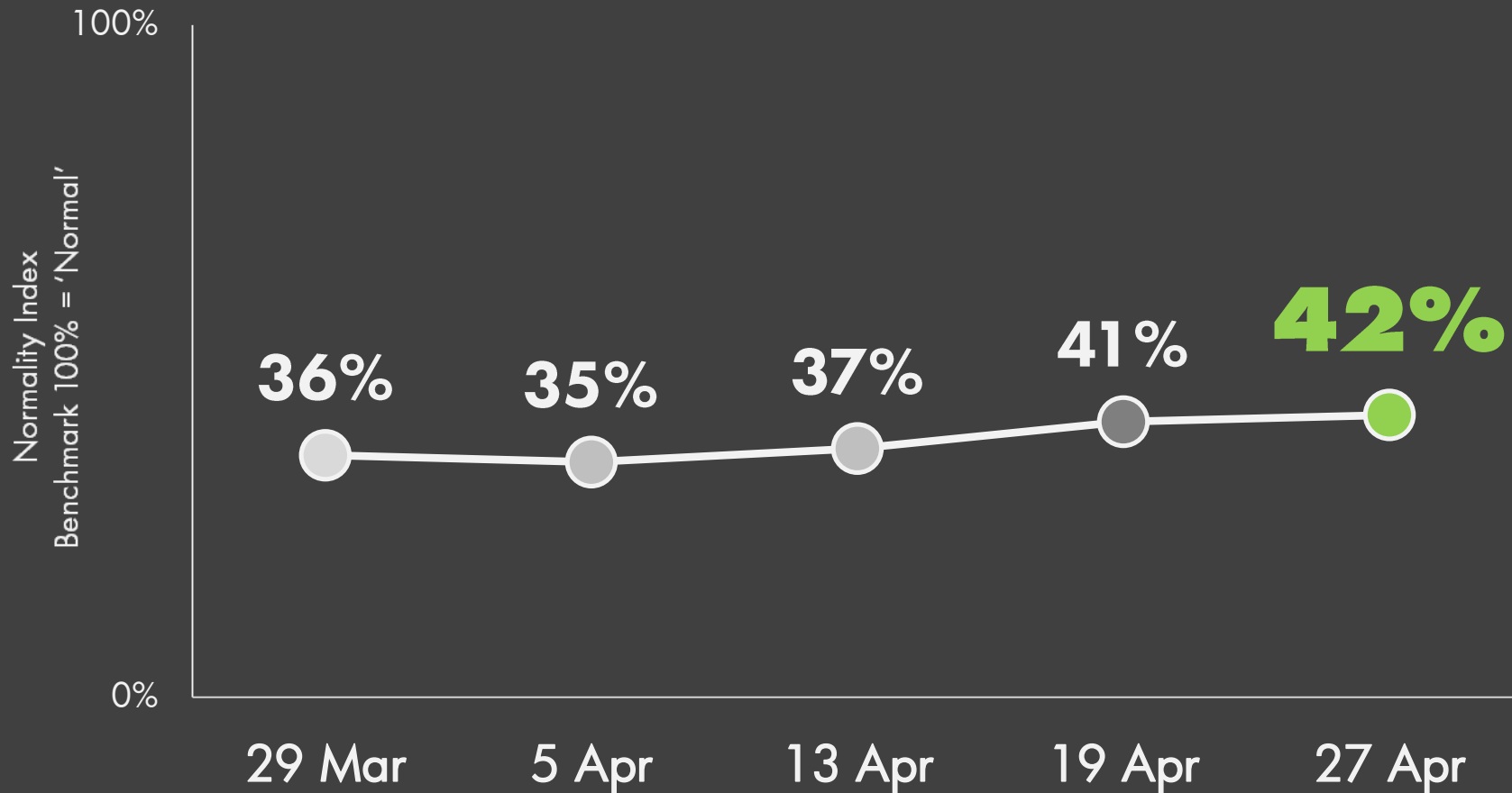


The Australian Normality Index

Our sense of Normality is inching up slowly week on week



THIS WEEKS OBSERVATIONS

Brand comms cannot take a one size fits all approach – we have examined age segments this week, and find some surprising insights. Marketers need to carefully observe the different segments behaviours and respond in relevant ways.

We are feeling more positive

How we are feeling emotionally now in Week 5 of the COVID-19 restrictions, is returning to how we felt prior to the virus hitting our shores.

Positive emotions continued to repair from the negative shock felt in Week 1 of the restrictions. Our sense of Contentment, in particular has almost returned to the benchmark resting state.

This overall rebound in positive emotions is a further indication that we are continuing to adjust to the current environment, and in turn, we may be more receptive to brand messages.

Younger and older generations are responding differently

Not all Australians are responding to this environment in the same way.

Young adults' employment is most negatively impacted, which seems to be resulting in rising anxiety. They also have higher distrust in brands across categories.

Yet, they believe the corona impact will only be 6 months and then life will return to normal.

On the other hand, Australians aged 65+ seem to be rebounding more quickly emotionally, and even thinking about their pre-COVID behaviours e.g. travel. There is a positive pragmatism about this older cohort, 23% of which believe life will never be the same, and yet there are adapting quickly and getting on with it.

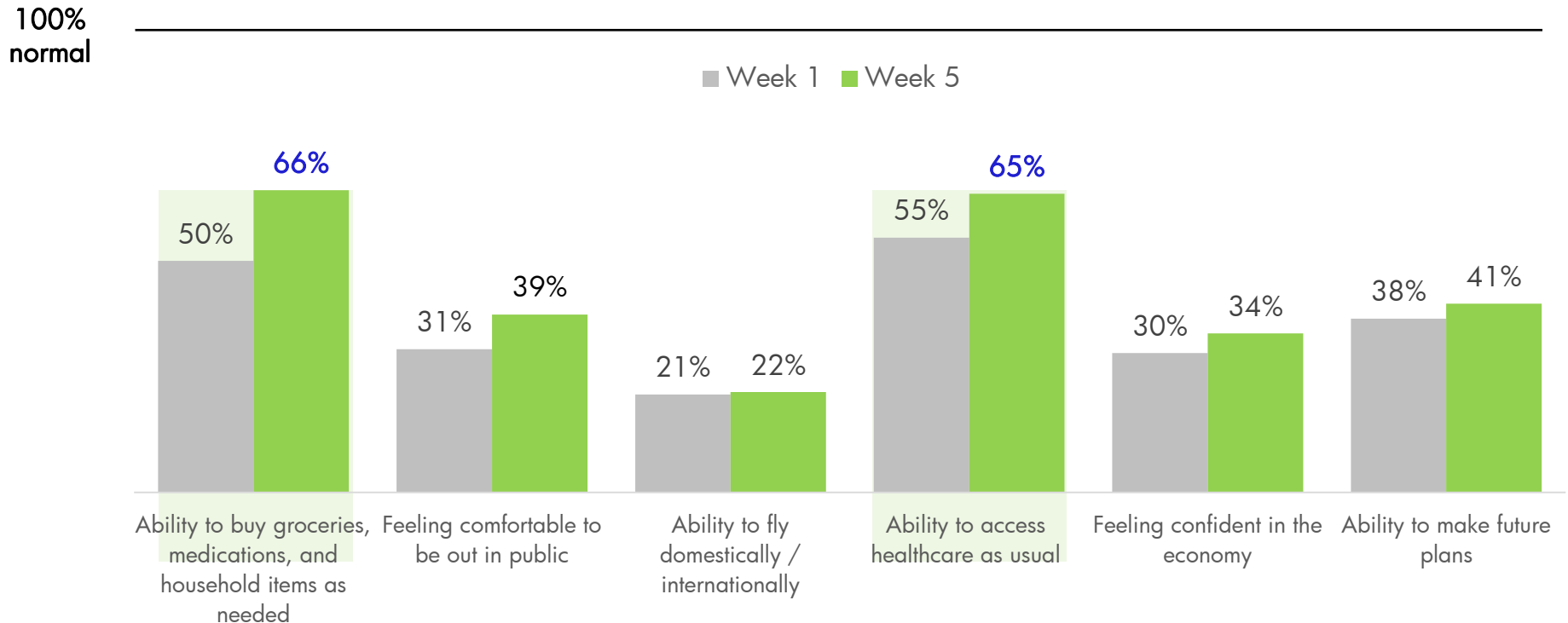
Necessity is the mother of adaptation

Significantly more older Australians have moved to using digital tools and services this week (internet banking, streaming etc.) As digital is the only viable channel to complete many daily tasks, this generation of Australians (can we call them the Digital Laggards?) are moving along the life-cycle curve and becoming more comfortable to interact with the world online.

There is an opportunity for brands to start speaking directly to them and make the digital world even more comfortable for them, for example Westpac has recently addressed this cohort of digital users, rolling out a TVC that clearly explains how to access online banking.

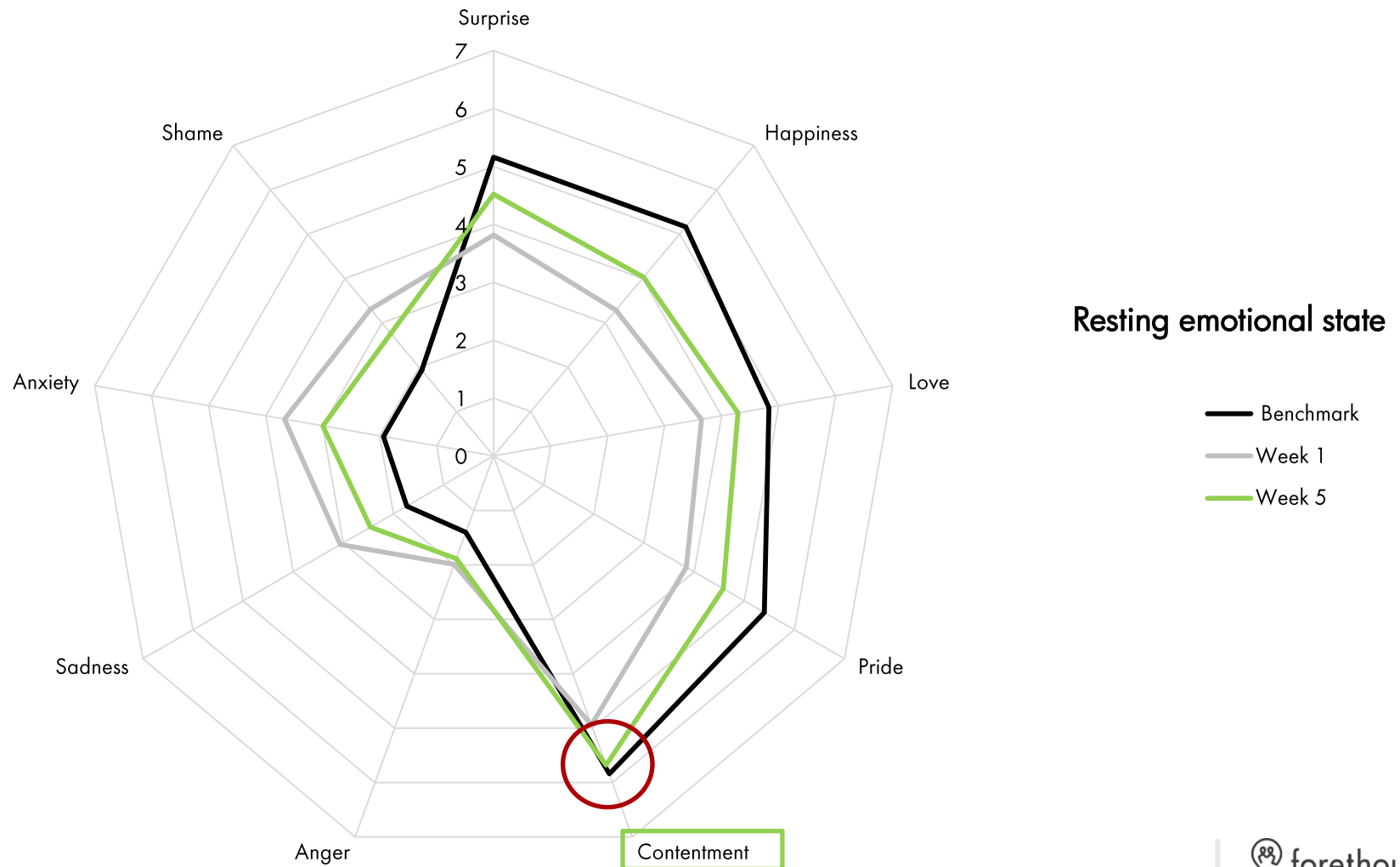
Over the last month, Australia has made clear progress on the grind back towards Normality

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



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.

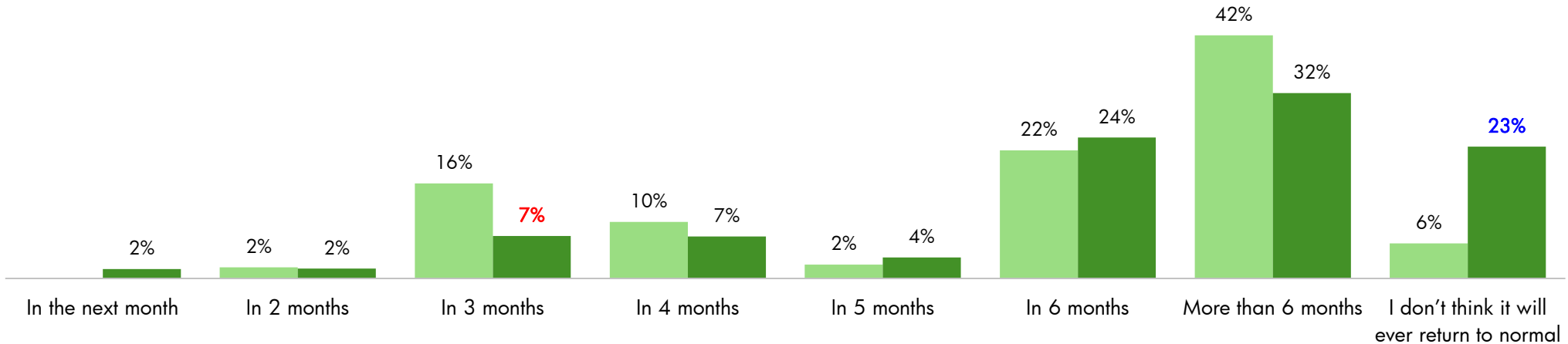
We are adapting to the environment, which is reflected in the improvement in our feelings. Contentment is almost back to pre-COVID19 benchmark.



Interesting comparison between 18-24yo and 65+ age group. 23% of 65+ Aussies think life will never be the same but they are adapting and planning. The younger cohort sees the crisis as a 6-month blip

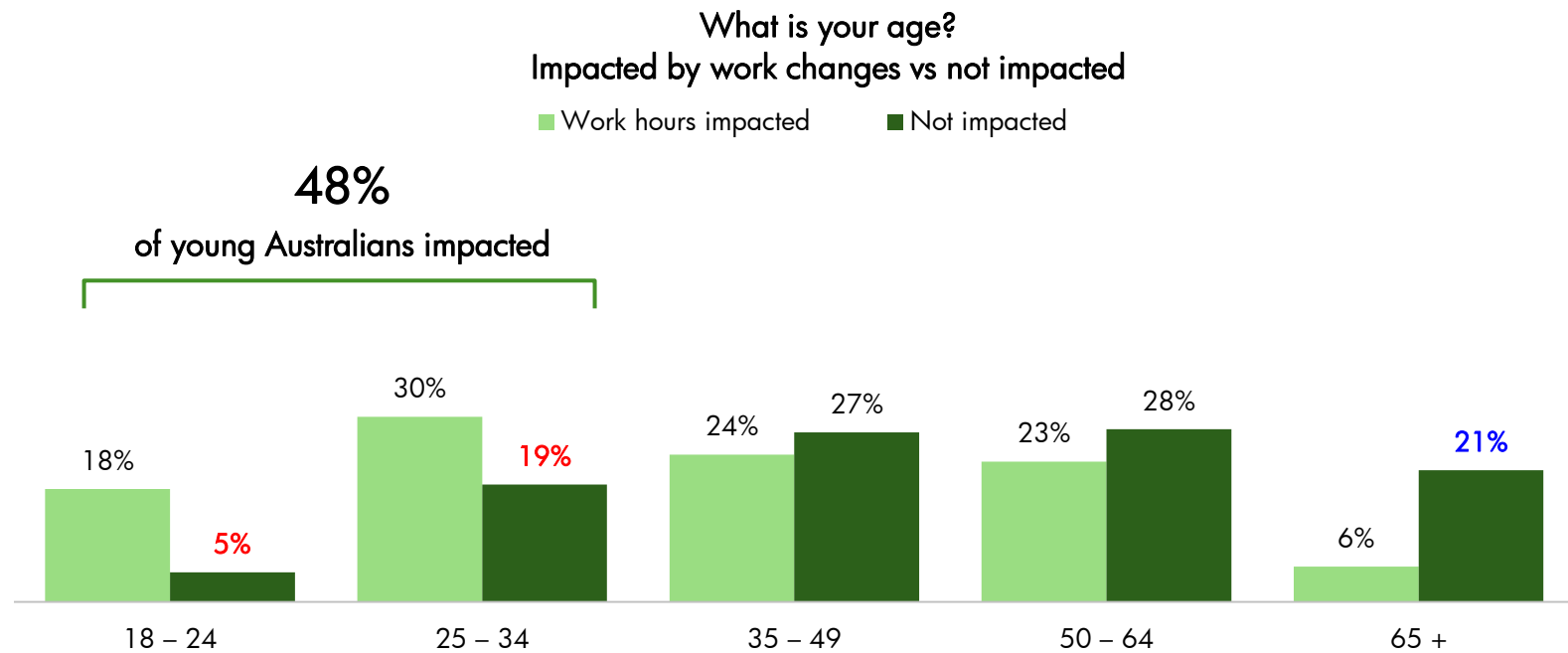
When do you think life (including wider society) will return to normal?

■ 18 to 24 ■ 65 +



How are our young Aussies coping?

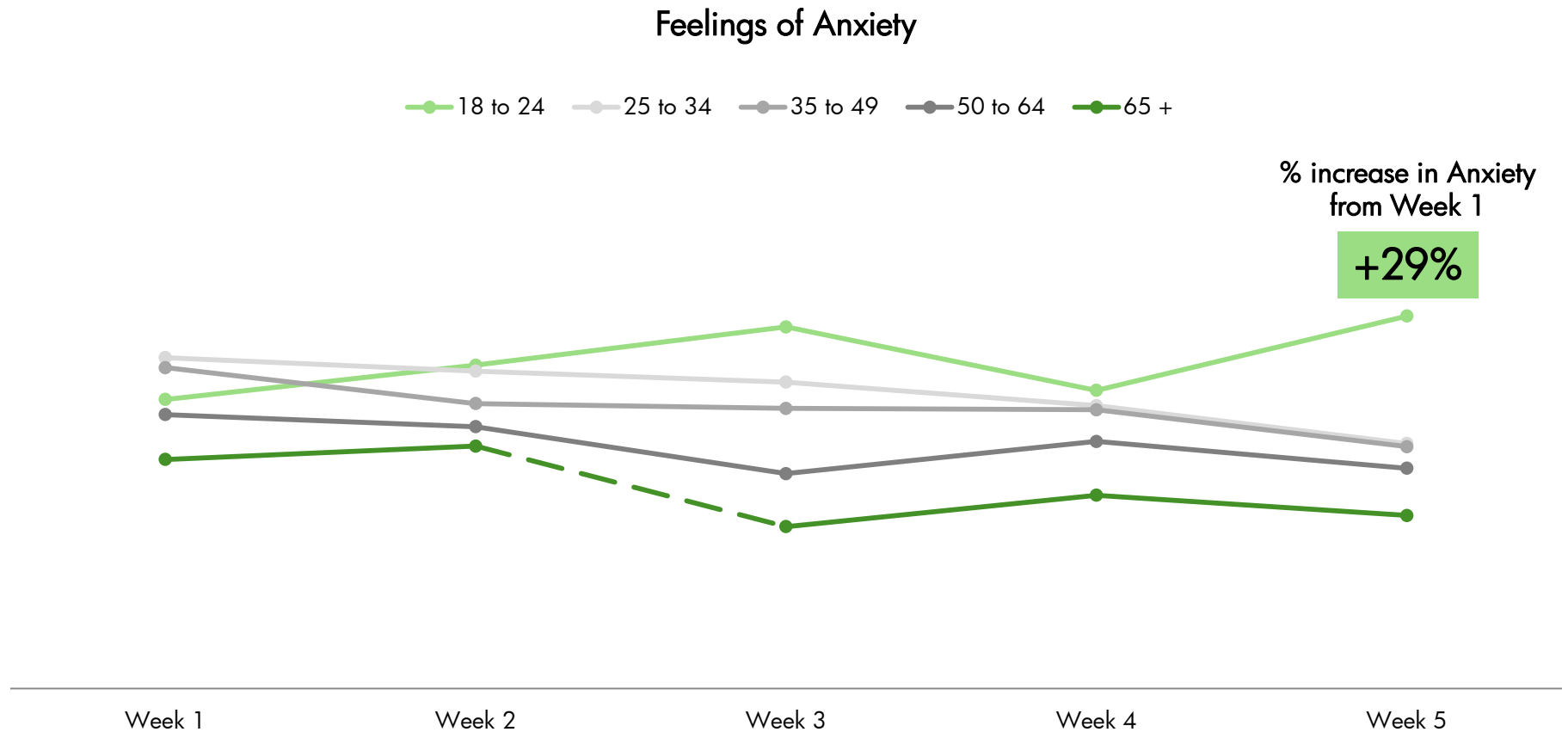
Young Aussies' employment has been the most negatively impacted by the pandemic



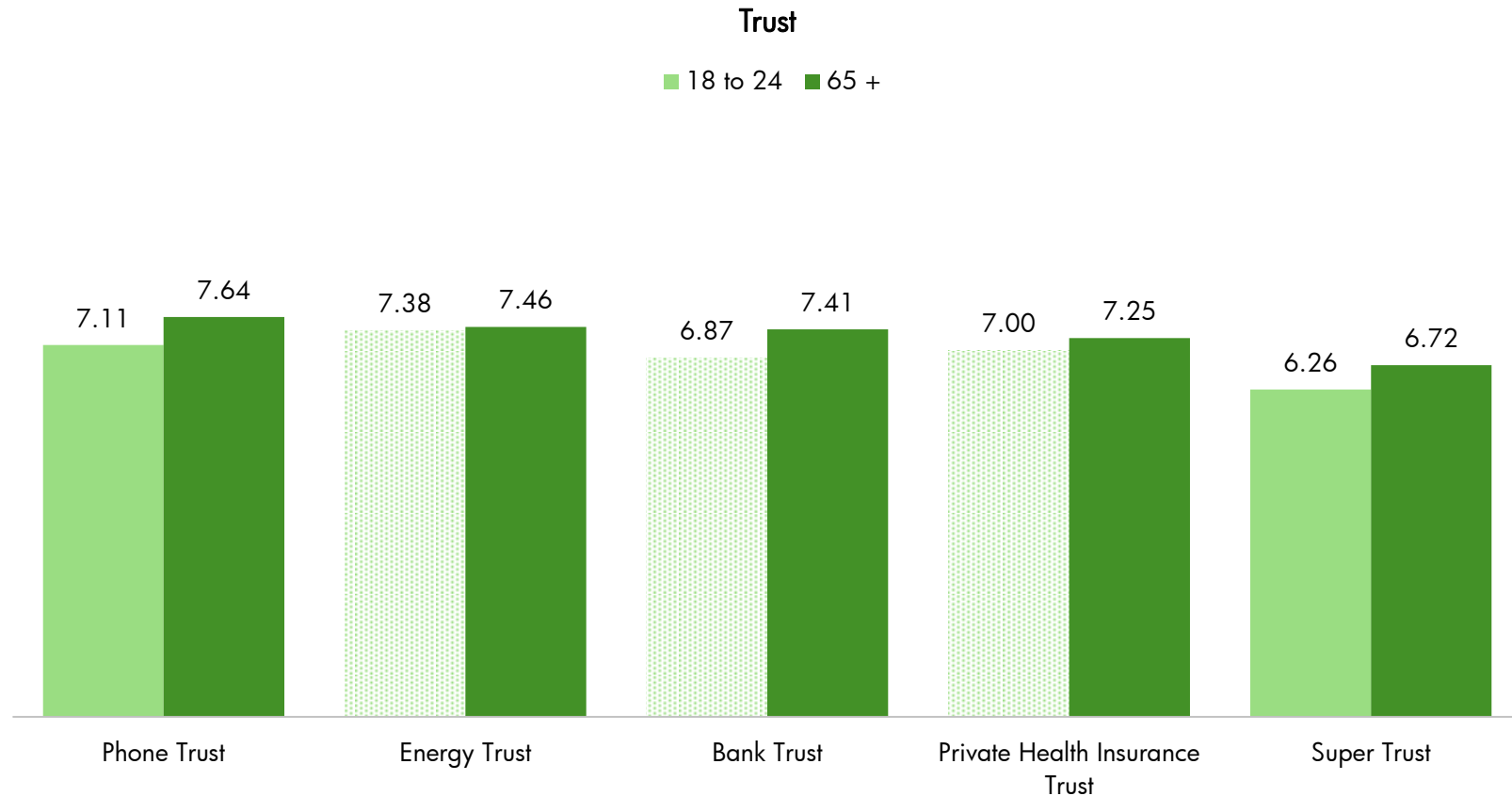
Note: Significance testing was conducted between Work hours impacted and Not impacted at the 5% level of significance.

Blue indicates the Not impacted result was significantly higher than the Work hours impacted result, red indicates it was significantly lower.

Is it a surprise that their Anxiety has heightened this week? And over the month?



Young Australians are less trusting of brands across categories

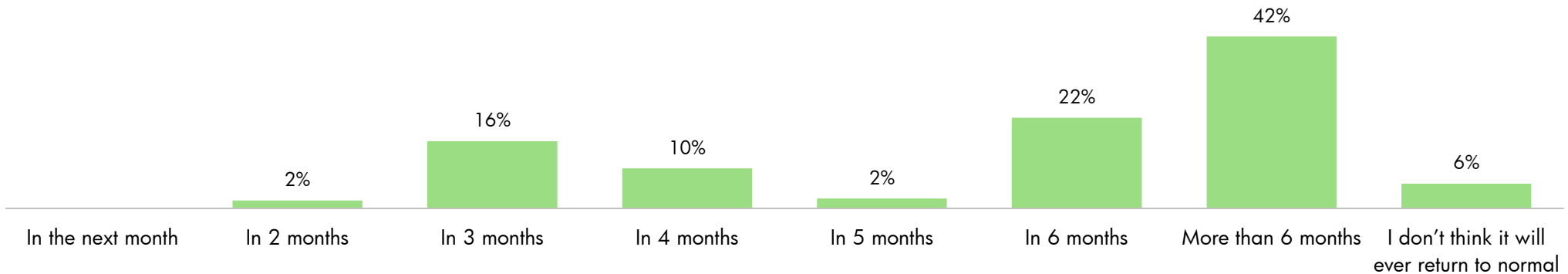


Note: Significance testing was conducted between 18 to 24 and other age groups at the 5% level of significance. No significant differences were found. Shaded bars indicate results based on small sample where significance testing could not be conducted. A minimum sample of n=30 is recommended for an indicative result.

As reported last week, young Australians anticipate that it will take at least 6 months for things to return to normal

When do you think life (including wider society) will return to normal?

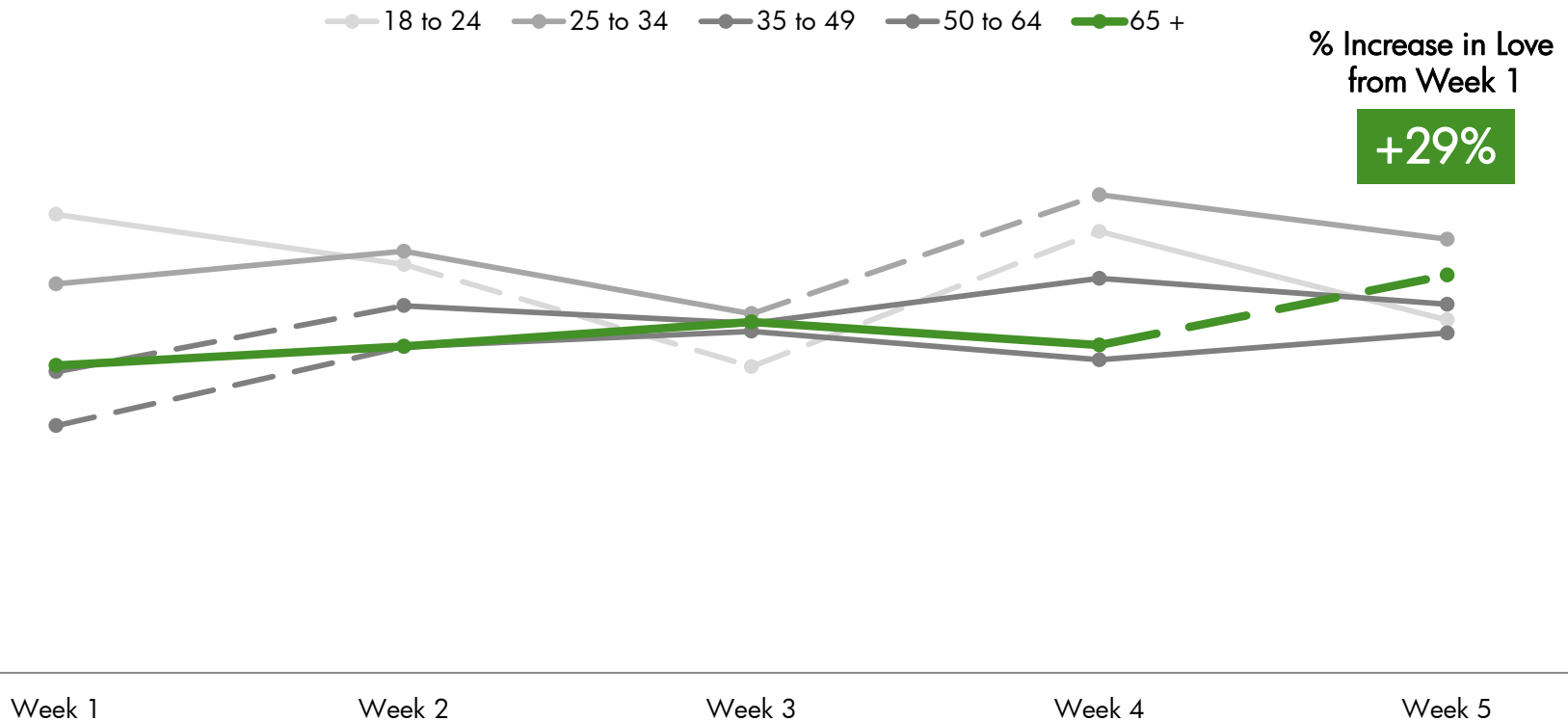
■ 18 to 24



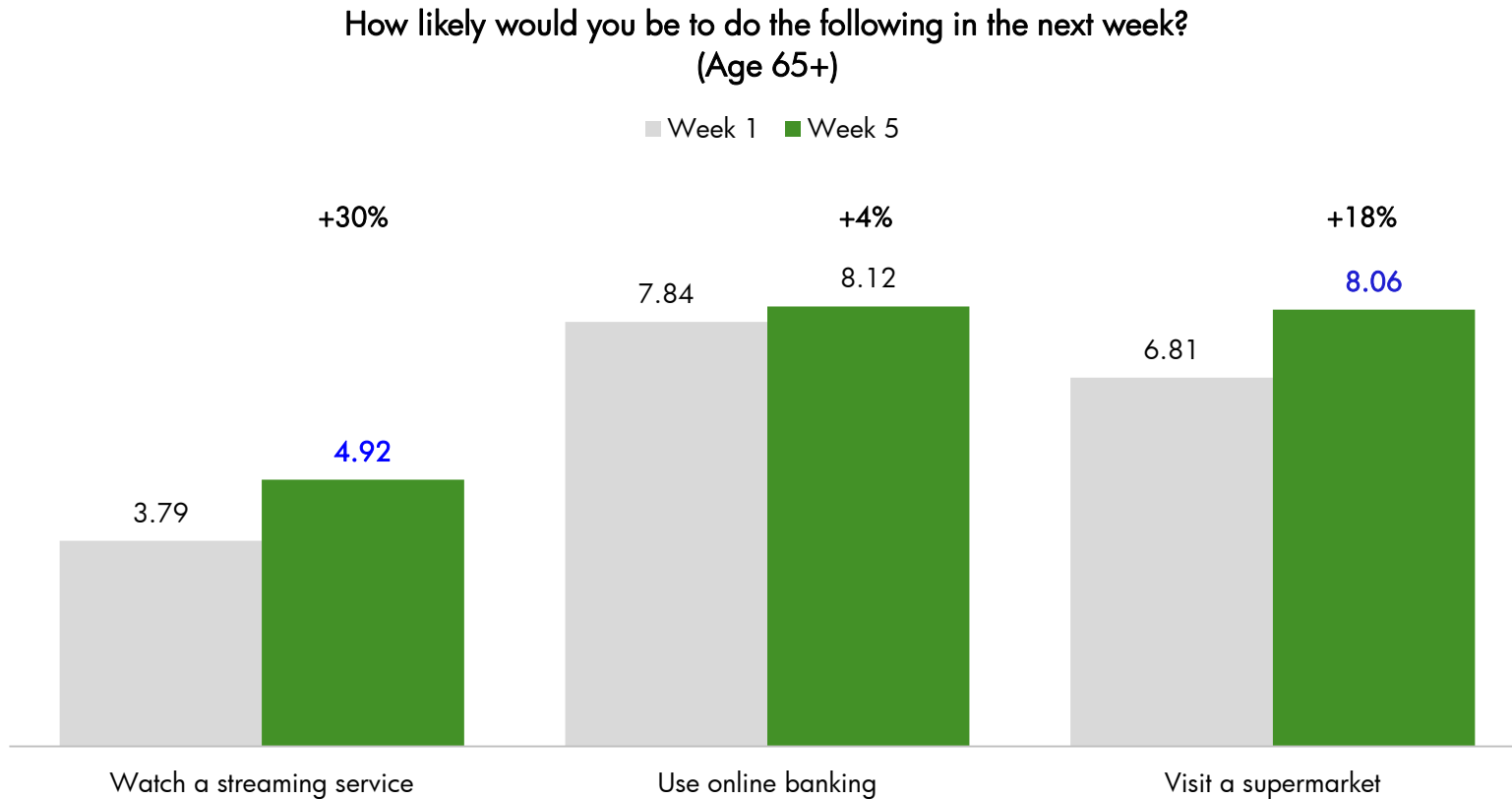
And what about our older Aussies?

In contrast, older Australians are feeling significantly more Love this week as their sense of community strengthens in the new environment

Feelings of Love

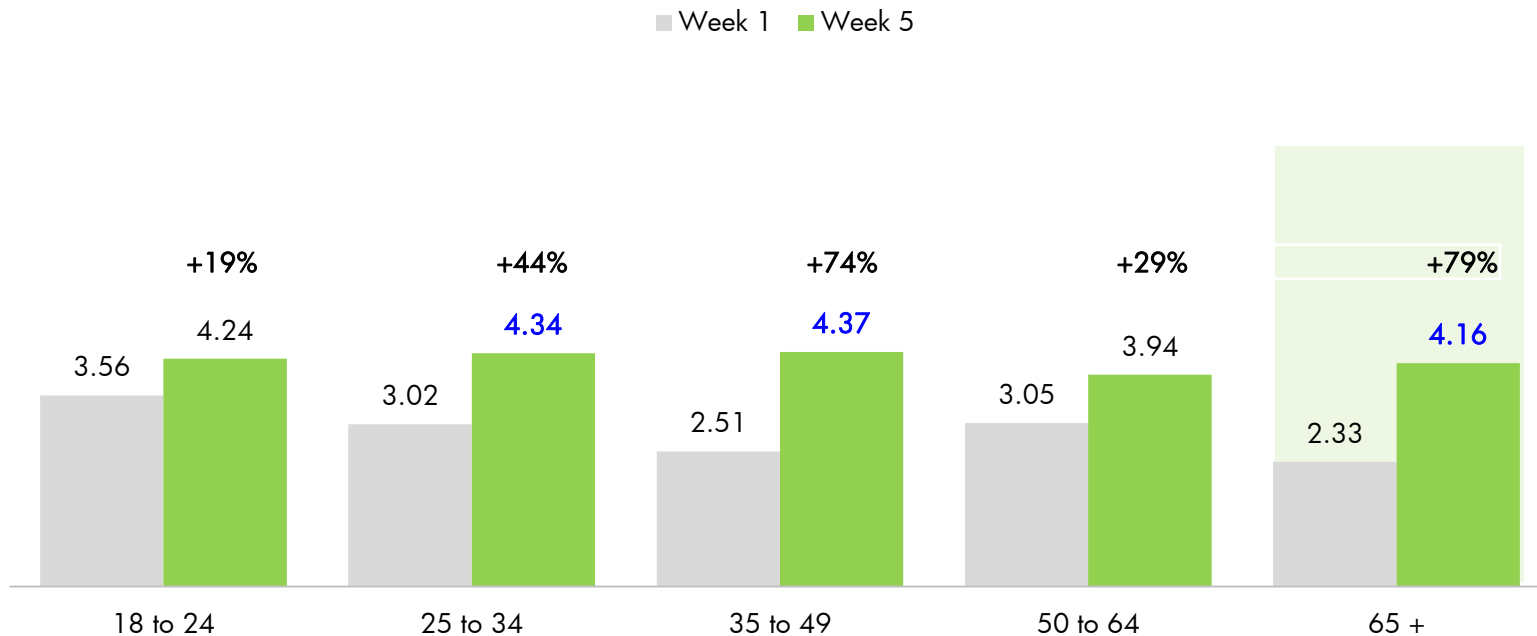


Necessity is the mother of adaptation. Our older Aussies are increasingly adopting digital tools and services



It looks like the 'Silver Nomads' are preparing to roll. Our 65+ cohort have had the largest increase in optimism regarding domestic travel

How likely are you to travel domestically within Australia in the next 6 months?



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