The fragile (im)balance
how media & brand narratives can support women post-pandemic

SEEHER | ANA | GWI
Consumers are exposed to an increasing number of media and brand narratives on a regular basis, and these narratives play a critical role in how we see ourselves and others. This is particularly true in times of crisis.

In this report, created in partnership with GWI, we explore how important narratives of support and self-care are to women during difficult times like the pandemic.

Women have always juggled various responsibilities and demands, and in extraordinary times like the one we’ve been experiencing, this balancing act becomes even more fragile. And it’s critical to acknowledge that men play a major role in this dynamic, both in terms of allyship and diverging perceptions. In this report, we explore this interplay in detail.

Messaging also impacts how consumers react to brands in times of crisis. Our study revealed that over half of consumers feel that the types of narratives used by brands and media in difficult times have a direct impact on their purchasing decisions.

As we emerge into the uncertainties of a new normal, brands and media can play a pivotal role in supporting and engaging women with authentic and relatable messaging. In fact, women are relying on them to do so.
Mental stress and need for self-care

Women are over 50% more likely than men to say their mental health has declined this past year.

One of the key findings from our research is that, over the course of the pandemic, women in the U.S. were more likely than men to say their mental health, physical health, and work stress had all gotten worse.

The biggest gender disparity is psychological, with women being over 50% more likely than men to say their mental health has declined this past year. And when asked about the potential lasting implications from the pandemic in their own lives, women’s number one concern was around mental health. Nearly one-third of women said they worry about this, while one-quarter of men reported the same (31% women vs. 25% men).

It’s also older women who are most worried about these long-term effects. While Millennials have reported greater feelings of anxiety during the pandemic than older generations, Gen X and boomers are actually the most concerned about the lasting effects on women’s overall mental health.

Even among women, however, the effects of the crisis are not equally distributed. Women of color have been hit the hardest when it comes to job losses and lower financial security. Not surprisingly, these women are more likely than total women to feel that the pandemic will have long-term effects on their mental health.

The implications on women’s mental health may be long-term

% who think the pandemic will have negative, long-term effects on their mental health.
Narratives that balance reality with inspiration

The media landscape has been inundated with sympathetic messaging around the pandemic support for healthcare workers, families reuniting, and long-time friends catching up on Zoom calls. However, not a lot has been created to specifically visualize the high-stress balancing act that is daily life for many women, immersed in addressing the needs of their families and their jobs. Even less has been done to normalize and encourage self-care for women. Yet women’s experience with this mental burden directly influences the sorts of images and narratives they are most receptive to.

Perhaps unsurprisingly, close to half of the women we surveyed want to see ads that show women finding ways to relax and take care of themselves (47%). In fact, self-care was the most in-demand brand narrative of any that we measured in the study. Women were also receptive to narratives that show women getting support from their male partners (42%), women connecting with other women (38%), and women dealing with the often chaotic nature of home life (33%).

These findings indicate that, to really resonate with women today, portrayals in advertising should be both realistic and inspiring. It’s important to reflect back an authentic reality of women’s lived experience, which is often shaped by inequalities in domestic expectations. But it’s also crucial to inspire and encourage, and this can be done by leaning into the narratives of self-care, challenging the idea that women’s needs must come last every time.

Women of color are more likely to want to see ads that reflect restoring balance to their lives. Compared to white women, women of color are more likely to prefer ads that show female characters finding ways to relax and take care of themselves (women of color: 51% vs. white women: 45%), being successful in their jobs (44% vs. 41%) and solving a problem (43% vs. 37%).

Different portrayals of women’s narratives in media
% who want to see female characters shown in the ads in the following ways

<table>
<thead>
<tr>
<th></th>
<th>All women</th>
<th>Mothers</th>
<th>White women</th>
<th>Women of color</th>
<th>All men</th>
<th>Fathers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finding ways to relax and take care of themselves</td>
<td>47</td>
<td>51</td>
<td>45</td>
<td>51</td>
<td>37</td>
<td>38</td>
</tr>
<tr>
<td>Being successful in their jobs</td>
<td>43</td>
<td>44</td>
<td>41</td>
<td>44</td>
<td>45</td>
<td>50</td>
</tr>
<tr>
<td>Getting support at home from their male partners</td>
<td>42</td>
<td>46</td>
<td>42</td>
<td>39</td>
<td>37</td>
<td>44</td>
</tr>
<tr>
<td>Solving a problem</td>
<td>40</td>
<td>38</td>
<td>37</td>
<td>43</td>
<td>36</td>
<td>39</td>
</tr>
<tr>
<td>Connecting with other women</td>
<td>38</td>
<td>37</td>
<td>38</td>
<td>34</td>
<td>25</td>
<td>28</td>
</tr>
<tr>
<td>Dealing with chaos at home</td>
<td>33</td>
<td>35</td>
<td>32</td>
<td>32</td>
<td>21</td>
<td>25</td>
</tr>
<tr>
<td>Saving money</td>
<td>25</td>
<td>25</td>
<td>23</td>
<td>26</td>
<td>26</td>
<td>25</td>
</tr>
<tr>
<td>Struggling with stress</td>
<td>24</td>
<td>25</td>
<td>25</td>
<td>21</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>Doing home tasks/chores</td>
<td>17</td>
<td>22</td>
<td>15</td>
<td>22</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>Having a messy home</td>
<td>15</td>
<td>14</td>
<td>16</td>
<td>15</td>
<td>9</td>
<td>11</td>
</tr>
</tbody>
</table>

QWI & SeeHerStudy, March 2021  1,665 U.S. internet users aged 16-64
The dad effect

Fathers are more likely to believe that the media has “a lot” of responsibility to address gender equality.

Another key finding from this study centers around the idea of allyship and how it is actualized by men and particularly by fathers.

Overall, we know that parents are more worried about the gendered images that media and brands project, likely because they are concerned about the impact on children’s developing confidence and values. For men, fatherhood seems to make an even bigger difference in this regard than motherhood does for women.

In fact, 47% of fathers, compared to 38% of all men and 44% of mothers, believe that the media has “a lot” of responsibility in addressing gender inequality. A similar pattern holds true for brands, with fathers more likely even than mothers in pointing to brands’ responsibility. Fathers are also much more likely to see women’s professional opportunities at risk because of the pandemic, nearly 1.4x as much as men without children.

In essence, what we’ve termed the “dad effect,” men with children are more likely to be concerned than men overall about the effect the crisis is having on specific issues for women.

This is especially true when it comes to the potential long-term risks for young girls in terms of their professional opportunities, as well as how girls are affected by the media around them.

In a broader sense, these findings are indicative of men’s specific mindsets when considering women’s equality. Fathers are 22% less likely than mothers to feel that women’s mental health suffered during the pandemic, and 38% less likely to feel that the balance of household labor worsened. It appears to be easier for men with children to be on par with women when it comes to bigger issues like education, work, and representation, but not for the more direct, personal experiences of women.
The dad effect: men and women are misaligned on the pandemic’s effects on women

% who think that the following things are getting worse as a result of the pandemic

- Women’s mental health
- Balance of household labor
- Women’s physical health

Parents overwhelmingly believe in the media’s role to address gender inequality

% who believe that the following have a responsibility in addressing the issue of inequality between men and women

- The media
  - A lot
  - A little

- Brands
  - A lot
  - A little

GWI & SeeHer Study, March 2021
1,865 U.S. internet users aged 16-64
Closing the gap with nuanced storytelling

Interessingly, the ‘dad effect’ also impacts the sorts of images and narratives that people want to see from media to reflect a better gender parity. Our study reveals that there is a key difference in what’s important for men vs. women, and for fathers vs. mothers.

When asked how they would like to see female characters portrayed in advertising, men prioritized seeing women being successful in their jobs and solving problems; a finding even more pronounced for fathers. This is in contrast to women, who preferred portrayals of self-care for women, partner support, and positive female relationships. For men, these types of narratives were much less important.

This points to an interesting, somewhat paradoxical dynamic with the “dad effect.”

For men with children, there is obviously a greater awareness in their perceptions of gender inequality, its particular long-term effects, and what media and brands should do about it.

Fathers also prioritize media narratives that show women being successful in their jobs and solving problems. They don’t, however, see the impact on adult women’s stresses or the value in media that encourages self-care. This represents a disconnect between the opportunities that men want their daughters to have and their perception of (or perhaps lack thereof) the difficult realities often faced by their partners in achieving exactly those things.

Brands have a role to play in bridging this gap. Storytelling directed at fathers can portray women being successful in their jobs and solving problems, as well as getting help from their partners. And to help restore the fragile balance, perhaps make it less fragile, brands and media can go one step further. This can be done by creating content for women and their allies, particularly fathers, that helps raise awareness of the enduring physical and mental health concerns brought on by the pandemic; and also shows women engaging in much-needed self-care.
Summary: leading with purpose

One of the key trends to emerge from the pandemic is to see brands leading with purpose. Consumers call over the world, and especially in the U.S., increasingly want to engage with brands that align with their values and show a clear commitment to diversity, inclusion, and community. Findings from our study confirm this; half of consumers report that when brands/Companies show support to people during times of crisis, it impacts their purchasing decisions (women: 45%; men: 50%).

And when thinking specifically of balancing the inequalities women face, consumers believe that media has a very important and purposeful part to play. Nearly 40% of all consumers—and nearly 50% of parents—say the media has “a lot” of responsibility in addressing the issue of gender inequality, with about a quarter saying the same for brands. Clearly, there is a role for media and brands to play in creating positive change.

In addition, consumers believe in the power of this positive change, especially when we’re most vulnerable: 2 out of 3 people agree that media (women: 64%; men: 66%) and brands (women: 60%; men: 59%) can shape how women see themselves during times of crisis.

As we emerge from this pandemic and steel against any future crises, brands and media can support women by authentically portraying their lives and the stresses they experience. Prioritizing narratives that show women caring for themselves and their allies supporting them will go a long way in ensuring the balance is less fragile for today’s women.

In summary, we know the images and stories we see reflected back at us will always be important because they shape how we see ourselves. Creating more impactful, representative, and ultimately inspiring media directly supports women and makes the path to equality that much closer.

Half of consumers report that, when brands show support times of crisis, it impacts their purchasing decisions

During times of crises, the role of media and brands is paramount
% who agree that the following have the power to shape how women see themselves during challenging times

<table>
<thead>
<tr>
<th>The media</th>
<th>Brands</th>
</tr>
</thead>
<tbody>
<tr>
<td>64</td>
<td>60</td>
</tr>
<tr>
<td>69</td>
<td>65</td>
</tr>
<tr>
<td>66</td>
<td>59</td>
</tr>
<tr>
<td>74</td>
<td>66</td>
</tr>
</tbody>
</table>

All women | Mothers | All men | Fathers

GWl & SeeHer Study, March 2021 | 1.865 US internet users aged 16-64
For brands, acting with purpose has a direct impact

% who say that a brand/company showing support to people during the pandemic impacts their purchasing decisions

- Total
  - A lot
  - A little

<table>
<thead>
<tr>
<th>Total</th>
<th>All women</th>
<th>Mothers</th>
<th>All men</th>
<th>Fathers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>45</td>
<td>48</td>
<td>50</td>
<td>56</td>
</tr>
<tr>
<td>21</td>
<td>24</td>
<td>24</td>
<td>23</td>
<td>30</td>
</tr>
<tr>
<td>24</td>
<td>24</td>
<td>27</td>
<td>26</td>
<td></td>
</tr>
</tbody>
</table>

GWI & SeeHer Study, March 2021 1,665 U.S. Internet users aged 16-64
Key contributors

Latha Sarathy
EVP, Analytics, Insights & Measurement

Amanda Abry
Senior Director, Analytics, Insights & Measurement

Carrie Seifer
Chief Customer Officer

Virna Sekuj
VP, Trends & Research, U.S.
Methodology

The data in this report is taken from a mix of GlobalWebIndex sources, with these sources clearly stated at the bottom of each chart.

Much of this report draws on data from a study conducted in partnership between GWI and SeeHer. This study surveyed 1,865 U.S. internet users between the ages of 16-64. Fieldwork was conducted online between March 15th – 24th 2021.

This report also references data from GlobalWebIndex ongoing syndicated research, which allows us to examine trending insights across 47 global markets. Additionally, sections of this report also draw on GlobalWebIndex Work dataset, which profiles the attitudes and behaviors of 17,000 business professionals across 10 global markets (U.S., UK, France, Germany, Spain, Singapore, Japan, India, Brazil, Australia). For the purposes of this report, only U.S. respondent data was examined.

Our research

As part of our ongoing global research, each year GlobalWebIndex interviews over 700,000 internet users aged 16-64 across 47 markets.

Respondents complete an online questionnaire that asks them a wide range of questions about their lives, lifestyles and digital behaviors. We source these respondents in partnership with a number of industry-leading panel providers.

Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and no respondent can participate in our survey more than once a year (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

Our quotas

To ensure that our research is reflective of the online population in each market, we set appropriate quotas on age, gender and education — meaning that we interview representative numbers of men vs. women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs. tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics, as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the ‘weight’ of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.
The SeeHer mission is to “accurately portray women and girls in marketing, advertising, media and entertainment so they can see themselves as they truly are in all their potential.”

To this end, SeeHer is committed to creating thought leadership that can shine a light on how we as an industry can continue impact gender equality in media.

GWI is the leading audience targeting company for the global marketing industry. We have been delivering game-changing insights to all the agencies, media organizations and brands you know and love since 2009.