

WHAT THE FUTURE: LOVE

How changing institutions will
define relationships PAGE 11

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online dating is headed PAGE 14

How expressing love will change
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drive change PAGE 23

+ Experts from Pandora Jewelry and the American Enterprise Institute, as well as a dating expert and an advice columnist discuss changes in how we'll define, find and express love in the future

GAME CHANGERS



What business and institutions need to know about changing norms of love

Imagine it's 2030.

How did you meet your spouse or partner? It's a basic cocktail party question. When fielded as a survey prompt, we see a lot of expected answers: work, school, friends, etc. But then sometimes verbatims bring home the gold: "He came to my house to serve my foreclosure notice."

Now there's a story of love. And who knows, with interest rates where they are maybe we'll see more of this kind of answer in the future. Because love and marriage and money are inextricably tied up with each other. Always have been, and plausibly always will.

The Philosopher of Love, Huey Lewis, once sang that, "The power of love is a curious thing. Make a one man weep, make another man sing." I would argue it could make the same man do both, but I digress. In foresight, it's a contractual obligation that you are a fan of "Back to the Future," so this key soundtrack song fits this issue in multiple ways.

We are curious about love, its future, and how changes in how we love, who we love, how we express our love and how we navigate the functional constructs of love will impact everything from housing to financial services to jewelry and retail and more.

Some aspects of love, like marriage, have been changing over the decades. The median age at first marriage has risen to over 30 for men and over 28 for women. Importantly, the portion of the never-married population has also been rising for decades. All of that is the nuts and bolts of relationships (or lack thereof), so what of love itself?

How will we meet our partners? How many will we have at once, and over our lifetimes? These answers are changing, and increasingly technology and platforms are playing a role. Like so many aspects of our lives, love is now moderated and mediated by screens and tech. Enter ChatGPT and its AI successors.



11%

of matched Americans met their current spouse or partner through a dating app, with 16% of Gen Zers and Millennials saying so.

(Source: Ipsos survey conducted Jan. 9-10, 2023, among 705 U.S. adults currently in a relationship.)

In this issue we'll talk to dating expert and former Tinder sociologist Dr. Jess Carbino who thinks there is a lot of potential for AI to assist in the dating process, especially since matchmaking sites have such a trove of data to train it on. But even without insider access, ChatGPT is doing a reasonable job. I asked it to write a dating profile for a 25-year-old guy who likes the outdoors, cooking and action movies and wants a female partner. It did a decent job. But as Carbino told me, humans are bad at doing that themselves.

Having an AI tell you that a dating profile should be “honest about who are you” as it writes you a dating profile is a little mind-bending.

So I told the AI that it had been trained on suboptimal inputs (there's a larger story of AI here, for sure). I asked it to write me something it thought would be more effective. And it said, “An effective dating profile should be clear, concise, and honest about who you are and what you're looking for. ... Here is a possible example of a more effective dating profile,” and it wrote me one. I had the AI write me a couple of scenarios for if this guy found love and if he didn't. They were cheesy and trite.

“One day, while they were on a trip to a new city, the guy got down on one knee and proposed. The woman was overjoyed

and said, ‘Yes.’ They were excited to start their new life together as a committed couple.” Not far off the mark as romance fiction goes, eh? AI has the power to transform how we date and find the people we date in ways that could be viewed as positive or negative, maybe making it easier, maybe harder.

In WTF Aging, we talked about an AI-assisted companion for the elder community, ElliQ. As more young Americans remain single for longer — or forever — how far can we be from normalizing similar products aimed at those who are living alone at different phases of our lives?

The future of love is tied to the institutions that have historically shaped and defined it: religions, governments, etc. As our relationships with those structures change, so will our relationships to each other.

Certainly, love in all its forms will be a driver of how we live, spend, relate and even vote. And I would love it if you'd read on, subscribe to What the Future and forgive/indulge the Huey Lewis earworm I lodged in your brain.

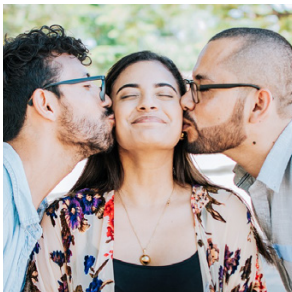
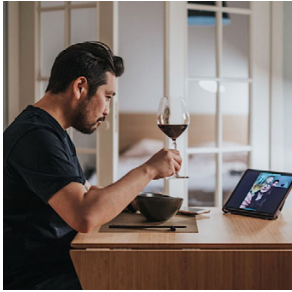


Matt Carmichael is editor of What the Future and head of the Ipsos Trends & Foresight Lab.

65%
of single Americans ages 18 to 34 say they want to get married (or remarried) someday and 16% say they don't.

(Source: The Ipsos Consumer Tracker, fielded Jan. 31–Feb. 1, 2023, among 516 single U.S. adults.)

Contents



1. Territory map

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

2. By the numbers

We look at the state of love today with Ipsos U.S. and global data.

3. The lay of the land

We talk with a love advice columnist, a dating expert, and experts from Pandora Jewelry and the American Enterprise Institute about changes in technology, cultural institutions, and demographics and how they will shape how people will connect, commit, spend and split in the future.

3. Tensions

Do people think dating apps are a good tool for finding “the one” or no? What’s more important to show love: actions or gifts? Would people rather that financial services define relationships legally or flexibly? The side that people take on these forced choices in the future could shift how people seek partners for love and life and how brands represent and serve them.

4. 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 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. Then, we explore the optimism gap between what we hope to see in the future versus what we expect to see in the future.

5. Appendix

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

Territory: What will drive the future of love?

The future of love is bound to the institutions that have historically shaped and defined it, from religion to government to financial structures. As our relationships with those structures change, so will their influence on how and when we seek life partners (or not), how we live and how we express our feelings and identities.

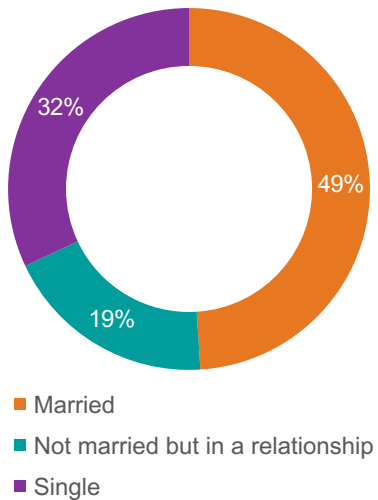


Love by the numbers

How we partner — or not

Who is together

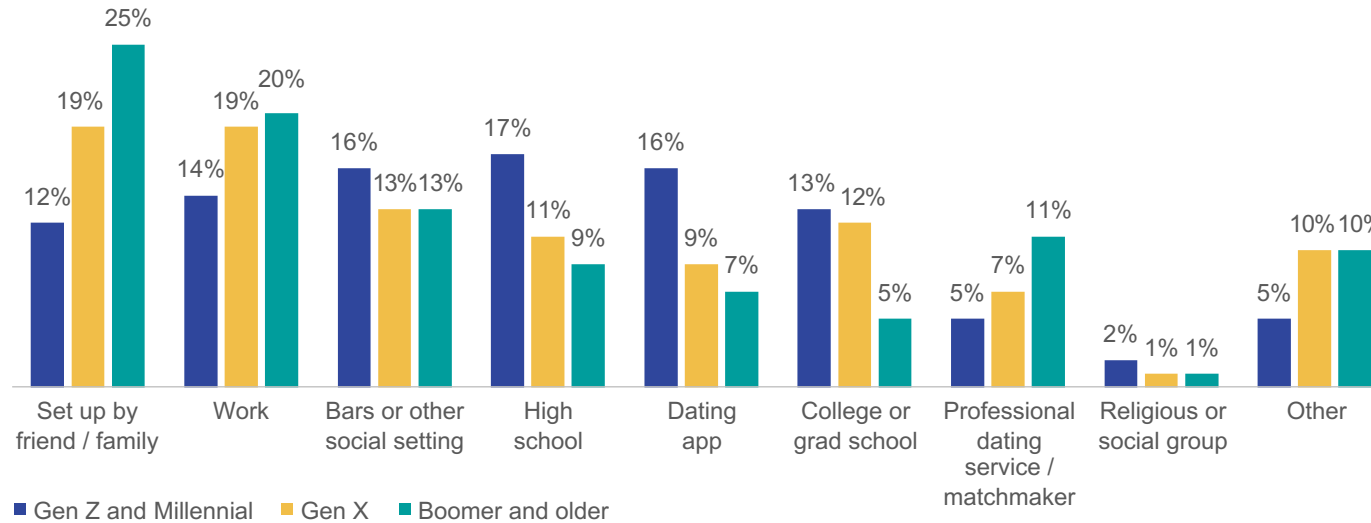
Q. What is your marital status? / Are you currently in a relationship?



(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)

Where we find love

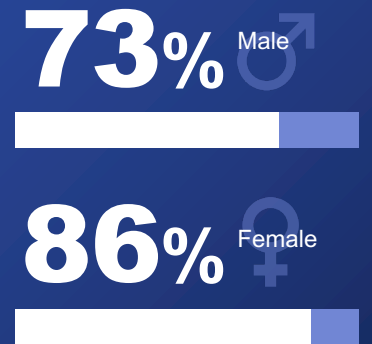
Q. How did you meet your current partner/spouse?



(Source: Ipsos survey conducted Jan. 9-10, 2023, among 705 U.S. adults currently in a relationship.)

Monogamy varies by gender

Q. Which of the following best describes you and your partner / spouse's relationship?
(% Selected monogamous)



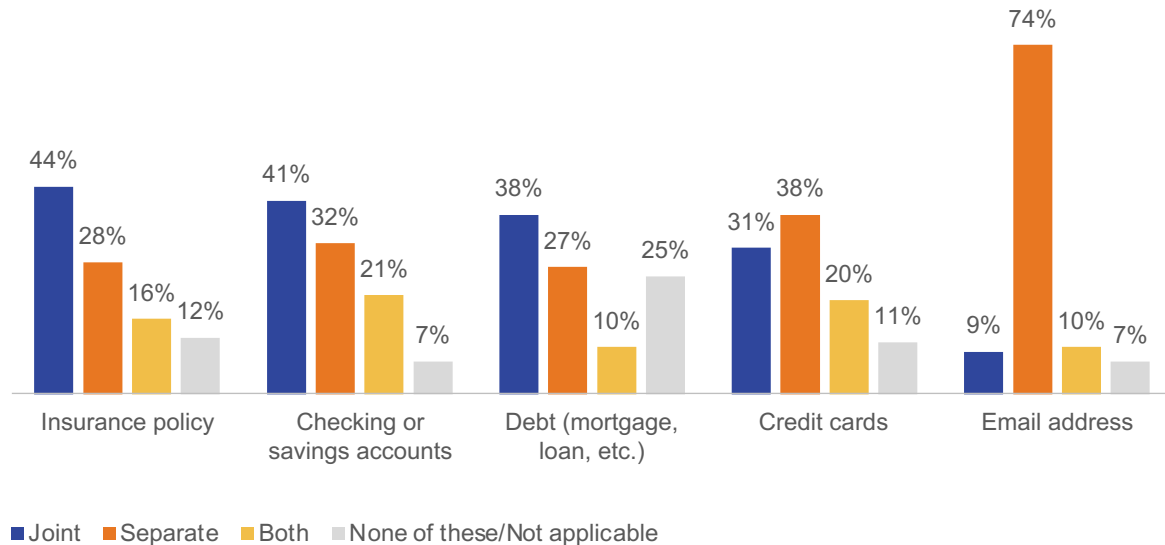
(Source: Ipsos survey conducted Jan. 9-10, 2023, among 705 U.S. adults currently in a relationship.)

Love by the numbers

What's yours, mine or ours

How partners share accounts

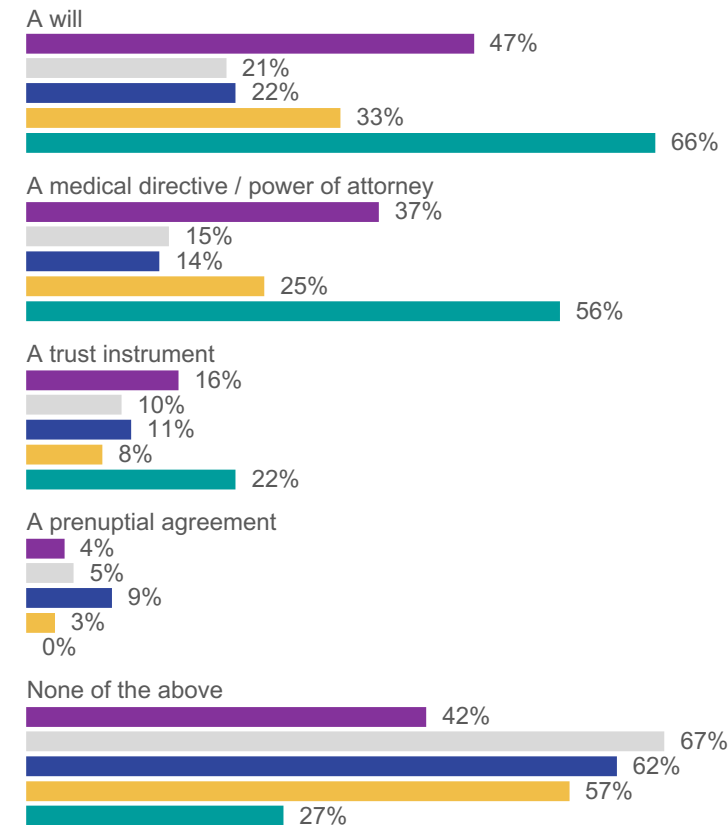
Q. For each of the following, do you have a joint account or item with your spouse/partner, a separate account or item, or both? (% Selected)



(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)

How partners make it legal

Q. Do you and your partner/spouse have any of the following? (% Selected)



(Source: Ipsos survey conducted Jan. 9-10, 2023, among 705 U.S. adults currently in a relationship.)

Love by the numbers

Will love keep us together?



62%

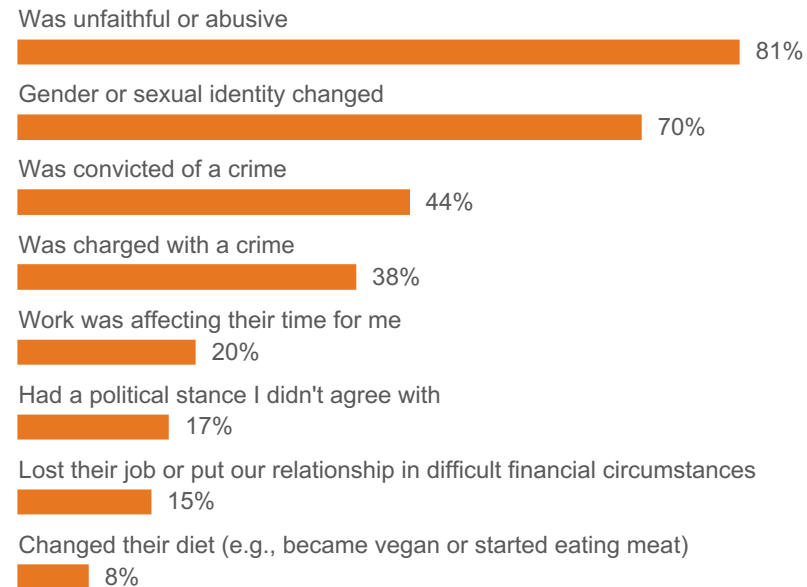
of Americans would likely consider a divorce or breakup if they didn't love their spouse or partner anymore.



(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)

Why we split up

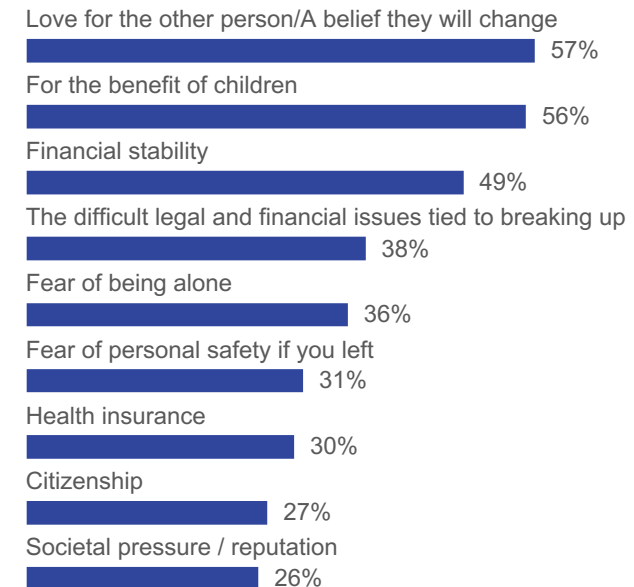
Q. Whether you are currently in a relationship or not, how likely or unlikely would you be to consider a divorce or breakup under the following circumstances? If my spouse/partner(s)... (% Likely)



(Source: Ipsos survey conducted Jan. 9-10, 2023, among 705 U.S. adults currently in a relationship.)

Why we stay

Q. Below are some reasons why people may choose to stay in an unhappy relationship. Regardless of your current relationship status, how likely or unlikely would you be to stay in a relationship for the following reasons? (% Likely)



Emerging Global trends

People in these countries think it will get easier to find a mate

For romantics around the world, things are looking more hopeless than hopeful.

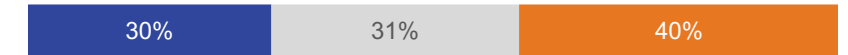
A little more than one-fifth of people on average globally expect that finding a romantic partner or spouse will get easier for singles, according to a new Ipsos survey. Out of 32 countries, Americans are among the more skeptical of their chances, as just 13% say things will get easier and 43% say it will get more difficult. South Koreans have the worst outlook, as 65% see the future as more difficult. Saudi Arabians are the most positive, as 50% see things getting easier.

Not surprisingly, hope increases with youth. Interestingly, more Gen Xers perceive finding love as getting more difficult than other generations, both in the U.S. and among the global average. Perhaps these perceptions signal how technology could make things better or worse for people as meet-cutes are increasingly driven by dating apps and immersive media than Cupid's dart.

Younger adults globally expect it to become easier for single people to find love

Q. Do you expect that over the next 10 years the following will get easier, get more difficult, or stay about the same? – For single people to find a romantic partner or spouse (% Total)

Gen Z



Millennial



Gen X



Baby Boomer



■ Get easier ■ Stay about the same ■ Get more difficult

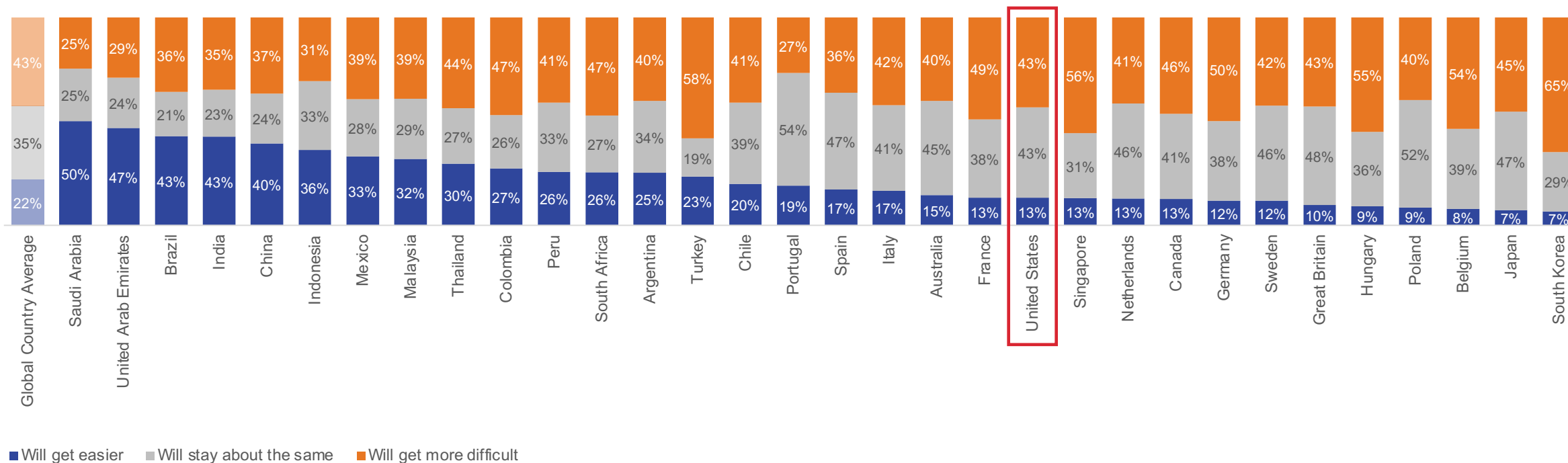
(Source: Ipsos Global Advisor survey conducted Dec. 22, 2022-Jan. 6, 2023, among 22,508 adults across 32 countries.)

The world outlook for finding a romantic match

Americans are among the less optimistic that finding love will get easier

Q. Do you expect that over the next 10 years the following will get easier, get more difficult, or stay about the same?

– For single people to find a romantic partner or spouse (% Total)



(Source: Ipsos Global Advisor survey conducted Dec. 22, 2022-Jan. 6, 2023, among 22,508 adults across 32 countries.)

How changing institutions will define relationships



Dan Cox

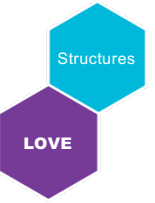
Director, Survey Center of American Life, American Enterprise Institute

Dan Cox is a senior fellow at the nonpartisan think tank AEI. He researches cultural shifts in religion and youth culture, as well as loneliness, arguably the flip side of love. He sees ongoing changes in how people meet, how well their relationships work, how they are defined and how they are structured, which feels like a lot of change for something as old as humanity itself.

76%

of Americans agree that in the future it will become more common for people in relationships or with partners to remain unmarried.

(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)



Dr. Cox agrees with sociologist Dr. Carbino in that he sees the institutions where people meet changing, which could lead to a rise in more online forms of meeting and dating. But he finds the commodification and gamification of relationships troubling, he says.

“I worry that technology, in its effort to supplement our sociability, actually replaces it.”

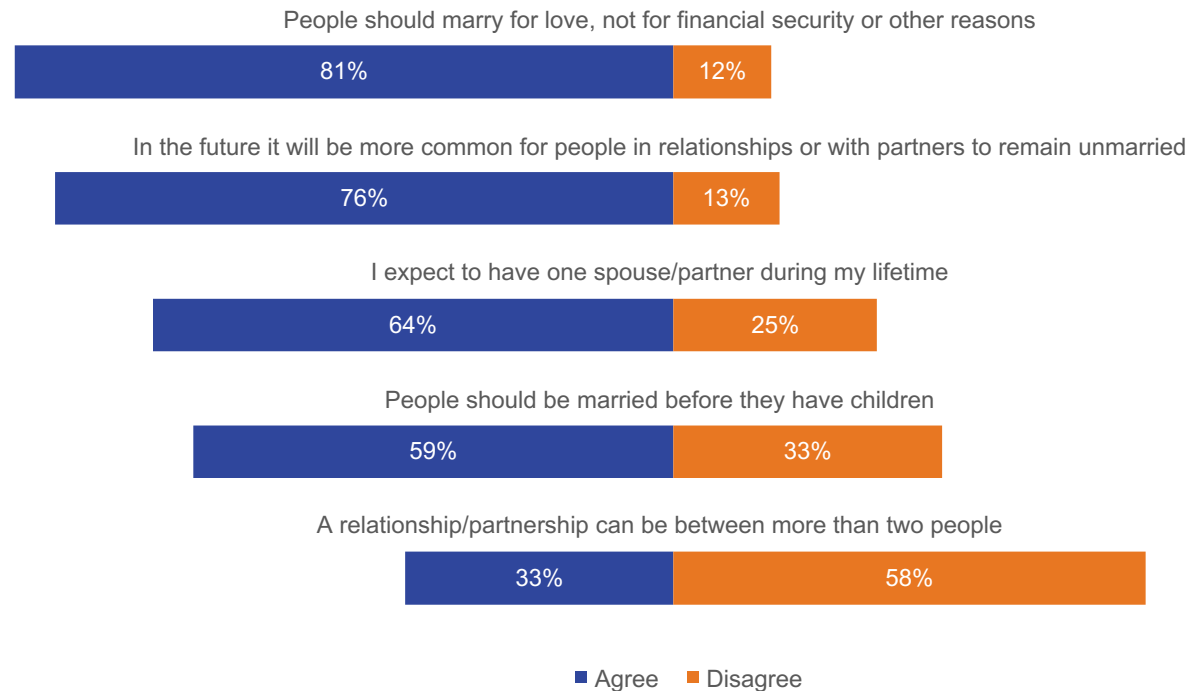
Maintaining relationships is hard enough, especially with people having overall less community ties in their lives to support them. All of this leads to more fluidity in identity, structures, duration and types of partnerships.

So as people’s connection with institutions like governments and religions weakens, how will they define relationships in the future, and will the institutions keep up, with changes to tax codes, legal definitions, lending requirements, etc.? Or will they swing back to being more proscriptive?

[Read the full Q&A on page 34.](#)

How people view marriage and relationships is complex

Q. To what extent do you agree or disagree with the following statements? (% Total)



(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)

How heart-to-heart chats can unlock understanding

In an era of shifting social structures around marriage and relationships, Americans are making romantic decisions differently — and on their own terms. Quantitative data only reveals part of this picture. If brands want to form authentic connections with people as they navigate their love decisions, they'll need to listen.

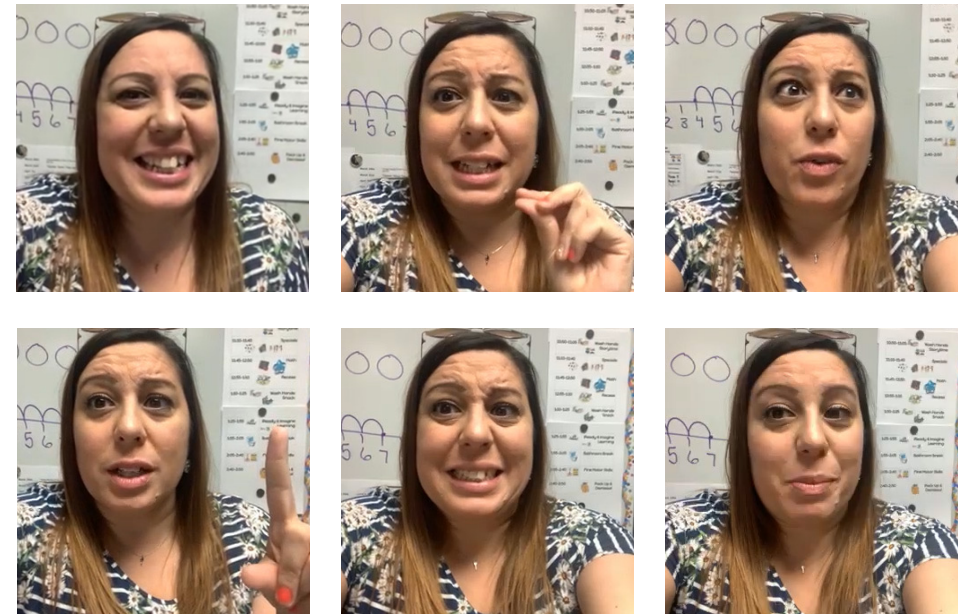
Ethnography is a powerful tool brands can use to gain a deeper understanding of personal matters that aren't always easy to articulate, says April Jeffries, president, global ethnography and immersion, in Ipsos' Understanding Unlimited qualitative practice, the largest in the world.

By holding multiple audio and video one-on-one conversations over time, brands can digitally capture and connect with people in their normal, natural environments. Seeing them complete designed tasks that unveil more intimate beliefs and values, brands can tap into matters of the heart and gain authentic insights on how people find love, give love and want to be loved in the world today, Jeffries says.

“Just like any relationship, if brands listen deeply with empathy, they can innovate and communicate in the love language that reflects evolving needs and changing lifestyles.”

For brands looking to understand how relationships with people and products shape our lives, a heart-to-heart conversation could be the right step.

Love is hard to measure, but quantitative research can reveal deep insights



Ethnography participant Shanelle shares in a self-recorded video how the past year brought many changes for her love life.

Where the next generation of online dating is headed



Jess Carbino, Ph.D

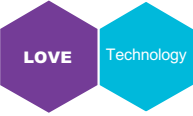
Sociologist and dating expert

Jess Carbino (aka Dr. Jess) knows a lot about how people meet and date. As the former lead researcher and sociologist for dating platforms Tinder and Bumble, she has had access to a trove of dating data. The kind you could use to train an AI with, but we're getting ahead of ourselves. As the institutions where we meet people shift — 31% of Baby Boomers met their partners at work or a religious or social group — online platforms will fill that void. Gen Zers and Millennials were twice as likely to meet via a dating app (16%) than Boomers (7%).

77%

of Gen Zers and Millennials agree that in the next 10 years, more people will meet their partners/spouses virtually.

(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)



Carbino says we are in the second generation of online dating. In the first wave, you posted your profile to Match.com or a similar site. In the second stage, Tinder and Bumble and similar apps added the “match” feature, where both sides have to be interested in each other through swiping, etc. As for how we’ll evolve, AI could bring in outside data to help the matchmaking process. A tech evolution would have to drive the next quantum leap, she says.

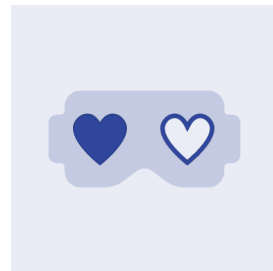
“This next stage will have to introduce a new technological mechanism that really upends how we think about dating.”

She thinks dating platforms have the data foundation to train an AI, and that premium services like AI-assist coaching could be useful and profitable add-ons for dating platforms. Because, as she has learned, people are really bad at marketing themselves. And of course, there’s the metaverse, which she sees as a potentially great platform for first dates.

[Read the full Q&A on page 36.](#)

How we expect to use technology for love

Q. In the next 10 years, how likely, if at all, do you believe it is that the following technology will be used for dating and relationships? (% Likely)



67%

Augmented reality (AR) /
Virtual reality (VR)
platforms used to
date virtually



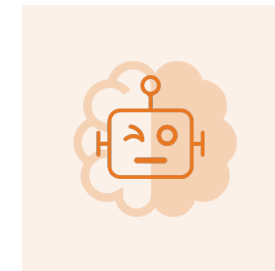
61%

Gaming platforms used
to date virtually



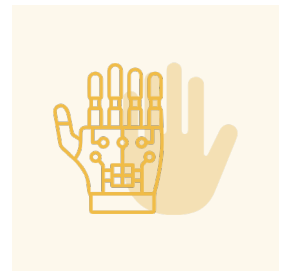
61%

Metaverse
love / romance



60%

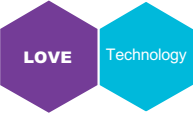
AI Chatbots



46%

Companion robots

(Source: Ipsos survey conducted Jan. 9-10, 2022, among 1,120 U.S. adults. For full results go to future.ipsos.com)



Why brands (still) need to address #MeToo

The advent of social media and online dating apps has certainly changed the dating landscape. But the #MeToo movement has also ushered in an increased focus on consent, safety, and accountability in relationships. Has it made men scared to date, too?

Three in five Americans agree that women tolerate less bad behavior in relationships than they did a decade ago, according to Ipsos data. Yet a bare majority, 52%, also feel that increasing discussions on sexual harassment and assault has made dating harder for men.

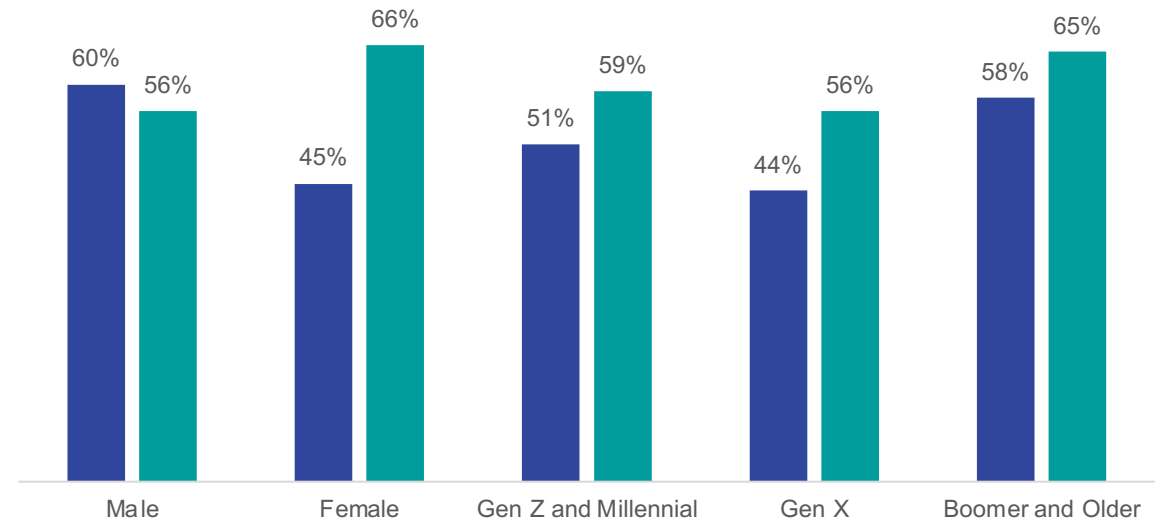
These views create an opportunity for marketers to support female empowerment, says Mallory Newall, a vice president within Ipsos' public polling practice.

“Dating apps and relationship-focused brands need to understand that dating today is much more complex, and they need to be able to convey that to their customers.”

Opening the dialog and modeling what is acceptable behavior in a relationship could make the difference for better outcomes and experiences for everyone.

How people see #MeToo's impact on dating

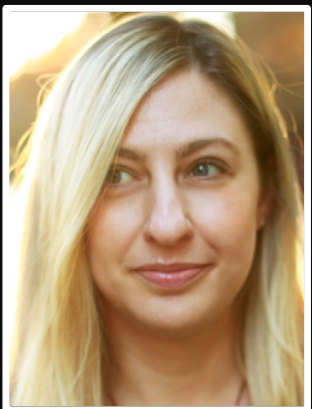
Q. To what extent do you agree or disagree with the following statements? (% Agree)



■ Increasing discussions on sexual harassment and assault in recent years has made dating harder for men

■ Women tolerate less bad behavior in relationships than they did 10 years ago

How people are rethinking happily ever after



Meredith Goldstein

“Love Letters” advice columnist and podcast host, The Boston Globe

Finding a love match is one challenge. Then there’s happily ever after. Since 2009, Meredith Goldstein has been giving daily advice to Bostonians and beyond about dating, love and relationships through her “[Love Letters](#)” column. Her column has spawned a popular podcast now in its seventh season, as well as an active community who share their takes on the letters and Goldstein’s responses. She also has written a deeply personal [memoir](#). Over time, she’s seen a host of attitude shifts about courting, commitment and singlehood.

81%

of Americans agree that people should marry for love and not for financial security or other reasons.

(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)

LOVE

Generational differences

Historically, relationships were often contractual, where [people married for money or property](#); marrying for love was less of an option.

Over time, love became the necessity, says Goldstein. That shift, she says, has altered the traditional courtship process, as more women support themselves and find alternatives to living with a romantic partner. Many women just don't *need* to get married anymore.

Yet many companies are still selling coupledness when more people than ever are living alone, she says.

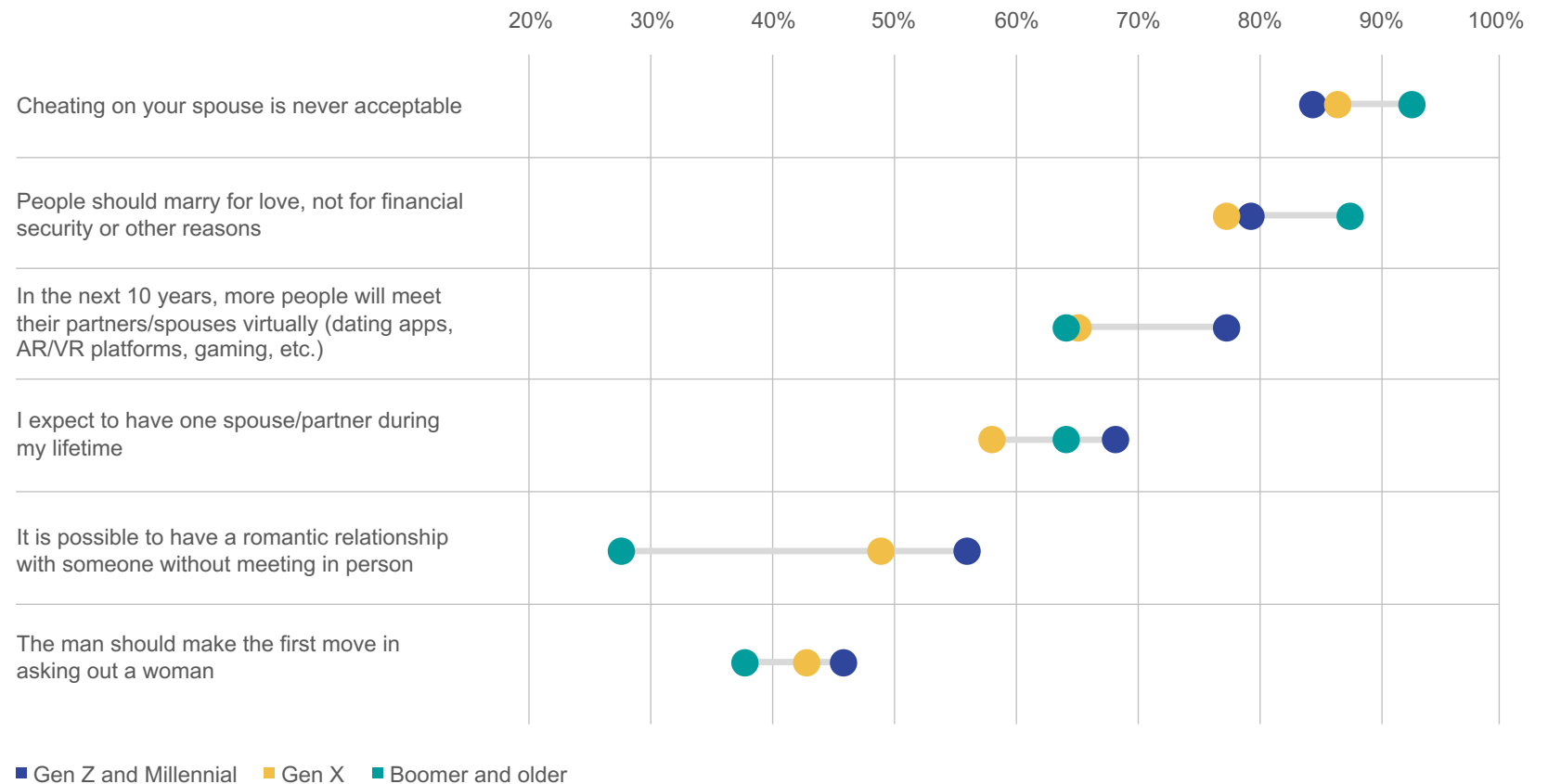
“So many people are saying, ‘I have all of this space to do life in a bespoke way, and yet I don’t always see it in advertising and services, and it may or may not be celebrated in the same way.’”

It's a call for brands to better reflect the diversity of our relationships and lifestyles in their products and ads.

[Read the full Q&A on page 38.](#)

How dating and relationships are changing by generation

Q. To what extent do you agree or disagree with the following statements? (% Agree)



(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)

More mass affluent households have single incomes

Dual incomes are a key driver for affluence in the U.S. In fact, more than one-third (35%) of respondents in the Fall 2022 Ipsos Affluent Survey wouldn't qualify as affluent (household income of \$125,000 or more) without being a multi-income household.

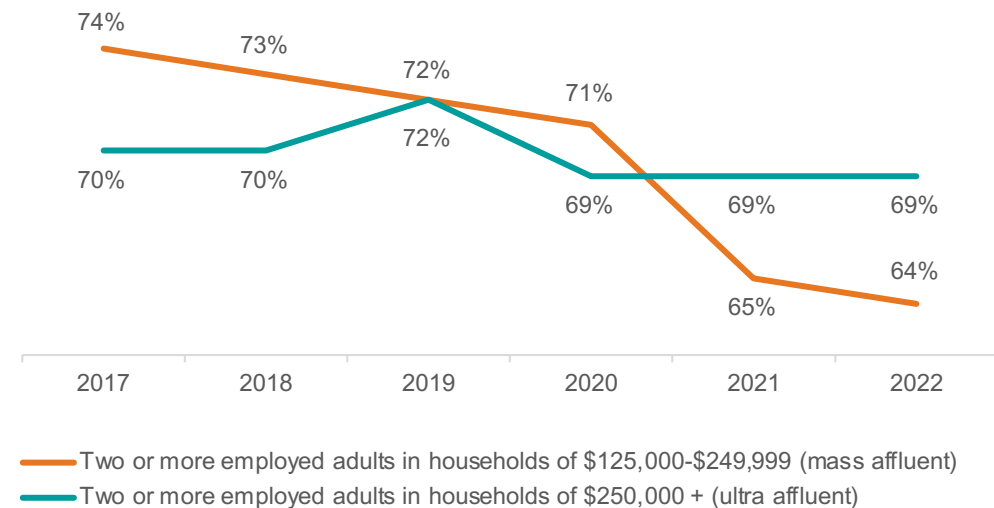
Since the survey's origins in the late '70s, the rise of the dual-income household has been the main driver of growth for the affluent. But since 2017, that has started to shift. The size of the overall affluent population has steadily risen. Yet the proportion of households that needed dual earners to attain mass affluent incomes of \$125,000 to \$249,999 fell dramatically. That change accelerated as people left the workforce due to COVID-19.

So, what the data is showing is wage earners earning more money, and as a result, more people attaining affluent status on single incomes, says Kip Davis, an insights director in Ipsos' Audience Measurement team.

“The question is whether the drop in the percentage of affluents in dual-income households is a permanent realignment or a short-term aberration waiting for a correction.”

Will mass affluence still depend on dual incomes?

Q. Number of adults currently employed in your household?



(Source: Ipsos Affluent Survey USA, Fall 2017-Fall 2022)





Behavioral science reframes connection for singles

Despite the increased normalization of choosing to stay single, some people continue to feel the pressure to pair up. To make matters perceptually worse, recent evidence shows that married individuals benefit from a longer life expectancy, presumably due to the sense of connection, support and stability that committed relationships bring.

While we all have an inherent need for connection to others, there are more ways than pairing up to generate a sense of belonging.

Behavioral science offers several means to connection that anyone can use to maintain and restore mental wellbeing:

- Connect to nature — Going outside makes us feel more human and connected, provides an escape from our cognitively demanding lives and decreases stress hormones.
- Food, friends and family — Eating together drives interpersonal trust, and we enjoy shared meals more.
- Lend a helping hand — Doing something for others affirms our sense of autonomy and competence and offers a way to increase our sense of relatedness and connection to others.

Single people have more leisure time and freedom, giving brands opportunities to engage them while also enhancing their wellbeing, says Sarah Mittal, Ph.D, a director on Ipsos' Behavioral Science team.

“As staying single becomes a new norm, brands must rethink how they feature singles in communications and how they can engage them through opportunities for connection.”



28%

of unmatched adults feel pressure from friends and family to be in a relationship rather than stay single.

(Source: Ipsos survey conducted Jan. 9-10, 2023, among 550 single U.S. adults.)



How expressing love will change ‘putting a ring on it’



Luciano Rodembusch

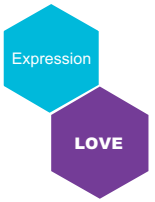
President, Pandora Jewelry North America

With societal shifts, people are reexamining how they express and commemorate love. When and how people “put a ring on it” is an enduring ritual, even if the relationships they symbolize are evolving. Luciano Rodembusch, president of Pandora Jewelry North America, has seen these changes first-hand over the past dozen years, including during his decade at Tiffany & Co. As Pandora expands its focus on charm bracelets to rings and other creations, he sees potential for people to create their own stories and meanings.

37%

of Americans express their love to a romantic partner with a ring or other jewelry.

(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)



Most Americans say they express love through words and deeds rather than through gifts or jewelry. That doesn't mean they're mutually exclusive, especially with younger generations who are making social media-friendly "promposals" and homecoming events as grand as some weddings.

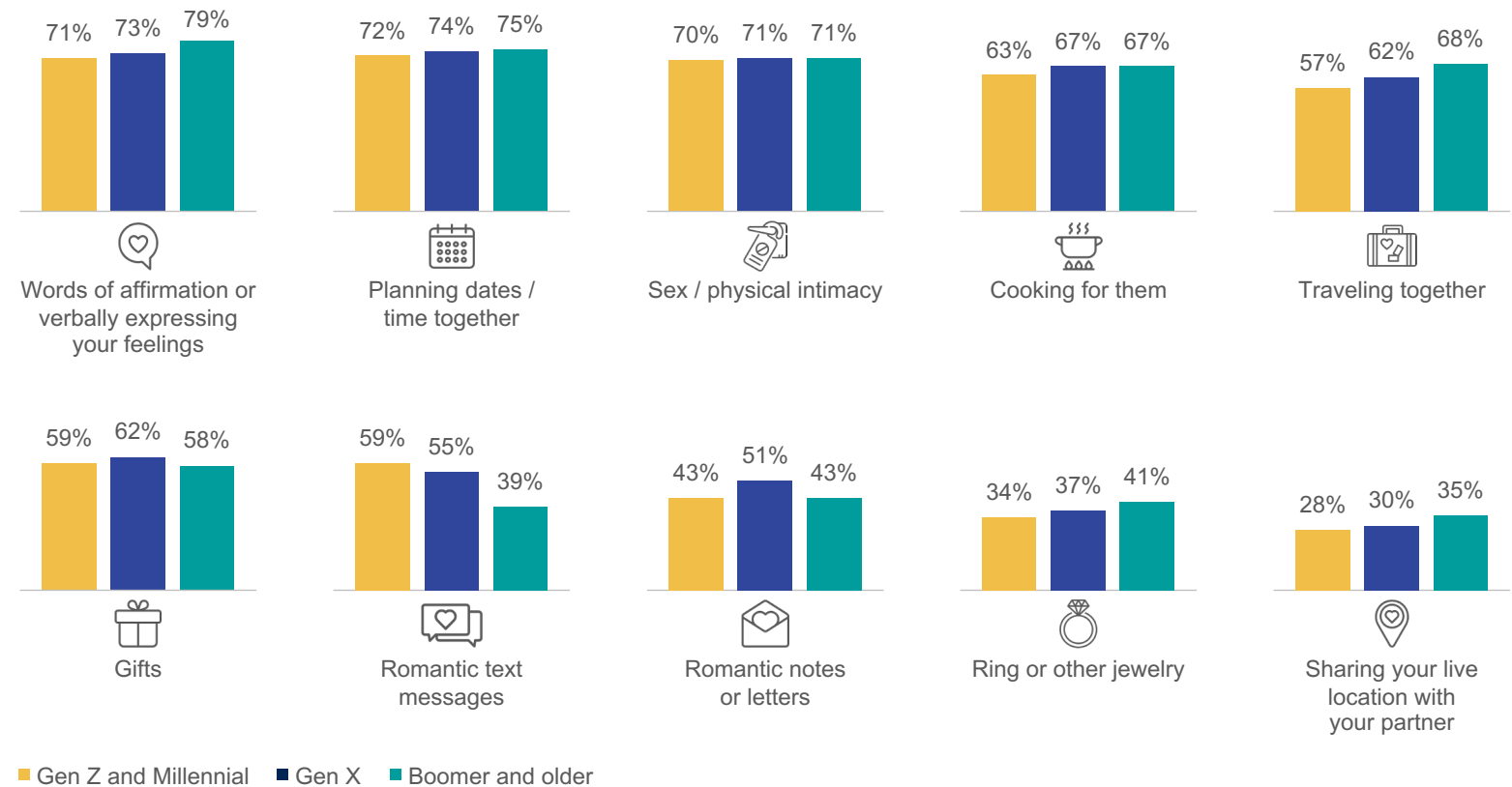
Younger generations are looking for more substantial memories, correlations and relationships that have meaning and aren't so quick to disappear like digital media, says Rodembusch.

"Ours is an industry where memories are encapsulated in physical things, and every single piece of jewelry has a memory attached to that. I still believe that that correlation between the physical thing and the memory will continue as part of this industry."

[Read the full Q&A on page 40.](#)

How we express love

Q. Whether you are currently in a relationship or not, which of the following are examples of how you express your love to a romantic partner? (% Selected)



(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)

Four tensions that will drive change:

1. Marriage by church or state?

A literal church and state tension, marriage is often a religious rite. Yet it's also a legal definition. That definition affects how someone/a couple accesses loans, mortgages and healthcare; navigates immigration status, and files their taxes. As our society becomes more secular, this tension could shift. And if it does, we need to evolve more systems to replace the community and support functions religious institutions used to provide to keep relationships strong and healthy, says Dan Cox, senior fellow at the American Enterprise Institute. "It's important that when we are dating or married and trying to raise a family that we have a broader community that can support us," he says. "Increasingly, a lot of Americans are out there on their own, particularly the Millennial generation who got married later and had kids a lot later."

More people say marriages should be legal rather than religious

Marriage should be defined by the state/legal system

60%

40%

Marriage should be defined by religious views

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

(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)

Four tensions that will drive change:

2. Dating apps for finding ‘the one’ or no?

Millennials are a curious group when it comes to dating. They are much more like Gen Xers in their thinking that dating apps are a good tool for finding a lifelong partner. That makes a certain amount of sense because those generations grew up with dating sites and apps as a tool. But they are more like Gen Zers in that they strongly believe that finding a lifelong partner or spouse is the point of dating apps in the first place. Dr. Jess Carbino thinks that dating apps are a great tool for meeting people. The rest is kind of up to you. “Dating apps can only bring you so far in the same way that friends, family, educational, religious institutions, bars, can only bring you to that meeting. Then it’s fundamentally up to you to have the relationship prosper.” But will AI tools help people use these platforms more effectively? And if so, will that start to shift these tensions?

People are split over the value of dating apps for finding a life partner

Dating apps are a good tool for finding a lifelong partner

49%

51%

Dating apps are not a good tool for finding a lifelong partner

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

(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)

Four tensions that will drive change:

3. Show love with actions or gifts?

Like most Americans, the majority of Gen Zers and Millennials believe that showing love through actions and feelings are more important than doing so with flowers or jewelry. These younger generations, however, lean a bit more toward the gifts (20%) than Baby Boomers and beyond (8%). That corresponds to the flurry of young people popping “will you” questions for friendships to “promposals” to engagements, often captured on social media and with tokens like promise rings to commemorate the moment. “Younger generations are looking for more substantial memories, correlations and relationships that have meaning and aren’t so quick to disappear like digital media,” says Pandora Jewelry’s Luciano Rodembusch.

People overwhelmingly prioritize showing love through actions over tokens

Actions and feelings are more important than gifts to show love

85%

15%

Gifts like flowers and jewelry and grand gestures are an important way to show love

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

(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)

Four tensions that will drive change:

4. Financial partners defined legally or flexibly?

The share of Americans who are married has been falling for decades and as of 2020 [dipped below 50%](#) of [women](#) for the first time. As we saw in Ipsos affluent expert Kip Davis' article, adding a second income is how the middle class as well as affluents have kept up their financial standing. But financial institutions, lending regulations and tax codes have been slow to recognize or accommodate alternative forms of relationships. So how are unmarried people supposed to finance their combined lives? "When you talk about companies and all the services we use, sometimes I feel like they forget what's happening, where they are selling coupledness," says relationship advice columnist Meredith Goldstein. "Yet that's actually not what most people are experiencing."

More people want financial relationships defined flexibly rather than legally

Financial services like loans and taxes should be flexible in defining relationships

59%

41%

Financial services like loans and taxes should consider only legal relationship status

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

(Source: Ipsos survey conducted Jan. 9-10, 2023, among 1,120 U.S. adults.)

A photograph of a bride and groom in formal wedding attire, smiling and looking at each other. The bride is wearing a white dress with gold detailing and a veil, and the groom is wearing a dark suit with a white shirt and tie. They are standing in front of a blurred background of other guests and wedding decorations.

Plausible port one:

Relationships shift but institutions are slow to adjust

Imagine it's 2033. We continue to get married later in life, religiosity continues to decline, same-sex marriage continues to be normalized despite ongoing culture war skirmishes. Even with a rise in alternative structures from polyamory to polycules, the dominant relationship structure is still one man and one woman in a committed (and usually married) relationship. Regardless of the structure, people are often meeting online.

Partially this new world is a result of a continued decline in the strengths of institutions like religious centers and schools. Partially it's because finding your partner at the workplace is complicated by hybrid working (and frowned upon by HR), and partially it's because online is just where we're spending our time, building communities and meeting like-minded folks. We have lots of AI assistants to help us create our dating profiles and touch up our profile photos. But these tools to level the dating playing field make it harder to cut through the chaff to get to the wheat. So, while we're meeting online, it's harder to find an authentic match.

Love takes many forms, but since institutions like governments, religious centers and banks are traditionally slow to respond to change and innovate, more people are living outside of historical male/female couples. They're still dominant, just less so. We're living with platonic roommates, we're living with non-platonic roommates, and sometimes more than one of those.

Also, because we're getting married later in life and interest rates (for mortgage and student loans) are still above the record lows of the previous decade(s), it's tough for unmarried people to get loans, buy homes and start families, and young adults continue to struggle to "launch" into adulthood.

Waypoints

Financial institutions recognize more than just married couples and put money in more hands.

Today, most people think financial institutions should be more flexible. But that group is not a huge majority, just 59%. What if that shifted? Say demographic trends continue, and fewer people marry, and they do so later. What if we have a decade of higher interest rates and inflation? That could shift this tension, and when tensions shift so can mountains. Perhaps that pushes traditionally slow-moving financial and government institutions to meet demographics where they are, instead of consistently lagging social change.



Plausible port two:



Relationship shifts accelerate, forcing institutions to adapt

Imagine it's 2033. The same trends continue from the first port, demographically. But they accelerate. Two institutions have defined relationships: religions and governments. Overall people have less faith in both, especially as the state keeps changing laws about who even can be married. The tension that currently *slightly* leans to a preference for flexible financial situations has tipped closer to 75%, as the share of the population that is “married, filing jointly” drops with older marrieds dying off and younger folks not getting married at nearly the same rate.

Financial institutions are forced to adapt. Perhaps we'll see a tax status of “twentysomething roommates living together to save money,” or “same-sex married couple with their unmarried partner.” Or a home loan that is more flexible for a single-income person who doesn't intend to “settle down” in one place. Similarly, divorce becomes less financially complicated as having finances entwined becomes less necessary and less commonplace.

It's not to say that people don't find love, or even that they don't find long-term relationships. It's just that those unions aren't necessarily defined by a license or certificate or fall into a neat box on a Form 1040. Ongoing shifts in gender and sexual identity also blur once black-and-white lines into shades of gray and/or rainbows.

Finding partners has become easier for those with the means to use the latest tools. Premium AI services make for obvious stratification in the quality of dating profiles. But more to the point, AI matchmaking has gotten scarily accurate. AI yentas match couples with speed and accuracy. The earliest AI-matched couples have only been partnered for a few years by now, but the percent who are still together is high, and they rate their relationships as going strong in the many research studies tracking them.

Future Jobs to Be Done

The traditional “Jobs to Be Done” framework focuses on the tasks and outcomes that people are trying to accomplish and why they hire products and services to help them achieve those outcomes. We don’t rent a wedding venue; we hire it to host our friends and family to celebrate the big day with us. We don’t buy a dating app; we hire it for screening potential dates or partners.

Ipsos takes this theory forward with *future* Jobs to Be Done (fJTBD). We envision powerful and plausible future scenarios through strategic foresight. These scenarios help us define the circumstances in which people may find themselves, like in the metaverse. What will their new needs be? Then we use fJTBD to tie these scenarios to actions that organizations can take today and tomorrow to help people meet those future needs.

While many needs are enduring and do not change over time (e.g., looking for love), the context of that job (e.g., scrolling on a dating platform for a potential partner) will change that job space and the potential solutions and alternatives. Because of this, we often create fJTBD clusters that are higher-order and needs-driven. Within each, we can envision more granular fJTBD to illuminate opportunity spaces to meet human needs in new ways.

Sophie Washington is a senior consultant with Ipsos Strategy3.

Potential Future Jobs to Be Done related to love

1

Help me authentically find my fish in the sea

With new spaces and places to meet people in digital and immersive web worlds, people may become overwhelmed by the opportunities — both on and off the screen — and need a greater sense of trust.

Potential fJTBD:

- Help me find the right pool of matches on an app without a tiered-pricing model
- Help me filter the number of profiles without limiting the possibility of connection
- Help me present myself in a genuine way
- Help me find *real* love

Imagine a world where ... you could trust any profile you see on your favorite dating app that lets you filter for, say, other runners in San Francisco.

2

Help my love be recognized on my terms

Whether or not they're socially accepted in any relationship, getting a domestic partnership certificate or selecting "non-married union" on a tax form, people will look for ways to share their status.

Potential fJTBD:

- Help me feel seen and validated by social and government institutions
- Help me and my partner(s) make us legally "official" but not in the traditional sense
- Help me benefit from financial perks afforded to traditionally defined couples

Imagine a world where ... it becomes common to have your marriage officiated by a digital priest, and you own the NFT certificate that lives on a blockchain.

3

Help me love and respect other people

With rising polarization and political splintering occurring around the globe, it will become critical to foster connection between groups with different opinions and value sets.

Potential fJTBD:

- Help me avoid being siloed, romantically or platonically, based on my views
- Help me feel human connection with others who may be different from me
- Help me overcome learned prejudice and practice love for others

Imagine a world where ... you can earn "gratitude" points on social media by turning off your account algorithms in order to see people outside of your usual connections.

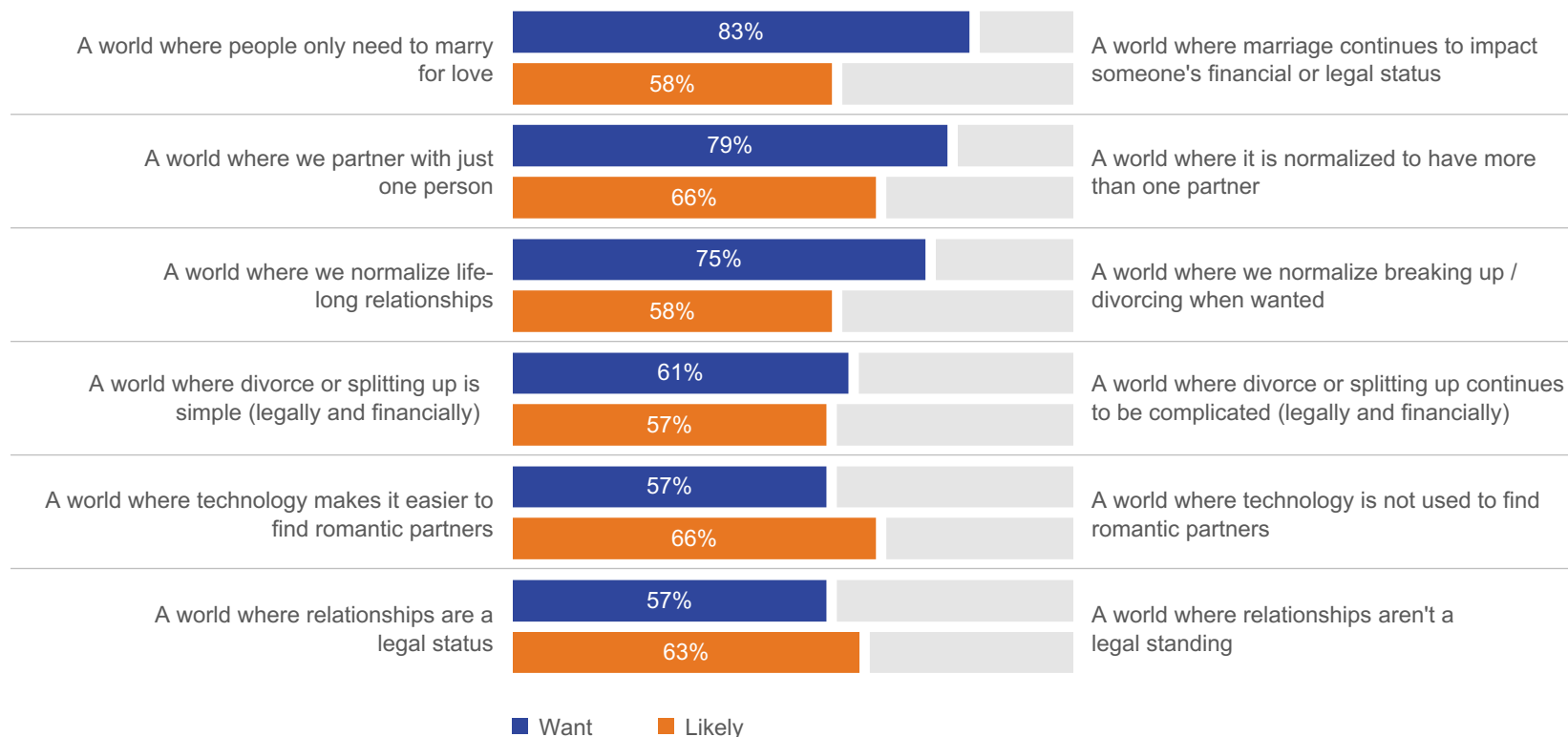
Future optimism gaps

We largely agree, when asked, on a common vision for the future of love.

We want a world where relationships have some sort of legal standing and where tech makes it easier to find partners. But even people who don't want that future expect we're going to wind up there. There's a gap, however, between other aspects of the future we want for love — that divorce is less complicated, that people will partner with just one person, where lifelong relationships are normalized and where people marry for love, not status — and the future we think is likely. Many of these are policy questions, but how can brands and institutions help bridge these optimism gaps?

Some gaps in how we want and expect love and relationships are significant

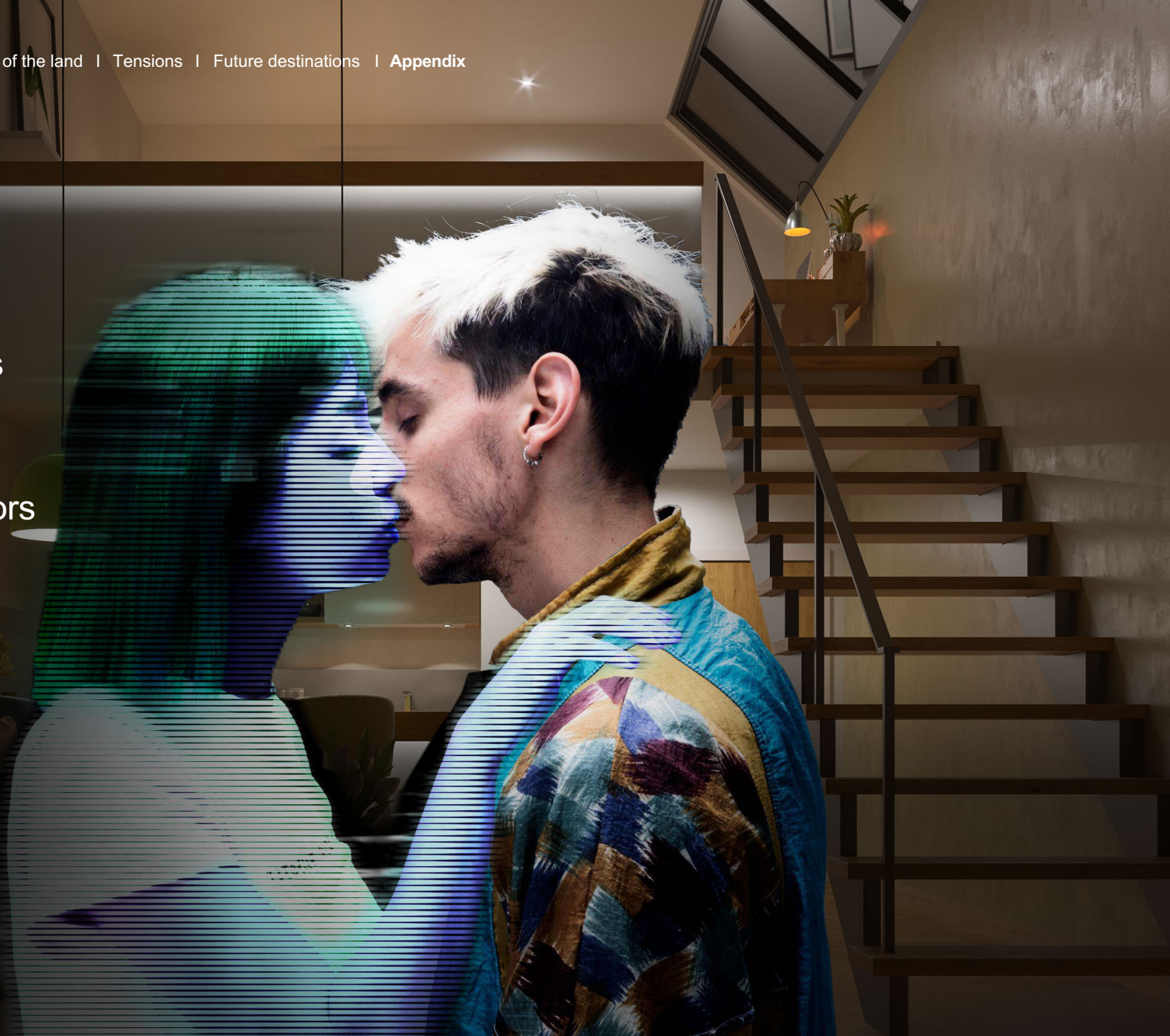
Q. For each of the following future scenarios, select the one that [you most want/seems most likely] to happen. (% Total)



Appendix

In this section,
we show our work
and our workers

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



How changing institutions will define relationships



Dan Cox

Director, Survey Center of American Life, American Enterprise Institute

Dan Cox is a senior fellow at the nonpartisan think tank American Enterprise Institute. He researches cultural shifts in religion and youth culture, as well as loneliness, arguably the flip side of love. He sees ongoing changes in how people meet, how well their relationships work, how they are defined and how they are structured, which feels like a lot of change for something as old as humanity itself.

Matt Carmichael: The dominant institution of love, marriage, has been declining for decades. Why?

Dan Cox: There are a whole bunch of reasons why. Some that people might argue are a good thing, that women have more options in having their own careers and not needing the marriage financially. Others might argue that this decline is negative, that fewer marriages often mean fewer families, smaller families and more out-of-wedlock births. Societally, I think there's a good reason for us to be concerned about some trends.

Carmichael: What do you see in the data?

Cox: It's difficult to provide any statistic that captures the multitude of different opinions, feelings and experiences people have regarding relationships and marriage. We're incredibly diverse in our relationship trajectories, our experiences and backgrounds.

Carmichael: How is the complicated discussion about gender norms playing out?

Cox: It's complicated. In our survey, we've seen significant differences in how satisfied liberal women are in their relationships versus conservative men and women. Conservative men and women are similarly aligned with traditional gender roles, domestic responsibilities and how to raise children.

Carmichael: And liberals?

For liberal men versus liberal women, there are still significant gender divisions and expectations about who's going to be doing the majority of cooking or cleaning or childcare, and whose job takes priority.

Carmichael: So, what does that mean for love?

Cox: In more conservative households there's not as much uncertainty to navigate. That's one of the reasons why we're seeing lower levels of satisfaction in relationships among more liberal couples. Of course, not all liberals date and marry liberals, but increasingly we are seeing political alignment on that, too.

Carmichael: In our polling, Americans are sharply divided on the role that state or religion should have in defining a relationship.

When you're dealing with relationships, it's easier if you are doing it within a community. Churches and places of worship are great sources of community support for couples. So, it's not surprising that we see that Americans who are more actively involved in their church or place of worship tend to be happier with almost every aspect of their life.

Carmichael: As the role of the institutions that define our relationships change, will their support functions, like financial and regulatory systems, catch up?

Cox: Culturally, we've progressed light years from where things were in the '50s in expectations and gender roles. But in a lot of how our institutions are functioning, we have not advanced nearly as quickly. For relationships in which both parents are working, it's incredibly difficult to navigate. Employers are starting to realize we need to provide some flexibility. But it's slow going. Schools are probably going to be the last to change.

Carmichael: Are the kinds of relationships we have going to change and become more fluid, too?

Cox: There's already been a revolution around talking about open relationships. You see it among people who identify as

gay and lesbian more likely than people who are straight. Yet even among people who are gay and lesbian, the vast majority are not or never have been in an open relationship. We're culturally exploring these ideas, but they're not finding a large audience. However, there's a divergence. We are talking about these things, and people are getting really upset about a lot of these things. But the fact of the matter is they're just not that widespread.

Carmichael: Will marriage become less popular?

Cox: We might hear about all the ways that Americans are more open when it comes to sex and sexuality. But particularly for younger Americans, the desire to get married is still really strong.

Carmichael: Will artificial intelligence change our relationships?

Cox: I worry a lot about AI. People are going to find quickly that you can turn it into some kind of social outlet where you can have conversations with your AI and create a platonic relationship with [it], which is not bad in and of itself. But I worry that technology, in its effort to supplement our sociability, actually replaces it.

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

“Culturally, we’ve progressed light years from where things were in the ’50s in expectations and gender roles. But in a lot of how our institutions are functioning, we have not advanced nearly as quickly.”

Where the next generation of online dating is headed



Jess Carbino, Ph.D.

Sociologist and dating expert

Jess Carbino (aka Dr. Jess) knows a lot about how people meet and date. As the former lead researcher and sociologist for dating platforms Tinder and Bumble, she has had access to a trove of dating data. The kind you could use to train an AI with, but we're getting ahead of ourselves. As the institutions where we meet people shift — 31% of Baby Boomers met their partners at work or a religious or social group — online platforms will fill that void. Gen Zers and Millennials were twice as likely to meet via a dating app (16%) than Boomers (7%).

Matt Carmichael: How do people meet each other days these days, and how is that evolving?

Jess Carbino: Our lives are mediated by institutions. People have met their romantic partners through third parties, whether that is family, friends, a religious institution, a neighborhood, an educational institution. To varying degrees, those third parties have dictated whom we date based upon our religion, our national origin or our socioeconomic background. Today, people like to think that the way we choose our partner is based upon our preferences, our values, and that third-party intermediaries are largely removed. But dating apps *are* third parties.

Carmichael: Have dating apps totally taken over?

Carbino: When I started studying online dating about 12 years ago, individuals would say that online dating was a tool in their arsenal. But as dating apps have become ubiquitous, online dating has emerged

as the primary mechanism by which individuals meet their romantic partners. The pandemic has all but made that a sure conclusion.

Carmichael: Do people burn out on online dating? Will people get nostalgic for the bar scene? What if they never knew anything but apps?

Carbino: The fatigue aspect is inherently associated with dating. People are inherently interested in meeting a romantic partner. And when you aren't able to find someone in an efficient way it's just frustrating.

Carmichael: Will that fatigue open the door to new ways of finding dates?

Carbino: That could just translate into another mechanism by which people would try to meet somebody, whether it's the metaverse or something else. This next stage will have to introduce a new technological mechanism that really upends how we think about dating.



Carmichael: One transformative new technology is AI like ChatGPT. Are we headed for virtual Cyrano de Bergeracs that will help up your dating game?

Carbino: As somebody who's done an extensive content analysis of [dating] post profiles and messages using online dating apps for whom I've worked, I can tell you that fundamentally people are bad not only at presenting themselves in their profile but also at communicating who they are and what they want. And communicating via text with a stranger is a relatively new technology. Chatbots may help people get to the first date. But the dating apps would have to help develop these bots because you would have to have a large data set to be able to train them.

Carmichael: The norms around what a relationship is are changing. Do you see dating apps responding to these shifts or maybe even driving them?

Carbino: Dating apps have largely been responsive to the varying shifts that have happened in the marketplace as well as cultural trends related to sex, gender and gender identity more broadly. When I was at Tinder, individuals who didn't identify with the gender binary really were struggling to use Tinder because they were being misreported based on their gender identity, because people didn't understand why somebody who was not identifying with the binary was being matched with them. We developed a tool that

allowed individuals who didn't identify with the binary to do so in a way that was consistent with their gender identity and how they wanted to identify.

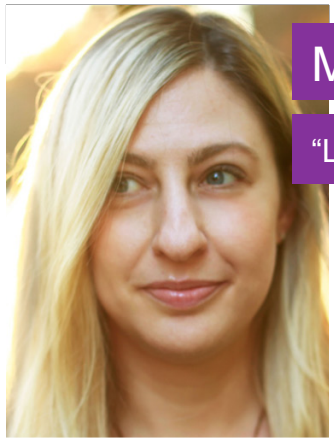
Carmichael: There's a tension between people wanting to present their best possible selves, but also wanting authenticity from the people who they're trying to interact with. How do you see that playing out?

Carbino: Partially that speaks to whether people truly know themselves and at what stage of life they are in. We're not just presenting the person who we are, we're also presenting the person that we want to be, and the person that we believe other people want us to be. I don't think that most individuals go about trying to engage in a major form of deception. There is significant learning associated with people using the apps refining their profile in a meaningful way. It's not just based on what is working for them in meeting a partner, but also learning what they are looking for and what they want. That is something that happens relatively early on, and it would be interesting to consider whether young people are more likely to present an authentic self or what they perceive as being an authentic self, relative to somebody who's older and has had more relationship experience.

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

“Chatbots may help people get to the first date. But the dating apps would have to help develop these bots because you would have to have a large data set to be able to train them.”

How people are rethinking happily ever after



Meredith Goldstein

“Love Letters” advice columnist and podcast host, The Boston Globe

Finding a love match is one challenge. Then there’s happily ever after. Since 2009, Meredith Goldstein has been giving daily advice to Bostonians and beyond about dating, love and relationships through her “Love Letters” column. Her column has spawned a popular podcast now in its seventh season, as well as an active community who share their takes on the letters and Goldstein’s responses. She also has written a deeply personal memoir. Over time, she’s seen a host of attitude shifts about courting, commitment and singlehood.

Kate MacArthur: How have the letters that people write to you evolved since your column began?

Meredith Goldstein: I’ll be in the 14th year of the column and privacy is still an issue. But there are a lot less letters coming in about snooping and about needing to break into a partner’s email account or Facebook account. Instead, what I am seeing more than any other letter is dating fatigue, an absolute high level of exhaustion and misery with the monotonous way we date. Now, people are always asking me, “Is the internet good or bad for love?” And the truth is all the above. If you’re not swiping, you can feel like you’re missing out on somebody important, which means you can do it forever, and it feels like a job.

MacArthur: Back in history, relationships were contractual, where people married for money, property or connections, and marrying for love was this unattainable thing. Is there an under-analyzed trend about how we seek and engage in love?

Goldstein: There’s a whole set of people, even in my life, that don’t truly believe that this whole thing was built on that contract. You can point to different times in history, but at some point, love became the necessity.

It sets up a lot of confusion, because in straight relationships, you have more women working, supporting themselves, finding alternative ways of living with partners, and that might be having roommates for longer. You don’t need to get married. It’s like, “I’m not going to [marry] unless it’s additive, and it’s about being madly in love.” Yet we’re going to use the old [property] model for the contract in some ways, even though it’s been adapted for divorce and the power of women.

When you talk about companies and all the services we use, sometimes I feel like they forget what’s happening, where they are selling coupledness. Yet that’s not what most people are experiencing. More people than ever are living alone.



MacArthur: Is there a place for marriage in the future, and if so, what is it?

Goldstein: I do think there's a place for it. It's just we didn't acknowledge along the way how wildly different the meanings can be and how it's changed. Some couples I know are finding different moments. It might be buying property together, having a nice dinner after. It might be specific financial investments and marking "Here are the ways we're combining our lives."

MacArthur: If love isn't for pair bonding to procreate and survive, what's it for?

Goldstein: There is something chemical and emotional and wonderful to it. And there is something to it where occasionally two people find each other, and they love partnering for life and that can happen. But I don't think it has to happen. We see people have a partner for part of their lives, and then a different partner or maybe no partner for a while. We love a chosen family, we love "Golden Girls," we love all these models. Yet I don't think we're at a place where there is real permission to consider that an ideal.

MacArthur: It's one thing to marry for love, and our origins were marrying for a contract. So, what's the harm in getting married for insurance or money today?

Goldstein: The fact that some people *have* to [marry] for health insurance is very unromantic to me. One thing that's interesting is during 2020, Somerville, Massachusetts, [became the first town to allow for polyamorous relationships on the books](#). Somerville has a high number of polyamorous units. When lockdown was still happening, there was some concern that a second person wouldn't be able to go to the hospital. The city council quickly passed an ordinance that you could be domestic partners with more than one person. It was really radical. I've never understood why I can't insure a sibling or insure loved ones. Why does it have to be somebody we love romantically? It's just an odd thing that we've tied these things together.

MacArthur: What are the signals that you're getting about what modern love will look like in the future?

Goldstein: There will always be traditional pairings, and there will always be, as long as I'm alive, marriages that look like 1990s rom-coms. But we're heading to a place where it's more fluid, where there will be a phase of life where a relationship will take you so far, and then it looks different. My question is, as the wealth gap changes and as our relationship with the workplace changes, and we are hopefully less tethered, how do those changes affect what we're seeking from a romantic partner?

Kate MacArthur is deputy editor of What the Future.

“When you talk about companies and all the services we use, sometimes I feel like they forget what’s happening, where they are selling coupledness. Yet that’s not what most people are experiencing. More people than ever are living alone.”

How expressing love will change ‘putting a ring on it’



Luciano Rodembusch

President, Pandora Jewelry North America

With societal shifts, people are reexamining how they express and commemorate love. When and how people “put a ring on it” is an enduring ritual, even if the relationships they symbolize are evolving. Luciano Rodembusch, president of Pandora Jewelry North America, has seen these changes first-hand over the past dozen years, including during his decade at Tiffany & Co. As Pandora expands its focus on charm bracelets to rings and other creations, he sees potential for people to create their own stories and meanings.

Kate MacArthur: How are you seeing the calculus evolving for gifting and tokens of love?

Luciano Rodembusch: Clearly, you can see that society is trying to find new rites, new norms and a nice balance during this transition as a society between the past and the future. We are seeing that valuable token of celebration in jewelry is still very strong, but we see it stronger in young Millennials, and for sure Gen Z is coming. You see them looking for meaning, looking for content, looking for more than just a thing. What’s the substance of that gesture?

MacArthur: Younger generations are into grand gestures like “promposals.” What signals are you getting about how they factor into social media?

Rodembusch: We see our jewelry, our creations, having a completely different meaning sometimes than we expected. At the beginning of 2021, this group of girls posted on TikTok one of our wishbone rings as a

promise ring. That’s why for me the physical token is so important, because clearly others could just copy the event or the video or the music or the feeling. But that generated a huge amount of people coming to the stores and made our wishbone ring a huge success. It was not only trying to replicate the feeling or the moment; it was buying the same ring and having the same kind of moment with your friend or loved one.

MacArthur: Diamonds have long symbolized how marriage is forever. Yet at least half of marriages fail, and fewer people are marrying. How does that shift how brands respond to people’s needs?

Rodembusch: Affordability is in the core of our brand. When we launched diamonds, we had that conversation about how we would like to present diamonds. If you see our campaign, it’s the “Just Because” diamond. That’s what we believe, that with lab-grown diamonds — and especially our diamonds because of the quality of them — you shouldn’t need permission to buy them.

MacArthur: People are marrying at a later age, and some have children already before they marry. How does that change the gifts that they're looking for?

Rodembusch: If you look at specific jewelry, I don't believe it changed a lot. The way we set up our room, our houses, the way we set up our life was very much more formal in the past, right? It's not anymore. That is about the furniture, about all the other things around that, because the vision was it will be eternal. Today it's much more aspirational. Because of that, jewelry took a different role, which is a celebration of the moment. The way we connect today is driving that. And, of course, the fact that women more than ever have a stronger voice in the society and more [believe] "I don't need to wait for you. I don't need to wait to be given, I don't need to drop a hint. I want this, and I have the purchase power and I will go there, and I will buy."

MacArthur: Do you see a need to create identity-specific — like LGBTQ-specific — gifts or categories?

Rodembusch: In a truly inclusive world, everything is for everyone. If any type of client, any gender, any age comes to us and says, "I think it's missing something in your portfolio. I like more color, more sparkle, more bold." That's fantastic, right? We love to create for them and

that's what we do constantly. But not because we believe we are going to create something niche for someone.

MacArthur: When the world is trying to figure out their presence in the metaverse, what does that mean for gifting?

Rodembusch: The moment the world became so accessible, so easy, you see that Gen Zers and Millennials are looking for more substantial memories, correlations, relationships, things that have a bit of meaning that are not so fast to disappear. The data we have shows that more than 80% of our client journeys start in the digital space. So, we need to be strong there.

But in our specific case, and in the case of our industry, it's an industry where memories are encapsulated in physical things. Every single piece of jewelry has a memory attached to that. I still believe that that correlation between the physical thing and the memory will continue as part of this industry. Brands like ours will be more present in the avatar world, where you can have your Pandora bracelet on your Fortnite avatar and things like that. But that's not going to be the core of the conversation.

Kate MacArthur is deputy editor of What the Future.

"In our specific case, and in the case of our industry, it's an industry where memories are encapsulated in physical things. Every single piece of jewelry has a memory attached to that. I still believe that that correlation between the physical thing and the memory will continue as part of this industry."

Signals

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

Perspective: Women are more likely to make friends at work than men. Here's why that matters via [AEI](#). Female workers seem to foster deeper and more rewarding social connections at work than their male colleagues, per a study from the AEI's Survey Center on American Life. As the workplace takes a more essential role in developing social capital, the research suggests that workplaces and employees would benefit from investments in relationship building.

Singles want partners who vote via [The Hustle](#). A review of 2022 trends from the Match Group dating site about how social issues rank among the red and green flags for swiping right.

How Gen Z is rewriting dating, marriage and family plans for their 20s via [CNBC](#). How a looming recession and wild job market have Goldman Sachs interns putting their love lives on the back burner.

A court in Israel recognizes online civil marriages as valid via [NPR](#). An Israeli court ruled that couples who married over Zoom from Utah were valid, adding a non-travel option to a loophole recognizing civil marriages performed abroad.

Couples who combine finances are happier. So why don't more do it? via the [Wall Street Journal](#). Why couples who get hitched can't take the same plunge with their finances often relates to how people consider the risks and the rewards in case of a breakup or from leftover financial traumas.

For queer couples, engagement rings with subversive stones via the [New York Times](#). For LGBTQ partners, inclusive engagement ring designs put formerly overlooked and nontraditional stones above traditional diamonds.

Many Americans have engaged in age-gap dating via [Ipsos](#). This Ipsos poll conducted on behalf of Cougar Life finds that a large majority of Americans believe it is socially acceptable for both men and women to date someone 10+ years younger than them.

As pandemic drags on, relationships are getting more serious via [Ipsos](#). This Ipsos poll shows that most unmarried, but partnered, people say their relationship has gotten more serious since the coronavirus pandemic began.

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

