



RETURN TO NORMALITY?

A Pulse on USA Consumer Normality



Week 1
Fielded: 19 - 21 March, 2020

THE NORMALITY INDEX

Americans' perceptions of normality are at 53%.
That's 47% lower than the same time last year.

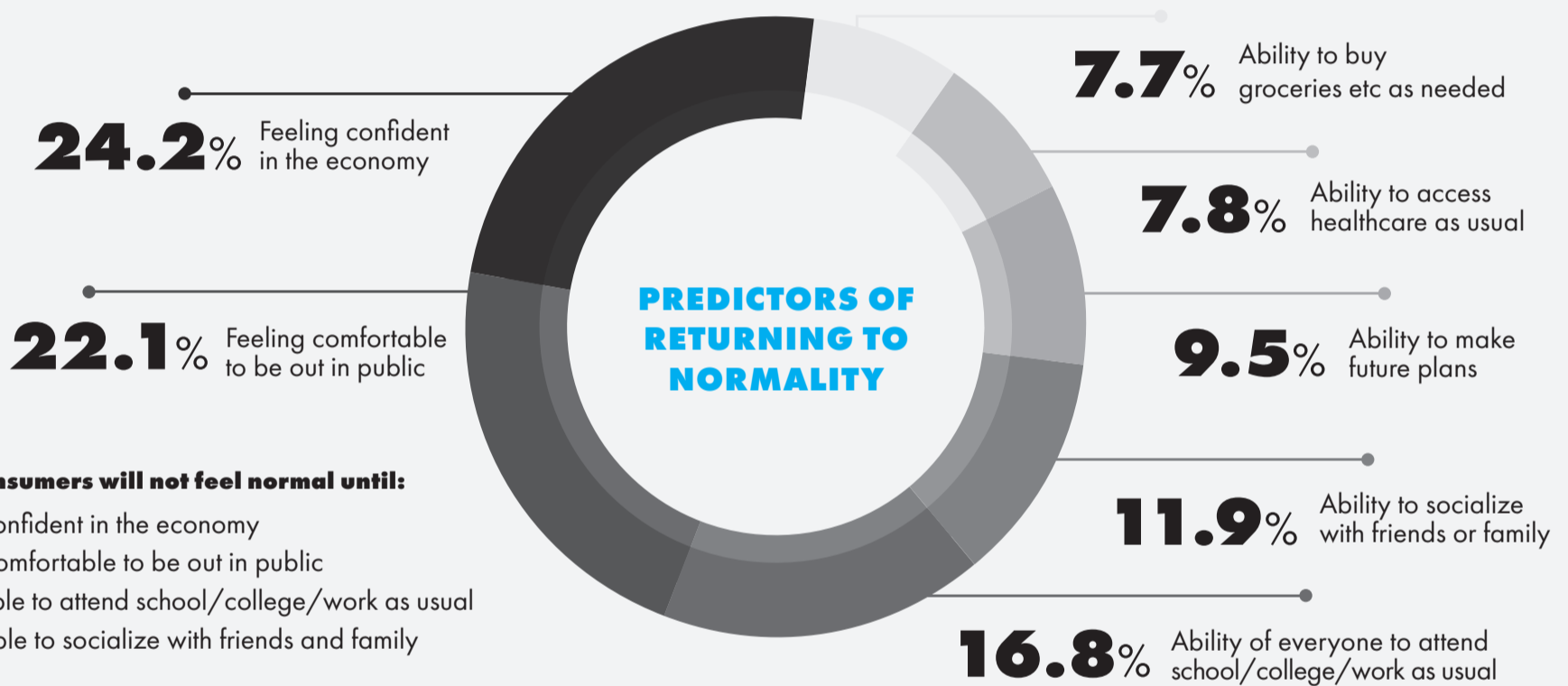


Normality Index Benchmark is 100%

Amongst the great preoccupation with how challenging things presently are, Forethought has launched a predictive indicator of when we might expect to see the green shoots of normality emerge. We are calling it the Normality Index. Forethought understands that our partners will want to re-establish normal patterns of business at the optimum time. By keeping an ongoing, quick to measure pulse on consumer sentiment, the Normality Index can inform brands when the American population will be most receptive to "normal" communications, informing strategy in the midst, and post-Coronavirus (COVID-19).

Forethought has devised a model of indicators that might be considered "normal". We are expecting that our partners will draw on this data to establish correlations in their own transactional data, thus establishing a reliable non-financial lead indicator. It is somewhat experimental and speculative but it's future focused and our effort to help us pinpoint the upturn in consumer sentiment.

Each Monday morning for the next three months (and beyond if necessary) we will be sending you the results from our weekly poll of Americans.



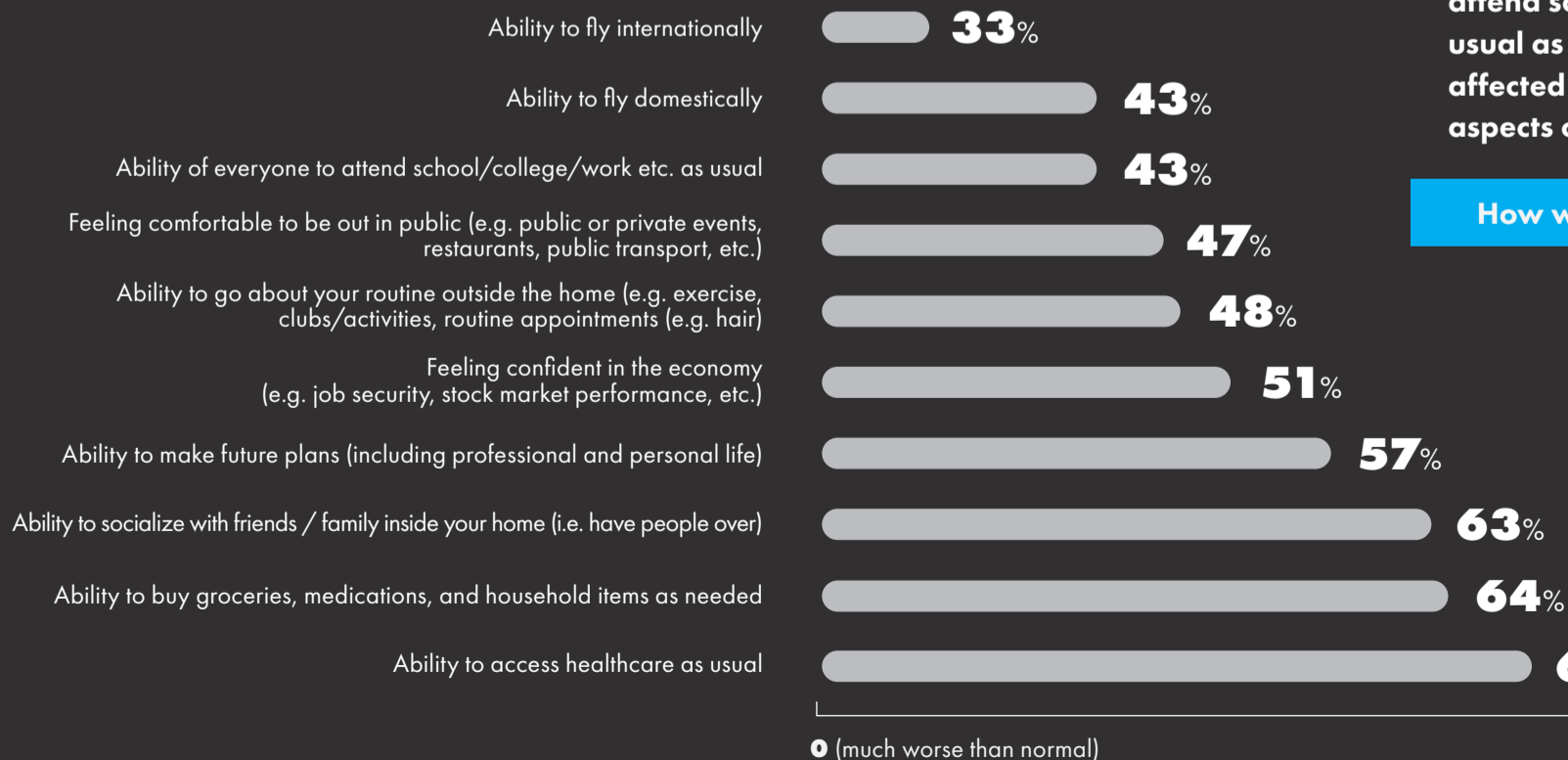
American consumers will not feel normal until:

1. They feel confident in the economy
2. They feel comfortable to be out in public
3. They are able to attend school/college/work as usual
4. They are able to socialize with friends and family

WHAT'S NORMAL?

Index numbers across indicators of normality

The higher the index number the more normal. Index benchmark is 100%



Currently American consumers judge flying internationally, domestically and ability to attend school/college /work as usual as the most negatively affected (or least normal) aspects of their life at present.

How will it change next week?

IMPACT

CURRENT IMPACT

Has the news of the spread of Coronavirus (COVID-19) had a negative impact on the following aspects of your day-to-day life?

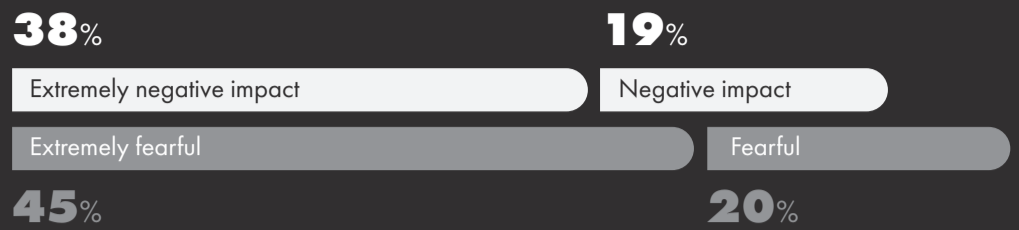
COVID-19 has had an extremely negative impact on personal, financial and work life.

FUTURE IMPACT

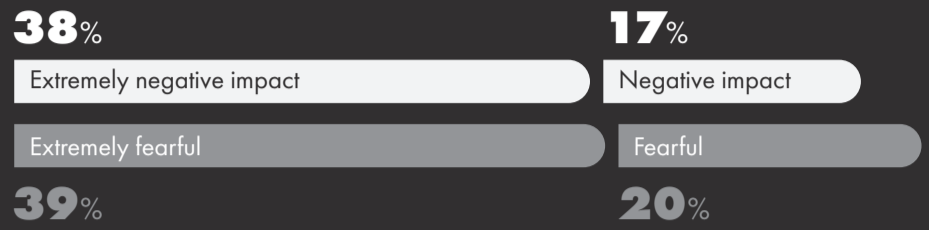
Thinking again about the news of the spread of Coronavirus (COVID-19), how fearful are you about the future impact it will have to your day-to-day life?

American consumers are most fearful for the future financial impact of COVID-19.

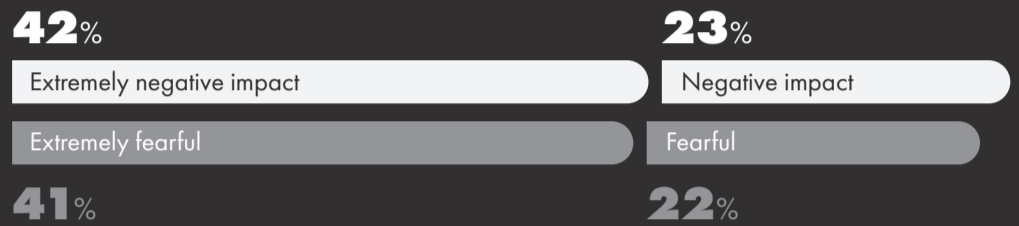
FINANCE



WORK LIFE



PERSONAL LIFE

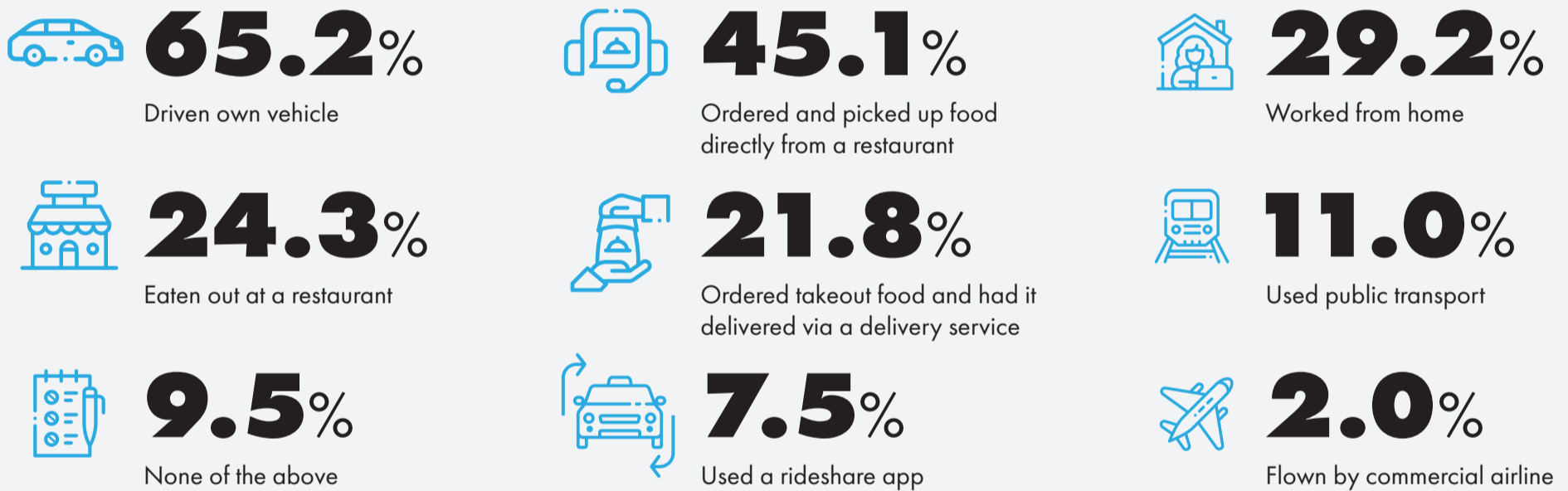


PAST WEEK

Which of the following have you done in the last week?

How will this change next week?

In the last week, American consumers had...



LOOKING FORWARD

How optimistic do you currently feel about the status of the following?

American consumers were not at all optimistic about Business, Employment and Economic conditions.

