

oOh!media

Covid-19 Pulse Report

Getting you ahead of the curve

Monday, 18th May 2020
Week 2

Ahead of the Curve

Welcome to oOh!media's Covid-19 Pulse Report, where we aim to make sure you are 'Ahead of the Curve'. This insight series delves into the attitudes, intentions and appreciations of over 2,200 Australians.

Our ongoing study will tap into the changing face of Australian life as we work to get to the other side of the Covid-19 crisis.

Following the announcement of the Federal Government's 3 stage plan, the gradually relaxing of restrictions and stores soon to re-open; this week we deep dive into the Retail sector.

We shine a light on the categories that have grown during the crisis, those that have been challenged and the opportunities that exist based on Australia's mindset and attitude into the future.



Lets Go Shopping!

Australians have been making a list and checking it twice. It may not be Christmas but people are feeling optimistic, they plan to make purchases delayed while in lockdown and look forward to a dose of Retail Therapy.

Once social distancing restrictions are removed, planned purchases will go ahead

79% believe their **ability to purchase** products and services in the future will be unimpacted¹



2 in 5 intend to **make purchases postponed** during the Covid-19 outbreak. Under 40's are even more likely (1.2x) to intend to buy¹



Australians plan to hit the shops more often in the future

Compared to before the Covid-19 outbreak, people are **3.7x more likely** to say they will do more **in-store shopping** once social distancing restrictions are removed, as opposed to less in-store shopping¹



Fair pricing (77%), reliability (65%) and trust (64%) are the attributes Australians are looking for in the brands they'll purchase post lockdown¹

Australians to look to brands with a physical presence

When considering brands to purchase in the future, half expect brands to be **available in physical stores** v.s. 30% to have an online presence¹



Grocery & Food

Spend on groceries continues to trend upwards, and looking forward Australians will keep some of the habits developed in the crisis; stockpiling and our newly discovered interest in cooking and eating-in.



As social distancing restrictions are relaxed, there will continue to be an element of storing more in the pantry



Over 1 in 3 will continue to buy and store **more non-perishable food items**¹

43% of people will continue to buy and store **more hygiene items**¹



2 in 5 will continue to buy and store **more cleaning items**¹

Once social distancing restrictions have been removed we'll continue to head to the shops to stock up for home cooking¹

77% of Australian's **intend to buy all** their **groceries at the supermarket** while only 8% intend to buy online¹



Compared to pre-Covid 19 outbreak, 91% of Australians intend to **cook at home**; either the same amount or more often¹



Gen Y are **1.2x more likely** to cook more often from home, compared to pre Covid-19 outbreak¹

Department Stores & DDS

The re-opening of retail stores is welcomed news to retailers and consumers who intend to pick back up in store shopping across clothing, footwear, and entertainment categories.

Once social distancing restrictions are removed in store purchase will be preferred



63% intend to buy all **clothing purchases in-store** vs only 13% all online¹



54% intend to buy all **toy purchases in-store** vs only 19% all online¹



68% intend to buy all **footwear purchases in-store** vs only 11% all online¹



46% intend to buy all **entertainment items** (books, games etc.) **in-store** while 30% look to blend purchases in-store and online¹



Home Improvement & Garden Supplies



Focus has turned to improving and updating our homes and entertainment experience while in lockdown and this trend is here to stay.

Once social distancing restrictions have been removed trips to the local hardware store are set to continue

76% intend to buy all **home improvement items in-store** while only 8% online¹

76% intend to buy home improvement items in the future¹



Electronics & Computers



Strong intention to purchase electronics and for the in-store shopping experience once social distancing restrictions are removed

Once social distancing restrictions have been removed

84% intend to buy electronics (e.g. TV, mobile, laptop) in the future¹



61% intend to buy all their **electronic purchases in-store** while only 15% intend to buy all their electronics online¹

Restaurants & Café

With cafes and restaurants evolved to remain afloat, as they are starting to re-open for business as usual across the country, Australians are looking to embrace the café and venue lifestyle more so than ever before.



Once social distancing restrictions are removed Australians will visit cafes, pubs, venues and restaurants more frequently than before the crisis



86% intend to **continue or even increase their visitation cafes, pubs and/or venues**, compared to before the Covid-19 outbreak¹

Gen Z are even more likely (1.2x) to increase visitation¹



60% intend to **visit cafes more** compared to before the Covid-19 outbreak.

Once social distancing restrictions are removed, 47% intend to **dine-out more** often compared to before the Covid-19 outbreak¹



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oOh!media Pulse Report

Methodology

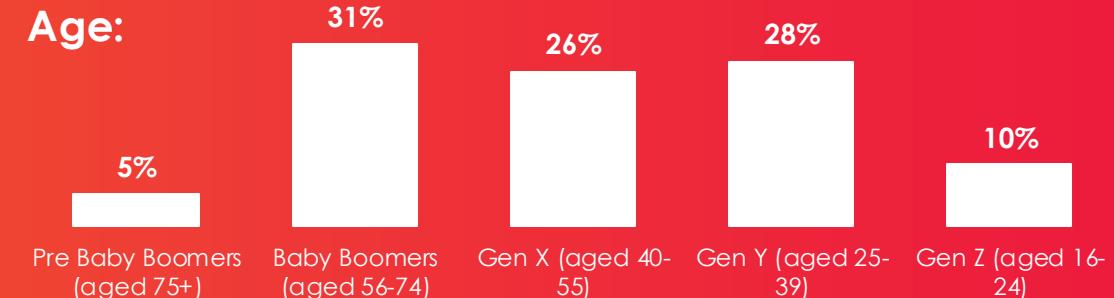
The Covid-19 Pulse Report is a weekly up-to-date insights summary harnessing a combination of best in class behavioral data on what is happening today, in addition to current and finger on the pulse attitudinal insights into what the future looks like in the eyes of Australians.

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| 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= 2,212 |
| Research Timings | 1st- 4th May, 2020 |

Gender:



Age:



Location:

