

MEDIA RELEASE

29 October 2020

SURVEY FINDS LARGE IMPROVEMENT IN VICTORIANS' SENSE OF NORMALITY

Research shows that Victorians' sense of 'normality' has leapt overnight with the easing of COVID19 restrictions.

On Tuesday night, Victorians went from feeling 47% 'normal' to 55% of how they felt before the pandemic. This compares to all other states that are 69% normal.

Since March, researchers at Forethought have tracked how Australians in each state are feeling. The data forms the basis of a 'Normality Index' which businesses have been using for strategic decisions.

'Mid-year most Australians moved from focusing on the health threat to worrying more about the economic threat. But, at the same time, the mood of Victorians diverged from those in other states and trust in Government started to decline,' Forethought CEO, Diane Shelton, says.

'But just 24 hours after the easing of restrictions was announced, Victorians started to close the gap and they are now prioritising catching up with family and friends. Victorians' trust in the State and Federal Governments has lifted although it is not back to levels seen in May levels.' (See attached graphs)

Ms. Shelton says our 'incredible sensitivity' to COVID case numbers is shown by any spikes in cases leading to an immediate and significant decrease in our sense of normality.

'There has been an equally rapid improvement as we have managed to get COVID19 under control, but any uncontrolled resurgence of the virus in any state will impact negatively on our sense of normality in the future,' Shelton says.

The Australian Normality Index is currently around 70% – a figure we think is unlikely to shift significantly until international borders are open,' she says.

In early October, the top driver of normality for Australians became the ability to live and *attend work/university/school as usual.* Other key drivers in the October data include the *ability to go about routine outside the home, motivation to work towards goals/obligations* and the *ability to make future plans.*

See below for background on the Normality Index and attached graphs.

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ABOUT FORETHOUGHT

For the past 25 years, Forethought has used state-of-the-art quantitative and qualitative research methodologies to understand, and then predict, consumer behaviour. It was founded and is still overseen by one of the world's best market researchers, Ken Roberts. Forethought has offices in Australia and New York.

ABOUT THE NORMALITY INDEX

The Normality Index is based on a series of questions that chart emotional and rational changes in Australians' decision making. The findings are calibrated against pre-pandemic data to show how far we are from 'normal' behaviour. Forethought also uses online rapid ethnography to further explore and validate its findings.

Australian businesses have been using the Normality Index data to inform how they can most effectively serve customers, remain economically viable and contribute to Australia's wellbeing.

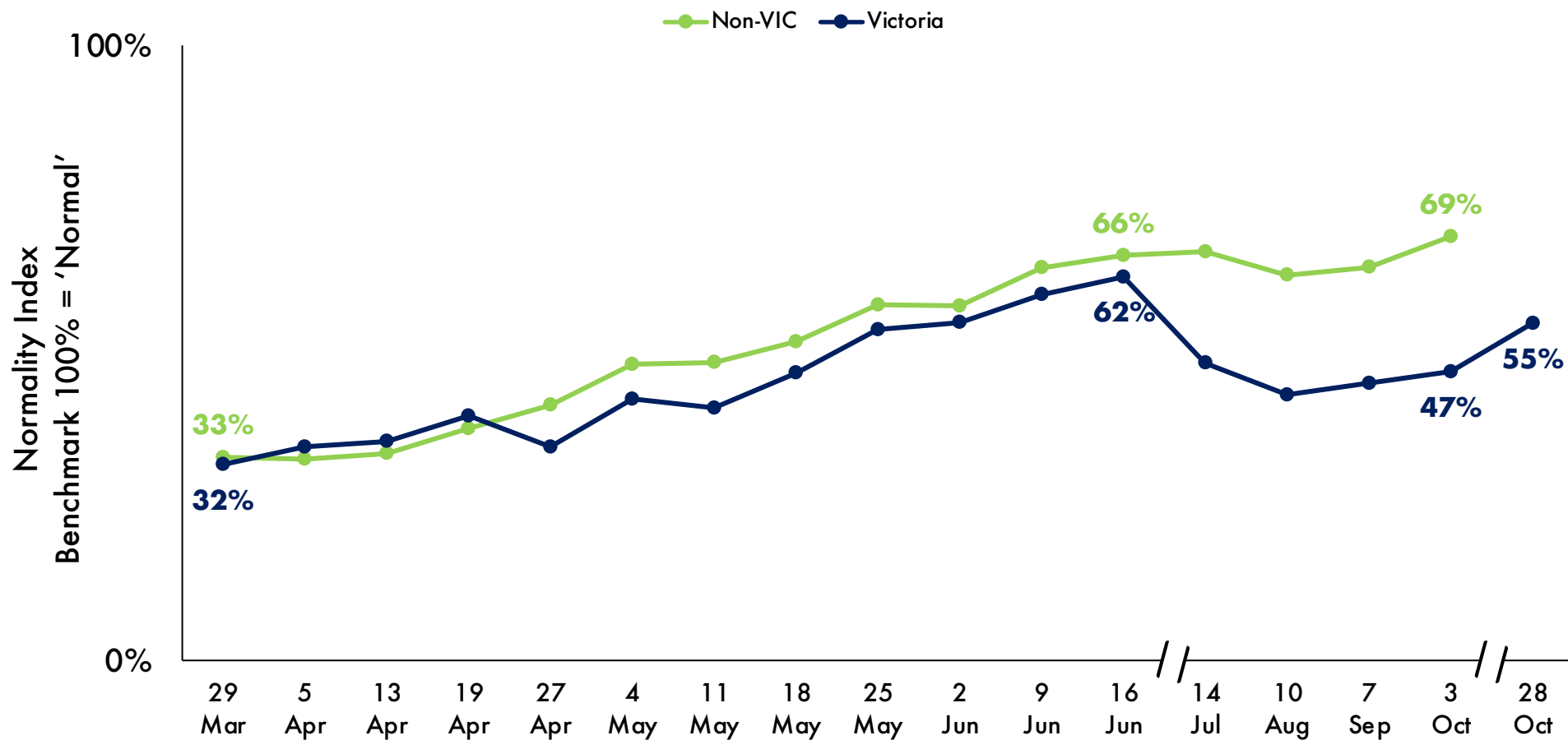
Forethought now holds longitudinal data from the start of the first lockdown in Australia, with responses from over 12,800 Australians (n=800 per wave). Initially fielded weekly (29 March to 16 June 2020) the Normality index is now a monthly pulse (July to date). The data is compiled using advanced analytic techniques to provide models of normality, track shifts and explore topical questions.

PARTNER STUDY: USA NORMALITY INDEX

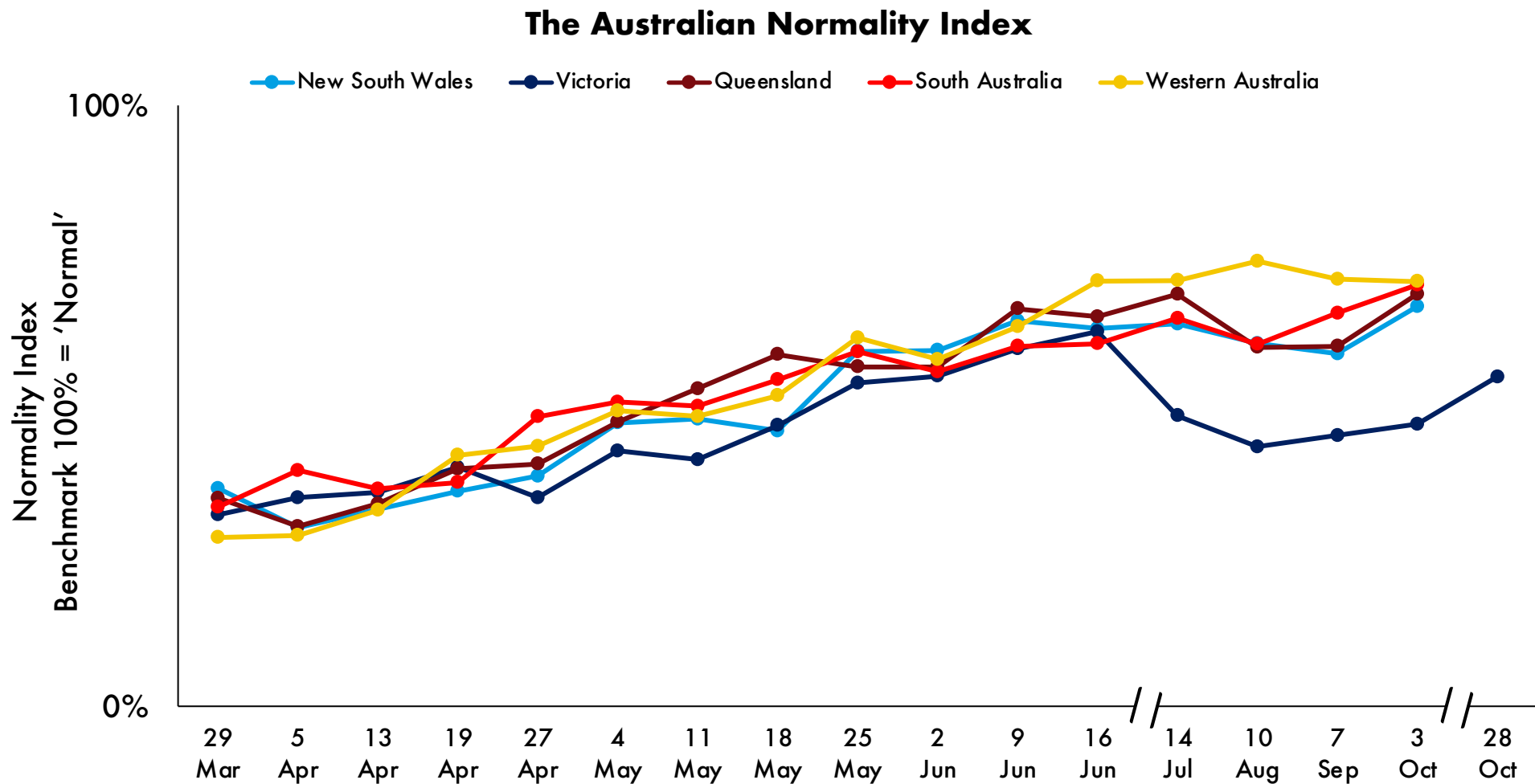
Forethought launched a partner study, the USA Normality Index, when it started the Australian Normality Index so it could compare data from both countries.

Announcement of easing restrictions had an immediate impact on Normality in Victoria

The Australian Normality Index – Victoria vs. Non-Victoria



After recording over 700 cases in one day in July, Victoria is closing the gap to the other states



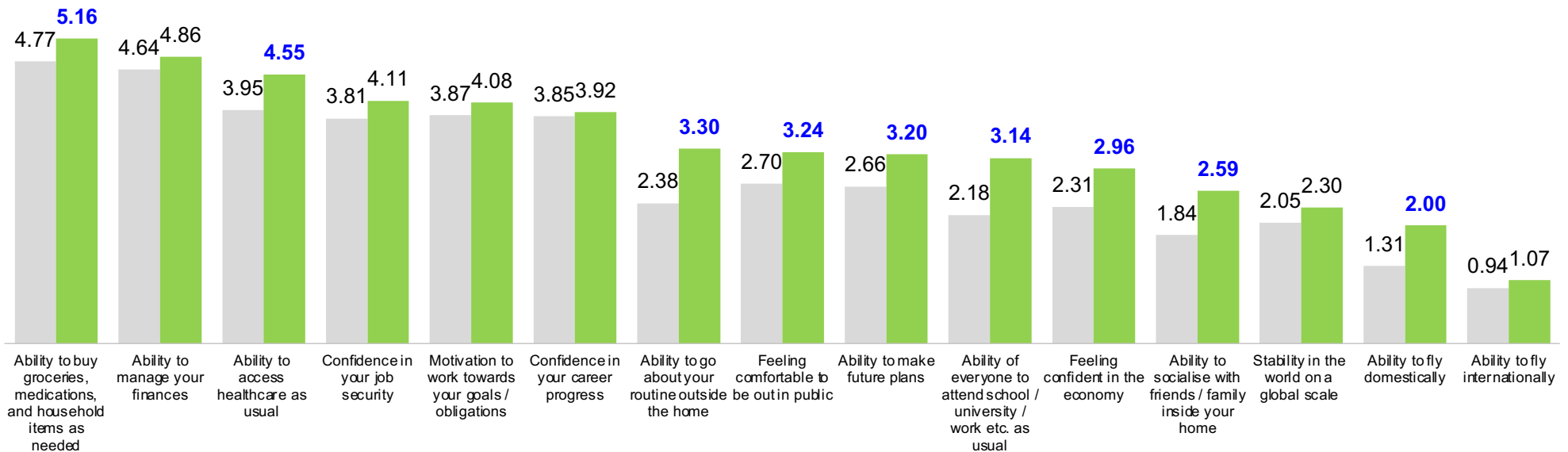
Significant increases were seen in items to do with socialising.

Items to do with career, finances, and global stability remained stable.

Victoria

■ 3 Oct

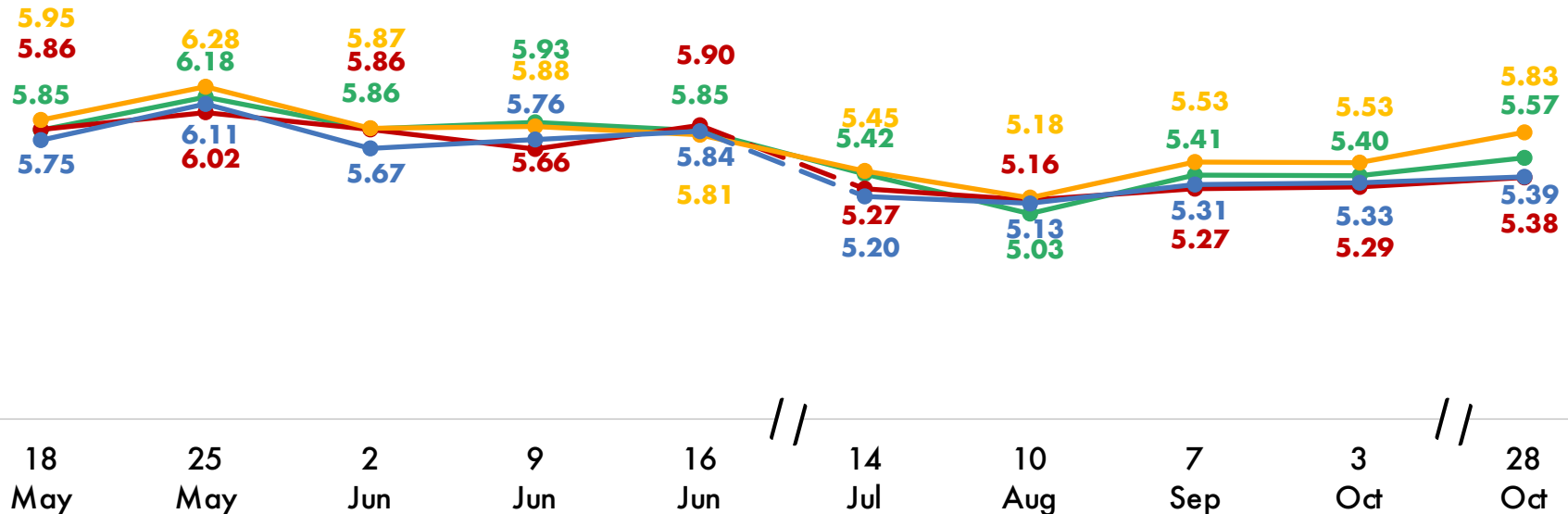
■ 28 Oct



Victorians lost trust in Government in July. This has been building back up, but still not to the same levels as May.

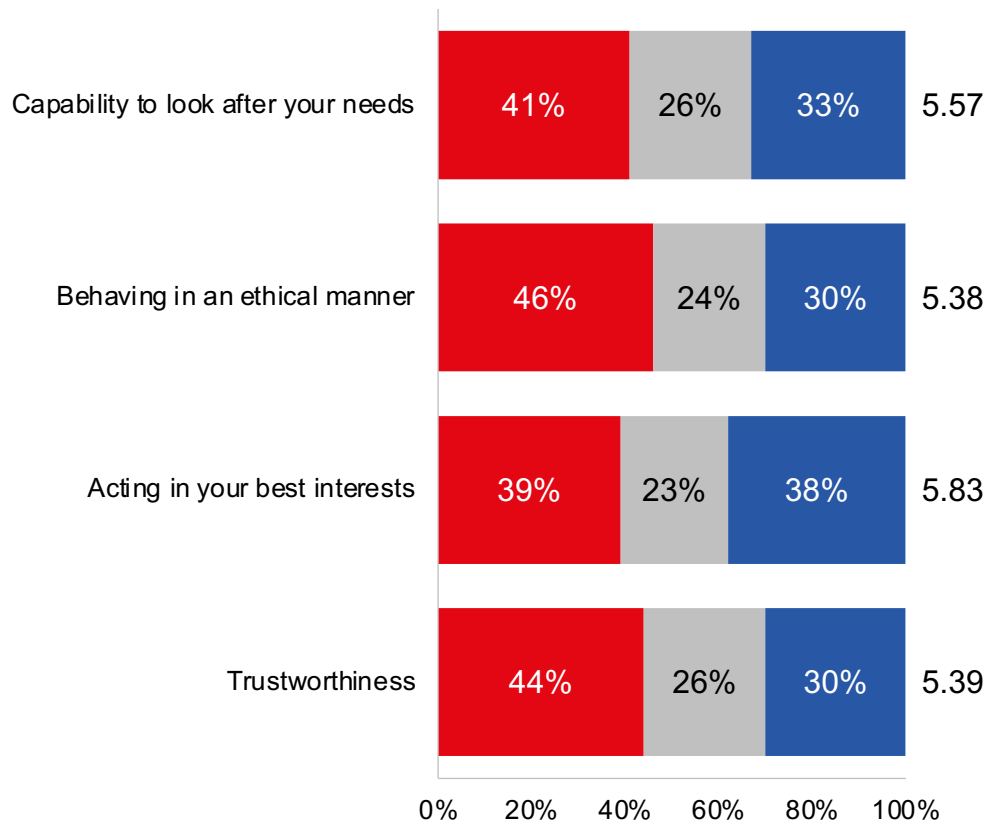
State Government

● Capability to look after your needs
 ● Behaving in an ethical manner
 ● Acting in best interests
 ● Trustworthiness

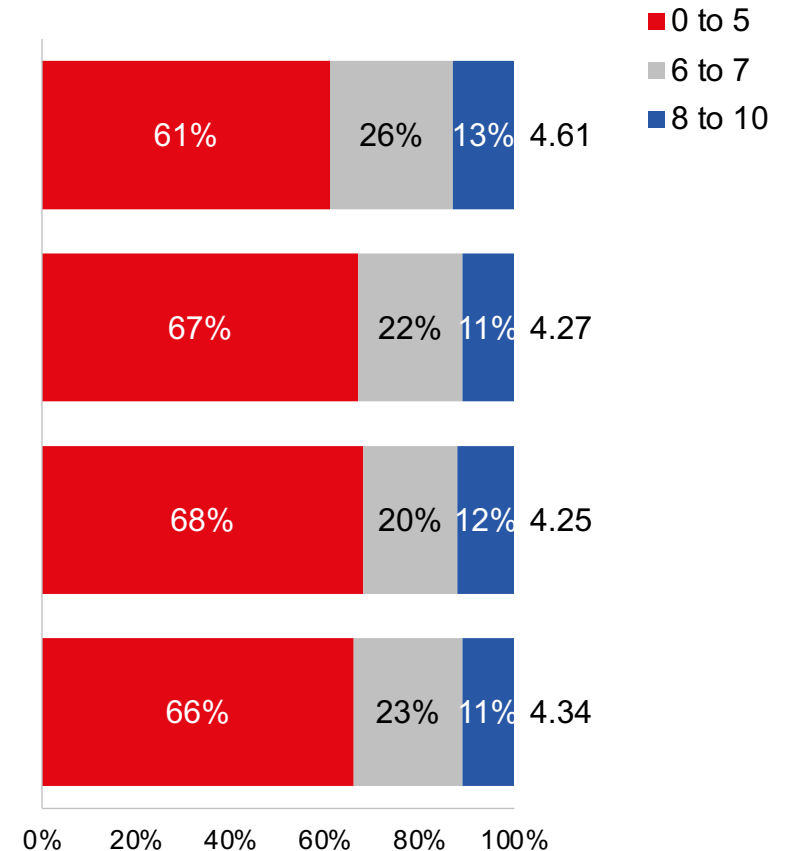


Trust in Government is higher than trust in Media

How would you rate the State Government on the following?



How would you rate the media on the following?



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