WHAT THE FUTURE: IDENTITY

How what you wear reveals your true identity PAGE 5

Is party ID the only ID? PAGE 10

Will we have different identities in virtual spaces? PAGE 15

Five tensions shaping the future of identity PAGE 24

+ **Experts from Ready Player Me, The Sandbox and USC's Inclusion Initiative share insights on how we form, shape and express our identities**

GAME CHANGERS   Ipsos

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Imagine it's 2032.

Who will you be and how will you represent yourself both in the physical world and virtual spaces? How will you find "your people"?

"Who are you?" sang The Who. It's an age-old question. Identity today is at the forefront of conversations in both positive and negative ways. Identity is used to draw together communities with common interests and values. It's a complex and culturally dependent philosophical construct. Identity is also being used to group us in ways that are productive and less so. Our political identity is a quick heuristic for deciding if someone is like us or not. It's like wearing a Cubs hat: You'll make friends wherever you go and probably only enemies in St. Louis.

The flipside of identity is anonymity, which has increasing value and scarcity in today's data-driven digital world where we can be uniquely identified by our face, our fingerprints, our heartbeat, our breath and our gait. As we move into more 3D virtual spaces, how will we craft and express our avatar identities, and how many will we craft?

Underlying all this discussion is, of course, a central question for us all to consider: How do we as marketers and researchers use what we know of identity and to what extent? Ponder on, dear reader. And ask yourself the question as you go: Who are you?
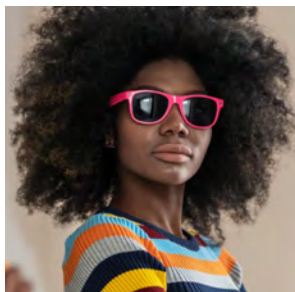
I really wanna know.

38% of Gen Z adults agree that a person is either a man or a woman and not anything in between. That's 10 percentage points less than the average American and 13 points less than Gen X and Baby Boomers.

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 3,015 U.S. adults.)

Contents

1. Territory map

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

2. The lay of the land

We talk with experts from The Sandbox, Ready Player Me, Wolf3D, USC's Inclusion Initiative, The American Communities Project, the Hollywood fashion world and futurism.

3. Tensions

Do people see themselves in popular culture or not? Will they live with people like them or in more mixed communities? Do people feel free to express their true selves or not? Opinions about these tensions will influence changes in ourselves and the worlds around us. What happens then?

4. Plausible ports and Waypoints

Based on our data and interviews with experts, we plot out some potential futures. Thinking again of our tensions, how far do they have to shift before we know which plausible port we're approaching?

5. Appendix

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

6. Artifact from the future

A look at an item from tomorrow that will eventually seem commonplace, but today seems as if it's on the edge of plausibility.

Territory: What will drive the future of identity?

The factors that will shape our identities in the future are as complex as the components of our identities themselves. We map out six macro forces and talk through how we form our identity, how it's shaped and represented externally and how we want it used in products, marketing, media and as a credential.

Representation
Stereotypes
Targeting

Language
Groupism
Community

Biometrics
Intellectual property
Ethics

Media

Society

Security

IDENTITY

Politics

Where we live
Age
Generational shifts

Technology

Demographics

Metaverse
Privacy
Regulation

Expression
Career
Structures

Society

IDENTITY

# How what you wear reveals your true identity

Leesa Evans

Costume designer and private stylist

How do we express our identities? According to the Ipsos Future of Identity survey, it starts with foundational factors such as how we treat others, where we live and who we choose to spend our time with. Among the next tier is fashion. We dress to express our individuality. We dress to show we are part of a group. Hollywood costume designer and stylist Leesa Evans hopes for a future where we will use fashion to feel confident and authentic.

56%

of Americans ages 18-34 rate fashion or things they wear as important to expressing who they are.

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 1,508 U.S. adults.)
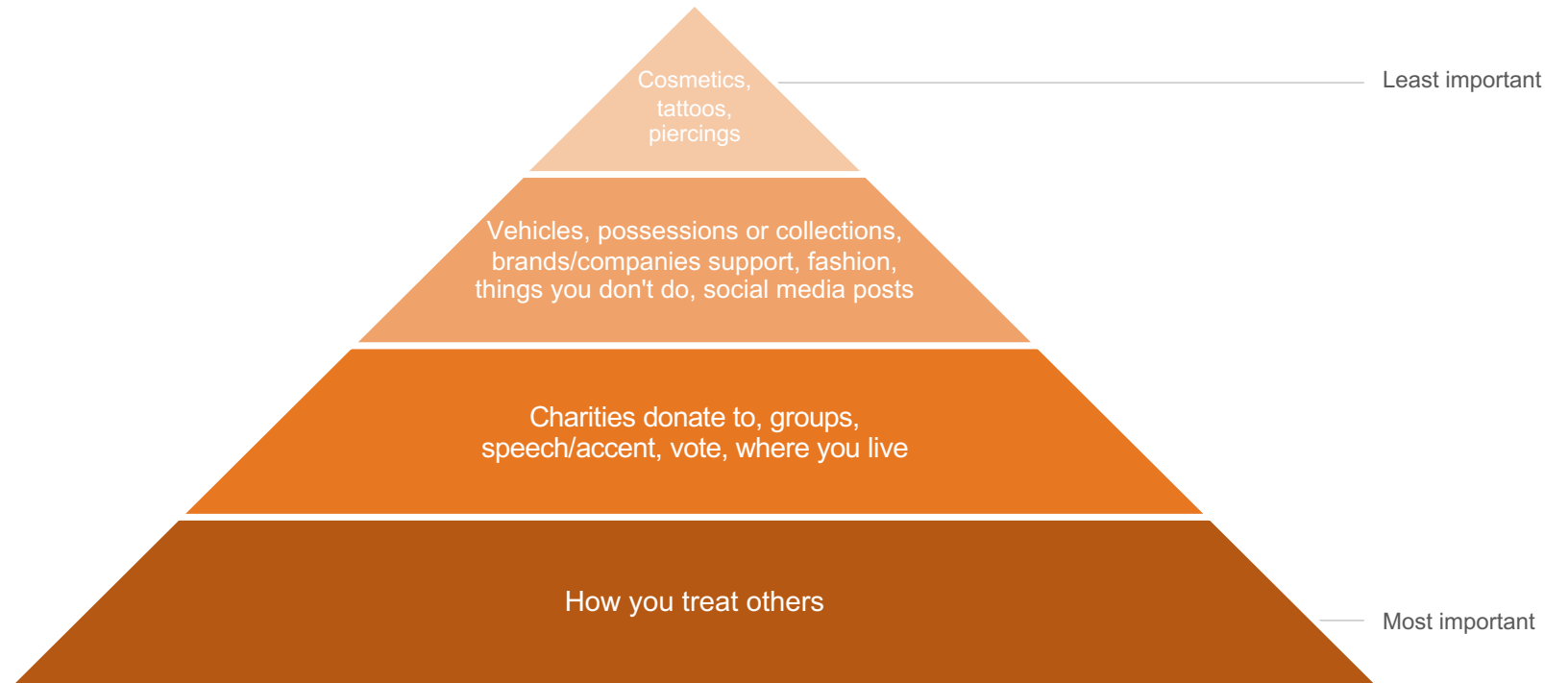
Society

IDENTITY
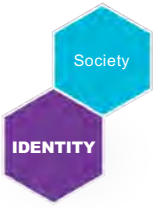
Through her work in cinematic costume design Leesa Evans knows what a powerful heuristic fashion can be to communicate a person's nature or mood. "You can tell who someone is from the moment you meet them on screen based on the way they dress," she says.

"You can evoke certain emotions from the movie-going audience in the way a person is dressed. [The audience interprets] immediately that they're intimidating, or they seem vulnerable or insecure, or if the character is inspiring and kind. But we are sub-consciously doing that to one another in so many ways daily in our real lives."

Read the full Q&A on page 33.

How much does appearance play in how we express ourselves?

Least important
- Cosmetics, tattoos, piercings
- Vehicles, possessions or collections, brands/companies support, fashion, things you don't do, social media posts
- Charities donate to, groups, speech/accent, vote, where you live
- How you treat others

Most important

(Source: Ipsos survey conducted Mar. 8-11, 2022. Results are based on a split-sample question where we asked 1,507 U.S. adults to rate and 1,508 U.S. adults to rank these factors on how they help express who they are. The results were combined, weighting the ranking more heavily, to produce the tiers of the pyramid with the most important in the foundation of the pyramid and the least important at the top. Full question wording is available at future.ipsos.com.)

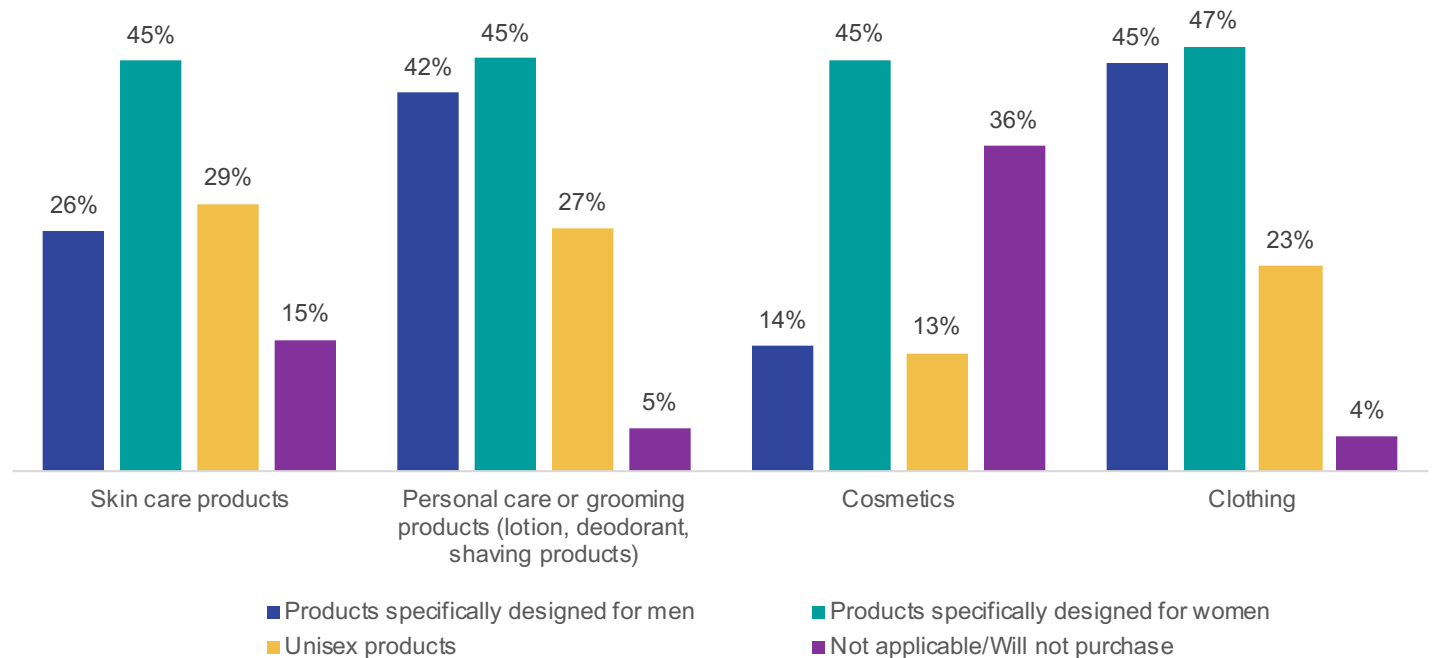# People want products just for them. That's getting easier.

Our identities have several demographic components that marketers have found traditionally shape consumer needs and how to reach and communicate with discrete audiences. Like clothing and footwear, males will gravitate to purchasing hair care and grooming products that are designed specifically for the male gender, says Kristy Click, an Ipsos client officer.

"This is partly driven by their belief that their unique needs can only be addressed with gender-specific product formulations."

But just as the market is shifting into creating products for underserved groups, the technology is arriving to create products tailored to and personalized for the individual. That's going to give shoppers an entirely new set of tools to express their identity.

Which products are the most gender-limited?

Q. For each of the categories below, please select the types of products you are open to purchase for yourself in the future.

Legend:
- Products specifically designed for men
- Products specifically designed for women
- Unisex products
- Not applicable/Will not purchase

Skin care products: 26% / 45% / 29% / 15%
Personal care or grooming products (lotion, deodorant, shaving products): 42% / 45% / 27% / 5%
Cosmetics: 14% / 45% / 13% / 36%
Clothing: 45% / 47% / 23% / 4%

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 3,015 U.S. adults.)

How where we live shapes who we are

Dante Chinni

Founder, The American Communities Project

Social media — and cable news before it — has been accused of helping people isolate themselves into community bubbles of thought and ideas. Increasingly, that seems to be happening in our physical world as well. Studies have shown that there are fewer and fewer "purple" areas on our electoral map and more and more deep reds and blues. Journalist Dante Chinni analyzes the data and reports on the ground about how our political identities shape and are shaped by our physical landscape.

62%

of Americans rate where they live as important in forming how they think of themselves. That number rises to 73% among people with household incomes of $100,000 and up.

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 1,508 U.S. adults.)

Chinni says that in the '90s people thought the Internet would make geography irrelevant. But the opposite happened. People today move to communities with amenities they want, including consumer choices like restaurants. Retailers consider demographics when choosing site locations and even restaurants and stores become more polarized. Physical bubbles mirror our virtual bubbles. Places and politics define us.

But he sees glimmers of a different future where some boundaries become fuzzier and split open in our political and place-based identities.

"The blue and red divides have gotten deeper. But when you break it down by geography, you see these fissures, and you see the puzzle pieces moving a little."

Read the full Q&A on page 35.

Identity factors less in where we choose to live

Q. Regardless of your current plans to move, when thinking generally of a place you would be willing to move to, how would you rate each of the following in terms of their importance in making that place a great place to live? (Mean ranking from 1-10 with 10 being most important among 16 factors.)

Ranking		
1	Overall cost of living	8.1
2	Crime rate	8
3	Ability to afford housing that meets your/your family's needs	8
4	Access to affordable healthcare	7.8
5	Climate	7.3
6	Relative risk of natural disasters (fire, earthquakes, flooding, tornadoes)	7
7	Available jobs	6.7
...		
11	Racial and ethnic diversity	6.1
...		
16	Whether the place leans Republican or Democratic in voting	5.3

(Source: Ipsos Coronavirus Consumer Tracker conducted Mar. 1-2, 2022, among 1,154 U.S. adults.)

IDENTITY   Politics

Is party ID the only ID?

Identity is becoming one of the most fraught battlegrounds in politics today. Democrats are pushing for conversations about the current and historic dynamics of race, gender and sexuality and power. Republicans, claiming that those conversations are divisive by nature, are passing legislation to ban identity-based conversations in the workplace and schools.

And yet, political identity itself is the most significant fault line in America today. "Many factors go into how we shape our identity," says Cliff Young, U.S. president of Ipsos Public Affairs.
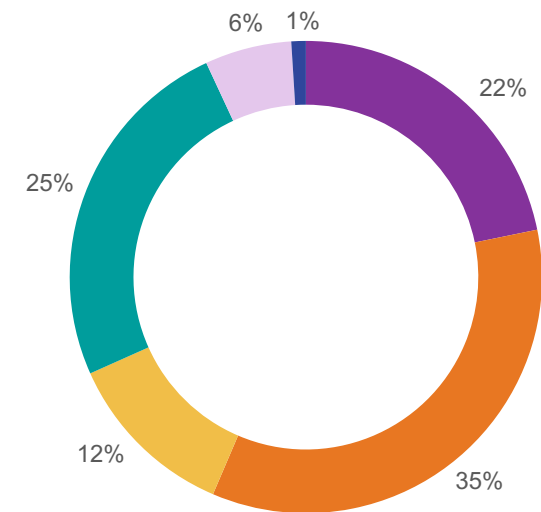
"But in terms of who we identify with, party identity is the strongest shortcut for us to understand who is 'like us' or 'not like us.'"

Whom do we identify with?

For Democrats

5%   3%
12%
38%
16%
27%

For Republicans

6%   1%
22%
25%
35%
12%
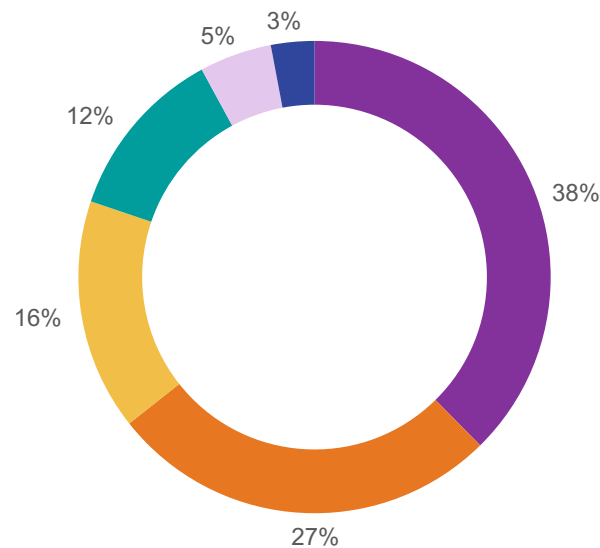
■ Party ID ■ Religion ■ Nativity status ■ Race / ethnicity ■ Urbanicity ■ Education

(Source: Ipsos The Fault Lines of America report survey conducted Oct. 27–Nov. 6, 2020, among 3,500 U.S. adults.)

IDENTITY   Politics

Will virtual spaces be safe places to express our identities?

Sébastien Borget

Co-founder & COO of The Sandbox

What about virtual spaces? How will they shape our identities? Will technologies like the 3D-virtual communities and the metaverse lead to more tightly defined bubbles as we sort ourselves into like-minded communities? Or will they allow us to move freely between virtual spaces and connect with people who we wouldn't be able to meet in the physical world? That was one initial promise of the internet. Sébastien Borget, who is building one of the leading decentralized virtual gaming worlds, hopes for the latter.

44%

of U.S. adults say they feel a sense of belonging in their community. That number rises to 59% among people with household incomes of $100,000 and up.

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 3,015 U.S. adults.)

Sandbox is first and foremost a gaming platform, but also increasingly a virtual mall. Major brands and marketers like Adidas, Warner Bros. and Snoop Dogg have all bought real estate there. Individual plots of space have sold for millions. It would be easy for Sandbox to become an enclave. So how do you keep it inclusive so that people of all identities are free to participate and express their virtual identities? Sandbox aims to be as diverse as possible, but that takes intentional design of systems, says Sandbox's Sébastien Borget.

"It's a combination of technology and workforce. It's protecting every user and having incentives for the community to be part of that monitoring and moderating system."

How communities rank among factors that form how we think of ourselves

Q. From the following list, please rate how important, if at all, each of the following internal or personal factors are in forming how you think about yourself. (% Very important or somewhat important)

Where you live

62%

Communities you are part of

58%

The school you attended/your education

46%

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 1,508 U.S. adults.)
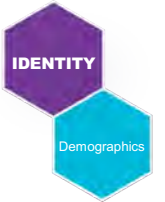
IDENTITY

Demographics

Will our identities become more fluid online?

How we create our identity is based on a wide arrange of demographic and psychographic characteristics. The 2020 Census showed many demographic characteristics are becoming more fluid. For instance, the number of people identifying as more than one race increased 276% from 2010.

The psychographic components as well are shifting. The Ipsos Future of Identity survey showed that one in three people who ranked "religion" as a leading factor in their identity ranked it as the top factor. For the much smaller group who listed their career or occupation as a key component of their identity, more than four in ten said it was one of the top three factors.

But these institutions are changing, too. Religiosity in America has been declining for decades. The number of Americans who hold more than one job has been increasing over the decades as well.

As identities morph, so will people's values and social mores. Increasingly, these point to more flexible, even situation-based standards.
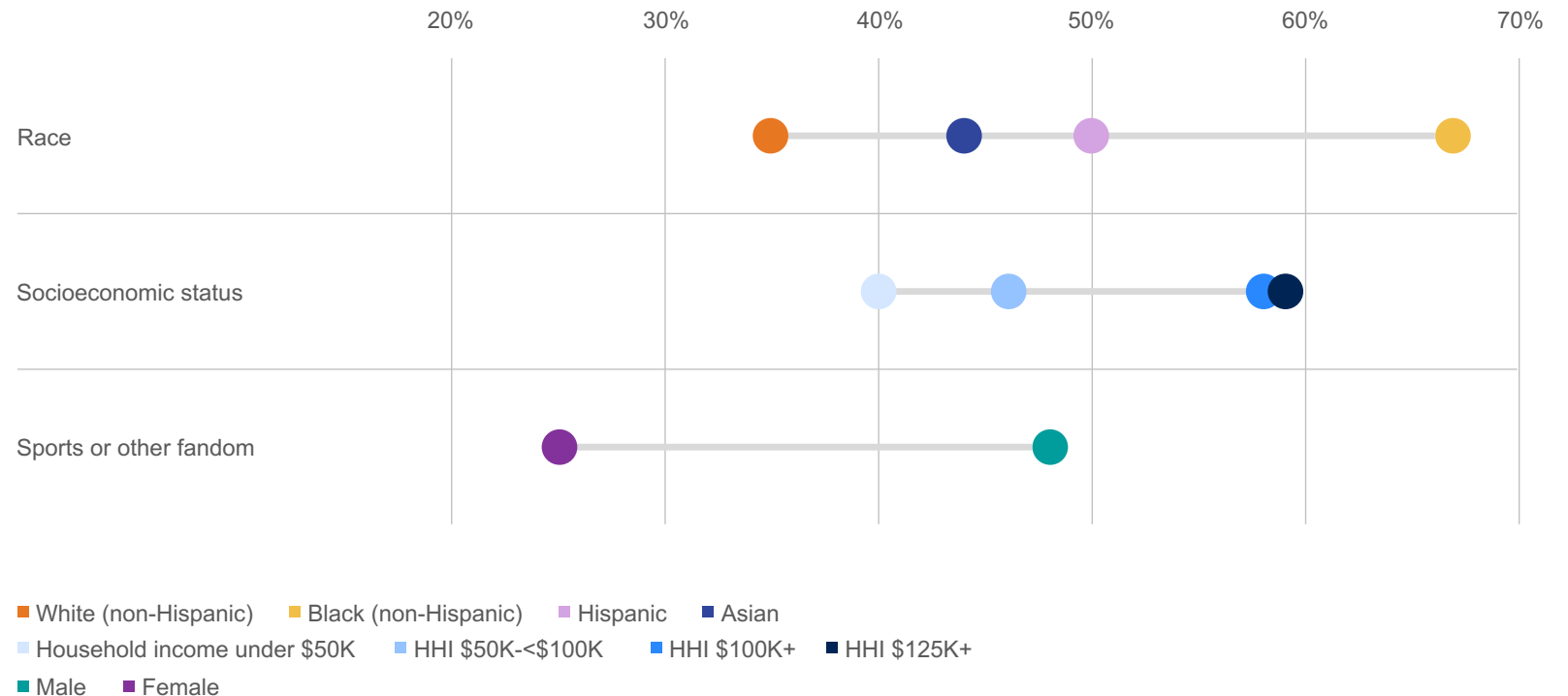
HELLO
MY IDENTITY IS
?

IDENTITY

Demographics

This could play out a couple of ways in the digital world, says Houda Messoudi, a director at Ipsos.

"It's certainly plausible that our sense of identity will become more and more fluid in the future, especially as we can express ourselves in virtual spaces and change that expression frequently with almost no limits."

"On the other hand, we might be looking at a future where we'll need an even more controlled 'real' identity used for access, credentials and more that is tightly regulated by a centralized authority."

How do personal identifiers shape who we are?

Q. From the following list, please rate how important, if at all, each of the following internal or personal factors are in forming how you think about yourself. (% Very important or somewhat important)

- ■ White (non-Hispanic)   ■ Black (non-Hispanic)   ■ Hispanic   ■ Asian
- ■ Household income under $50K   ■ HHI $50K-<$100K   ■ HHI $100K+   ■ HHI $125K+
- ■ Male   ■ Female

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 1,508 U.S. adults. Asian base = 66.)

Will we have different identities in virtual spaces?

IDENTITY

Technology

Timmu Tõke

CEO, founder, Ready Player Me

In virtual spaces we are able to craft digital representations of ourselves as avatars. That opens up many questions about the future of our identities. One consideration is purely logistic. Do we want to make an avatar for every platform we use? If you think creating unique passwords is a pain, this is much more of a burden. But what if it was seamless? Timmu Tõke founded Ready Player Me to solve that by creating an avatar engine that is meant to be portable across platforms. He thinks this will enable us to express ourselves as we want and need to, but with much less work.

62%

of adults 18-34 rate the groups they join as very important or somewhat important to how they express who they are.

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 1,508 U.S. adults.)
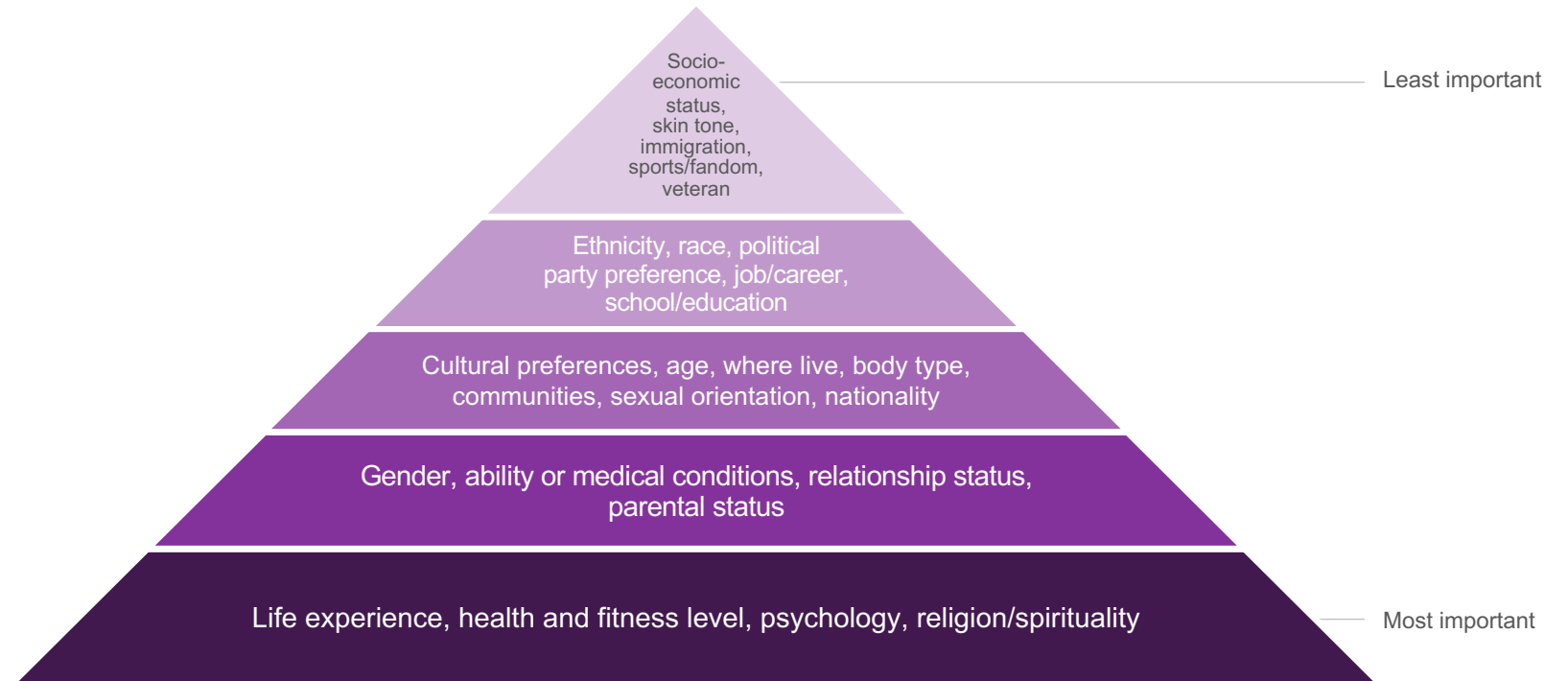
IDENTITY

Technology

Tõke suggests that we'll have different identities for different purposes. We might choose avatars more like our physical selves for people who know us in person. We might have an avatar for work. And we might have "aspirational" avatars for dating or gaming worlds, he says.

"Ultimately you will likely land on a few different identities. You will use not an infinite amount, because you still want to create some kind of a connection and maybe live out different parts of your own character in those identities."

This kind of switching between ourselves happens in real life as we change in and out of our "work clothes," for instance. The ideal is to make it a smooth transition in digital spaces, too.

Where do communities fit in America's identity pyramid?

Least important

Socio-economic status, skin tone, immigration, sports/fandom, veteran

Ethnicity, race, political party preference, job/career, school/education

Cultural preferences, age, where live, body type, communities, sexual orientation, nationality

Gender, ability or medical conditions, relationship status, parental status

Life experience, health and fitness level, psychology, religion/spirituality

Most important

(Source: Ipsos survey conducted Mar. 8-11, 2022. Results are based on a split-sample question where we asked 1,507 U.S. adults to rate and 1,508 U.S. adults to rank these factors on how they form how they think about themselves. The results were combined, weighting the ranking more heavily, to produce the tiers of the pyramid with the most important in the foundation of the pyramid and the least important at the top. Full question wording is available at future.ipsos.com.)

Why multiple identities are closer than you think

IDENTITY

Technology
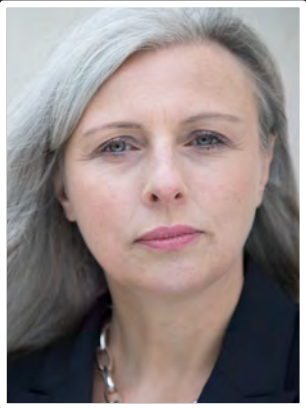
Tracey Follows

Author, "The Future of You"

Identity and its flip side, anonymity, are concepts that will evolve in virtual worlds like the metaverse. Already identities are complex to form, hard to define and increasingly easier to steal and fake. But even the concept and philosophy of "identity" varies from culture to culture. Tracey Follows explores these topics and more in her book, "The Future of You." How will we define ourselves? And what happens to our legacy identities as they drift through time and space? Will we run into our various selves from time to time?

42%

of Americans ages 18-34 are interested in a virtual identity, like an avatar, to express their identity online.

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 3,015 U.S. adults.)

IDENTITY

Technology

One key question, of course, is how much of our time will we spend in digital spaces vs. physical spaces. Follows doesn't think the answer is linear. Instead, we'll move more and more into virtual spaces. Trends rarely work like that, including in virtual worlds, she says.
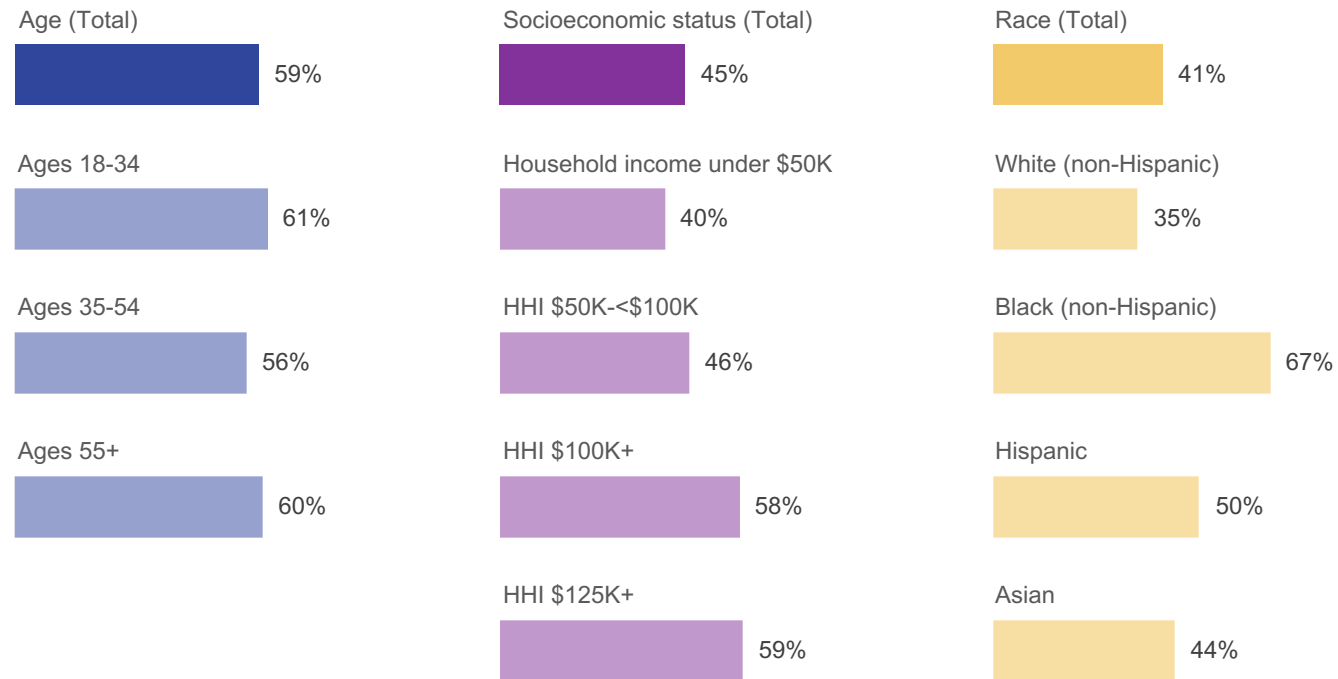
"I don't see it as this huge unfettered progress. People will stop doing certain things and decide, oh no, we want much more human contact again. It'll be cyclical. Then they'll come back to doing much socializing or work in the virtual environment."

But will tech advances lead to worlds where we can spin up a version of ourselves and role-play different decisions? Or converse with a former version of us? If you think avatars are cool now, just wait.

How do common demographics stack up in how we see ourselves?

Q. From the following list, please rate how important, if at all, each of the following internal or personal factors are in forming how you think about yourself. (% Very important or somewhat important)

Age (Total)
59%

Socioeconomic status (Total)
45%

Race (Total)
41%

Ages 18-34
61%

Household income under $50K
40%

White (non-Hispanic)
35%

Ages 35-54
56%

HHI $50K-<$100K
46%

Black (non-Hispanic)
67%

Ages 55+
60%

HHI $100K+
58%

Hispanic
50%

HHI $125K+
59%

Asian
44%

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 1,508 U.S. adults. Asian base = 66.)

How to design for any and every identity

IDENTITY

Technology

How does our identity impact our user experience?
For starters, design should consider the wide range of identities, and the wide range of expressions and abilities that they represent.

But beyond that, consider how we might log in or authenticate within apps in the future. Currently we use passwords or biometrics linked to our physical selves. How will that work in virtual spaces? Jacqueline Hull, a vice president in Ipsos' UX practice offers one solution:

"We might see cases where our avatars have to be verified as tied to our physical selves, even if the avatar is expressing another form of our identity."

Plausibly, however, we'll have to create wholly new experiences for verification where the combination of ourselves *and* our avatars have different access rights.

What matters most on internet anonymity?

Q. Please indicate the extent to which you agree or disagree with the following statements.

I feel safer on the Internet when I can be anonymous

White (non-Hispanic)

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
12%	24%	36%	12%	11%	5%

Black (non-Hispanic)

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
16%	19%	40%	10%	10%	6%

Hispanic

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
18%	28%	29%	12%	9%	4%

Asian

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
11%	29%	44%	6%	7%	4%

People should always have to post on social media under their own verifiable identity

Male

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
23%	23%	28%	11%	9%	7%

Female

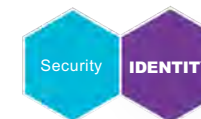| Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
19%	20%	34%	9%	10%	9%

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

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 3,015 U.S. adults.)

Security   **IDENTITY**

How will you prove and protect your virtual identity?

Imagine your avatar is walking into a party in the metaverse. There's a bouncer at the door. She looks at her virtual guest list and lets you in. But what is she checking? Your name? Your avatar? An NFT invitation in your crypto wallet?

Blockchain tech opens potential for us to have much more granular control over our personal information and identifiers. But decentralization has drawbacks, too. How do you appeal something? Will it be too "permanent" of a record? How do you get the world to agree on one system for verification? Otherwise, identification could be even more complicated than what we have now, says Trevor Sudano, a senior engagement manager in Ipsos Strategy3.

"There's a likely scenario where some centralized authority will be needed to verify people's unique digital identities."

That raises privacy, security and monopolistic implications in terms of who controls that database. It's almost too critical to entrust to any one entity. Will we have to anyway, to make the system function?

60%

of Americans overall agree that they are concerned about their identity being stolen or misused, while 50% of those ages 18-34 agree.

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 3,015 U.S. adults.)

Media

IDENTITY

When will entertainment better reflect all identities?

Katherine Pieper, Ph.D

Program director, USC Annenberg Inclusion Initiative

Media both shapes and reflects our identities — at least for those who see themselves in the media at all. Historically, that hasn't always been a positive thing. Stereotypes, biases and complex issues of under-representation of some identities have plagued the industry. But there is growing awareness that media should be as diverse as its audiences, says Katherine Pieper, who oversees the research and advocacy efforts for the University of Southern California's Annenberg Inclusion Initiative. She co-authored its "Inequality in 1,300 Popular Films" report.

53%

of Black and Hispanic Americans say they don't identify with people they see in popular culture, and 70% of white Americans agree.

(Source: Ipsos survey conducted Mar. 8-11, 2022, among 3,015 U.S. adults.)

Media representation and identity have a tricky relationship. People know when they see people like themselves on screen, when it's a positive or negative portrayal, and if it's an accurate one. Arguably, that's truer for underrepresented identities. But it's also important to see people who aren't like you. People who might have identities you don't run across in your everyday life, especially as we live in our physical and virtual bubbles. "Generally, we talk about media effects as being more powerful in the absence of direct contact," says Pieper.

"What are you watching? What are you consuming in the absence or in the presence of what you know?"

If you only know a certain demographic based on their on-screen portrayal, and that's not a positive stereotype, that can impact how you view people with that identity in real life.

Read the full Q&A on page 43.

Media influences who people are when other influences are absent
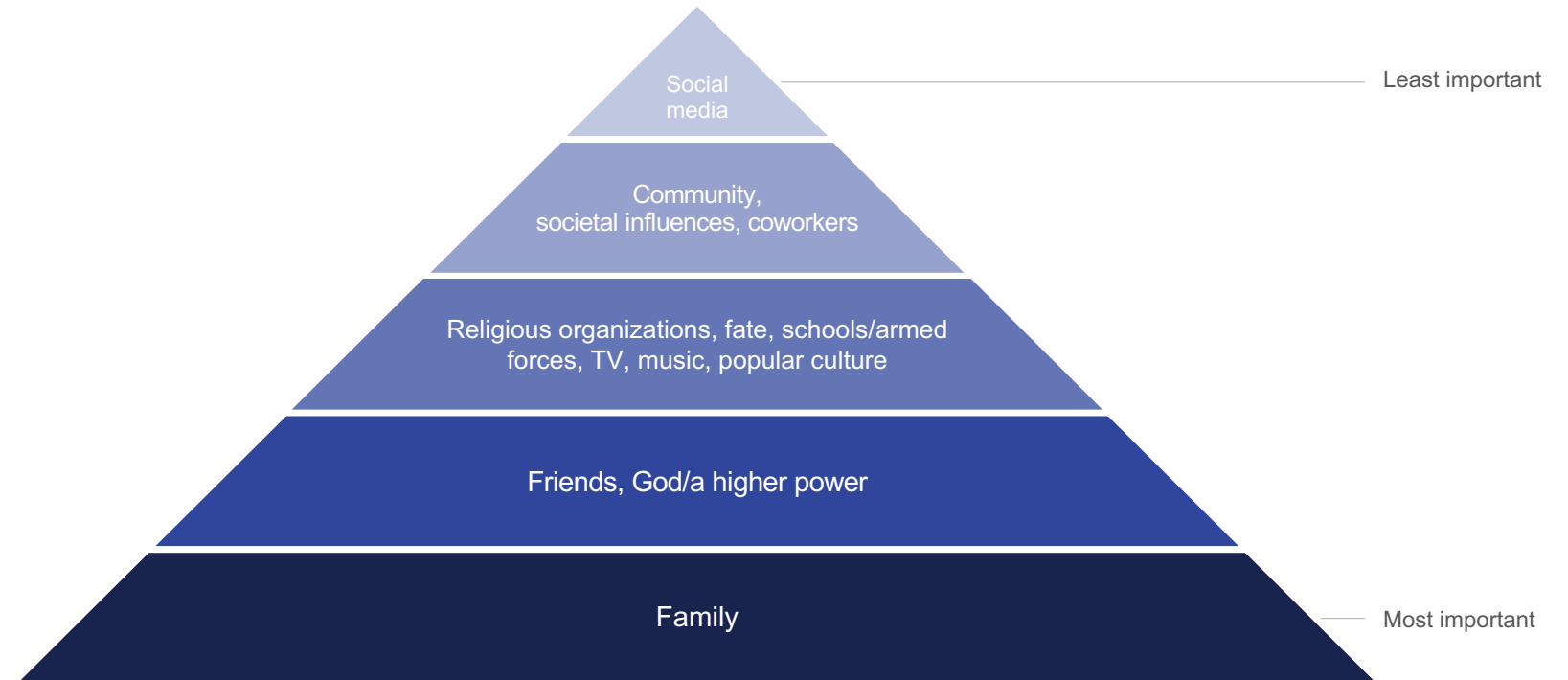
Social media — Least important

Community, societal influences, coworkers

Religious organizations, fate, schools/armed forces, TV, music, popular culture

Friends, God/a higher power

Family — Most important

(Source: Ipsos survey conducted Mar. 8-11, 2022. Results are based on a split-sample question where we asked 1,507 U.S. adults to rate and 1,508 U.S. adults to rank these factors on how they shape who they are. The results were combined, weighting the ranking more heavily, to produce the tiers of the pyramid with the most important in the foundation of the pyramid and the least important at the top. Full question wording is available at future.ipsos.com.)

WHAT THE FUTURE I Identity   Territory   I   **The lay of the land**   I   Tensions   I   Plausible ports and Waypoints   I   Appendix
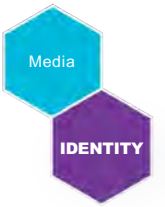
Media

IDENTITY

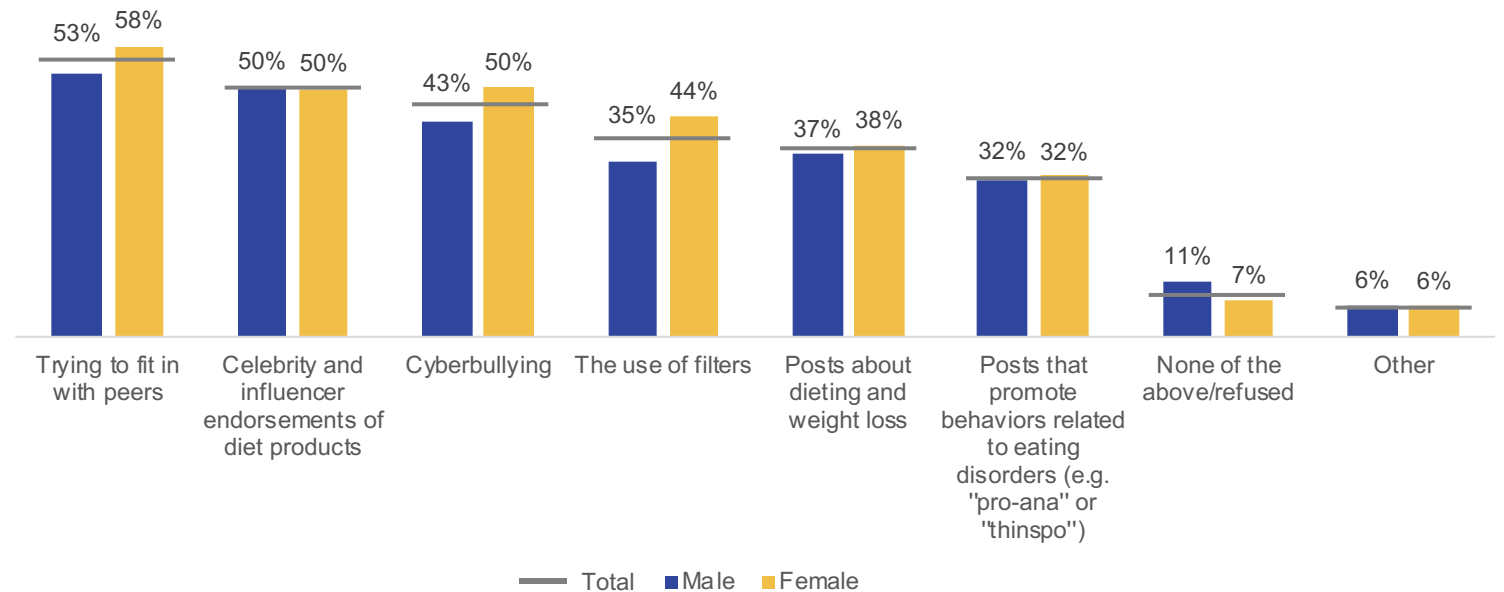# Here's what happens when media poorly reflects our identities

Our digital selves don't always match our real selves. Sometimes that a reflection of aspiration. Sometimes it's insecurity. And sometimes, that's unhealthy. Despite trends to embrace what our bodies can do rather than what they look like, Americans' preoccupation with weight and appearance can directly impact self-worth, especially for women, says Mallory Newall, a vice president in Ipsos Public Affairs.

She contends that pandemic trends of isolation and increased digitization created a perfect scenario for an eating disorder pandemic that could stick well into the future.

"Given the link between social media and lower levels of self-love, the basic contours of daily life may continue to inadvertently fuel eating disorders or negative self-perception."

How the disconnect between digital and real identities can cause unhealthy views of ourselves

Q. What are the biggest contributing factors in social media's impact on people developing eating disorders or unhealthy relationships with food?

Factor	Male	Female
Trying to fit in with peers	53%	58%
Celebrity and influencer endorsements of diet products	50%	50%
Cyberbullying	43%	50%
The use of filters	35%	44%
Posts about dieting and weight loss	37%	38%
Posts that promote behaviors related to eating disorders (e.g. "pro-ana" or "thinspo")	32%	32%
None of the above/refused	11%	7%
Other	6%	6%

— Total ■ Male ■ Female

(Source: Ipsos survey conducted Feb. 2-4, 2022, among 733 adults who think social media is a factor in people developing eating disorders or unhealthy relationships with food.)

Five tensions that will drive change:

1. To see or not to see yourself in popular culture

It's established that media has a representation problem. Hashtags like #OscarsSoWhite call this out annually. Currently only one in three people sees themself in popular culture. But interestingly, that number is higher for Black, Hispanic and Asian consumers, more than half of whom feel represented in the media they watch. But perhaps equally important is the understanding of identity we get from seeing people on screen with identities we don't interact with day to day.

"It's with identities you are less likely to come into contact with — people from different backgrounds or from different identities — that media can play a role in shaping how we see other folks with potentially greater impact," says USC Annenberg's Katherine Pieper.

Few see themselves in popular culture today

I identify with people I see in popular culture (movies, TV shows, etc.) | 36% | 64% | 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 is exactly right.

(Source: Ipsos survey, conducted March 8-11, 2021, among 3,015 U.S. adults.)

Five tensions that will drive change:

2. Do we want avatars?

Today, only a quarter of us want avatars. But this tension is almost certain to shift the other way as we have more and more places to express our identities in 3D virtual spaces. The tech isn't there yet, but it isn't far off, either. We're also growing a generation that will only know a world with virtual identities as overall tech uses catch up to where we are now to some degree with gaming.

"I'm excited to see what's going to happen when those kids grow up and start working together," says Timmu Tõke of Ready Player Me. "Are they going to use games as a communication tool? As a social platform? How will it change how they work together?"

Few are interested in creating a virtual online identity, so far

| I am interested in creating a virtual identity, like an avatar, to express my identity online | 25% | 75% | I am not interested in creating a virtual identity, like an avatar, to express my identity online |

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

(Source: Ipsos survey, conducted March 8-11, 2021, among 3,015 U.S. adults.)

25 – Powered by **Ipsos**

Five tensions that will drive change:

3. The freedom of expression

Today, most of us feel free to express our identities. That could be viewed as a very positive thing, especially as this is true to only slightly-varying degrees among every demographic and split we looked at, including sexual orientation. But we have been in a liberal period in terms of legislation and court rulings. Signs point to that pendulum swinging the other direction. If we feel less free in the future, that could have negative consequences on how we express our identities.

What's most important about expressing ourselves through fashion is "that we feel in true alignment with who we are internally and who we present to the world externally," says designer Leesa Evans. "When we are authentic that way, it puts to bed things like feeling like a fraud or being less than and all these inner dialogue ideas that we don't need."

Most of us feel free to be ourselves

I feel free to express my true identity in my daily life | 78% | 22% | I don't feel free to express my true identity in my daily life

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

(Source: Ipsos survey, conducted March 8-11, 2021, among 3,015 U.S. adults.)

Five tensions that will drive change:

4. To live in a bubble, or pop it.

The surest sign that we identify with someone else is if we share the same political party, according to Ipsos research. And we know from election data that more and more people live in areas where every presidential result is a landslide. So, it's not surprising that most say they live near others like themselves. But it is surprising that 42% don't. Dante Chinni hopes we don't let ourselves get too bubbled. "I just don't think that's what life's about," he says. "Part of being a citizen of the United States is it's kind of your job to understand that the world's bigger than you."

Now, what if virtual worlds allow us to become even more bubbled than we are currently? Or what if, as NPR reports, we move based on our politics? (Note: Census and other data suggests this isn't happening in significant numbers. Yet.)

Most live among people like themselves

| I live in an area where there are a lot of people like me | 58% | 42% | There are not a lot of people like me where I live |

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

(Source: Ipsos survey, conducted March 8-11, 2021, among 3,015 U.S. adults.)

Five tensions that will drive change:

5. Who builds the metaverse?

On one hand, virtual worlds could become like our social media spaces of today, concentrated among a handful of massively dominant platforms that rule their own gardens. On the other hand, smaller platforms could proliferate where each community rules its own platform. And, of course, it could be a bit of both with platforms like Sandbox allowing the users to have a role. "We're creating jobs for people to become moderators. It's supported by elected users of the platform to be able to report, and to vote on the report to evaluate whether a user's actions are appropriate," says Sandbox's Sébastien Borget.

Most want the metaverse to be governed by its own community

If I were engaging in a virtual world, I would want that world governed by the community of members who are part of it

77%   **23%**

If I were engaging in a virtual world, I would want that world controlled by the people or companies who created it

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

(Source: Ipsos survey, conducted March 8-11, 2021, among 3,015 U.S. adults.)

Plausible port one:

We cluster based on identity

Say it's 2032. The pandemic of the past decade didn't cause the huge migration that people initially thought, but it did accelerate a trend first called out in Bill Bishop's 2008 book, "The Big Sort." People move to communities where residents share similar identities. It's how megachurches got so mega. It's why sports bars pick a team to follow (even if it's a rival of the "local" team).

What if we continue to cluster, physically, with people with similar identities? A walk down Main Street will tell you a lot about who lives in a place. Retailers and restaurants develop regional concepts to mirror local preferences. Politically, the concentration of Democrats in big cities even within red states means the electoral vs. popular vote mismatch is even more skewed. The school board fights of the mid-'20s mean that No Child Left Behind gets ditched in favor of locally-driven curricula that speak to the values of the local community.

People use their virtual identities to explore other communities — like a cross between cosplay and Epcot tourism. But they get a similar touristy sense of those communities.

Our identities become more rooted in our physical locations because they're reinforced day in and day out by being surrounded by people of similar identities. We become even less comfortable in spaces (physical or virtual) where we have to interact with people not like us. Partially due to rising nationalism, and minority rule, our identities become more similar even as our actual selves diversify. That spills over into political dysfunction and even conflict in the workplace.

Waypoints

What if we become less bubbled in where we live?

Now, suppose we either choose to live where there are fewer people "like us" or circumstances change otherwise. In that world, maybe only 47% of people would say that they live in an area where there are lot of people like them instead of today's 58%. Suppose, as Dante Chinni suggests, that new schisms and fissures develop in areas like exurbs, military and college communities and even our large cities. Or it's just a natural outgrowth of having a more diverse population — it becomes harder to segregate. Would we seek out communities with similar identities in virtual spaces? Would we become more tolerant of the actual humans around us? Or would we choose something darker and more insular, creating micro-communities within our physical communities (think the Florida retirement community The Villages, but for other identities than "old and hedonistic," and tighter, more homogenous virtual spaces).

Plausible port two:

Our bubbles burst and identities flourish

Now, imagine 2032 again, but our waypoint, shifting toward a less bubbled society, shows us we're pointed toward a different outcome. In this plausible port, we express ourselves in more ways, both in our physical spaces and virtually. That's due, in part, to our physical spaces becoming less bubbled as our population diversifies and population density increases.

Imagine in this world that the macro trend toward urbanization continues, density increases, and mobility (which dropped to 8.4% in 2021) continues to decrease. We inevitably wind up living with people who are not like us. But human nature doesn't lend itself to that very well. We like having things in common with our neighbors.

In the meantime, the metaverse keeps growing and people find themselves spending more time with their virtual identities. They enjoy the freedom to create avatars that express different aspects of their personalities, including aspirational goals. One of two things happens: The metaverse centers around one or two main platforms, and people congregate in that space. Or the metaverse fragments, leading to the need for a Ready Player Me-like interoperable avatar.

Either way, brands realize that they can now sell virtual goods and target virtual ads to you based on each of your personas. This proves a revelation for brands that see potential for near-limitless growth as they create more goods and experiences not just for your work you, your home you and your "hobby" you than they do now. But for your hopeful you, your younger self (who you keep active in some worlds for nostalgic reasons), your aspirational self, that amusing self you created one long weekend but grew fond of — and more.

Appendix

**In this section,
we show our work
and our workers**

1. Full Q&As

2. Signals

3. Contributors

4. Artifact from the future

How what you wear reveals your true identity

Leesa Evans

Costume designer and private stylist

Leesa Evans has helped film audiences fall in love with film and TV characters from "Zoolander 2" to "Bridesmaids" to "Young Rock." Through their wardrobes, she helps inform how the actors brought their characters to life and how audiences perceive them. As one of Hollywood's busiest costume designers and stylists, Evans knows that the future of what people wear in real and virtual life is shifting toward understanding our true selves and comfort over social convention.

Kate MacArthur: You work with fashion and people's images on screen and in real life. Where do you rank fashion in how you present yourself and your identity?

Leesa Evans: What's most important about how we dress, and our appearance is that we feel in true alignment with who we are internally and who we present to the world externally. Because when we are authentic that way, it puts to bed things like shame and feeling like a fraud or being less than, and all these inner dialogue ideas that we don't need to succeed in whichever thing that truly brings us joy and passion.

MacArthur: That's in how you express your identity, yes?

Evans: Absolutely. This is something I really learned through the process of costume design. You can tell who someone is from the moment you meet them on screen, based on the way they dress. You can evoke certain emotions from the movie-going audience in the way that person is dressed. [The audience interprets] immediately that they're intimidating, or they seem vulnerable or insecure, or if the character is inspiring and kind. But we are subconsciously doing that to one another in so many ways daily in our real lives.

MacArthur: How is clothing used to set limits and boundaries around our identity?

Evans: Sometimes clothing can help create limitless possibility, and then sometimes clothing can inhibit you from reaching your full potential. Because we've all had this feeling where we have on a good outfit and that equates to a good day, or we have on a bad outfit and that equates to a bad day. That can be not from a fashion perspective, but from a comfort perspective. Or we just felt like we weren't dressed appropriately for a particular meeting or event, or for whatever reason we weren't in our comfort zone.

MacArthur: Can people invent or reinvent an identity purely on clothing?

Evans: It's possible. It's not so much that you're trying to reinvent yourself, but you're trying to present yourself finally and truly authentically. And what I do in my private styling career is help people find out who they know themselves to be and how to then express that through their clothing.

MacArthur: In our survey, 89% of American adults rated how they treat others as most important in how they express themselves. Things they wear was 42%. I was skeptical of that. What do you think?

Evans: First, it gives me faith in humanity that 89% of people said it's how we treat one another because I couldn't agree more. But I think that our ability to be in a good state of mind to truly be kind to one another is based on our own alignment and connection with ourselves, first and foremost.

To truly get to that place where we can always be kind to one another requires having a certain sense of self. And that is the equation that I find time and time again, which is feeling confident and a sense of well-being on a daily basis. That links to a greater sense of happiness, and that happiness directly relates to kindness. That's where I can see how what we wear gets us to a place where that statement is true.

MacArthur: How might the metaverse change how we express our identity?

Evans: The metaverse just opens all this opportunity to play and to have fun and to create all these different versions of ourselves. But it's important to stay grounded in the true nature of who we are. The playful aspect of it isn't based on perceptions of what size you wear, the length of your hair – things that are judgment-based – but more on what part of your personality can be expressed through [them].

MacArthur: What will we be wearing in the next 10 years?

Evans: I hope that we will have fabrics, and it's already starting to happen, where the fabric technology, whether it's just flat-out good for the environment, and we are not adding to climate issues, to fabrics that keep us cool when we're hot and keep us warm when we're cold and help us regulate our breathing when we start to feel a bit anxious. This future of fashion and fashion technology is all about the mushrooms that we grow to make our leather goods, and we no longer use leather goods. And the bamboo that we grow to make fabric, and we no longer cut down rainforest for trees and old growth trees for any reason. There are many interesting and new technologies that will bring us into the future in a more conscious way.

Kate MacArthur is deputy editor of What the Future.

"It's not so much that you're trying to reinvent yourself, but you're trying to present yourself finally and truly authentically. And what I do in my private styling career is help people find out who they know themselves to be and how to then express that through their clothing."

How where we live shapes who we are

Dante Chinni

Founder, The American Communities Project

Dante Chinni wasn't having a bad day. He just isn't optimistic and talking about the future kind of depresses him. A longtime journalist, he's the creator of the American Communities Project, which uses a county-level segmentation he created, as well as on-the-ground reporting to look at the geography of political identity.

Matt Carmichael: How are our physical divides dividing us politically?

Dante Chinni: Everybody's trying to win, or more importantly, I think everybody wants the other side to lose. That's why we can't get anything done. I'm not feeling very positive about the future right now. I keep telling everybody it's going to be a really bad decade. There are a lot of winners and losers economically and we're going through big demographic changes. These things create uncertainty and create tensions and they don't tend to create unity. I don't see anything pushing everything back together right now. The only forces I see are things pulling things apart.

Carmichael: How do demographics and political identity interplay?

Chinni: The way I like to think about it is the different markers within the data that increasingly let you figure out whether somebody's a Democrat or Republican.

It's been remarkable over the last 10, 15 years, what education is done for understanding where somebody stands, particularly for white people. If you give me the basics of age, race and educational attainment, I'll tell you a lot about someone. If you tell me where they live — their home, county or city — I can tell you much more.

Carmichael: Has the role of place in our identity changed?

Chinni: I've been doing this project for 14 years in different forms. I always knew the place part of it was big and it's become bigger. There was this feeling in the '90s when the web became a thing that place wasn't going to matter anymore. You could live in Kansas and have it be like the most far-flung suburb of New York. But what's really happened is the internet and the web have just become a million-channel cable box.

Carmichael: The American Communities Project is both a quant and qual project, right?

Chinni: We start with the quant work. Essentially, it's a filter. We use the data to find the story. But going out and talking to people is eye-opening. There's almost always something I hadn't thought about. And it'll make me go back and get another data set to see if this is an outlier or something we hadn't captured yet in the data.

Carmichael: How is the geography of our political identity changing?

Chinni: The blue and red divides have gotten deeper. But when you break it down by geography, you see these fissures and you see the puzzle pieces moving a little more. I feel that the parties in 10 years could just look dramatically different. Nationally, the party ID is getting stronger. The big cities are more Democratic. The urban suburbs are more Democratic and rural middle America is more Republican. But then you get to these other communities and exurbs, and you start to see the shifts happening in those places.

Carmichael: So, geographic complexity might lead us to more than two parties?

Chinni: It's tough, because the system is just designed for two. There could be a point over the next decade where we go through a period where there are three or four parties. But I feel like it's a moment. Eventually we'll transition that into something else.

Carmichael: Will the metaverse make unity easier or harder?

Chinni: The virtual spaces are going to allow people to retreat further and subdivide their community to be around people that are more like themselves. The metaverse is going to exacerbate the thing we've seen with real-world geography. It's going to create digital communities of affinity.

Carmichael: Do you think people are relocating to other states to find politically similar neighbors?

Chinni: No, not in a number that would matter. Because most people can't even afford to move at all. The people who can afford to, and we're talking a fraction of a fraction of a percent of Americans, are moving near people like them. And they're leaving behind people who can't afford to do that. And the people who can't afford to do that also are also impacted by it as well.

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

"The metaverse is going to exacerbate the thing we've seen with real-world geography. It's going to create digital communities of affinity."

Will virtual spaces be safe places to express our identities?
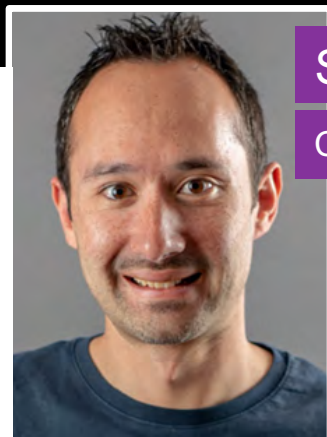
Sébastien Borget

Co-founder & COO of The Sandbox

Virtual worlds are an exploding new space for creating identities. The Sandbox is one of the leading platforms with brands like Adidas and Warner Music buying virtual land. But how do we govern those new worlds and how do we keep them safe spaces to express ourselves as individuals and as brands? Co-founder and COO Sébastien Borget says it's all about community.

Matt Carmichael: You're essentially creating a virtual earth with an entertainment and gaming focus. Are there limits to what you can do with that?

Sébastien Borget: We're creating a virtual world to enable creators and players to replicate experiences in the real world, such as live concerts, attending art galleries or fashion shows. But it's much more social and immersive.

Carmichael: You've had a lot of success partnering with brands, everything from Atari to Warner, to Snoop Dogg. What are the brands hoping to accomplish by buying space in Sandbox?

Borget: They are trying to establish a much, much closer relationship with their true community of loyal fans. With web tools there has always this run toward getting more followers, getting more likes.

But engagement through those media is limited and passive. And it's always one way. By entering the Sandbox, they are looking for not just a transactional relationship, but really taking this community-driven approach.

Carmichael: What do brands get out of that?

Borget: They value the time users grant them and users get rewarded through NFTs and in other forms for their engagement. I've seen the Morgan Stanley report that says the metaverse is an $8 trillion industry opportunity. Some brands are having a hard time after the pandemic physically to connect to Generation Z, who are less interested in physical goods or traditional products. Brands are trying to reconnect to those younger generations by also reinventing themselves.

Carmichael: What do you wish brands would do more to stretch the bounds of possibility?

Borget: I wish that within five years most brands will have adopted a Web3 approach, which is really community-driven, empowering their users through letting them own their digital assets. Brands will be able to provide value and run communities by engaging their fans with activities like attending a virtual concert from Snoop Dogg and by launching their own stores, their own adventures, becoming their mutual neighbors, and developing experiences.

Carmichael: Real estate in the physical world is highly regulated and taxed. Governments are slow to follow technology, but eventually they catch up.

Borget: With Web3, the value is driven directly toward creators. They are the ones reinvesting. But wouldn't it be a great recognition of the value of virtual real estate, if it becomes taxed as property? Then you can rent it, etc.

Carmichael: In a decentralized world such as this, how do you resolve what equates to zoning disputes or location exclusivity?

Borget: Our approach so far has been to create neighborhoods where we try to mix up a lot of culture and lifestyle. We bring music, artists, sports, entertainment, all within that neighborhood. That has helped Sandbox evolve where not all the value is concentrated at the center of the map with nothing in the suburbs. But then for the secondary sale, it can change. People can decide to start replicating the same business on all the land.

Carmichael: How do you keep it a safe place for people to express themselves and their identities?

Borget: We want to make the Sandbox as diverse as possible and as open as possible to any users. We're promoting more to women and underrepresented communities.

Carmichael: How do you enforce that?

Borget: It's a combination of technology and workforce. It's protecting every user and having incentives for the community to be part of that monitoring and moderating system. We have created jobs, elected by users of the platform, to be able to evaluate whether actions are appropriate or not.

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

“I wish that within five years most brands will have adopted a Web3 approach, which is really community-driven, empowering their users through letting them own their digital assets.”

Will we have different identities in virtual spaces?

Timmu Tõke

CEO, founder, Ready Player Me

Talk of the metaverse is all the rage today, but tomorrow these sorts of 3D virtual spaces will likely be ubiquitous. However, the metaverse evolves, people are going to need an avatar to represent their identities. Timmu Tõke sees the metaverse as "a network of thousands of different places." He believes that as people move from one virtual space to another, they won't want to make a new avatar for each, so he's building an interoperable format that can be used in multiple worlds. He started Ready Player Me to fill that need.

Matt Carmichael: How do you think about identity in virtual spaces?

Timmu Tõke: Identity is your representation in a virtual world. You can have many identities. If you have a 3D world, you need to have some kind of avatar. The more social the game is, the more important the identity is. The more you play the game with your friends from real life, the more likely you are to create an identity connected with your real-life identity, versus if it's a fantasy world you might create something that doesn't relate to you at all.

Carmichael: What will we be able to do to express ourselves differently?

Tõke: A great thing about the virtual world is that there's no physical limitations. People will have a lot of different virtual identities and avatars that they use for different types of experiences. One can be connected with your

real-life identity. You might have a realistic one for work meetings and you might have a more aspirational version for playing games with your friends or going on a date. And then there can be also just a fantasy identity that can be a different gender or an animal.

Carmichael: As the metaverse evolves how do you see the role of avatars changing?

Tõke: The more time people spend in 3D virtual worlds, the more they need an avatar to represent them. Our core hypothesis is that people will spend more time in virtual playing games, shopping and going to events. In all those places they need to have an avatar. It becomes a bigger part of our lives as more virtual interactions will happen through an avatar. People will see avatars as an extension of their own identity.

Carmichael: How many identities do you think we can support at once?

Tõke: Ultimately you will land on a few different identities. You will use not an infinite amount because you still want to create a connection and live out different parts of your own character in those identities.

Carmichael: How will people express those identities?

Tõke: They're more likely to spend money on them to buy skins [costumes and gear for avatars] and buy cool things and express themselves and so forth. Right now, it's very much a gaming thing and a lot of people play games. But it's going to be more mainstream as virtual spaces evolve.

Carmichael: And as you're moving from world to world, will you look the same? What happens to the skins and accessories you buy for your avatar?

Tõke: We believe that the metaverse needs to be more connected and interoperable. We believe that the assets you buy in one world should work in other games – not all of them, but I think with avatars it makes a lot of sense to be consistent.

Carmichael: How are brands helping people create and express their identities in these 3D virtual spaces?

Tõke: In the real world, brands tell a story and help you express your identity. I can't see why that would be any different in the virtual world, because if you have built a real-world brand and it's something people desire, why wouldn't they scale that virtually?

If it's a clothing brand, you could have incredible margins and maybe even a better business in the virtual world long-term. It also makes sense that the same new brands will be desirable in the virtual world. They're just experimenting now. There's so much to learn.

Carmichael: Will brands have to work across multiple platforms as well if avatars aren't interoperable?

Tõke: You can either go to each individual game and customize and create a new asset that works for their [specifications]. But that's going to be a nightmare. An interoperable avatar is great for brands because people can purchase something that then becomes usable across thousands of different worlds. That enables brands to play in the metaverse in a different way than manually creating assets for each game. That's just not feasible.

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

"In the real world, brands tell a story and help you express your identity. I can't see why that would be any different in the virtual world, because if you have built a real-world brand and it's something people desire, why wouldn't they scale that virtually?"

Why multiple identities are closer than you think
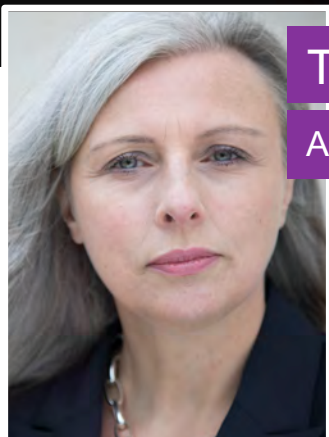
Tracey Follows

Author, "The Future of You"

The central question of this issue is how we will shape our identities in virtual spaces. Futurist Tracey Follows tackled this in her new book, "The Future of You." While there are certainly questions that will still be answered over the coming decade, she offers some hints about what the future will hold.

Matt Carmichael: How do we create our identities online today?

Tracey Follows: It's somewhat of an elusive concept but then I don't go along with the people who say that it's just an illusory concept. Because you have to know who someone's identity is because you have to ascribe rights and duties and responsibilities and even emotions to a specific person. And that person has to have some continuity. In the past we would've said it was continuity over time, but now we're saying it's continuity over space.

Carmichael: What do you mean by that?

Follows: Are you the same person in real life as you are in these online worlds? Partially it depends on your philosophical take. It depends what culture you've grown up with? For some people and some groups, it's a very tribal thing and your identity's conferred on you by the group that you want to belong to. For Buddhists, the

identity is something that is arrived at, towards the end of life because it's the summation of every single interaction you've had with every single person.

Carmichael: How do you see this changing as we have identities now in more virtual spaces?

Follows: We will have much more fluid identities because we'll be in more fluid spaces. But then I see the counter trend which is the authorities or institutions needing to reclaim back or to manage these fluid identities with centrally organized, biometrically underpinned identity systems.

Carmichael: How do we keep control of our identity and our biometrics like our face, our fingerprints?

Follows: It's a vigilance on behalf of every single citizen. We have to stop thinking of ourselves just as consumers or users of these technology products and understand that we are citizens and that we have some digital rights.

Carmichael: There's a way in which this could allow people to be their more authentic selves in a safer space than would necessarily be in the real world. Then there's a clear counter to that where it becomes even more toxic in the online world than it is in the real world.

Follows: It will be interesting to watch is how different virtual reality and virtual media is from social media. I'm sure you know the Marshall McLuhan quote, "All forms of violence are quests for identity." We see a lot of aggression and antagonistic behavior on social media, it's because people are fighting to get their identity represented. When we have sensory capabilities in virtual media, I think then we'll get a proper representation. I think it will be less antagonistic than we find social media right now and more empathetic.

Carmichael: How many identities will you have in these sorts of worlds?

Follows: We are used to having one authentic identity physicality because we're embodied in this physical body, but we won't have that. We could have many different identities in the metaverse or whatever you call it. That means that you could end up meeting up with yourselves. And I think that's the most interesting thing that you can

bend time and space so that you don't have to be just one person living a very linear life. One could meet up with different versions of one self at different ages lifestyle ages, perhaps you could meet up with your younger self or older self, you know, all of these things could be possible and that will really give us a completely different sense of reality.

Carmichael: How do you build trust in those communities if you don't really know who you're interacting with and if it's really them?

Follows: Eric Schmidt has suggested that we'll all have of AI assistants who are very good at detecting what's authentic and what's not. Sort of an AI detective on your shoulder trying to work out the digital forensics. I'm not entirely sure people want to live like that. I don't see it as this huge, unfettered progress. People will stop doing certain things and decide, oh no, we want much more human contact again. It'll be cyclical. Then they'll come back to doing much socializing or work in the virtual environment.

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

> "I'm sure you know the Marshall McLuhan quote, 'All forms of violence are quests for identity.' We see a lot of aggression and antagonistic behavior on social media, it's because people are fighting to get their identity represented."

How can entertainment better reflect all of us?
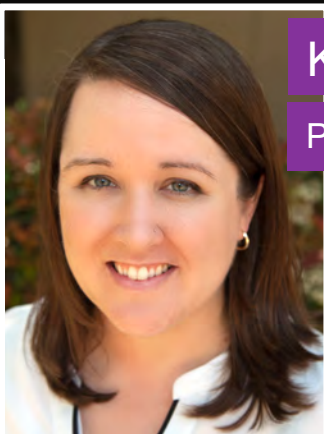
Katherine Pieper, Ph.D

Program director, USC Annenberg Inclusion Initiative

Media both shapes and reflects our identities — at least for those who see themselves in the media at all. Historically, that hasn't always been a positive thing. Stereotypes, biases and complex issues of under-representation of some identities have plagued the industry. But there is growing awareness that as audiences are more diverse, media should be, too.

Kate MacArthur: How does Hollywood have the most powerful effect on what shapes who we are?

Katherine Pieper: Generally, we talk about media effects as being more powerful in the absence of direct contact. It's when you are less likely to come into contact with people from different backgrounds or from different identities that media can play a role in shaping how we see other folks with potentially greater impact. It really is then back to what are you watching? What are you consuming in the absence or in the presence of what you know?

MacArthur: What are some of the ways specifically how representation is evolving?

Pieper: Is it numerically? Are people present and part of these stories in ways that demonstrate the impact that folks have in our communities, and are present in ways that they're a focus of the storytelling? And then some of these other indicators focused on stereotypical stories,

or the various aspects of identity that people can inhabit. Intersectional inclusion is often absent. The picture of the LGBTQ-plus community in top films is still largely white and still largely male. That's important to represent that experience, but there's a variety and an array of experiences that people in our communities and in the audience experience. And we often don't see those represented on screen.

MacArthur: What might be a powerful entertainment moment that would shape or reflect a person's identity?

Pieper: It's going to vary so much between people. But portrayals that make people feel seen and heard are always important. You can see when "Wonder Woman" came out, all the anecdotal reports of women who said, "I'm finally seeing something that is inspiring to me, or I feel excited about it." Or "Black Panther" and how Chadwick Boseman embodied that character and what it meant to viewers and to people.

MacArthur: What has been most successful that will help move things forward?

Pieper: You're seeing companies who take this seriously who are trying to put systems in place. Amazon Studios, who we've worked with to build their inclusion policy and playbook that they released last summer is really a guide to how to do this well. There's more work to be done and it's finding those places in the hiring and the development process.

Whatever place in the process where they can take actions or put something into practice, that's going to shape the things that move forward. Seeing progress for women directors, seeing that the gains that we had were sustained, that's so important. That number has been very stubborn to move over time. So, there is progress. Now it's about widening that aperture so that women of color are also part of that progress.

MacArthur: Can you connect those metrics with profit?

Pieper: When we looked at films with women of color in leading roles, they consistently were given lower production budgets, lower marketing, put in fewer theaters and fewer territories. If films aren't getting the support that they need to succeed, and they tend to be films that fall into stories about women or people of color, then there's something else at play. The question about linking profit to identity, you can't

answer it because you're consistently setting films up with women and people of color in the lead to not perform as well. It's about coming back to that, and for executives who are green-lighting and developing films saying, "How do we level that playing field and then really see what happens," because that's not been the case.

MacArthur: Now you can be anything in the metaverse and you don't even have to identify with a particular gender. Where do you see that going?

Pieper: We're very much at risk at replicating some of what we currently have. So that's where our eye will be. Are things looking the same or are they looking different in the worlds that are constructed, because then we're just inserting people into the status quo and expecting something different.

MacArthur: How much opportunity is there in the metaverse for people to reflect or express their identity?

Pieper: You're seeing some interesting research right now, like on Instagram and girls. How is social media also a way to put on an identity and play with that identity in ways that that can have real consequences for people offline? It's young people that will be the fertile ground for research as they embrace these technologies from a younger age.

Kate MacArthur is deputy editor of What the Future.

"If films aren't getting the support that they need to succeed, and they tend to be films that fall into stories about women or people of color, then there's something else at play."

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

We found the real names of bored ape yacht club's pseudonymous founders via Buzzfeed. This hyped NFT collection has earned millions, but its anonymous leadership is raising questions about accountability in the world of Web3.0.

The metaverse is the next venue for body dysmorphia online via Technology Review. Will seeing realistic avatars help or hurt our body image? How will virtual replicas of ourselves impact how we feel about our physical selves?

Even in the metaverse, not all identities are created equal via Bloomberg. Price differences for digital avatars based on race, gender and skin color are cropping up in the buzzy collection of CryptoPunks NFTs, which defies the notion of the blockchain and its related industries like NFTs and cryptocurrencies leveling the playing field.

Bill Gates says the metaverse will host most of your office meetings within 'two or three years' — here's what it will look like via CNBC. Virtual work meetings are going to look way different and sooner than you think.

LGBT+ Pride 2021 Global Survey points to a generation gap around gender identity and sexual attraction via Ipsos. The survey also finds much more support than opposition toward corporate activism promoting equality.

The Fault Lines of America via Ipsos. New Ipsos research finds that identifying as either a Democrat or Republican is a real and more meaningful source of difference than race or religion in the minds of many Americans today — particularly for Democrats.

Diversity & Inclusion Research Insights via Ipsos. Ongoing Ipsos research exposes uncomfortable truths about diversity and inclusion, while our experts forge a new path forward. Leveraging Ipsos data, and experts from the U.S. and around the world, our detailed research reports explore a wide-range of topics from societal behaviors and shifts, consumer-driven expectations, advertising and brand dos and don'ts and more.

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 Ipsos employees Alveena Siddiqi, Wyatt Smith and Sophie Washington.

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• **Ipsos BRIDGE** (Being Racially Inclusive and Diverse is Good for Everyone) fosters a shift to active involvement and support of racial equality.

• **Ipsos MVP** (Military Veterans Program) has partnered with Onward to Opportunity and the Veterans Career Transition Program to help veterans and military service members transition from military to civilian life and form an internal network of veterans and those interested in helping the veteran community.

• **Out@Ipsos** ensures an inclusive culture for all Ipsos employees and enables them to be active in LGBTQ+ community outreach.

• **Gender Balance Network** helps women at Ipsos develop leadership skills and connect to each other as they advance through personal and professional life stages.

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Artifact from the future

It's 2050 and you've forgotten to update your digital passcode to get into the house. Again.

Everything has a passcode now. But crypto codes have been too easy to forget. Faces and voices can be faked. The idea of a single password is still too fraught with risk of theft (or forgetting) or the lack of privacy control.

You'd think by now that it would be easier to verify who somebody is, right?

You're just glad that science has finally perfected a way to combine fingerprint and scent biometrics to accurately prove you are who you say you are. And just in time. It looks like the sky is about to dump a lot of rain.

For full results and methodology, <u>visit future.ipsos.com</u>

and <u>subscribe to our newsletter</u> to receive our next issue, What the Future: Earth

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