

oOh!media Covid-19 Pulse Report

Getting you ahead of the curve

Monday 15th June, 2020

It's official....

Long weekend roadtrips are back and domestic holiday travel looks set to boom.

Over the June long weekend, Australians hit the road and travelled at near same levels as the long weekend last year.

Regional traffic was up 15% week on week and travel from metro to regional areas was 92% of 2019 levels.

For more information see page 21



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‘Here and now’

Retail audience movement and
transaction trends

Data updated through to June 8 2020

Retail audience volume trends

Methodology

Harnessing mobile network data via Dspark, we have implemented a methodology to track audience visitation patterns to 500+ oOh! Retail centres

Dspark mobile network data provides anonymised, aggregated, always on insight into the movement patterns of millions of Australians, weighted to the population and nationally representative

This data provides accurate insight into the movement patterns of Australians derived from over 3bn geo signals from millions of devices daily

oOh! offers robust reporting of driving audience behaviour via:

- Size
- Scale
- Sophistication

Tracking audience volumes

Reporting

Captures audience volumes to oOh! Retail centres nationally generated from mobile device data provided by DSpark

- Total audience volumes (contacts) spending 15mins or more in the SA1 location of 500+ oOh Retail centres nationally
- State by state, metro and regional, local, medium and large centre insights
- Weekly data benchmarked to pre Covid-19 (week ending February 3rd 2020)

Size



Largest sample of Retail locations, tracking 500+ centres nationally

Scale



Industry leading trends providing the most robust insight into movements by state, metro/regional and by centre type

Sophistication



Most accurate measure of volumes via sophisticated method incorporating weekly visitation insights from DSpark in conjunction with transactional data and audience volumes from Quantum

Audience levels returning to pre Covid-19 levels

Retail audiences returning

While impacted through the Covid-19 period due to retail store closures and social distancing requirements, audience levels in Retail centres were maintained to a level due to the continued - and at times increased - purchase of essentials in supermarkets, pharmacies and food retail outlets.

The recent reopening of retail outlets nationally has seen a strong bounceback in audiences returning to bricks and mortar shopping and enjoying the prospect of retail therapy.



Retail audiences recovering strongly as Australians return to the shops

- WEEKLY AUDIENCE VOLUMES: **78%** of pre Covid-19 levels nationally
- WEEKLY AUDIENCE VOLUME GROWTH: **+73%** over past 7 weeks and **+4.7%** week on week



Regional centres and Medium centres in both metro and regional areas strong during lockdown and beyond

- Audiences in **Regional centres** at **88%** of pre Covid-19 levels
- Audiences in **Medium centres*** at **82%** of pre Covid-19 levels



All states exhibit strong growth, with individual results correlated to relaxation of restrictions

Faced with store closures, Australians shopped for essentials, went online and in some cases delayed purchase, all the while planning a return to physical shopping

Despite a shift in purchase behaviour during the height of the crisis, consumer attitudes captured early May show an intention to revert to traditional shopping habits

2 in 5 intended to **make purchases postponed** during lockdown once restrictions removed²

3 in 4 intended to buy **all groceries** in store and **2 in 3 all clothing, footwear, and electronics** in store once restrictions removed²

Australians were...

3.7x more likely to say they'd do more **in-store shopping** once social distancing restrictions are removed, as opposed to less²

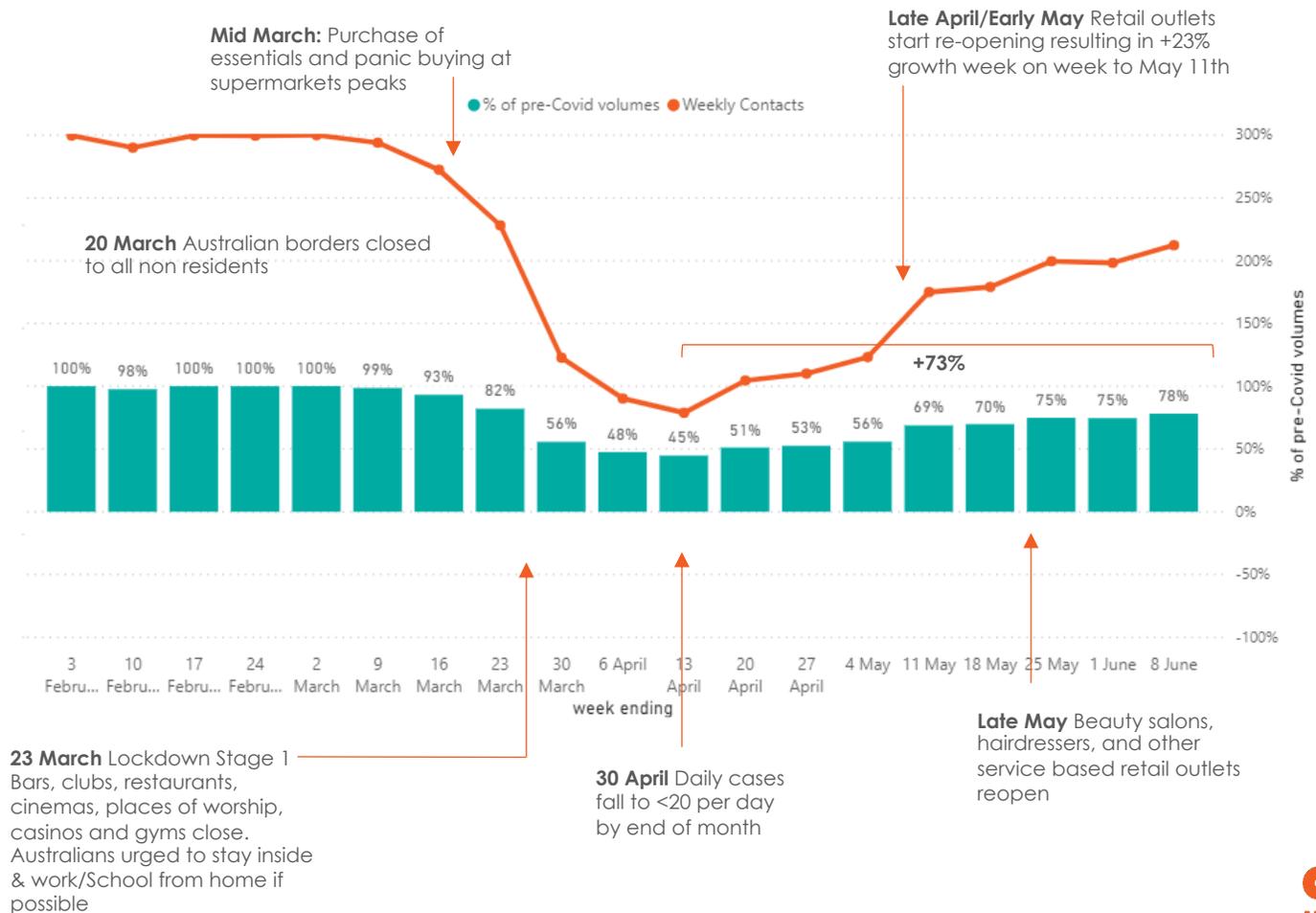
Over 2x as likely to say they would do more shopping in store compared to more online once restrictions are removed²

Retail audience insights - national

With strong intention to get back to the physical shopping experience, Retail audiences recovering strongly as outlets reopen

Last week saw national Retail audiences increase to 78% of pre Covid-19 levels

- Audiences up +73% since April 13th and +39% since early May when many national retail outlets reopened

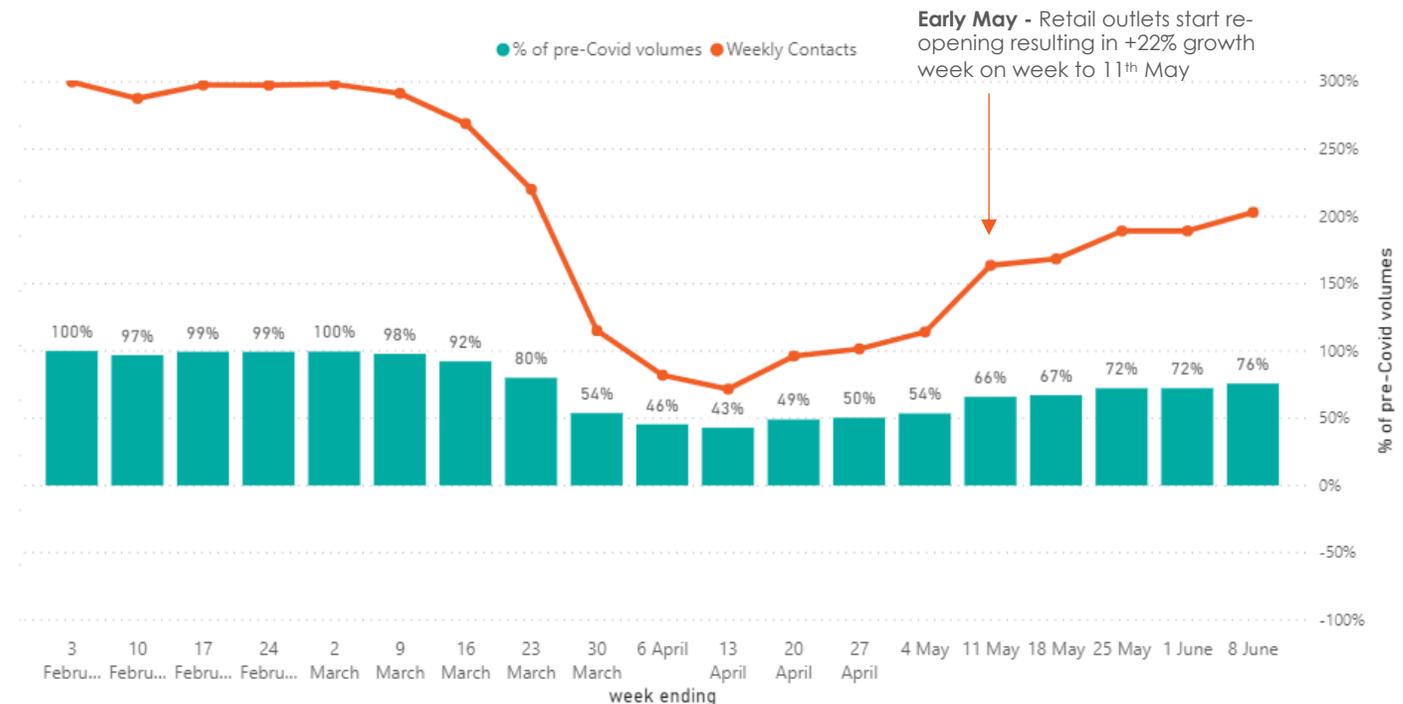


Source: oOh! Smart Reach, DSpark , Aggregated weekly total volumes, SA1 location of 500+ oOh! Retail locations, as at June 8th 2020 vs. pre Covid-19 (week ending Feb 3 2020)

Retail audience insights – metro markets

Metropolitan Australia

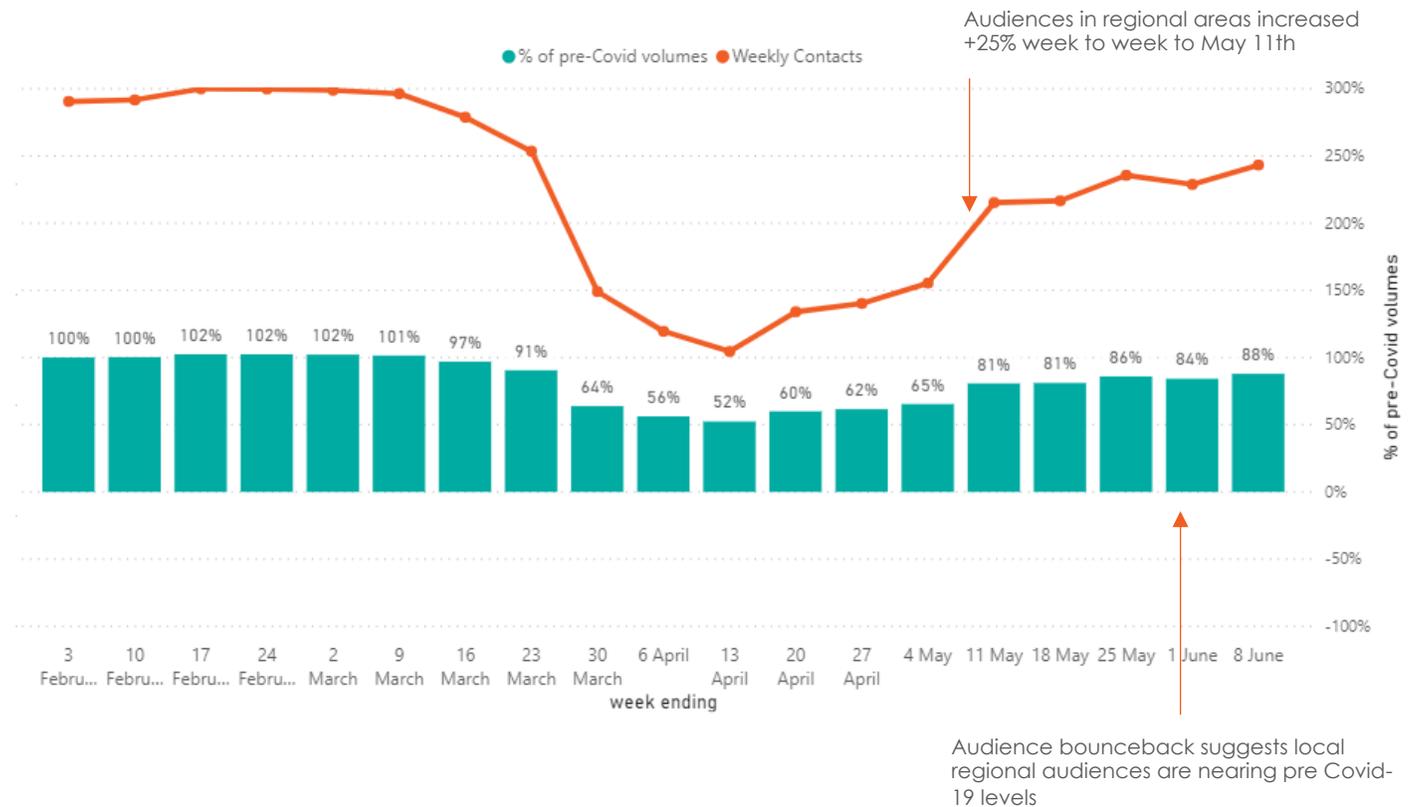
- Stage 1 restrictions were put in place resulting in the close of many retail outlets in late March
- While retail audiences saw an overall decline, visits to supermarkets, pharmacies and food retailers to purchase essentials were reasons for continued visitation during lockdown, and audience levels remained strong in these precincts
- Retail centres experienced strong returns of audiences in the week following reopening of stores, with audiences up +22% week on week to May 11th



Retail audience insights – regional markets

Regional Australia

- With lower Covid-19 cases, less concern of a second wave and greater confidence in employment and income prospects, regional audience levels demonstrated greater stability over the period
- The reopening of retail outlets in early May saw a +25% week on week increase to May 11th
- With +8.2% growth last week inclusive of the long weekend in many states, the injection of metro based consumers into regional centres signals a return to pre Covid-19 habits and levels



Retail audience insights – by centre type

Local

79% of pre Covid-19 levels
 +46% growth since mid April
 + 13% growth week on week to May 11th

With a core offering across supermarket, food retail and pharmacy categories, local centres attracted consistent audience during lockdown for essentials shopping.

Sitting at 79% of pre Covid-19 levels, week to week growth has been consistent as shoppers return to regular shopping patterns

Medium

82% of pre Covid-19 levels
 +46% growth since mid April
 + 18% growth week on week to May 11th

Medium centres benefited from offering essential services as well as discount department stores and other outlets that remained open during lockdown.

Sitting at 82% of pre Covid-19 levels and the same level of recovery in audience as local centres, audiences continue to return

Large

76% of pre Covid-19 levels
 +100% growth since mid April
 + 28% growth week on week to May 11th

Most impacted by lockdown and the close of retail outlets, large centres now sit at 76% of pre Covid-19 levels with audience recovery occurring at the strongest rates. Since mid April audience levels have doubled, and week on week once retail outlets opened nationally, audiences increased +28%

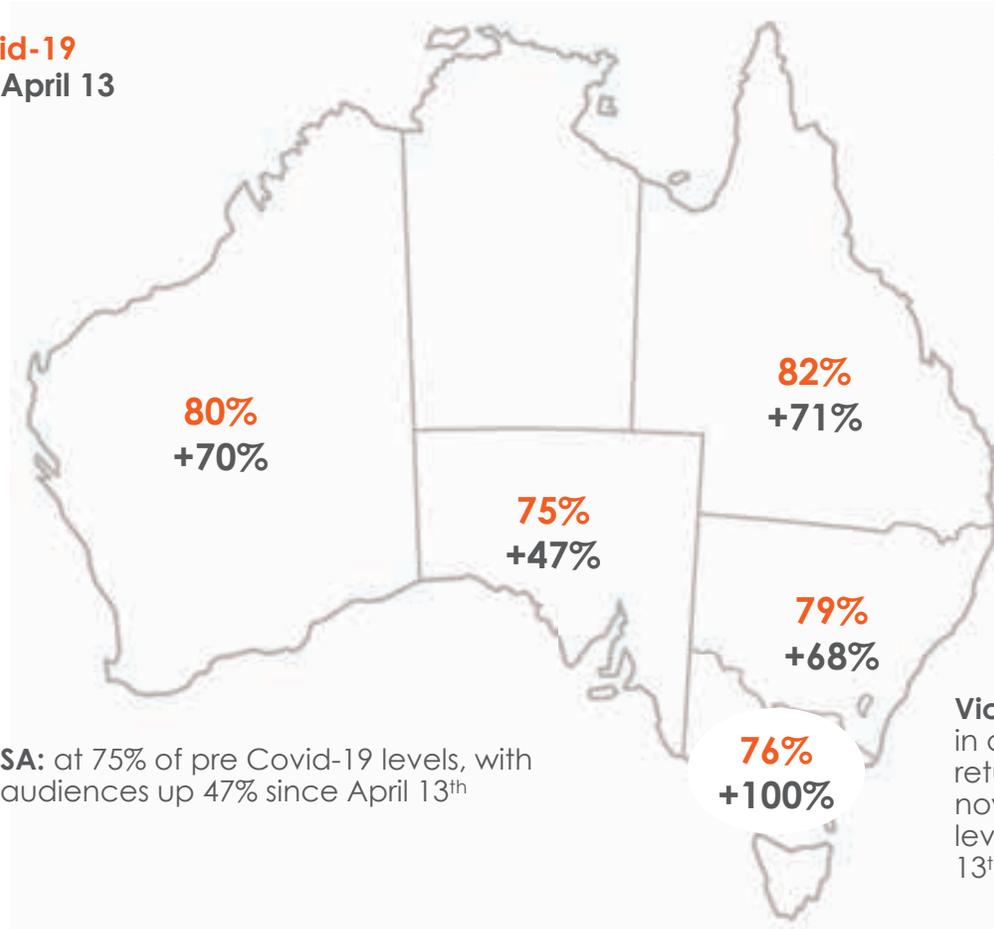
Retail audience insights – by state

By State

- Retail audiences are returning across the country, with growth across all states and most significantly in the past 5 weeks with a large number of retail outlets opening nationally
- In line with movement through the 3 stages, the return of audiences is driven by timing of lifting of restrictions by each state

% vs. pre Covid-19
Growth since April 13

WA: at 80% of pre Covid-19 levels, up +70% since April 13th



Qld: at a strong 82% of pre Covid-19 levels, up +71% since April 13th

NSW: at 79% of pre Covid-19 levels, up +68% since mid April

SA: at 75% of pre Covid-19 levels, with audiences up 47% since April 13th

Vic: after seeing the biggest fall in audiences, Victorians are returning to the shops fastest, now at 76% of pre Covid-19 levels and up +100% since April 13th

'A look into the future'

Attitudes and intentions of
Regional Australians

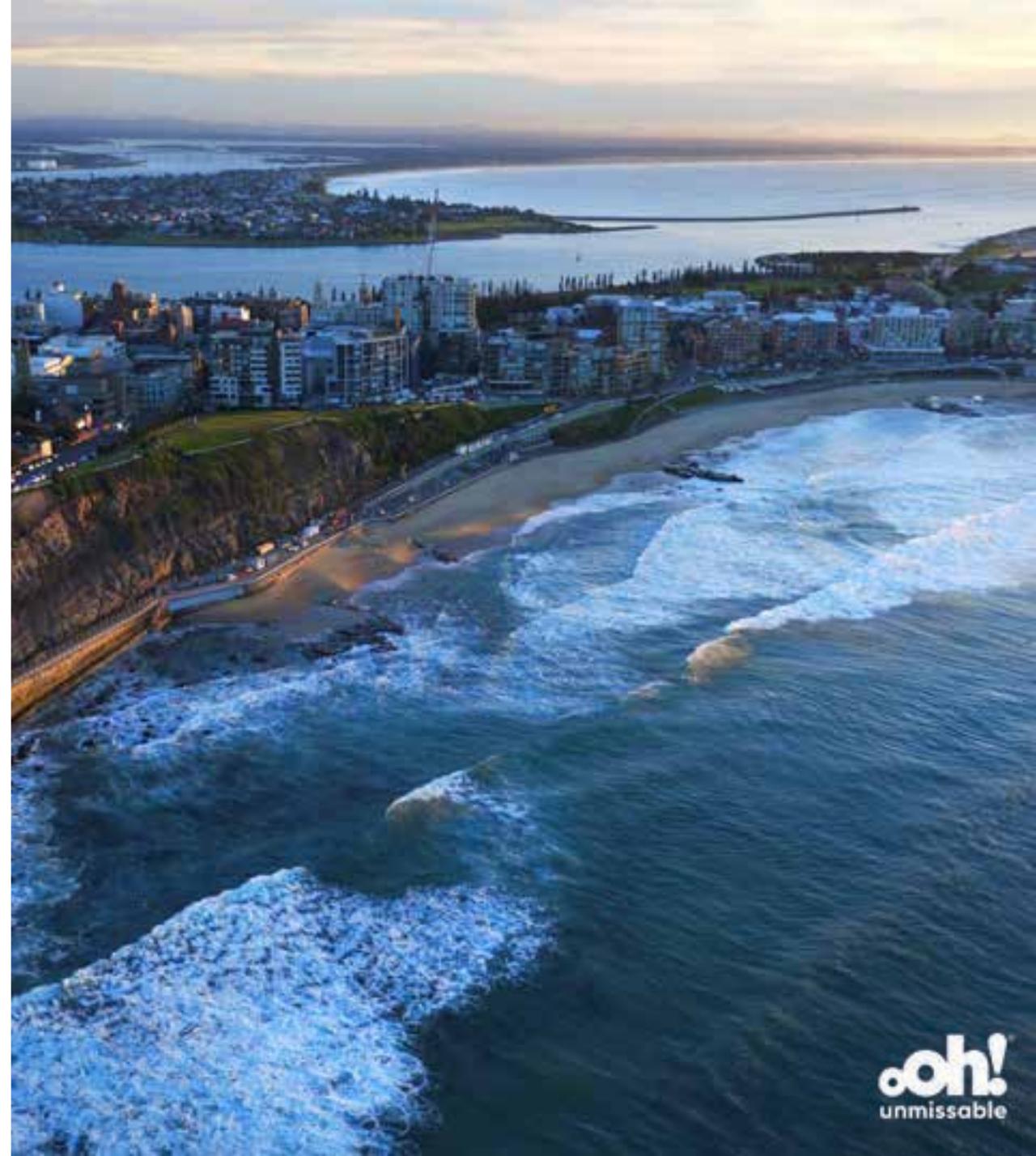
Ahead of the Curve

Droughts, Bushfires and a Pandemic. Australians Regional Towns have been some of the hardest hit areas in Australia over the last year.

But as restrictions begin to ease, visitation to and local economies are beginning to bounce back. In this report we take a look at Australias regional cities and deep dive into sentiment, travel behaviours and future intentions of residents.

This weeks Pulse Report themes include:

- Regional Australia- a key driving force behind the national economy during lockdown
- Regional Australians confidence towards institutions and businesses
- Regional Audiences Intentions towards Movement and Travel
- The rising interest in Regional Living



Regional Australia – A Key Backbone Of Our Economy

During the Covid-19 outbreak, Regional Australia was considered the engine room of the nations economy, with regionally based businesses continuing to service the nation across key categories

Regional Australia's contribution to the national economy



One third of Australians **live, work and raise families** outside Australian capital cities²



One third of Australia's **annual GDP** is generated from Regional Australia and **60% of Australia's goods exported** offshore come from Regional Australia²



Over the last couple of months, rurally and regionally based industries such as **Resources and Agriculture** continued to drive state's economy whilst some metro-based industries grind to a halt during the outbreak³

Source: 1 oOh!media Pulse Report | Timing Wave 1: 1st- 4th May, 2020 Wave 2:18th- 19th May, 2020 Wave 3: 1st -3rd June 2020 | Research Panel: Dynata | Australians aged 16+, Total n=2,953 | Metro Australians n= 1,842, Regional Australians n= 1,111 (displayed above)

Source: 2 Regional Australia- A Stronger Economy, Delivering Stronger Regions 2018-19, Commonwealth of Australia 2018, ISBN: 978-1-925531-48-0. Source: 3 Farm Online, Nations Engine Room Gearing Up to Lead Economic Recovery, 21st April 2020

The Lucky Country- with the regional economy maintained, the majority of Regional Australian jobs were preserved



65% of jobs were **unimpacted** by Covid-19 outbreak¹



Industry jobs unimpacted by Covid-19 outbreak include **Retail, Healthcare, Education, Public Administration, Community Service & Defence**¹



Only 35% of those in Regional Australia said their **jobs** have been **impacted** by Covid-19, 15% points **less than Metro Australians**¹



Additionally, only 7% stated that **while their job wasn't impacted, the business they work for has pivoted/ changed operations** as a result of Covid-19 outbreak¹



Only 12% of Regional Australians are likely **to look for a new job** once life returns to a 'new normal', on-par with Metro Australians¹

Regional Australians Are More Confident Than Ever

Minimal economic impact in Regional Australia has resulted in residents being more confident in Australian institutions and less speculative of another Covid-19 outbreak

As a result of the response to the Covid-19 outbreak...



75% **confidence in the Federal Government** has maintained or grown¹



87% **confidence in Australian businesses** has maintained or grown, 4% points higher than Metro Australians¹



84% **confidence in their employers' businesses** has maintained or grown, 4% points higher than Metro Australians¹



77% **trust in Large Banks** has maintained or grown¹

With less impact on the Regional Australian economy, less regional residents are concerned about a future sharpening of the Covid-19 infection curve



70% **fear a second wave** of infection as social distancing restrictions are eased, 6% points less than Metro Australians¹

Compared to before the Covid-19 outbreak and when social distancing restrictions are removed...



79% **expect their discretionary income** i.e. ability to buy products/services will be **maintained or increase**¹



81% **confident their employment** will be maintained or improve¹

Australians Keen To Explore Their Own Backyard

When it comes to travel, Regional Australians are keen to explore their own backyard and are looking forward to getting back on the road



2 in 3 are **keen to travel within their state**, 5% points higher than Metro Australians¹



When it comes to future holiday within states, 87% **prefer to travel by car**, 1.2x more likely than Metro Australians to hold this preference¹



1 in 2 are **keen to travel to other states**, sentiment shared with Metro Australians¹



When it comes to future **holiday in other states**, 85% are **comfortable to travel by car**, 6% points higher than Metro Australians¹



Regional Australians are keen to stay on home soil for the time being



Regional Australians are **19% less likely** than Metro Australians **to be keen to travel internationally** when borders reopen¹



28% less likely than Metro Australians **to be keen to travel to New Zealand** when borders reopen¹

Regional Australia a Hotspot for Relocation & Travel

Job losses, a desire to reconnect with family, uptake in working from home and motivation to move to less populated areas is driving some to consider relocating to regional Australia

Once all social distancing restrictions have been removed and life returns to a 'new normal'...



1 in 10 Metro Australians intend to **move to a regional area**¹

25% of all Australians **currently working from home would consider a move** to a regional area in the future¹



Of those considering relocating to regional Australia:



6 in 10 are **aged under 40**¹



56% are **white collar workers**¹



54% are **singles and couples without children** in their household¹

Regional travel is on the agenda

Beyond those considering a relocation to regional areas, for others in metro areas, regional travel is on the must-do list if not being ticked off already

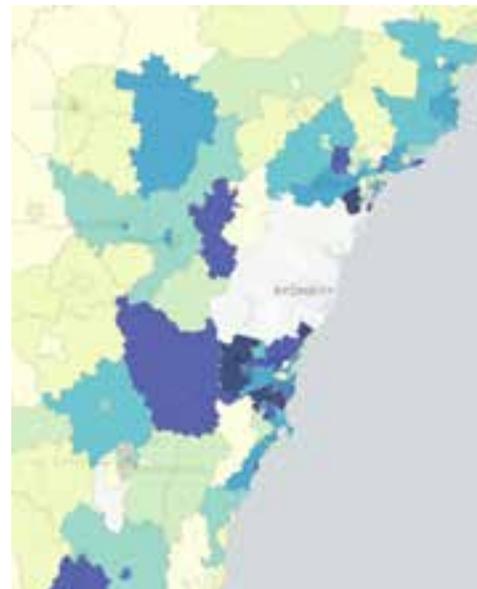
75% of all Australians are planning to travel to regional Australia in the near future, enjoying all that Regional Australia has to offer¹

Australians hit the road over the recent long weekend!

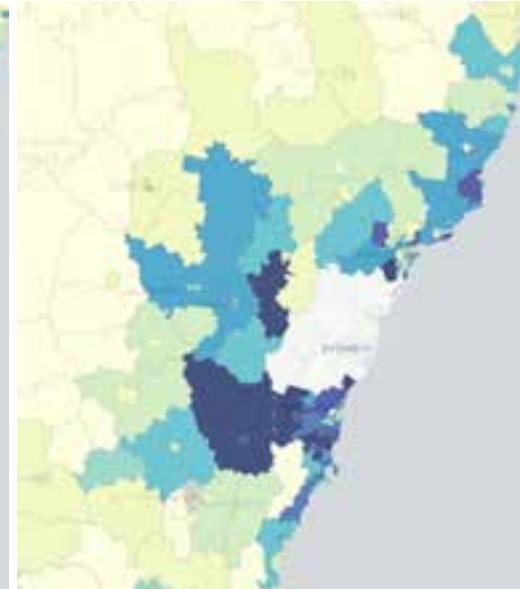
Over the past June long weekend, across NSW, Vic, and SA, Regional roadside audiences were up **+15%** week on week

And travel to regional areas in NSW was at **93% of 2019 volumes across the same weekend last year** as Sydneysiders took advantage of being able to travel within the state

This was in contrast to the Easter weekend this year where during lockdown audiences remained in local areas



2019: Regional NSW June long weekend travel



2020: Regional NSW June long weekend travel



2020: Regional NSW Easter long weekend travel

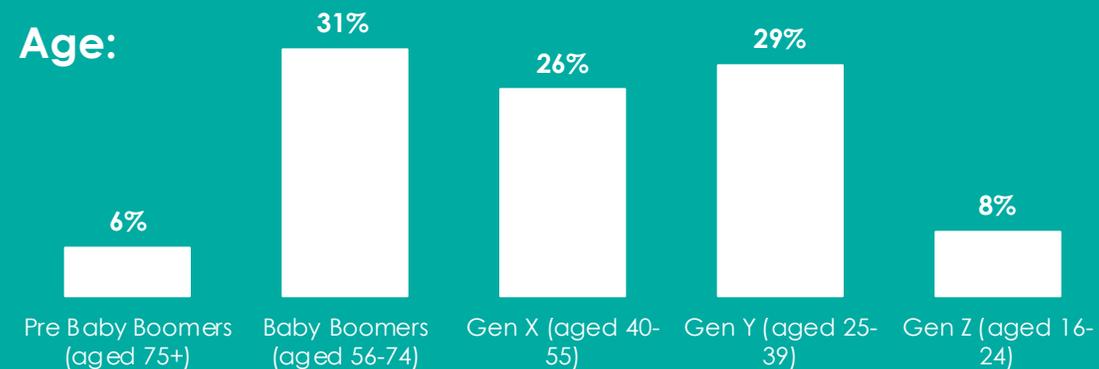
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unmissable

oOh!media Pulse Report Methodology

The Covid-19 Pulse Report is a weekly up-to-date insights summary harnessing a combination of best in class behavioral data on what is happening today, in addition to current and finger on the pulse attitudinal insights into what the future looks like in the eyes of Australians.

Research Agency	Independent research panel provider, Dynata on behalf of oOh!media
Methodology	Quantitative research via online consumer panel. Nationally representative sample based on age and geographic location
Sample	Australians aged 16+
Sample Size	Total respondents, n=2,953 Wave 1: n= 2,212 Wave 2: 423 Wave 3: 318
Research Timings	Wave 1: 1st- 4th May, 2020 Wave 2: 18 th -20 th May, 2020 Wave 3: 1 st – 3 rd June, 2020

Wave 3



Location:

