

# UN- MASK ING DIFFER ENCES

**shared crisis.  
different experiences.**



# Covid has been jarring

## **| At first**

Brands took a collective pause – appropriate for the moment.

## **| Then**

They voiced empathy and support – it started to sound the same, but still, appropriate for the moment.

## **| What now?**

What does the current moment ask of us as marketers? We can't stay silent or run the same ad forever.

**THE ANSWER IS THE SAME  
AS IT'S ALWAYS BEEN:  
MEET PEOPLE WHERE THEY ARE.**

## **| But where is that exactly?**

With the world seemingly turned upside down? People are tired of hearing about COVID. People are tired. What do they need? How can brands help them feel like they are living life, not just staying alive?

**RATHER THAN  
MAKE ASSUMPTIONS  
OR RELY ON  
PRE-COVID INSIGHTS,  
WE TOOK ACTION**

We surveyed a cross-section of people – various ages, races, socioeconomic groups and genders – to listen to how they are coping, to understand what they are craving, and to go deep on the needs that brands can help meet.

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# In this report you'll find

| **Macro trends & in-depth profiles dissecting sentiments across gender, race and age cohorts**

| **Emotional drivers impacting each audience set**

| **What experiences people miss most, and why**

| **How brands can help improve each audience's experience**

With a more nuanced understanding of what people are going through, you can design more nuanced interactions to meet those needs. After all, our memories of the COVID experience and its aftermath will last a lifetime – make sure your brand is remembered for making it better.

## MEETING DEEPER NEEDS

**Our findings validate and align with two different frameworks for thinking about human needs:**

### **Maslow's Hierarchy of Needs**

We particularly explore this in the Race section, as different groups face threat and instability in different areas of their lives.

### **Experiential EQ**

GMR's proprietary marketing construct for helping people fulfill their needs for Belonging, Identity, Enrichment and Release through experiences (and marketing efforts). To go deeper on this framework and see more of our research, visit [gmrmarketing.com/insights](https://gmrmarketing.com/insights)

# Big shared experience

## MACRO TRENDS ACROSS ALL DEMOGRAPHIC GROUPS

**COVID-19 may be the single most widely-shared experience in recent history – and yet, we're not all experiencing it the same way.**

But before we dissect our differences, let's look at our similarities. These macro trends span race, gender and age. They're the things on everyone's mind, and they showcase just how shared this COVID experience has been for the world.

### **The safety equation**

Now more than ever, safety is driving how we operate in the world. Our research shows that risk tolerance varies by cohort, but safety is on everyone's radar – whether that's physical protection from illness, keeping food on the table, future financial stability, or emotional security. However, there is universally a level of tension between safety and the need for self-actualization. We're denying ourselves and altering our actions for the sake of safety,<sup>1</sup> and we're collectively being asked to put the safety of others ahead of our own desire to return to normal – tensions that we feel both as individuals and as a collective. For many, the stress of personal safety has morphed into depression and anxiety as we adapt to threats out of our control.

### **Anxiety & the struggle for self-awareness**

The struggle with putting safety first is that mental health comes second. This comes through in the data in the form of increased anxiety – a natural result of living under multiple stressors we can't control, with no end in sight. The pandemic has spurred people to focus on physical and mental wellness, and to be more mindful of their internal thoughts and emotional needs. As people take inventory of their anxieties – employment issues, financial pressures, health concerns, ambiguity around education, social unrest, social isolation and loneliness – there is increased need to mitigate stress, just as many of our go-to stress release outlets aren't available. Whether people are living in close quarters or in complete isolation, they're looking for new methods to cope, often picking up old hobbies or adopting new ones in the search for well-being.

<sup>1</sup><https://advances.sciencemag.org/content/early/2020/09/18/sciadv.abd5390>

## **Togetherness & belonging**

Spending time together has never been more consequential. Wide and expanding social circles have shrunk back, as we join in new family units or “quaranteams.” Respondents across the board feel closer to the people they live with, both physically and emotionally, and are experiencing an increased sense of responsibility for, and dependence on, immediate family. The ratcheting up of togetherness can be a blessing or a curse. On the healthiest side, many people are feeling a deeper sense of belonging as a result of this closeness – expressing deep feelings of gratitude and togetherness that seem to help them stay balanced. In fact, as you’ll see in the Race section, “Love & Belonging” is the only area of need that didn’t stand out as a major concern for any group.

On the other end, more togetherness is also driving an uptick in domestic abuse, as unhealthy relationships are left with nowhere to go and financial stressors only add fuel to the fire. And in the middle, there’s general tension caused by the practicalities of togetherness: the complexity of multi-job, multi-generational households that are high on anxiety and low on outlets.

# Dignity

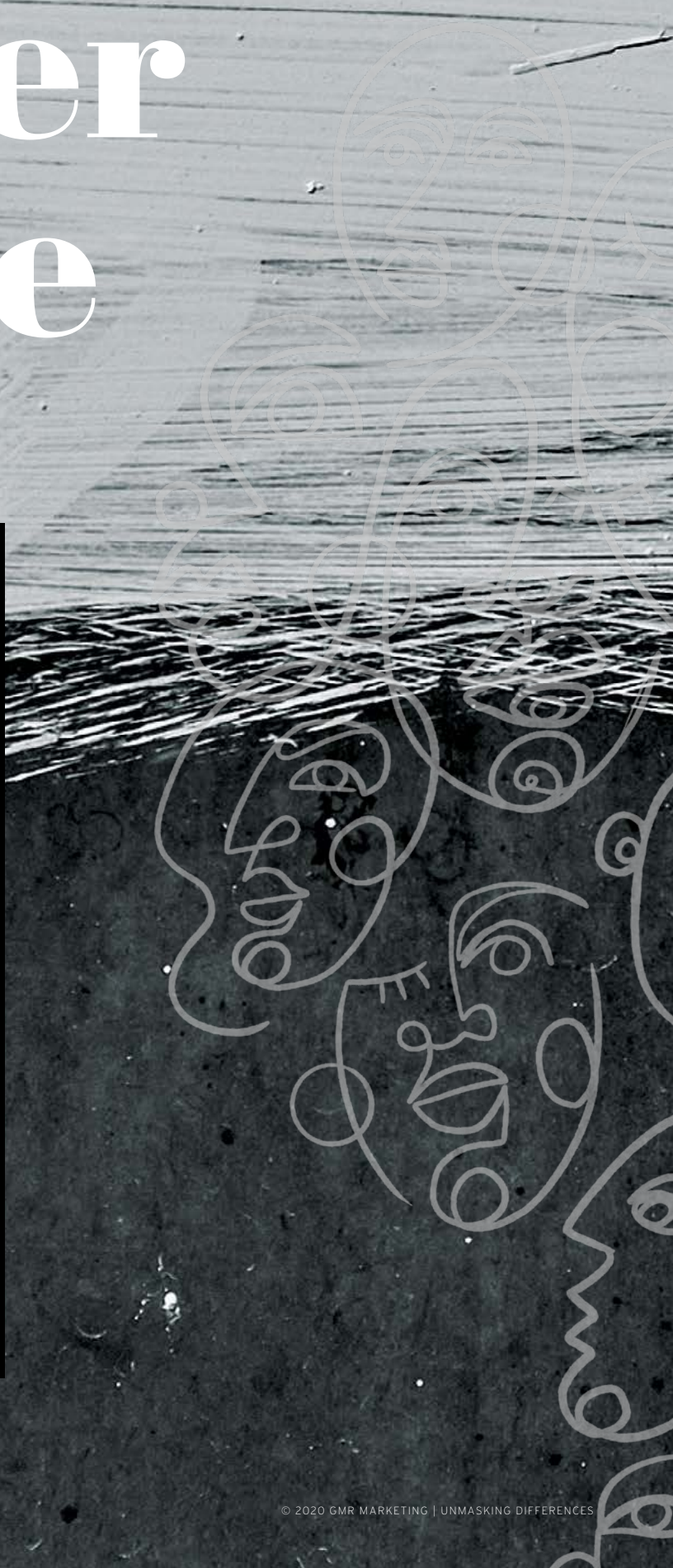
## **BLACKS MILLENNIALS WOMEN**

Dignity is a thread we saw running through Blacks, Millennials and Women – all strivers. Each of these groups faces their own challenges to be seen, validated and respected for their merits and worth. In a period of upheaval, the need for dignity becomes more pronounced.

# Gender Divide

## IN CONTRAST TO RECENT CULTURAL PROGRESS—

from more balanced parenting/ household roles, to workplace equality, to acceptance around gender complexity – the data reveals that COVID-19 is pushing people back toward traditional gender roles. For women, the pandemic has ushered in new (maybe more accurately said, old) household dynamics, which are triggering and leaving them feeling boxed in. For men, it's brought them closer to their families, but they feel burdened trying to be everyone's anchor without their usual outlets for stress relief.



# Women

## FOCUSED ON THE FAMILY -AT WHAT COST?

### **Caring for the collective**

Women have shifted into caretaker mode. They're worried about their tribe – their health, their safety and their emotional well-being. They're worried about their communities, especially those who are struggling. And they're worried about the planet, feeling conflicted about choices that prioritize immediate health and safety at the expense of the environment.

### **Dignity under threat**

But that caring comes at a cost. As household demands and parenting duties fall disproportionately to women, they risk losing the professional status, career traction and financial independence they've been working so hard to establish. "Maintaining dignity" rose up in the data for women, whose independence is threatened just as the recession grinds advancement opportunities to a halt.

### **Emotional rollercoaster**

Women's emotions – like their time and energy – are being pulled in many directions.

- More likely than men to feel both **grateful** and **lonely**
- Feeling both **stressed out** and **productive**
- Experiencing **uncertainty** about the world around them and **overwhelm** internally

Uniquely, women are coping with their complex emotions through internal work and awareness. They told us they are adapting, actively discovering new things about themselves, and paying deeper attention to how they feel. They are leaning into faith, balance and compassion for others. And perhaps tellingly, they report prioritizing present happiness over future happiness – suggesting that they are giving up something else to be happy now.

## WHAT THEY LOVE & MISS

- Celebrations & family events (weddings, birthday parties, memorials, cookouts)
- Music & entertainment events (especially the chemistry and interaction)
- Active gatherings (fun runs, yoga festivals, pop-up cafes, TED talks, cooking classes)

# HOW BRANDS CAN IMPROVE THEIR EXPERIENCE

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## **Create opportunities to connect & add meaning**

Women are missing interconnection and ceremony. We see this in the types of live experiences they miss, but also in what they miss about them, which tends to relate to coming together and personal interaction – attending with friends, preparation and hospitality, interaction between performers/athletes, even wearing themed gear.

## **Offer a platform for individuality & growth**

The need for dignity is big here, evidenced by both household stressors and by women missing events with an active component – from cooking classes to TED talks, these are all opportunities to learn, do, discover and share. The antidote to eroding dignity is to support women on all fronts with opportunities to strengthen their individual identity, through self-expression, enrichment and achievement.



WOMEN



# Men

## ALL OF THE PRESSURE, NONE OF THE RELEASE

### **Closer to home**

Men told us that COVID-19 has brought them closer emotionally to the people in their household. Flipside: they feel those near them have become more dependent on them than before COVID-19, which adds increased pressure and responsibility.

### **Safety stress**

Men feel responsible for putting safety measures in place for themselves and their households, and are frustrated by the mixed messages they're getting about how best to do that. This is causing not only confusion, but also stress and insecurity, as they feel responsible for something they can't entirely control.

### **Tension is building**

When COVID-19 first hit, men were feeling pride, and even reported a greater sense of connection and unity with their fellow Americans. As the pandemic has continued, however, those have shifted to feelings of anger and disappointment. It's not even the increased stress and strain – it's that the shutdown of most events (and the hampering of sports, in particular), has deprived men of the external outlets they've been relying on to stay emotionally balanced.

## WHAT THEY LOVE & MISS

- Sports! Sports! Sports! (live games, fantasy leagues, playoffs – all of it)
- Small gatherings and socializing (often around, you guessed it, Sports! Sports! Sports!)

# HOW BRANDS CAN IMPROVE THEIR EXPERIENCE

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## **Give them a competitive outlet**

The emotional anticipation. The high-stakes competition. The euphoria or heartbreak of the final buzzer. Men didn't miss sports solely because they care about their team – they missed having something to get lost in. Sports are cathartic, a way to blow off steam and forget the worries of the day. They need play, competition and release – simple things to make life fun and help them feel lighter and less stuck in a heavy world. Some sports have picked back up, which rights men's equilibrium a bit, but opportunities for gathering live at the game – or at your buddy's house – are still lacking, leaving a gap brands can help fill.

## **Provide a chance to socialize**

Men miss having a chance to shoot the shit. Sports layer in here too (all the talk about who will win or who should have won) but it's not just that. The simple fun of a social gathering is something that a lot of men told us they miss. It's just another way to escape and rebalance – one they rely on and aren't getting enough of during the pandemic.



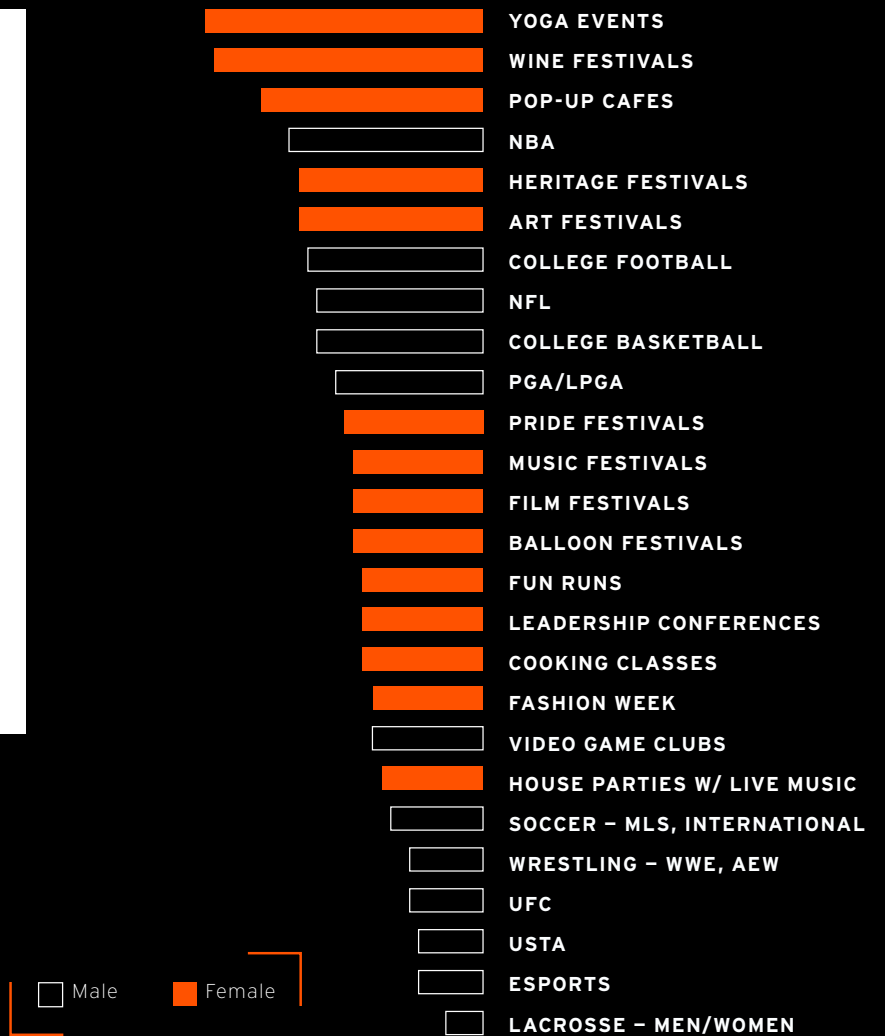
MEN

MISSING OUT

# His & Hers

## WHAT WE NOTICED:

Men and women missed some exclusively different live experiences. Men told us about sports, gaming and competitive pursuits, while women missed things that were active but shared – and often gave them meaning around their identities. This differential comparison focuses on the contrasts between the two genders, ranked from the largest to smallest difference.



# Age Cohorts

## ACROSS GENERATION AND LIFE STAGE, EVERYONE IS FEELING THE PINCH

Gen Z and Millennials are struggling with the pandemic's impact on their drive and ambitions, creating more conflicting and acute emotional reactions. Gen X is trying to survive with older children, aging parents and nests that aren't as empty as they'd hoped they would be. Meanwhile, Boomers have battened down the hatches and are trying to enjoy their retirement safely. Each group is facing their own problems, but they're all craving the energy of fulfilling social interactions.



# Gen Z

## STRUGGLING TO NORMALIZE

18-24 years old\*

### **Mental health & awareness**

Gen Z are more likely than any other generation to be dealing with extreme mental health issues that can result in thoughts of self-harm.<sup>2</sup> It's not just COVID-19, it's the ambiguity of their futures. These higher levels of stress and anxiety aren't new to the generation that's been raised alongside the threat of school shootings and the existential crisis of climate change. At this point in their lives, they finally have the agency to make their own decisions, yet their needs seem to always be deprioritized for the needs of others.

Gen Zs have had trouble understanding their emotions, especially at the beginning of the pandemic. They're at an incredibly social life-stage, yet are forced to choose between the risk of contracting COVID-19 and the emotional toll and anxiety that come from isolation. Consequently, Gen Z are paying more attention to

their emotions and finding ways to actively improve mood and monitor mental health.

### **Migrating home**

52% of young adults over 18 in the US are living with their parents, the highest share since the Great Depression.<sup>3</sup> Gen Z are feeling more dependent on others in the household and a stronger sense of intimacy with them as a result of increased time together. For the older half of Gen Z, this new dependency comes at a pivotal point in their lives. What should be a time of independence, budding adulthood, and exploration has regressed into the power dynamic and structure of their childhood.

### **Finance vs. family**

As many Gen Z move home, they're forced to consider the very real consequences of maintaining employment. More likely to be in entry level positions, Gen Z are on the lower end of the income range and

often in contact with the public. So even if they are less likely to socialize, many are at a higher risk of contracting COVID-19 and bringing it home to their families. This pragmatic generation watched Millennials go before them – they understand the consequences of student debt and how difficult launching can be. They don't want to give up employment or the promise of independence it brings, but also feel the pressure of keeping their family safe. They're torn.

## WHAT THEY LOVE & MISS

- The independence and spontaneity that should come with adulthood
- Sports and live events (specifically the personalities of commentators and announcers)

\* Our survey respondents were 18 and above, so data reflects the older portion of the Gen Z cohort, which we define as ages 18-24.

<sup>2</sup> <https://www.cnn.com/2020/08/14/health/young-people-suicidal-ideation-wellness/index.html>

<sup>3</sup> <https://www.cnn.com/2020/09/04/us/children-living-with-parents-pandemic-pew/index.html>

# HOW BRANDS CAN IMPROVE THEIR EXPERIENCE

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## **Prioritize their interests**

Gen Z is differentiated by the fluidity with which they've adjusted their life goals in light of the pandemic, demonstrating flexibility and working to make plans for when the economy reopens and COVID-19 resolves. This generation is independent, motivated and will find a way with or without help. Brands stand to earn understanding and loyalty from this generation by recognizing and supporting them and what they're passionate about, especially environmentalism and equality.

## **Give them back their independence**

The younger generation tends to process internally and has more of an interest in values like happiness, success and equality. But that doesn't mean they don't miss the benefits that come with their burgeoning adulthood. This is their time to experience the world, and brands would be wise to provide opportunities for exploration and discovery.



# Millennials

## WITH A GLASS HALF FULL

25-39 years old

### **Maintaining dignity**

It's become a cliché to use Millennials as the punchline, their recognition often coming out of what others see as their entitlement. But in truth, the world has never been safe for them. They've come of age alongside big events like 9/11 and the Great Recession, and their mindset and trajectory have been shaped accordingly.

Millennials have worked hard to launch and to claim their dignity and earn respect despite these setbacks. Those currently in the heart of career and family building said they were feeling anxious, exhausted, worried and are struggling with an overall loss of control. To that point, Millennials expressed satisfaction in the knowledge that they achieved something by being productive or accomplishing something during the shutdown.

### **Quick adapters**

Millennials value passion and drive. They've learned to be resilient as they've moved into adulthood, and this experience is just one more time to draw on that resilience and center on what matters most. As an example, while financial decisions have shifted for everyone, Millennials were more likely than any other group to report significant changes in their spending habits. Our hypothesis: this set had been balancing household & family expenses with food & entertainment, and when COVID hit, they pulled back hard from the pleasurable in favor of the practical.

### **Finding hope**

To maintain the never-ending list of surprises we've come to expect from Millennials as they mature and navigate the world,

they expressed that they are still feeling contentment, joy and happiness during this time. This group has always had hopefulness as a distinct marker, and it appears that they have managed to maintain it during COVID-19.

## WHAT THEY LOVE & MISS

- Music festivals (specifically ones that drive memories)
- Sporting events (but they're following athletes and stars on social media to fill the void)

# HOW BRANDS CAN IMPROVE THEIR EXPERIENCE

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## **Help them reestablish control**

While Gen Z is off discovering the world, many of the older Millennials are trying to settle down. The pandemic has cracked the foundation they've set to make major life decisions like career, buying a home and starting a family. Brands can support this generation by giving them opportunities to return to the driver's seat in their own lives.



# MILLENNIALS



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# Gen Z + Millennials

## A NEED FOR SOCIAL RELEASE

It's no surprise that the two younger generations share a lot of similarities. Chief among them are their needs for release and belonging – needs they typically satisfy by attending live events, social gatherings, entertainment and sporting events.

Social connection in people's 20s and 30s is such an important part of life as they establish foundational friendships and begin to pair off. Both Millennials and Gen Z are growing closer to those they live with, but it comes at a cost – they miss dating and meeting people.

Both generations miss the excitement and anticipation leading up to an event, specifically noting the energy of a live crowd. Additionally, they both said they would be

more likely than older cohorts to take a safety risk if it meant being able to attend their favorite live events. Their need for discovery and belonging is so strong that they may choose risk over safety because they aren't getting their basic social needs met. We've seen this play out in real time as others struggle to understand why young people are socializing freely. Consequently, Gen Z and Millennials have a hard time reconciling the need for emotional release and social connection with their responsibility to the health and safety of others. This tension is especially true of Gen Z, who feels they are being asked to help protect the very generations who have been overlooking/minimizing threats to them (gun control, climate change).

# Gen X

## DESPERATELY SEEKING SOCIAL

40-54 years old

### **Stretched thin**

Gen X is feeling strained and disappointed as they struggle to provide for the children and aging parents who depend upon them physically, financially and emotionally. Concerns of unemployment and financial stability continue to weigh heavily on their minds along with the stressors of managing complex households. Unlike Millennials, who felt worse at the beginning of the pandemic and are leveling out, these emotions are nipping at Gen X consistently.

### **Safety enforcers**

Gen X rated safety higher than both the younger generations. Sensible and pragmatic, this generation has Gen Z children

and is prioritizing the safety of the family, which may cause tension as the two generations compete for different concerns about overall health and wellness.

### **Finding release**

The burdens of daily life are taking their toll. Gen X is looking for personal and social connections and to have some fun to balance out the duty and feelings of being stretched. While everyone younger than Boomers misses the energy that comes with a live crowd, Gen X is notably excited by the anticipation leading up to the event – they need something to look forward to.

## WHAT THEY LOVE & MISS

- Social events (having fun, connecting with others, even dating)
- Live events (especially the anticipation leading up to it)
- Sports (bring on the competition)

# HOW BRANDS CAN IMPROVE THEIR EXPERIENCE

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## **Give them a break**

Gen X needs smart solutions to help with their bandwidth issues. Brands can help with time saving and enriching experiences that allow them to be effective while still having fun. Or, help them innovate by offering quality, time-saving options.



GEN X

# Boomers

## REELING IN THE YEARS

55-74 years old

### **The nuclear family**

During this time, Boomers are placing value on family, honesty and relaxation as a release from stress. They are more likely to be in retirement, which decreases their exposure to new communication platforms and (for some) reduces their social outlets. This combined with the health risks of the virus has made family their priority – they're hesitant to expand beyond their immediate circle, but happy to be focusing on the people who matter most.

### **Safety**

At the start of the COVID-19 shutdown, Boomers feared being taken advantage of. This sense of self defense or vulnerability is unique to the older group. As Boomers age and are out of the current flow of information that comes with being in the mainstream workforce, confidence begins to ebb and they turn inward to seek safety. They are also more likely than all three younger cohorts to mitigate risks by staying informed about the pandemic through news and other sources.

## WHAT THEY LOVE & MISS

- Retirement (particularly, the care-free retirement they envisioned – especially spending time with family and grandchildren)
- Community (book club, church groups, golf buddies, vacationing with friends)

# HOW BRANDS CAN IMPROVE THEIR EXPERIENCE

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## **Revive retirement**

Boomers have worked their whole lives toward the dream of retirement. This pandemic has brought on financial panic as 401ks yo-yo with the stock market and the economy tries to keep up with shutdowns. Brands can help Boomers return to the joy that should be accompanying the retirement they planned for: travel, socializing with their tribe, endless hobbies and time with family, especially grandchildren.

## **Keep them informed**

With Boomers searching for the most up-to-date information about the pandemic, brands can offer advice on distinguishing COVID-19 risks and help build confidence to make decisions surrounding safety.

# BOOMERS

# Defining generational values

## GEN Z

<b>DRIVE</b> (vs. Boomers)	<b>PASSION</b> (vs. Boomers)
<b>CHANGE</b> (vs. All Other Generations)	<b>ENVIRONMENTALISM</b> (vs. Gen X)

## MILLENNIALS

<b>DRIVE</b> (vs. Boomers)	<b>PASSION</b> (vs. Boomers)
<b>CHANGE</b> (vs. Gen X, Boomers)	<b>CONTROL</b> (vs. Gen X)

## GEN X

<b>RESPECT FOR OTHERS</b> (vs. Millennials)	<b>FAMILY</b> (vs. Gen Z)
<b>DOING GOOD</b> (vs. Millennials)	<b>PASSION</b> (vs. Boomers)

## BOOMERS

<b>HONESTY</b> (vs. Gen Z, Millennials)	<b>FAMILY</b> (vs. Gen Z, Millennials)
<b>JUSTICE</b> (vs. All other generations)	<b>CONTROL</b> (vs. Gen X)

### SHARED ACROSS

- Younger Generations
- Older Generations
- Younger And Older
- Unique To Generation

### WHAT WE NOTICED:

As many have come to expect, the younger generations ranked drive, change and passion above the older cohorts. Environmentalism bubbles to the top for Gen Z, as they continue to struggle with a world that doesn't recognize the long-term impacts of climate change. Meanwhile, Gen X and Boomers list family as a defining value. As the pandemic forces everyone to tighten their social

circles, there's a return to multigenerational living. Finally, Boomers and Millennials are seeking the control they once had. For Millennials, they're trying to regain control over both their personal and professional lives. And for Boomers, they're looking for some control over their personal health and safety, as the generation that is most at risk.

# Race

## COVID-19 IS HAVING A DISPARATE IMPACT ACROSS RACIAL GROUPS IN THE UNITED STATES

And while our questions focused solely on the pandemic, it's impossible to discount the influence that high-profile racial traumas (and subsequent national dialogue about racial injustice) would naturally have on respondents' sentiments. Particularly for communities of color, we expect COVID-19 and racial trauma to have an overlapping influence on feelings related to safety and security, concern for family and community, and personal agency.

A bright spot: while different races are experiencing 2020 in very different ways – and often having very different feelings about it – there was one universality across all groups: they are secure in their feelings of love and belonging. People are connected to family and very close friends in ways they have not been in a long time. 2020 has been rough, and we are anchoring ourselves to the people who matter most.



# Black

## VULNERABLE ON MANY FRONTS—BUT RESOLVED

### **Concern level: high**

Black and brown communities have been hardest hit by COVID-19,<sup>4</sup> and accordingly, our data found this group most concerned with safety compared to other races. They are more likely to avoid public spaces where people aren't wearing masks or social distancing, and have greater discomfort going to outings with people outside of their social circle. They also have faith in others to do the same – they are more likely (especially compared to whites) to trust that people will stay home if they've been exposed to COVID-19.

### **Emotional mix: focused under threat**

Insecurity is looming for many people of color, ranging from basic needs for safety to higher-level needs for esteem and self-actualization. Black people are worried about both current and future finances and the stability and basic needs of their household.

At the start of COVID-19, they expressed a complex emotional mix: taken advantage of and undignified, yet also revived. And revival seems to have won out – as the pandemic has gone on, their feelings have shifted to focused, grateful and strong. It's unclear how much of this shift has to do with the pandemic evolving over time, or whether protests and activism are providing a focal point of solidarity and purpose. Perhaps both.

<sup>4</sup> <https://www.cdc.gov/coronavirus/2019-ncov/covid-data/investigations-discovery/hospitalization-death-by-race-ethnicity.html>



# HOW BRANDS CAN IMPROVE THEIR EXPERIENCE

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## **Support & amplify them**

Right now, Black communities are facing the most direct threat to their physical and emotional well-being, so the need for dignity, esteem and pride is substantial. Brands can find ways to demonstrate empathy, solidarity and respect. Lend tangible support and sincere amplification to Black voices, leaders and problem solvers.

This group is the least likely to feel safe at concerts and sporting events, so find ways to deliver meaningful connection at home and through small family groups while recognizing their concerns and efforts to keep loved ones safe.



BLACK

# Latinx

## ANXIOUS THAT OPPORTUNITY & INDEPENDENCE ARE SLIPPING AWAY

### **Concern level: high-moderate**

Latinx communities have been hit nearly as hard as Black communities by the health impacts of COVID-19, so not surprisingly, their concerns about physical safety follow suit. Latinxs are following safety measures, are uncomfortable with the idea of going to large events, and would rather not go into public where people aren't wearing masks.

### **Emotional mix: steady economic anxiety**

Job and wage losses have had the largest impact on Latinx adults,<sup>5</sup> so not surprisingly, they surfaced more emotional concerns about the economy than any other group. Latinxs shared Black respondents'

concerns about maintaining stability during the pandemic, but were specifically fearful of losing opportunities to realize their potential. Respondents were also uniquely reserved about the safety risk of racial justice protests, specifically that they might cause a spike in cases that could set back the economy from opening.

This group has been working hard and is worried about maintaining their independence – concerned that COVID-19 will threaten their ability to keep building the lives that they want. Early feelings of anxiety have given rise to a sense of strength and focus, as Latinxs demonstrate less emotional variation over time than their racial counterparts.

<sup>5</sup> <https://www.pewresearch.org/fact-tank/2020/05/05/financial-and-health-impacts-of-covid-19-vary-widely-by-race-and-ethnicity/>

# HOW BRANDS CAN IMPROVE THEIR EXPERIENCE

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## **Give them opportunities to assert autonomy**

As Latinx communities worry they will lose their ability to thrive and realize their potential, brand connections that build esteem and independence can go a long way. Find ways to recognize and validate Latinx consumers' individuality, self-expression and independence.

These can build confidence and increase their sense of stability and autonomy. But again, be sensitive to safety concerns, focusing less on large gatherings and more on smaller, more intimate experiences at home and through family groups.



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# White

## CAUTIOUS, BUT ITCHING TO MOVE FORWARD

### **Concern level: lower than the rest**

While whites are thinking about the health and safety of their household, they showed less intensity for these issues across the board. They were less likely than Blacks to be uncomfortable in non-masked public spaces, and less likely than Latinxs to be wary of concerts and sporting events.

White respondents were the only group not losing sleep (literally) over how to meet basic household needs. It's worth noting that whites are more likely than all other groups to have been employed during the entire pandemic. They are also more likely to have rainy day funds, and they have the lowest COVID-19 hospitalization and death rates of any racial group in the U.S.<sup>6,7</sup>

### **Emotional mix: craving normalcy**

Despite the stability that white Americans enjoy relative to other groups, they aren't feeling particularly stable. In March, they felt resourceful yet uncertain – over time they've come to feel angry, frustrated, anxious, content, worried and are having trouble understanding their emotions. The two feelings that have stayed with white people this whole time: "anticipation" and "emotional rollercoaster." They're waiting for the next shoe to drop.

<sup>6</sup> <https://www.cdc.gov/coronavirus/2019-ncov/covid-data/investigations-discovery/hospitalization-death-by-race-ethnicity.html>


<sup>7</sup> <https://www.pewresearch.org/fact-tank/2020/05/05/financial-and-health-impacts-of-covid-19-vary-widely-by-race-and-ethnicity/>

# HOW BRANDS CAN IMPROVE THEIR EXPERIENCE

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## **Provide some continuity**

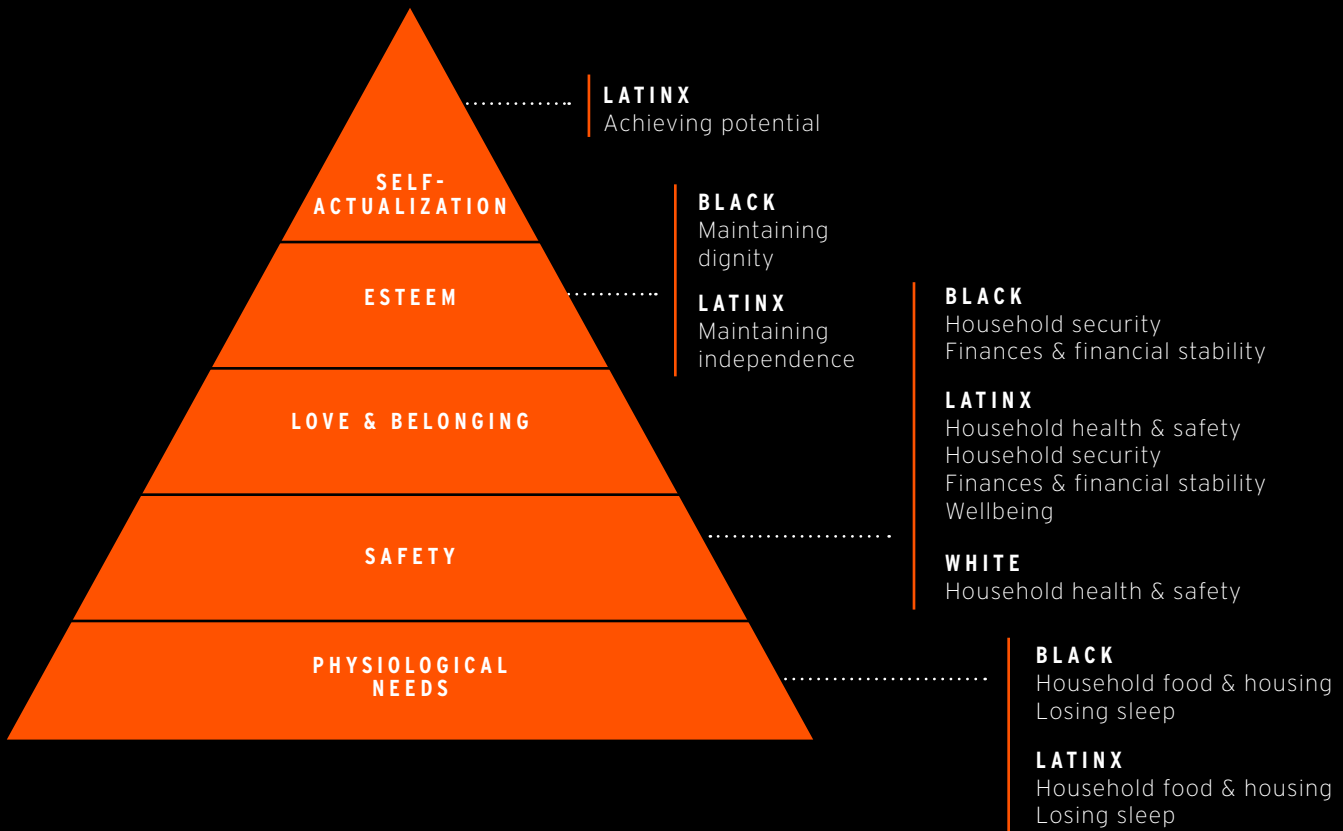
The only opinion that was fully unique to white respondents was the comment “I feel the shutdown is behind us and we are getting back to normal.” Whether this is realistic or aspirational, it reflects a desire in white communities for predictability and normalcy. Because this group is more likely to have their base needs met, they’re more focused on missing rituals like annual holidays, seasonal markers, and life milestones. Tapping into the expected rhythms of the year, and helping them look forward, are great way for brands to connect.



WHITE

BY RACE / DURING COVID-19

# Maslow's Hierarchy of Needs



## WHAT WE NOTICED:

Respondents expressed concerns that map in interesting ways to Maslow's Hierarchy of Needs, especially when differentiated by race. As we've discussed, Safety is an area of concern for all groups, be it physical, financial or both.

But Love & Belonging is an area of concern for *no* groups – it's the one realm where most people's cups are full. As much as it causes stress and tension in other ways, people are feeling closer than ever to their most important loved ones.

# Conclusion

FEELINGS.

FRUSTRATIONS.

FAMILY.

No matter how you slice the data, every gender, age and race identifies and struggles with these three themes.

We will end how we began: though COVID-19 is a truly universal experience with strong shared themes – on a day-to-day level, we're all experiencing it differently.

Throughout this report, we've worked to provide brands with greater cultural intimacy: a more nuanced understanding of what people are feeling, on a personal level, about their current experience – and what they miss, on a personal level, about the experiences they're not having right now.

And this kind of cultural intimacy is the first step toward meeting people where they are. Though large events and gatherings are on pause, personalized 1:1 interactions have the ability to fulfill what people crave now more than ever – they can fill emotional gaps, help people move through their uncertainty, and drive learning and engagement along the way. And perhaps most importantly as marketers and as humans alike, these interactions can make people's experiences better, making brands part of people's 2020 memories – in a good way.

# Unmasking Differences

## ABOUT THE RESEARCH

Unmasking Differences is proprietary research and analysis conducted by GMR Marketing between April 2020 and October 2020. We facilitated both qualitative (interviews) and quantitative (surveys) outreach to 400+ experience-seekers age 18 and older across the United States, asking people about their feelings, values, priorities, stressors, what they miss from life pre-COVID, and their sentiments about live event attendance. Our findings and analysis aim to help brands design marketing experiences that are resonant, audience-centric, and unforgettable.

## ABOUT GMR MARKETING

GMR has been devoted to the art and science of memory-making for over 40 years. From the world's largest stages to the smallest local moments, we create personal, unforgettable experiences – experiences that make brands part of people's life stories.

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