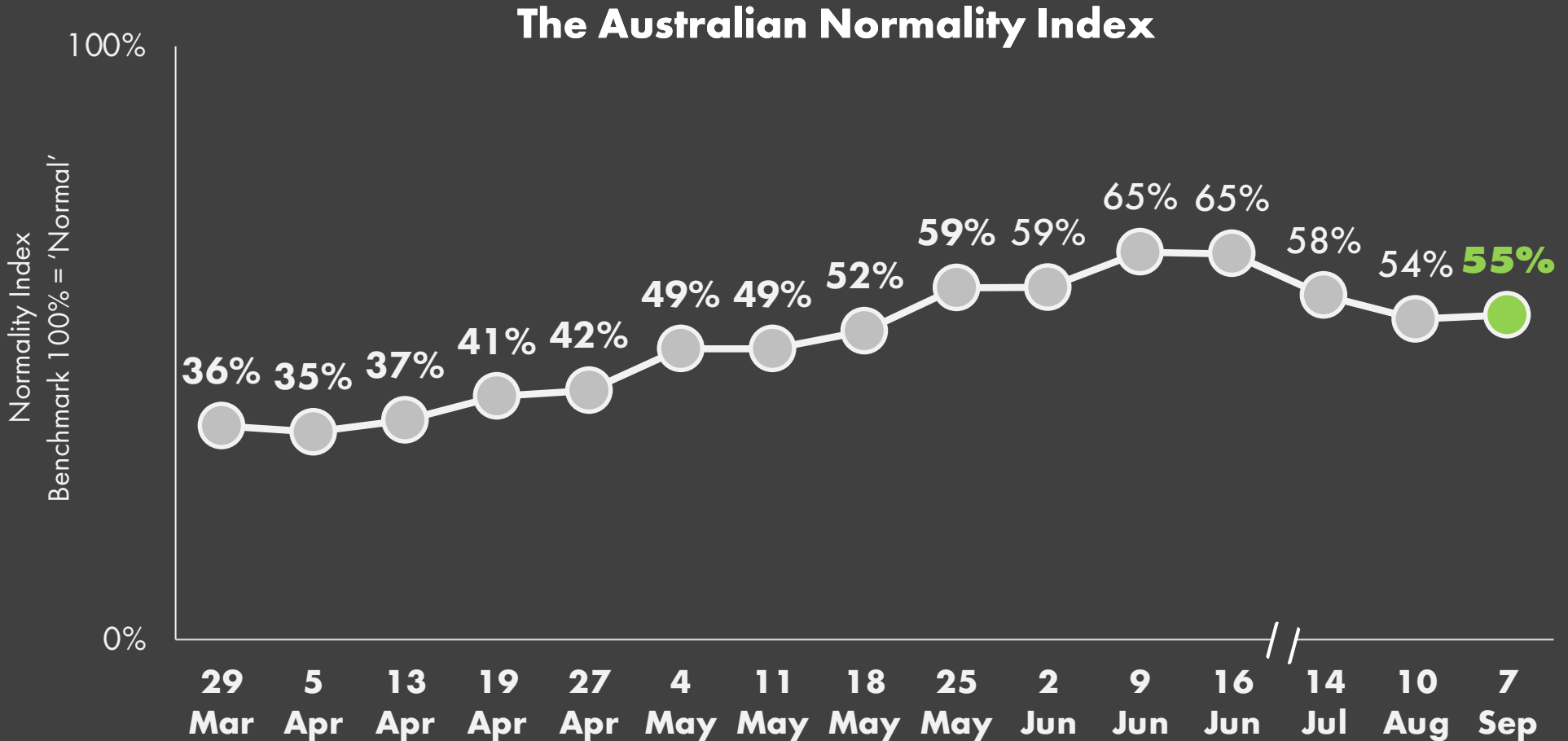


SEPTEMBER 2020 (10 August - 6 September 2020)

## Normality stabilises after a two-month decline



1. Normality inches up for the first time in three months
2. Adaptation: Is this the new normal?
3. Fast food industry coming out ahead

### **SMALL CORRECTION TO NORMALITY. STILL A LONG ROAD TO TRAVEL**

For the first time since June, Normality has marked a slight increase across Australia. This coincides with the steady reduction in new cases of COVID-19 in Victoria, which has been weighing down Normality.

Victoria, still in a mix of Stage 3 (regional) and Stage 4 (metro) restrictions, had a peak daily infection rate of more than 700 people in Iso #2. At the time of data collection for this wave, that number had fallen to close to 100 people. As a result, we saw a slight uptick in Normality for Victorians.

However, it is a cautious optimism. Anxiety remains much higher in Victoria compared to the rest of Australia, indicating that the state is not feeling comfortable just yet.

For business, there remains a need to tailor communication targeted to Victoria vs. Non-Victoria audiences, with their disparate rational and emotional states in mind.

### **ADAPTATION: THE NEW NORMAL?**

Despite Victoria trailing the rest of Australia on Normality, the impact of the second wave has not been as severe as the first.

While Victoria's second wave has had a far greater health impact, Victorians' sense of Normality remains above the lows of March-April 2020.

This shift highlights an interesting case study for adaptation and future outbreaks. Unlike in March, when there was minimal knowledge on COVID-19 and Australia's plans to fight it, today there is more certainty on the steps and adjustments that must be made. As Victorians become more familiar with the precautions in place, the impact on their sense of normality becomes less volatile.

Is adaptation the new normal?

### **MAKING LEMONADE: CUSTOMER EXPERIENCE WITH FAST FOOD BETTER THAN PRE-COVID-19**

Last month, we reported 57% of consumers were dissatisfied with their online retail shopping experience. We acknowledge the rapid pace of businesses to shift to a digital offering, but it seems different sectors have had varying levels of success. One industry that stands out for taking the opportunity to improve the experience of their customers is fast food.

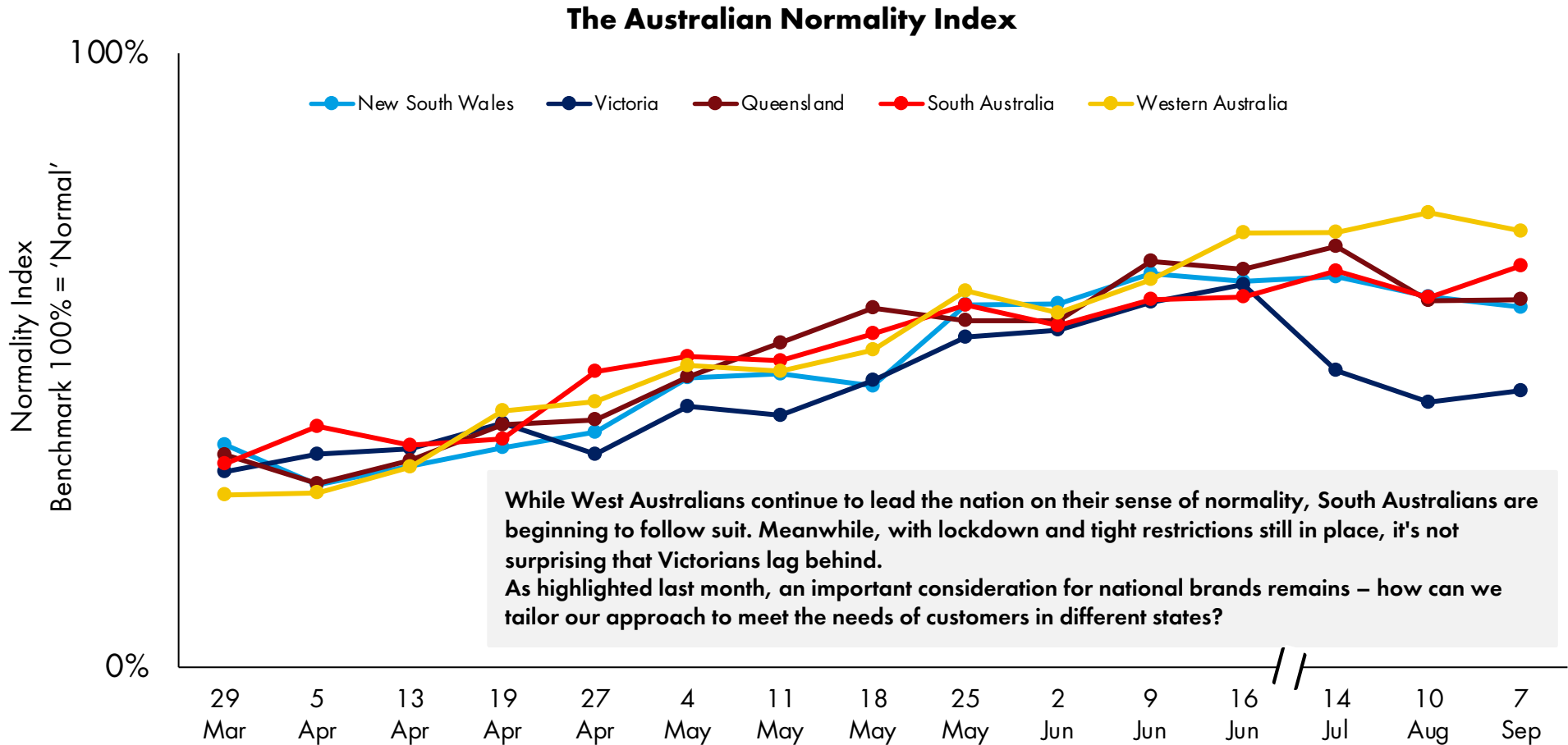
One in five Australians who ordered fast food this month stated that the experience was better than before COVID-19.

How has the fast food industry managed this unlikely outcome?

What can other industries learn from this?

# The State report

# Glimmer of hope: Across the states, Victoria trails, but has begun its climb back

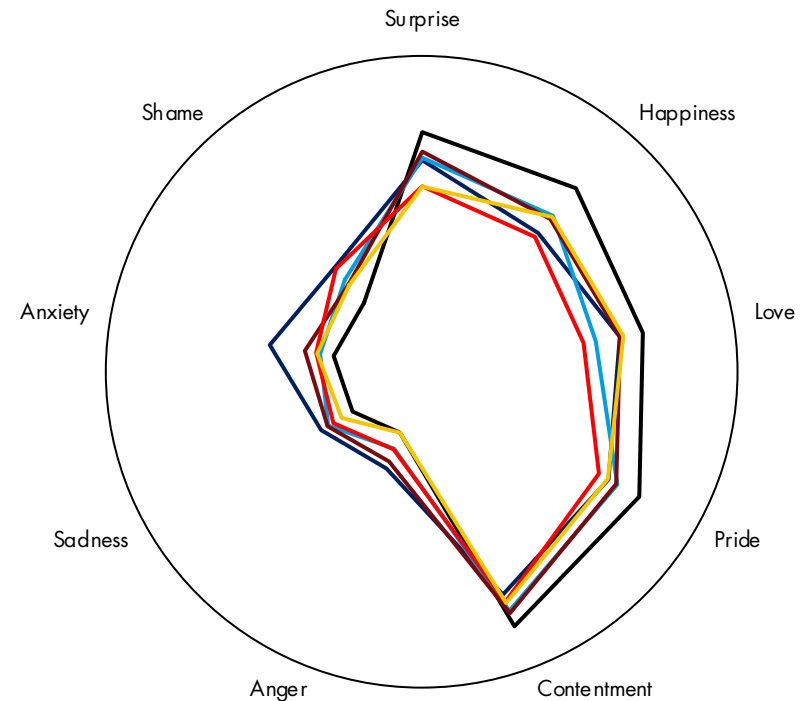
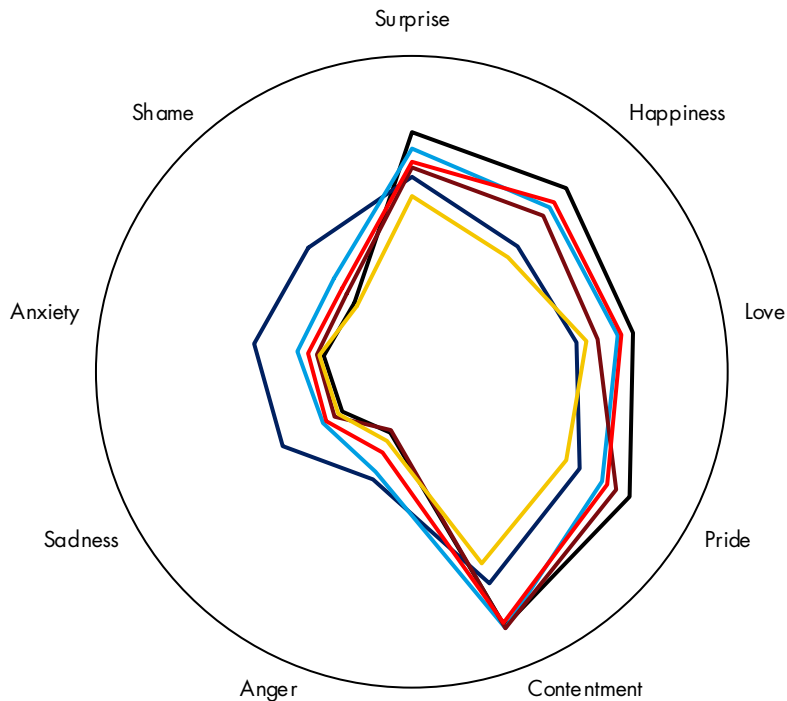


# Emotionally, Victorians have returned to parity with the rest of the country, except for Anxiety

August 10

September 7

● Feelings Calibration Benchmark (National) ● New South Wales ● Victoria ● Queensland ● South Australia ● Western Australia



While the emotional profiles across states did not dramatically differ, Victorians had a heightened sense of anxiety. As a decision inhibiting emotion, national brands should consider this baseline context and its impact on marketing effectiveness. Specifically, brands should consider tailored messaging and distribution of media.

# Adaptation: While Victoria's second wave has had a more devastating health impact, the impact on Normality has not been as severe. Is adaptation the new normal?

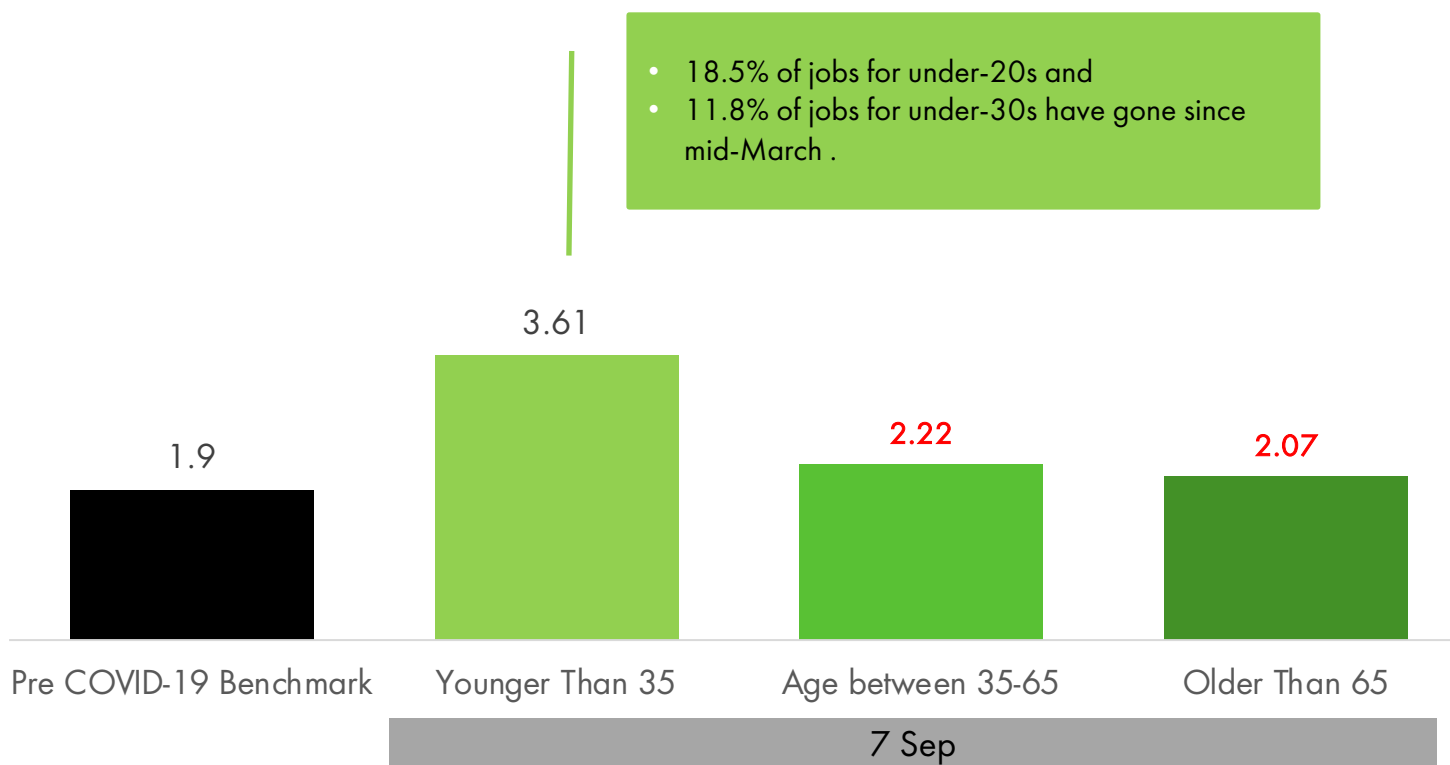
The below chart shows a far greater number of COVID-19 cases in Victoria's second wave compared to its first, yet Victorians' sense of Normality remains above the lows of March-April 2020. This shift highlights an interesting case study for adaptation and future outbreaks.



# Spare a Thought for GenY & Z

# Who Do You Think Is Most Anxious?

At a point of transition and launching into adulthood (18<sup>ths</sup>, drivers licence, uni), or slightly older and launching their professional and family lives, younger Australian's are most anxious. The milestones of this age have been clouded by lockdown, and the loss of job opportunities for this cohort has been significant.



Note: Significance testing was conducted between Younger than 35 and other age groups at the 5% level of significance.

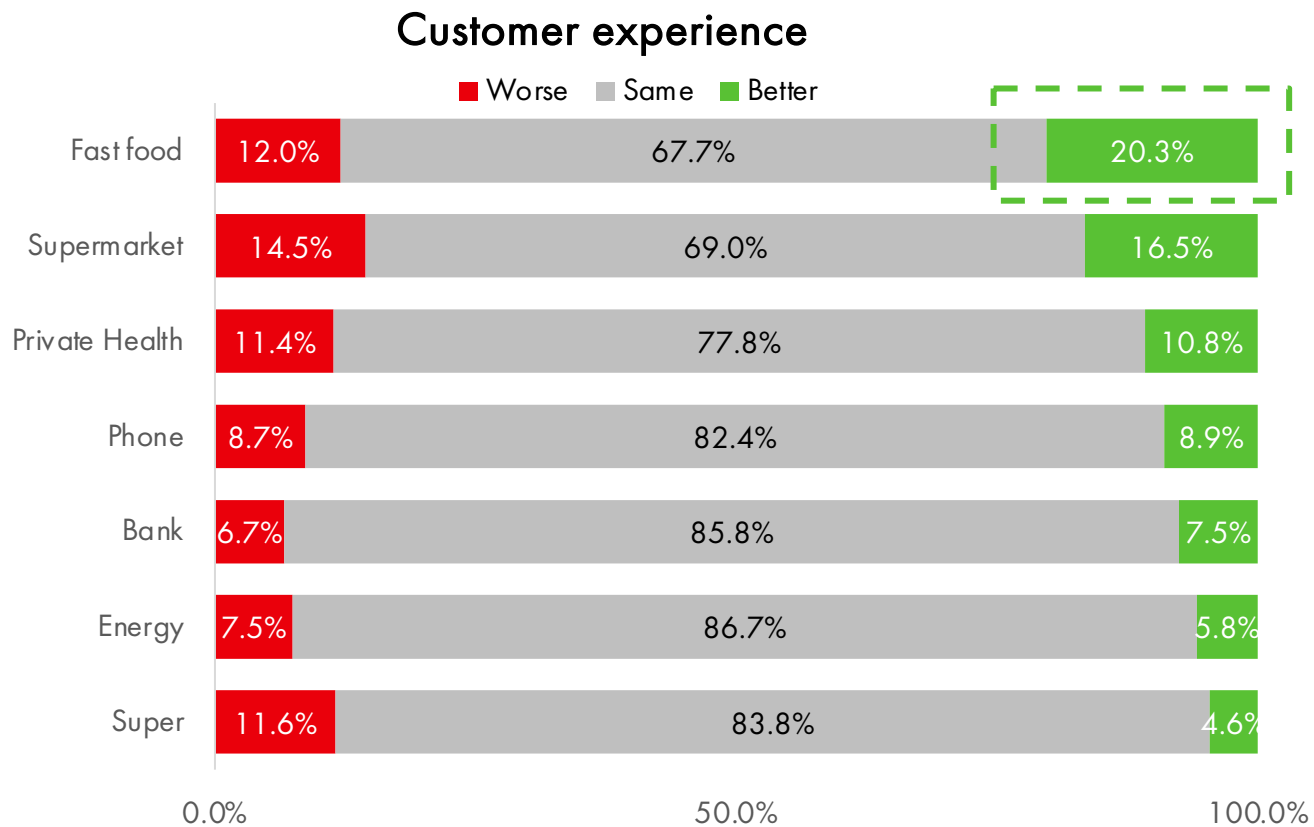
8 Red indicates the other age group result was significantly lower than the Younger than 35 result.



# The Customer Experience report

# Making lemonade: Fast food industry pivoting to improve the customer experience

Since March 2020, COVID-19 has disrupted the day-to-day operations of many organisations. However, the fast food industry has been the exemplar of adaptation and improving its customer experience. One in five customers stated an improved experience this month, compared to pre-COVID-19. It was the only industry to achieve this positive result. What can organisations learn from this industry and how it has pivoted to meet customer demands?



# CONTACT

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