in most cases, we think we are going to fall short.

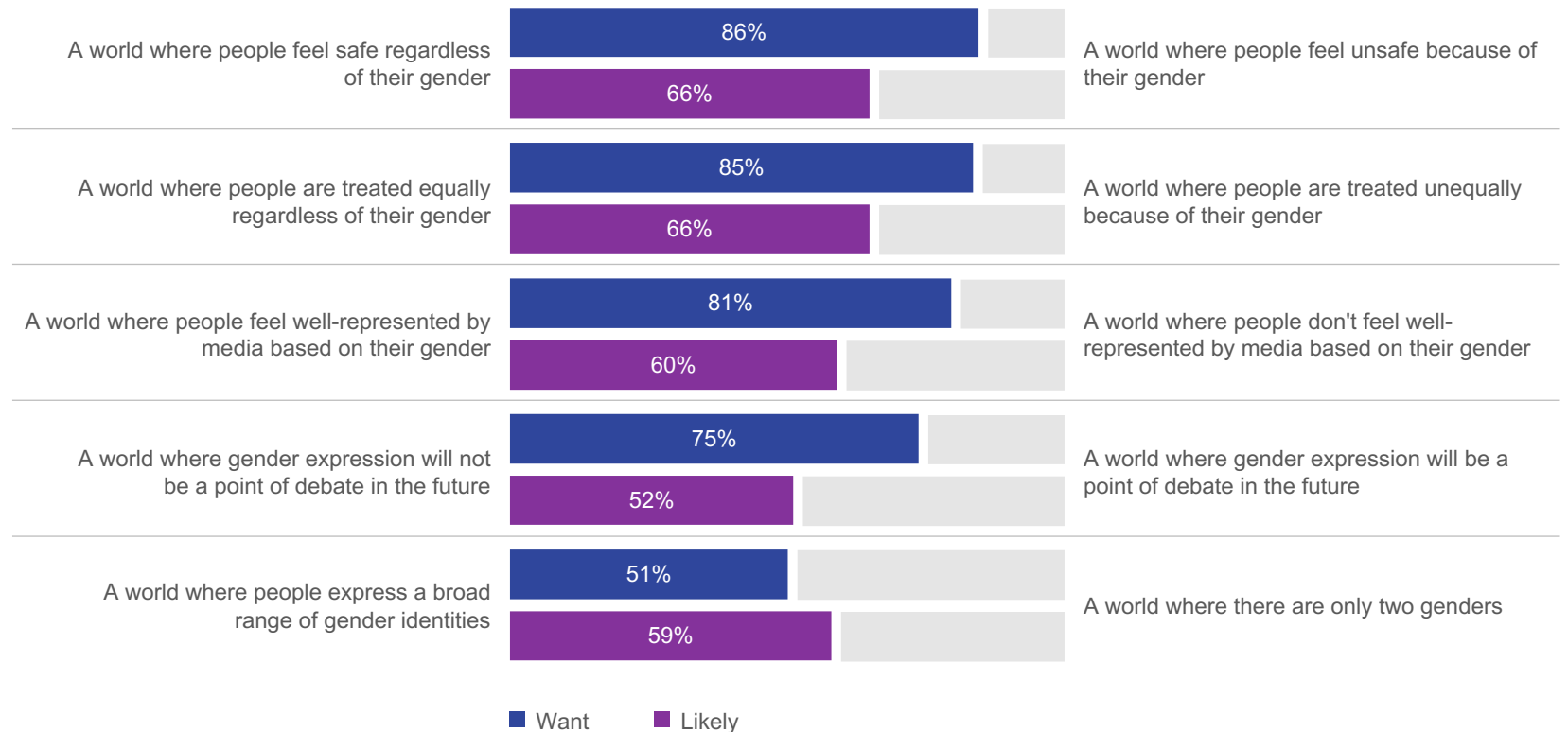
Brands and policy makers can help, but we all — regardless of our gender — have a role to play. One other thing we agree on: We want this to stop being an issue, but we don't think we'll get to that future either.

The future we want

vs.

the future we want less

Q. For each of these future scenario pairs, select the one that [you most want/seems most likely] to happen. (% Total)





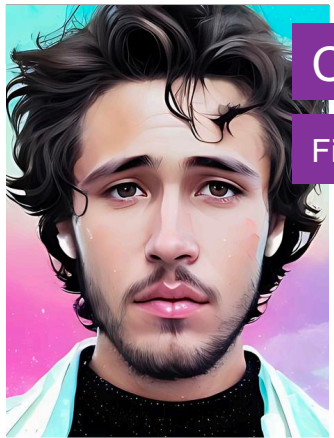
# Appendix

In this section,  
we show our work  
and our workers

1. Full Q&As
2. Signals
3. Contributors



# How technology can help us understand each other and ourselves



Cameron Kostopoulos

Filmmaker, creator, Body of Mine VR

**When Cameron Kostopoulos' family learned he is gay, they essentially cut ties. That painful journey made him wonder if he could use his skills as a filmmaker to create an experience that would help people understand what it feels like to be someone with a different identity. Using the Unreal Engine gaming engine and special hardware for body, face, eye and hand tracking, he created the award-winning Body of Mine VR immersive experience.**

## **Matt Carmichael: Explain how Body of Mine works.**

Cameron Kostopoulos: It's a real-time game powered through Unreal Engine hardware. We're using a lot of cutting-edge tracking technology to combine body, face, eye and hand tracking with a headset, which gets you immersed in the world. It's also collecting your eye tracking data so that you can look at yourself in a mirror and see yourself blink and see your eyes move around. You can step in and see your hands move. And then for the body, we're using five trackers along with sensors that detect what your body is doing so that you can be fully immersed into these bodies of different genders.

## **Carmichael: Would this work as well in film?**

Kostopoulos: No. This really is the only medium for the story because with film you are watching someone experience something. For this story, we wanted to explore the interactions we have with our own [bodies] and the way we relate to our own bodies, and through

that, make the connection to these transgender stories because it's about the way we exist in our skin, the way we relate to our bodies. It's a very physical experience that can only be done in a fully immersive way.

## **Carmichael: I met you when you were showing this at SXSW. How did people react?**

Kostopoulos: People had a really strong emotional reaction at SXSW. There were a lot of tears, there were a lot of hugs because I think you're not used to looking down and seeing different tattoos or seeing breasts where you don't have them or seeing different color skin. When that happens, your mind immediately is taken somewhere else because that's such a visceral reaction. You're able to connect with stories on a very intimate level that we can empathize with people. But that's not enough. We need to understand or at least try to understand those experiences if we want to fully empathize and fully understand.





**Carmichael: How does this build empathy?**

Kostopoulos: I believe that VR can be used as a tool for powerful storytelling and for generating not just empathy, but action and understanding. We wanted to explore embodiment in VR because for one, there are not a lot of VR experiences of this kind, period.

**Carmichael: How do you see younger people using immersive technology in the future?**

Kostopoulos: I could see tools where someone can use an AI to try out different pronouns or different names and connect with other trans girls who have been in your shoes [so you] know that you're not alone. I know how isolated an experience that can be when you are trying to pretend that you're someone you're not. You're not really seeking support because you don't even know where to look, or you don't even know how to begin that conversation with yourself. To build experiences that allow you to explore your body and your sexuality and your identity in a safe, intimate, private space within a headset could be really powerful and therapeutic for a lot of people.

**Carmichael: Your SXSW audience was self-selecting. Do you think there's a broad audience for these ideas?**

Kostopoulos: People had such a strong reaction to it is because they were realizing that through these trans stories, they were really seeing a lot of themselves in the way that they perceive their own gender. Because gender is not black and white, even for cis people. You have more feminine qualities, you have more masculine qualities, and most of us have been growing up in an environment where we're taught that there's more of a binary.

**Carmichael: You grew up in a conservative area of Texas. Could you take this to your neighborhood block party?**

Kostopoulos: Oh, my goodness, it would not go. There would be some people who love it and there would be some people who are so glad they saw it, including a lot of the people that we interviewed from Texas. There'd be even more people who are really unhappy, some scary people who would probably give us threats. But personally, that is what makes me a little bit excited about it. It's important to make people uncomfortable and have this conversation because it's the only way we move forward.

*Matt Carmichael is editor of What the Future and head of the Ipsos Trends & Foresight Lab.*

**“To build experiences that allow you to explore your body and your sexuality and your identity in a safe, intimate, private space within a headset could be really powerful and therapeutic for a lot of people.”**



# How gender shapes commercial representation for athletes



Erin Kane

VP, women's sports at Excel Sports Management

**In the nearly two years since the NCAA adopted new rules allowing college athletes to profit from their name, image and likeness (NIL), the floodgates have opened for commercial representation of student athletes, along with the hopes for gender equality in sports. While the rule shift gives women athletes more opportunities to catch up to their male counterparts, veteran sports agent Erin Kane says it could take a while to close the profitability gender gap.**

**Kate MacArthur: How is the shift in NIL laws influencing female athletes' compensation at the college to pro level?**

Erin Kane: Women are aggregating large audiences of their own and then money follows. It's beneficial to be at well-established programs that historically have avid fan bases. It's certainly changing the way recruiting is happening and what's being prioritized in recruiting meetings because these young women are smart and they know that if they go to a college that helps them grow their audience, the money follows, and they'll be able to take that audience with them at the next level if there is a professional level in their sport.

**MacArthur: How have the NIL laws changed that?**

Kane: With the ability to earn money, it becomes even more important to aggregate audience earlier. So, the focus of women's college basketball, in some respects, has shifted from who is best preparing you to be a



No. 1 pick and get a lot of attention around the draft, and then go to a good team in the league. But you're seeing programs clearly separating themselves in earning potential, and it's attractive to young basketball players. One of the things that we have to have a conversation about is it's still a very small and elite group of people that are capitalizing in this way.

**MacArthur: What has to happen for that to expand?**

Kane: Honestly, I'm not sure. It's not dissimilar in men's sports, either. Brands tend to want to align with the most elite, the best. In some ways, in women's sports there's a little bit of a dichotomy where there's this other path to revenue, which, if you look at the Cavinder twins and women's basketball, they obviously had a great tournament run this year [playing at the University of] Miami, but they're not draft prospects. They were more influencers. If you're looking at a scale of athlete [to] influencer, they were more on the influencer end of that, although incredible athletes as well.

**MacArthur: Is social media more of an equalizer for female athletes, given the fact that there's so much more money in men's sports than in women's sports?**

Kane: That's such a complicated question because there are good examples if you look at collegiate softball and baseball, how ESPN values them, what the audience looks like or the College World Series in both sports. And a reasonable question is, has women's softball been undersold? But still, that contract for the Women's College World Series has allowed softball to be the fourth collegiate sport from a revenue standpoint. After this year's March Madness and Women's Final Four and National Championship, the valuation from a broadcast standpoint for the women's tournament will change.

**MacArthur: Do you see the profitability gap between male and female athletes closing?**

Kane: Men's sports have a 75- to a 100-year head start. So, closing that gap is certainly a challenge. There will be individual female athletes that are standouts that are able to do that. But generally, it's just going to take time.

**MacArthur: Some of the progress of feminism is being rolled back. How does that affect the sports world?**

Kane: I mean, how does it not? Sports is a microcosm of

our larger society. I don't even want to predict what [the effects] would be. I just know we all feel it.

**MacArthur: Some female athletes use sexualized imagery to promote themselves because it's marketable. How does that influence what gets contextualized as positive representation in media?**

Kane: I just think self-determination is the most important piece. Individual women don't bear the responsibility for the cultural constructs. I can't fault women for expressing themselves the way they want to. That's the No. 1 principle of self-actualization and realization and having the freedom to be a woman [means] defying the cultural constructs or engaging with them in whatever way you choose.

**MacArthur: The higher visibility, the more pressure there is ...**

Kane: Everybody experiences that pressure. It's gender-agnostic. The one thing I'll say that's different for women and girls is the level of threats and the threats of violence against them. I'm sure that men get threats, and, in fact, I know they do. But there's something different about that kind of threat, for women and for young women, in particular.

*Kate MacArthur is managing editor of What the Future.*

**“After this year’s March Madness and Women’s Final Four and National Championship, the valuation from a broadcast standpoint for the women’s tournament will change.”**



# How men can find new purpose as a gender in 'crisis'



Ariel Binder

Economist

**The decline of younger men in the workforce has led some people to declare a crisis or even a war on men. Over decades, fewer men have been getting post-high school education or been a part of the workforce. Men are also less likely to be in committed or married relationships, shifting their long-standing role as breadwinners. Why and what comes next is a topic economist Ariel Binder has long researched. There is no simple answer.**

## Matt Carmichael: Do you think men are in crisis?

Ariel Binder: I would push back on that narrative of men being less valued by society and of the standard wage labor jobs with security and benefits that they used to be able to get not existing as much anymore.

## Matt Carmichael: So where do men stand these days?

Binder: Despite my having pushed back against the crisis narrative, change is painful, and these are accumulated decades of change with men ceding some power in the household and the labor market to women is difficult. That may lead to these malaise types of narratives of men feeling unmoored and unsure of their purpose.

## Matt Carmichael: How should men adapt?

Binder: As women have had this tremendous rise in labor force participation and education over the last

several decades, they have dynamically responded to opportunities and shifts in the economy. Men ought to be held to the same narrative. Situations have changed and they should be thinking about how they spend their time and skills and vocations that they invest in.

## Matt Carmichael: Will men do more around the house if they're not as engaged in the workforce?

Binder: There's this very stubborn fact that conditional on equal labor market opportunities, women perform more childcare and housework than men do. There has been progress, revising this male breadwinner norm. So maybe increasing numbers of men will have occasional employment spells and do other productive types of potentially non-paid labor that we should be thinking more about as a society. Before we label this a crisis, I would want to see more holistic engagement with what these men are doing outside of working hours.

**Carmichael: One could argue that the economy was quite productive in eras where few women were in the workforce. Can't it survive without as many men now?**

Binder: Given how productive the economy has become in fulfilling basic needs relatively cheaply, it's not necessarily a bad thing that you might see more time spent out of the formal workforce, more leisure taking, more engagement with volunteering and other ways of spending time.

**Carmichael: So, we're seeing both a disruption in workforce and in gender identity. How will AI impact all of this?**

Binder: We're still a long way from self-driving cars and things that can fully replace humans, especially labor like construction, transportation and the sort of manual vocations that employ a lot of men. But as far as more creative occupations that don't involve manual labor, AI could complement those types of positions.

**Carmichael: That sounds hopeful ...**

Binder: I would hope that it could be a productive part of the solution by removing some of the boring tasks and allowing people to spend more time on these valued tasks

that could bring more of these men back into a feeling of self-worth and productivity in the labor market. It's exciting and it's uncertain.

**Carmichael: Again, a lot of these trends are not new. Do you see them continuing or changing in the future?**

Binder: Never ask an economist to predict the future.

**Carmichael: Well, in foresight we talk in terms of what's plausible ...**

Binder: As far as household and family trends, I see a continuation of more nontraditional families emerging, with men shifting into nontraditional roles in the household. We have seen an uptick in fertility lately for the first time in a while after the pandemic, but whether that's a blip or whether that signals an increase in feelings of prosperity and hope for the future that results in more men being involved in these breadwinner roles is hard to tell. I think that that we're still going to see gender roles become more blurred and men continuing to have to contend with that and think about how they readjust their own priorities.

*Matt Carmichael is editor of What the Future and head of the Ipsos Trends & Foresight Lab.*

**“I would push back on that narrative of men being less valued by society and of the standard wage labor jobs with security and benefits that they used to be able to get not existing as much anymore.”**



# Signs that media is shifting gender perceptions



Latha Sarathy

EVP, analytics, insights and measurement, SeeHer ANA

**Women won't realize gender equality for another [132](#) to [300](#) years, depending on who's doing the measuring. It's an economic, educational and access issue, and it shapes societal perceptions overall, says Latha Sarathy, EVP, analytics, insights and measurement at SeeHer ANA, a division of the Association of National Advertisers. But so can media and marketing. Sarathy says new research signals potential shifts for how media depicts gender and how brands will target and communicate with people in the future.**

## Kate MacArthur: What's the progress in how women are represented in media since SeeHer began?

Latha Sarathy: SeeHer spearheaded development of the Gender Equality Measure, or GEM, in 2016. It is open source and has been leveraged by Ipsos for the last five years, which is awesome. We've tested close to 300,000 ads across 14 markets, which represent 97% of global ad spend. Year-over-year, we've proved how the accurate portrayal of women drives brand health metrics and actual sales.

## MacArthur: What signals are you watching on gender representation for the future?

Sarathy: We've just finished a study looking at [Gen Z] perceptions on gender identity and sexuality. What the study has shown us — which was really an a-ha moment — is not just that they are more aware of fluidity of gender identities, they're a generation that has embraced that idea more so than any other. Even those

who may not personally believe that gender is nonbinary support those who do. That's big. And the acceptance of different gender expressions and gender identities impacts the media and marketing ecosystem at the most basic level. It also impacts how we talk to this generation. If we need to rethink how we target male, female, age and gender like we used to, we have to unpack those paradigms and think differently.

## MacArthur: How does gender being more fluid shape how you look at testing and insights?

Sarathy: We have to be very intentional about testing across all gender and nonbinary identities and develop detailed insights and new norms. And thinking about traditional gender identities, we have to be very thoughtful about how we depict men as much as how we depict women. For women, the point is that we still have not leveled the playing field. But for men, how can we nuance their portrayal as well so there is true equality? That's the starting point.

**MacArthur: Some female public figures promote themselves using sexualized imagery. How does that influence what gets contextualized as women’s empowerment and representation?**

Sarathy: Let’s go back to the Gen Z example. They believe that men and women can express themselves any way they want. But when we think about the marketing and advertising community, we need to take into consideration all segments of consumers. Change is not always straight-forward, right? Certain elements of society may pull us forward and some may pull us back, but we need to move forward very intentionally and thoughtfully — and that’s where insights are so useful.

**MacArthur: Immersive media and AI are rapidly changing and influencing broader media. How do they influence the goals for gender representation?**

Sarathy: We all have built-in biases, many unconscious, that can get translated into the tools we create. When we think about gender representation, we need to consider how we can reduce these biases as much as possible. This is where a tool like GEM testing can be so effective.

The predictive drivers framework that we created with Ipsos provides real prescriptive diagnostics on how we can optimize gender portrayal — of both women and men.

For example, showing women actively pursuing their own goals as well as being caretakers is a strong driver of high GEM scores. We need to ensure that the ad testing and creative development process, which is becoming more and more AI-driven, is actively mitigating for gender bias.

*Kate MacArthur is managing editor of What the Future.*

**“We have to be very thoughtful about how we depict men as much as how we depict women. For women, the point is that we still have not leveled the playing field. But for men, how can we nuance their portrayal as well so there is true equality?”**



# Signals

What we're reading today that has us thinking about tomorrow

**When state law defines 'man' and 'woman,' who gets left out?** via [FiveThirtyEight](#). Legislation that attempts to establish a legal or biological definition of gender can exclude intersex people along with trans individuals.

**Japan wants 85% of male workers to take paternity leave. But fathers are too afraid to take it** via [CNN](#). With new paternity leave policies, Japan is encouraging men to change how they view parenthood — and running into cultural challenges.

**After going gray, a news anchor found herself the focus of the story** via [The New York Times](#). Canadian news anchor Lisa LaFlamme says she was dropped from her job after her hair went gray. The controversial firing has inspired an ongoing conversation about ageism and cultural double standards for women.

**Spain approves menstrual leave, teen abortion and trans laws** via [AP](#). Lawmakers in Spain have approved a slate of reforms on gender identity and reproductive health, including the right to gender changes and abortions.

**The men of the #MeToo generation** via [American Storylines](#). Dan Cox, [previously featured in What the Future: Love](#), discusses #MeToo, rape culture and the uncertain social landscape tomorrow's men face.

**How do men's and women's worries differ across the world?** via [Ipsos](#). This quiz, based on Ipsos' What Worries the World survey, offers a look at men's and women's concerns, from inflation to political corruption, and how they vary by gender.

**How insurers and employers are responding to abortion coverage since the overturn of Roe v. Wade** via [Ipsos](#). This Ipsos analysis looks at how insurers, brokers and other corporate entities have responded to the reversal of abortion rights in the U.S.

**Gender in the workplace** via [Ipsos](#). This exclusive Ipsos panel on gender in the workplace and in politics features Congresswoman Jennifer McClellan; Sarah Haacke Byrd, CEO of Women Moving Millions; and Carolyn Lee, president and executive director of the Manufacturing Institute.

**Most Americans say it is inappropriate to discuss a woman's prime years on TV** via [Ipsos](#). A recent Ipsos poll looks at how Americans view public statements on women's age.

**Ipsos Global Trends** via [Ipsos](#). Ipsos' groundbreaking survey of 48,000 people across 50 markets offers unique and deep insights on how the world views gender.

Scanning for signals is a type of research that is foundational to foresight work. These signals were collected by the staff of What the Future and the Ipsos Trends Network.

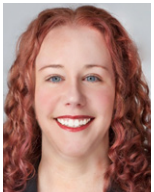
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GAME CHANGERS

