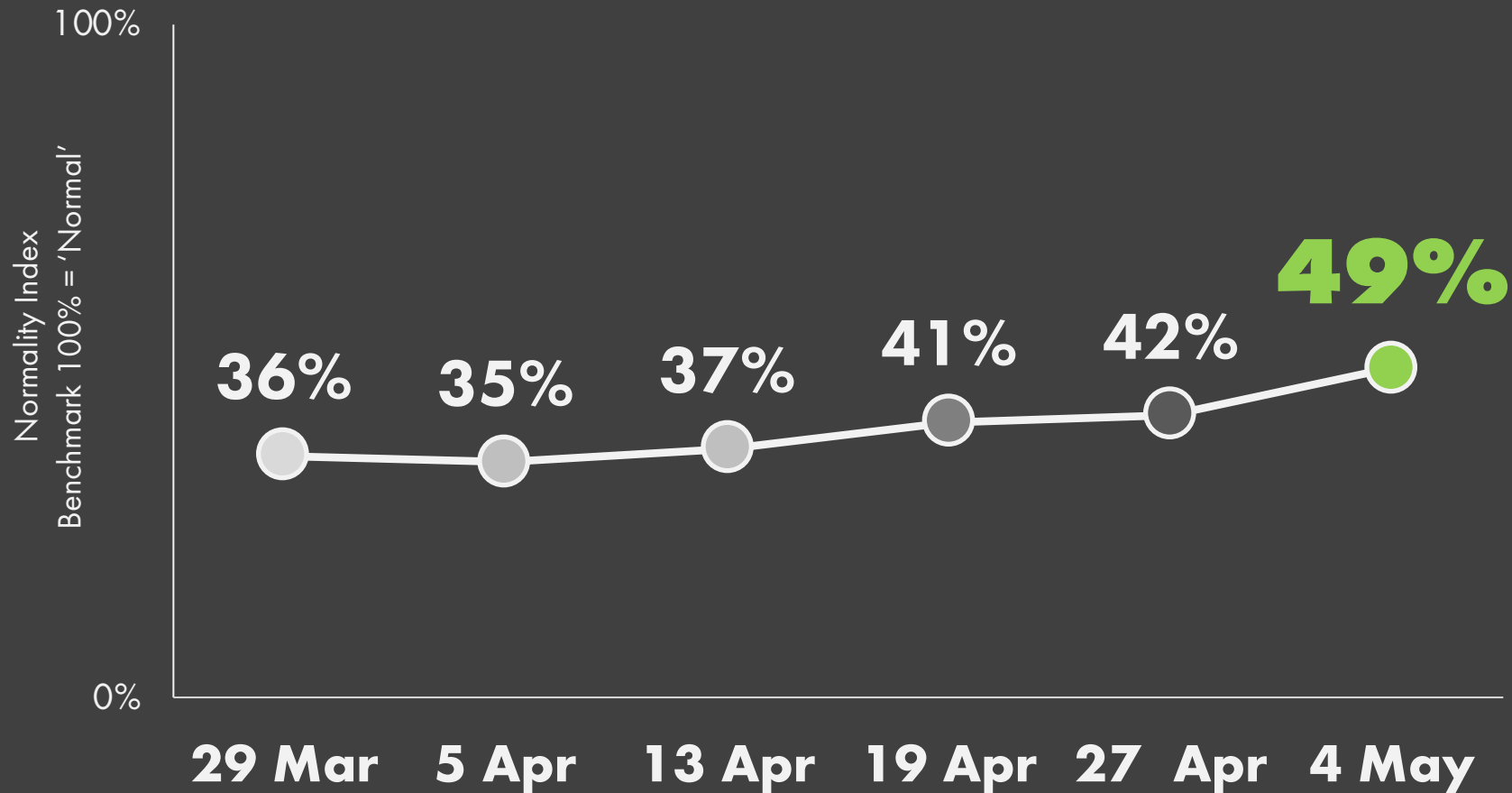


The Australian Normality Index

Our sense of Normality has been turbocharged this week in response to news about the easing of restrictions that are taking place



THIS WEEKS OBSERVATIONS

Over the past 7 weeks, your consumers have been forced to live differently. Their values and behaviours will be altered by this experience. Some changes will stick, some will slip. But this will alter the competitive environment for brands.

Brands that consider themselves immune to those changes risk missing the opportunity to re-orient (offer, comms and experience) in readiness for the economic rebound.

One step closer to freedom...

In our model of what makes life normal, the most important driver of normality for Australians was 'feeling comfortable to be out in public'. After 7 weeks of patient compliance with significant limitations to our daily movements, we have seen the first states start to ease restrictions and it's given us a real boost (16% up compared to last week, 36% improvement since lock down on 23 March 2020).

As a nation, we toed the line. We stymied the infection rate. Now, we're keen to get out.

VIC and NSW, who remain on tight restrictions, remain more anxious.

Western and South Australia might offer lessons in how we rebound. As their sense of normality improves with their sense of freedom, their level of anxiety dropped.

How quickly will the mental state improvement be followed by the tap of the credit card against the pay-wave machine? What will be spending on? We watch with interest.

Will the COVID-19 lockdown change us? Will those changes stick or slip by?

Whilst we observe our improving sense of normality, we are also mindful that during the restrictions, Australians have been forced to trial new ways of doing things – new services and new brands.

These trials will inform how we make decisions in the future – our behaviours and values will change. Some of those changes will stick, and some will slip by.

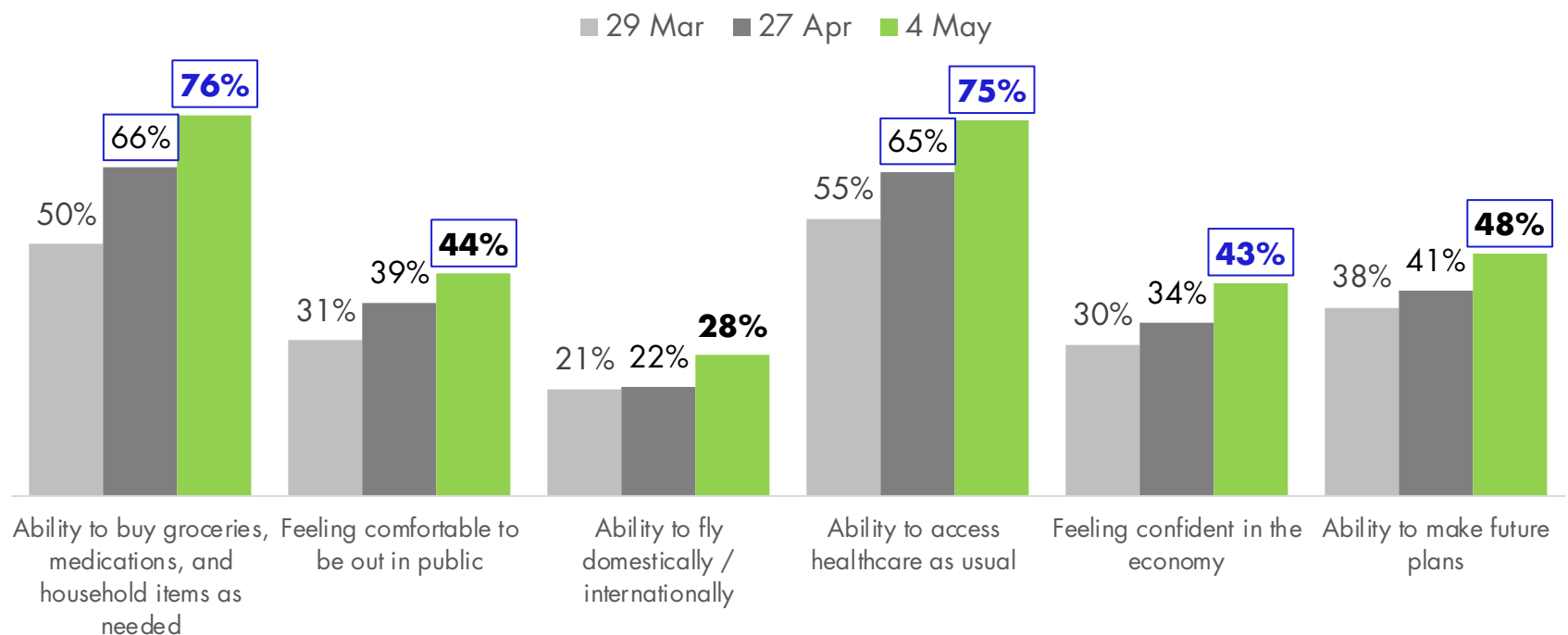
Anthropology suggests that people will resist change until it is impossible to avoid. We can see this in the forced adoption of digital services. Hand up if your mother's book group now meets online (even the over 80s Baby Zoomers). This is a change that will likely stick.

The Normality Index is monitoring for signals of those changes. One example, if there is a strong preference for home cooking, and no rush to get back to dining out – is this a change that will stick or slip by?

Many indicators are significantly up, with grocery and healthcare accessibility nearly back to normal

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

100%
normal

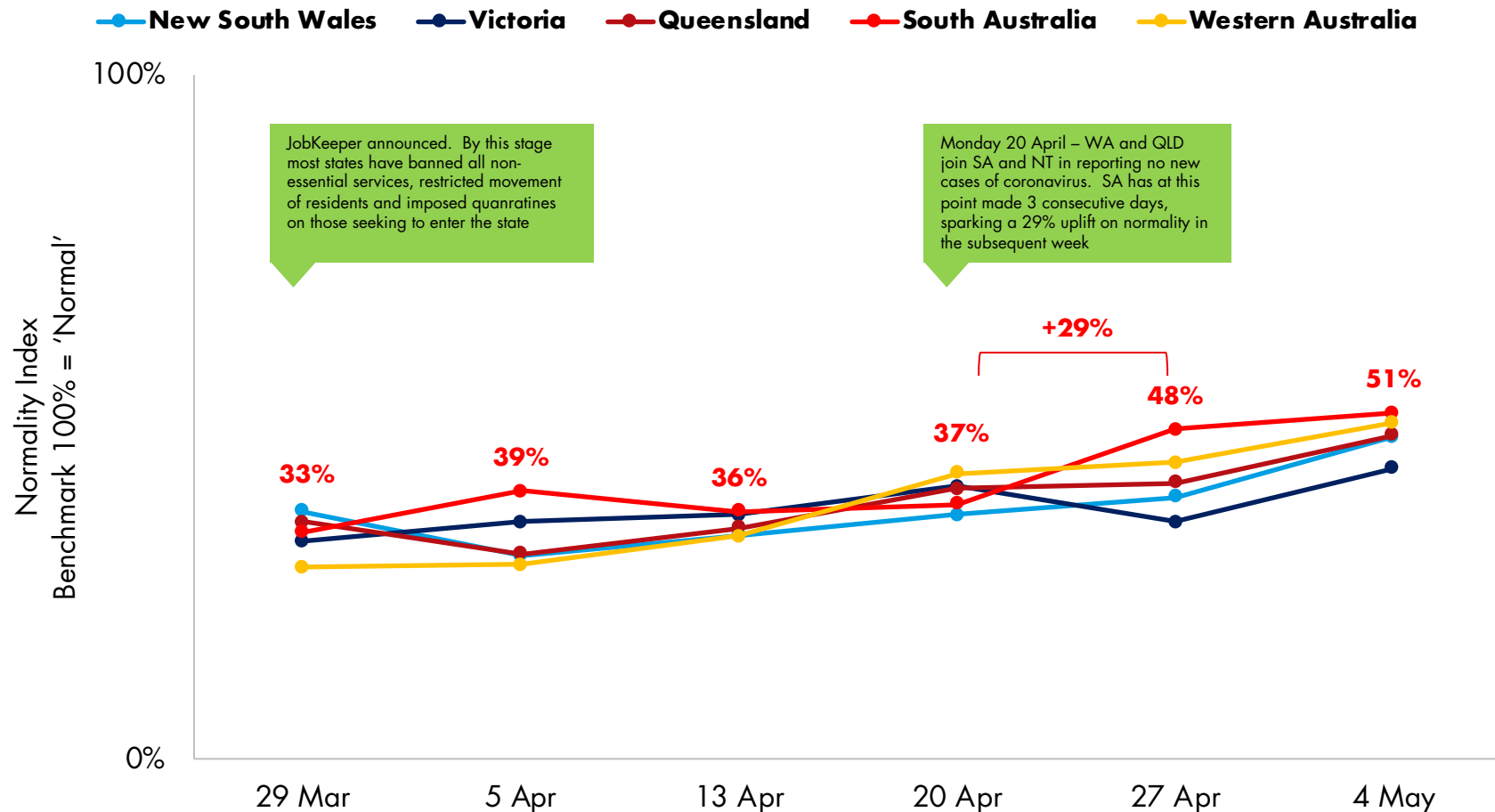


Ability to buy groceries and access healthcare are the drivers rebounding at the fastest rate, as continued government and category effort is invested to preserve these services.

Note: Significance testing was conducted between Week 5 and Week 6 at the 5% level of significance. Blue indicates the Week 6 result was significantly higher than the Week 5 result. Significance testing was also conducted between Week 1 and other weeks at the 5% level of significance. A blue box indicates the other week result was significantly higher than the Week 1 result.

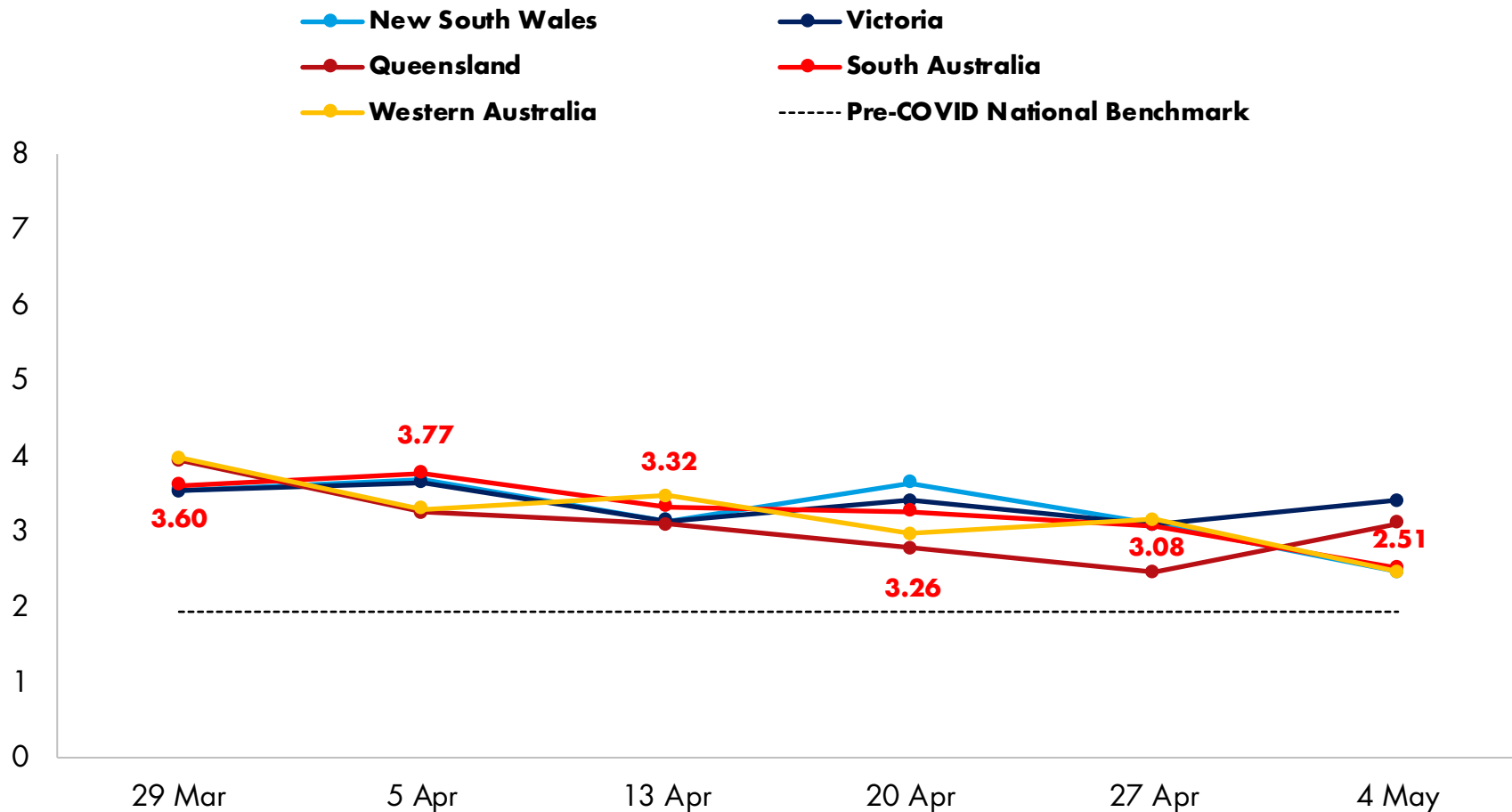
As we get back to business, the charge to normality is being driven by SA and WA

Normality over time, by state



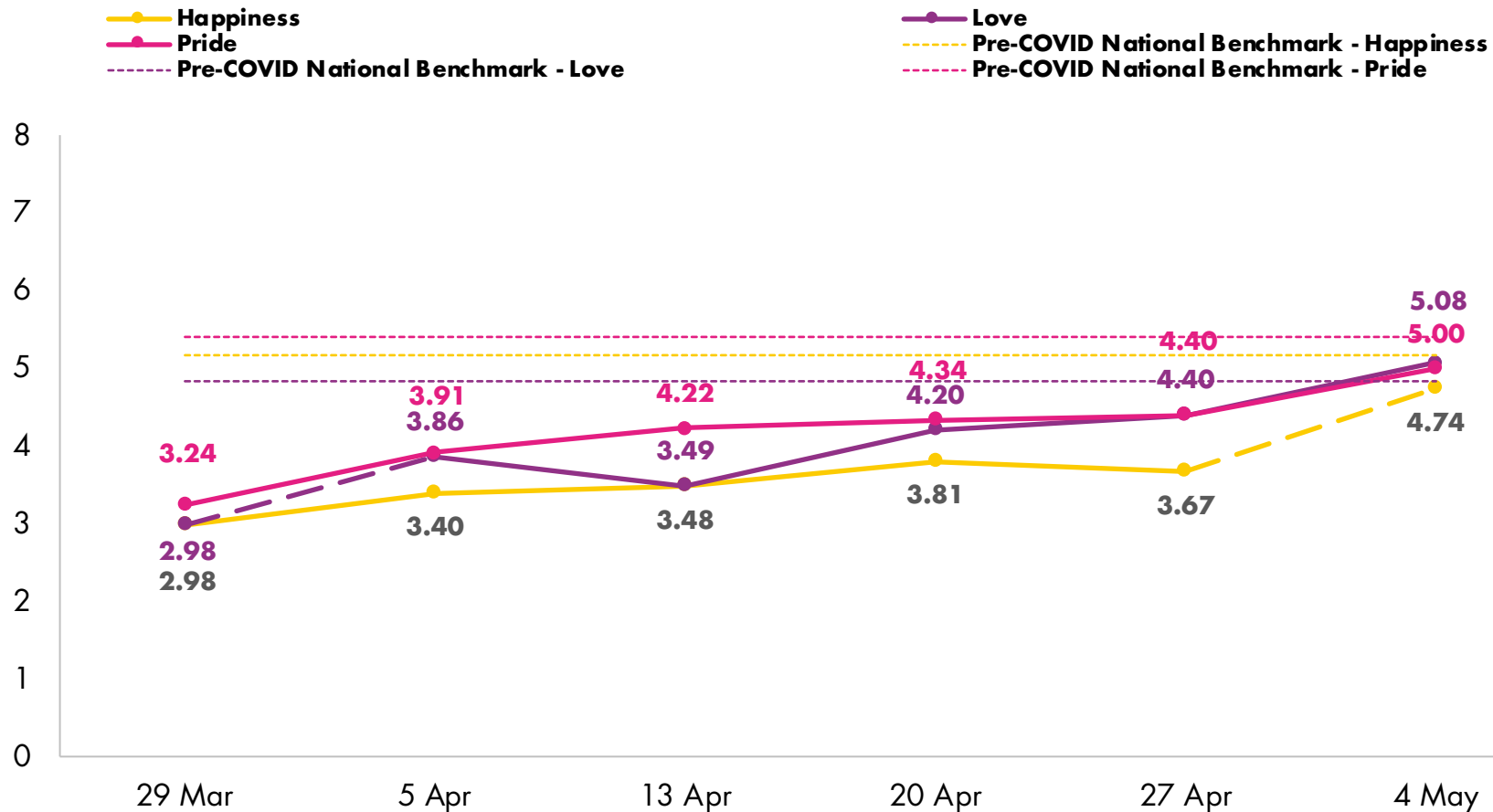
And as one of the early states to ease pandemic restrictions, emotionally, SA is the least anxious state in the nation

COVID-19 AUS Poll - Anxiety



SA is feeling the highest levels of Happiness, Love and Pride – and are nearly back to pre-pandemic levels on these emotions

South Australia



So here's the million dollar question – what are the early indicators of changes to consumer behaviour?

**Let's look at the early improver,
South Australia**

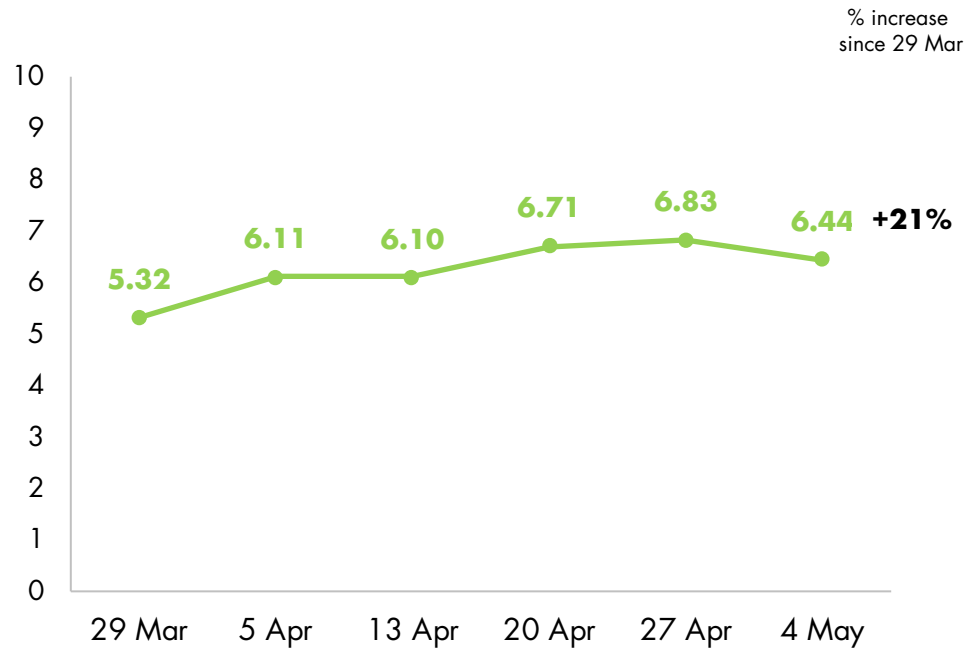
Sentiment towards content streaming and online banking continue to strengthen

South Australia

How likely would you be to do the following in the next week?
Digital Behaviours

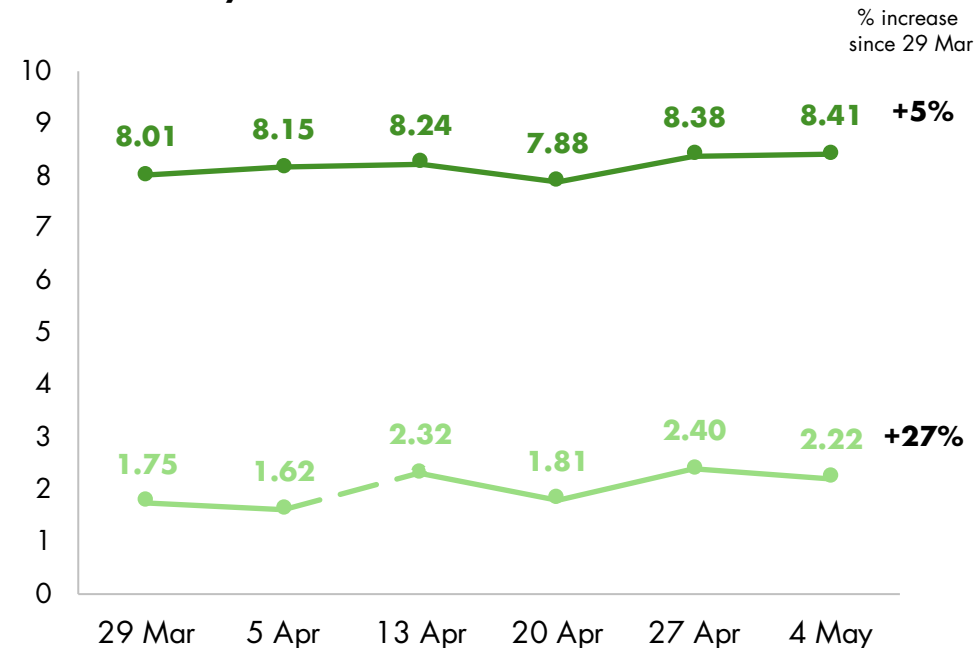
Intention to use a streaming service has steadily grown over the weeks

—● Watch a streaming service



Intention to transact online has edged ever higher over the pandemic, with intention to visit physical branches saying low

—● Visit your bank's branch —● Use online banking



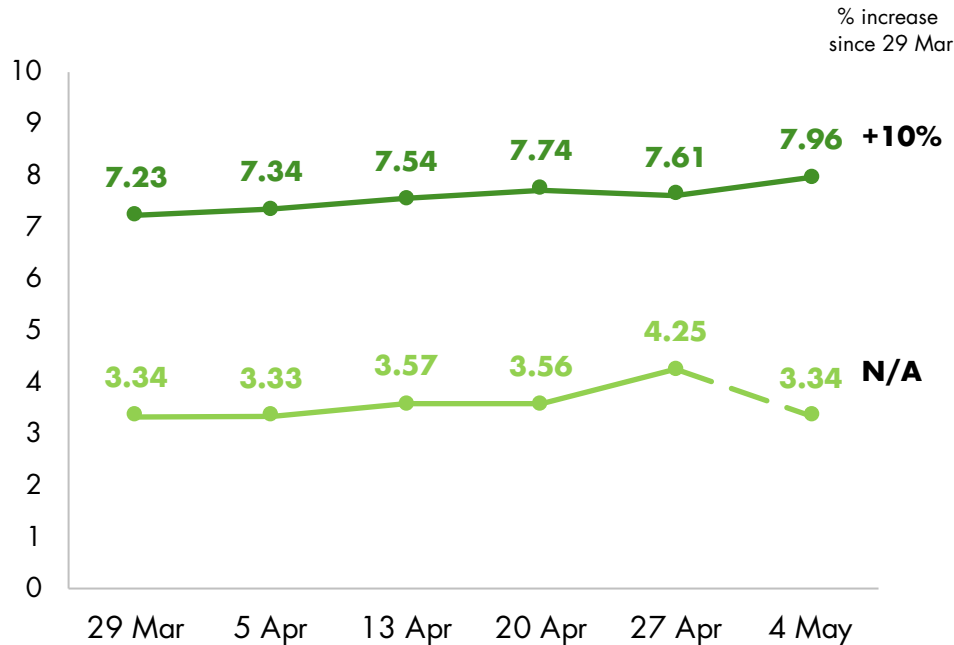
Having freedom of movement restored means positive things for SA supermarkets, but not for restaurants and takeaway

South Australia

How likely would you be to do the following in the next week?
Going Outside

As movement restrictions are eased, we are clearly keen to continue going to the supermarkets

● Visit a supermarket

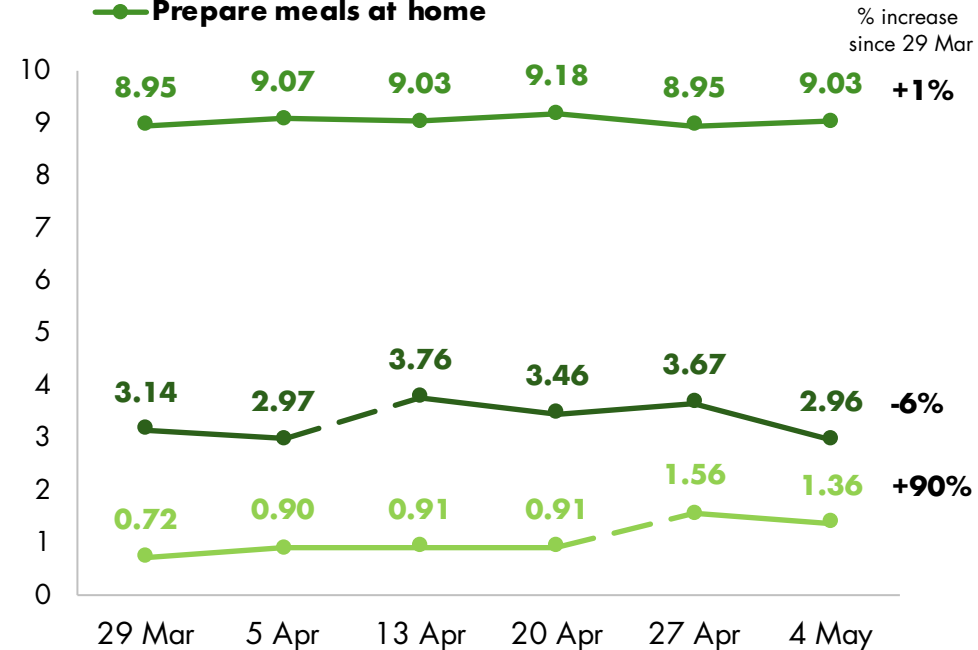


Despite movement restrictions easing we see intention to prepare meals at home remain extremely strong as likelihood to takeaway drops

● Go out to eat at a restaurant

● Order food delivery via a delivery service / app

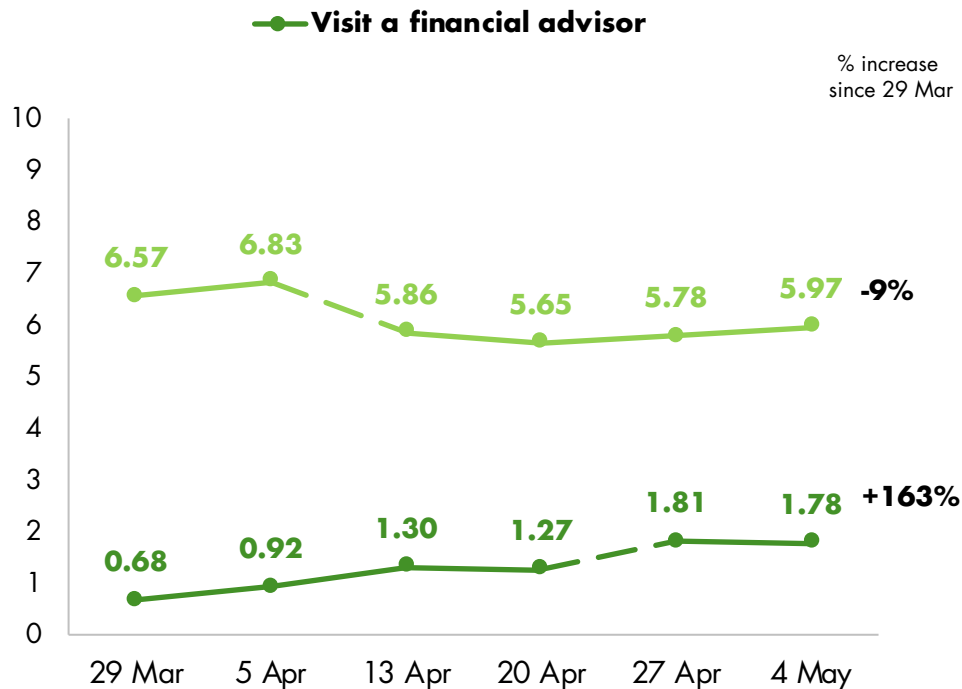
● Prepare meals at home



Financial anxiety has eased, but don't confuse that with financial engagement as intention to engage with professional advice slowly grows

South Australia

How likely would you be to do the following in the next week?
Financial Wellbeing



Likelihood to review their finances fell in line with the waning of Anxiety.

Likelihood to consult a financial advisor, while low, has grown over the pandemic

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