



# RETURN TO NORMALITY?

A Pulse on AUS Consumer Normality



**Week 1**  
Fielded 26 - 29 March 2020

## THE NORMALITY INDEX

Australians' perceptions of normality are **64%** lower than the same time last year.

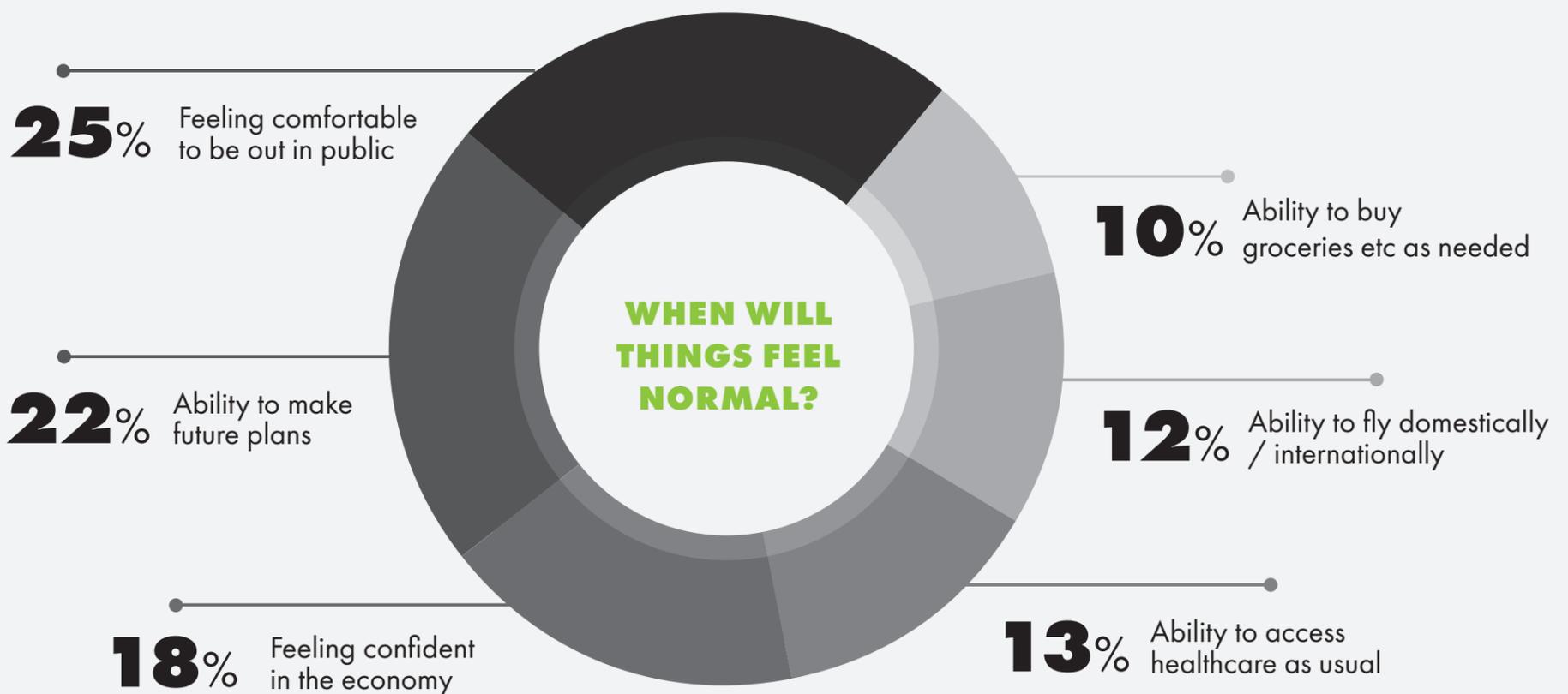


Normality Index Benchmark is 100%

As the way we live our lives rapidly evolves in response to the challenges presented by the COVID-19 outbreak, Forethought will keep a pulse on Australian sentiment to provide a snapshot of how far removed we are becoming from behaviours consistent with our lives before the pandemic.

Our ongoing pulse, the Normality Index, aims to provide our partners with the insight to identify when the Australian population will be most receptive and able to resume normal patterns of life, informing the development of tailored communications and strategy during and post-COVID-19. This measure of 'normality' will be shared every Wednesday, from our weekly poll of Australians.

We thank our partner PureProfile for their support in conducting this research.



### Yet to emerge as significant:

Ability to go about your routine outside the home, ability of everyone to attend school/work as usual, ability to socialise with friends/family inside your home

## WHEN WILL WE START FEELING NORMAL AGAIN?

When we think of 'normal', what springs to mind are things like our ability to go to school or work or to socialise with our friends and families. But what we've found is that our sense of normality is most impacted by the restriction on our basic freedoms which are core to our way of life.

We'll feel normal when we have our personal freedoms back - when we're able to be out in public or to travel. It is this freedom of movement that will have the largest impact on our sense of normality. Closely followed by the ability to start making plans again – for weddings, funerals, anything.



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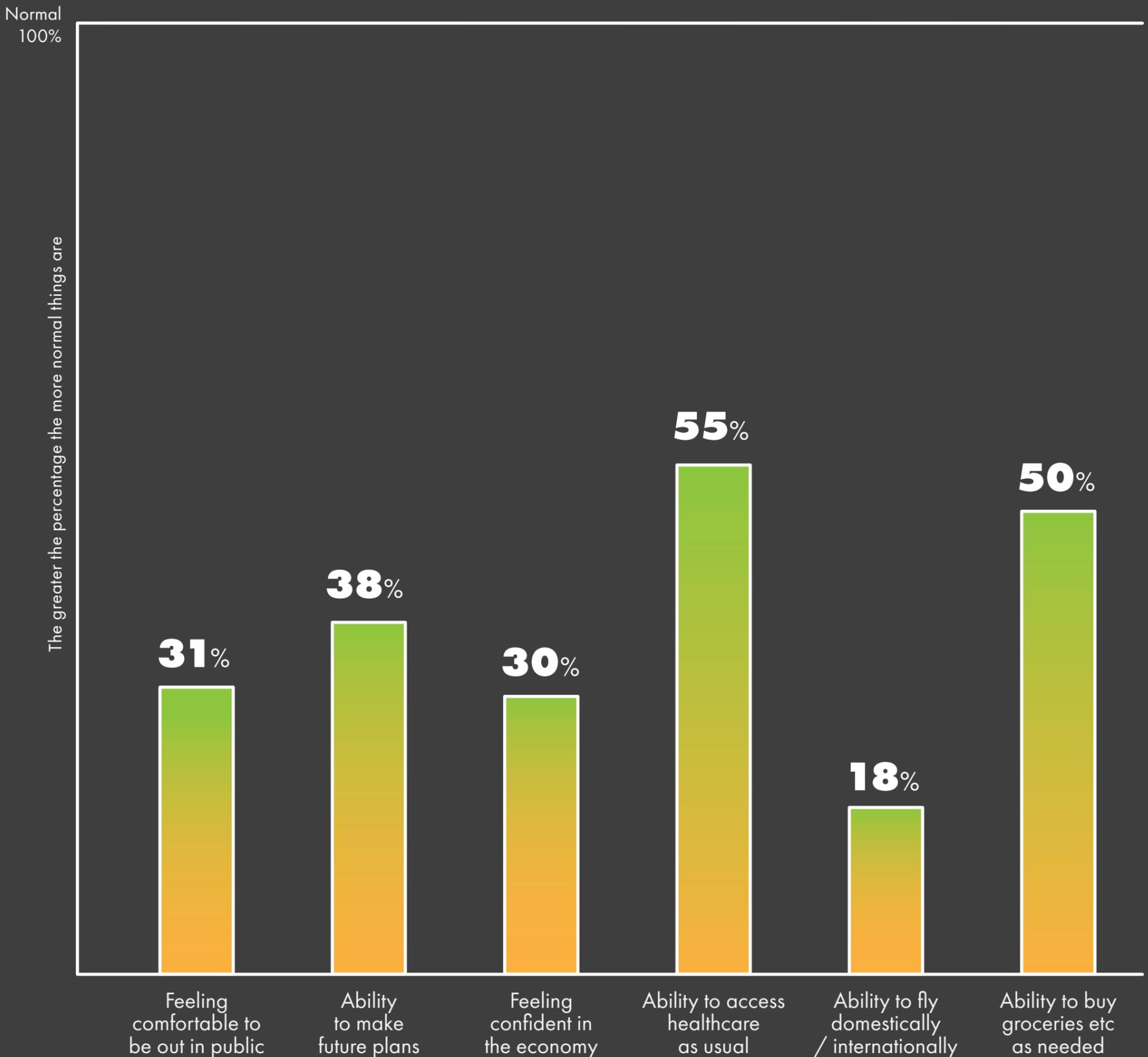
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## WHAT'S NORMAL?

### Index numbers across indicators of normality

Thinking about life at present (including wider society), how normal do you feel the following aspects are?



All key aspects of daily life are sitting below 'normal'. The biggest hit has been to our ability to travel (domestically and internationally) where sentiment is at 18% (where normal is 100%). This is unsurprising given our country and some of our states have shut borders. Also severely shaken is our confidence in the economy (at 30%), as we brace for more bad news on this front.

How will it change next week?

AUS National Representative sample, n=819



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## HOW WILL OUR BEHAVIOUR CHANGE IN THE NEXT WEEK?

Compared to behaviours pre-pandemic, the greatest shifts appear to be a lift in those reviewing their finances and reduction of supermarket visitation.

In the next week, how likely are you to...  
(On a scale of 0 to 10, only highly likely 8-10 responses shown)

### BANKING AND FINANCES

More Australians will be reviewing their finances and seeking professional help than usual.



49% of Australians are highly likely to review their finances in the next week



4% of Australians are highly likely to visit a financial advisor in the next week

### GROCERIES AND MEALS

The social distancing message is cutting through, with a significant drop in intention to visit a supermarket. In a blow to the struggling hospitality industry, intentions to order takeaway meals remains stable.



52% of Australians are highly likely to visit a supermarket in the next week



14% of Australians are highly likely to order food deliver via a delivery service (UberEats, Deliveroo etc.) in the next week

### ENTERTAINMENT

Notably, the proportion of those highly likely to stream their entertainment remains consistent with normal times, suggesting we were already streaming lots prior to the pandemic.



49% of Australians are highly likely to watch a streaming service (e.g. Netflix, Stan, Disney Plus) in the next week

- Increase in behaviour compared to before the pandemic
- Decrease in behaviour compared to before the pandemic
- No change in behaviour compared to before the pandemic