



# oOh!media Covid-19 Pulse Report

Getting you ahead of the curve

Monday 20th July, 2020

Edition 11 – Audience update and Attitudes and Intentions of Australian White-Collar Professionals

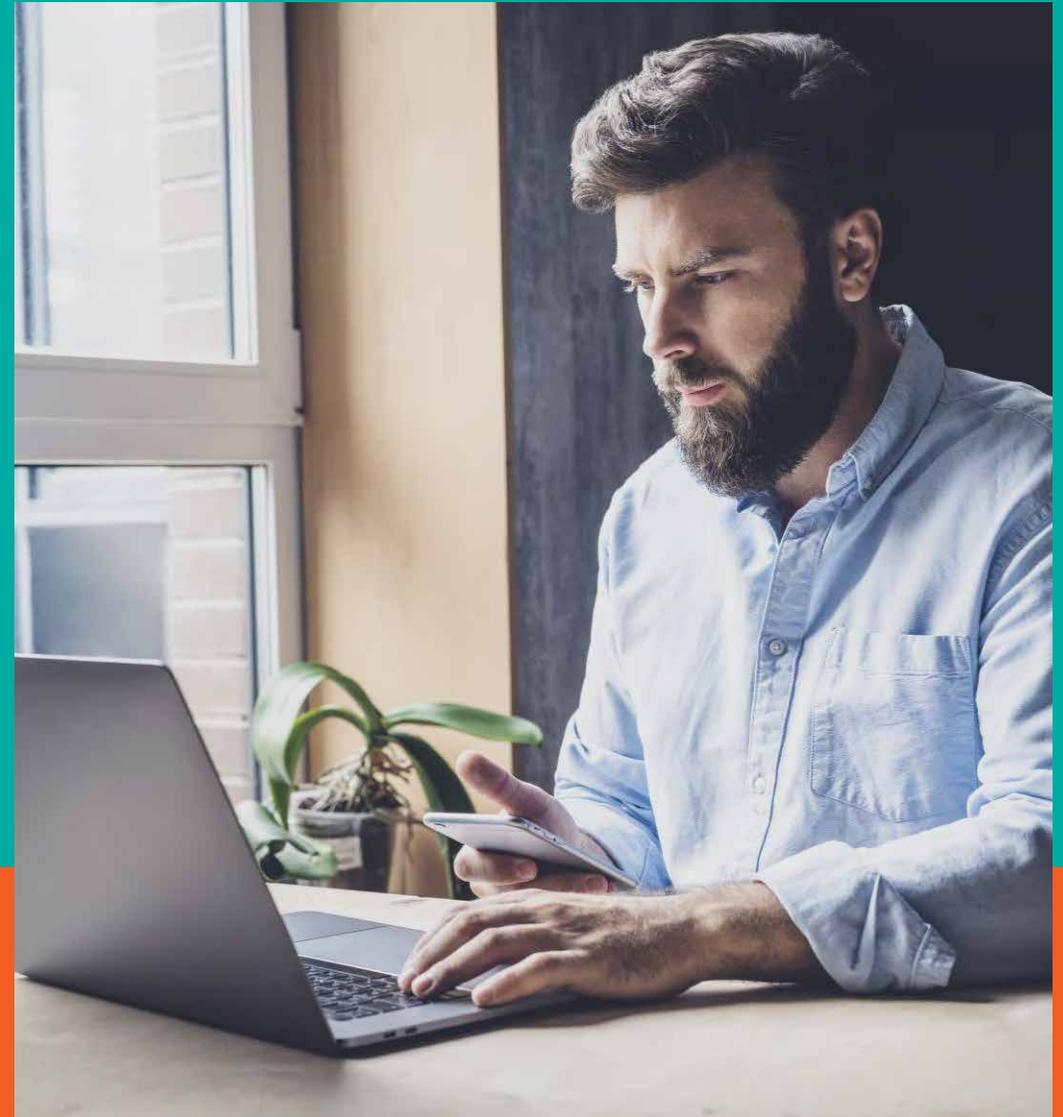
Making Brands Powerfully Unmissable

# Contents

**Here and now'**: updated audience insights derived from mobile data on Road and Retail audience volumes vs. pre Covid-19

+

**'A Look into the Future'**: consumer based insight on attitudes and intentions of Australian White-Collar Professionals



# Dspark data usage disclaimer

Whilst we endeavor to share as much as we can with our valued partners, due to commercial agreements the insights provided by Dspark within this Pulse report are not available for use by competitors to Dspark.

We thank you for your understanding as we abide by our contractual agreements

For Dspark, "Competitor" means each of the entities below and their Related Bodies Corporate:

- (a) Telstra Corporation Limited, only where the Customer Group is providing services directly to Telstra Corporation Limited or its Related Bodies Corporate (services provided by a media agency or other intermediaries to Telstra Corporation Limited or its Related Bodies Corporate shall not be deemed to be in breach of clause 2.3);
- (b) Google LLC;
- (c) Here Global B.V.;
- (d) TomTom International BV;
- (e) Any person or entity (other than Dspark or its Related Bodies Corporate) which is in the business of providing geospatial insights from telecommunications, GPS, WiFi and other similar data that informs movement to the public, in the Territory, using the retail brand names used or owned by any of the persons or entities listed above in (a) to (d), or the Related Bodies Corporate of any such person or entity; and
- (f) Any person or entity (other than Dspark or its Related Bodies Corporate) which is in the business of providing geospatial insights from telecommunications, GPS, WiFi and other similar data that informs movement to the public, in the Territory

# 'Here and Now'

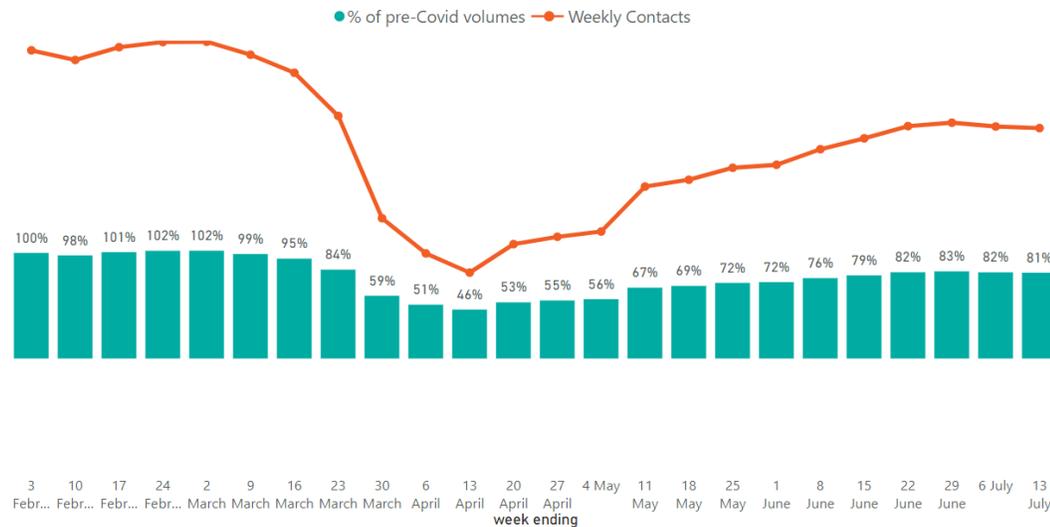
Audience movement and transaction trends

# Victorian decline not effecting national out of home audience

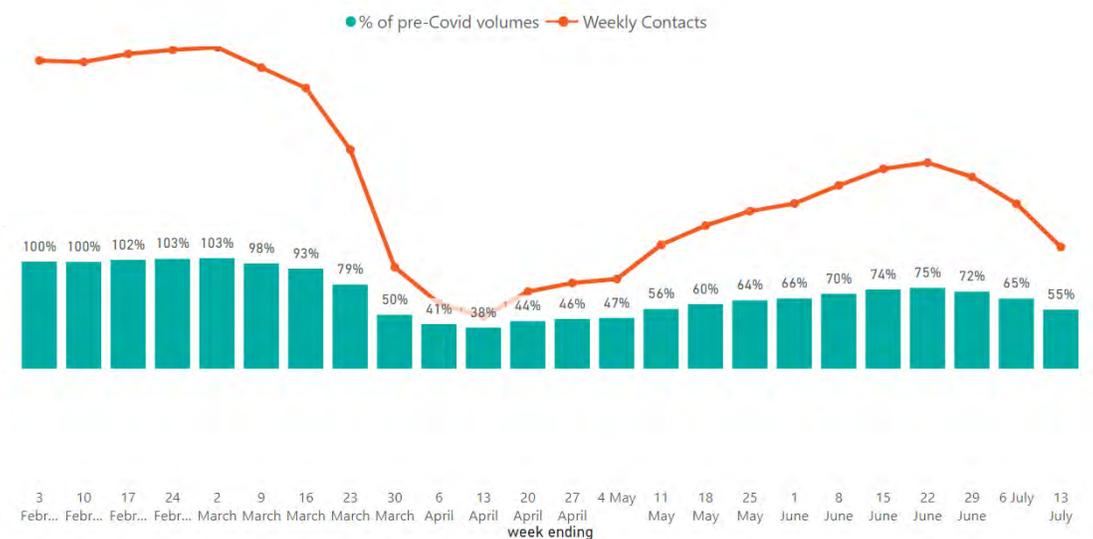
With the 2<sup>nd</sup> wave of grade 3 restrictions in Melbourne, Victorian audience recovery has been impacted. This impact is limited at a national level, with oOh! audiences staying stagnant at 81% of pre Covid-19 levels.

What audience loss occurring in Melbourne is being balanced by the gains in all other markets around Australia.

National –  
81% of pre Covid-19 levels (-1% WoW)



Victoria –  
55% of pre Covid-19 levels (-16% WoW)

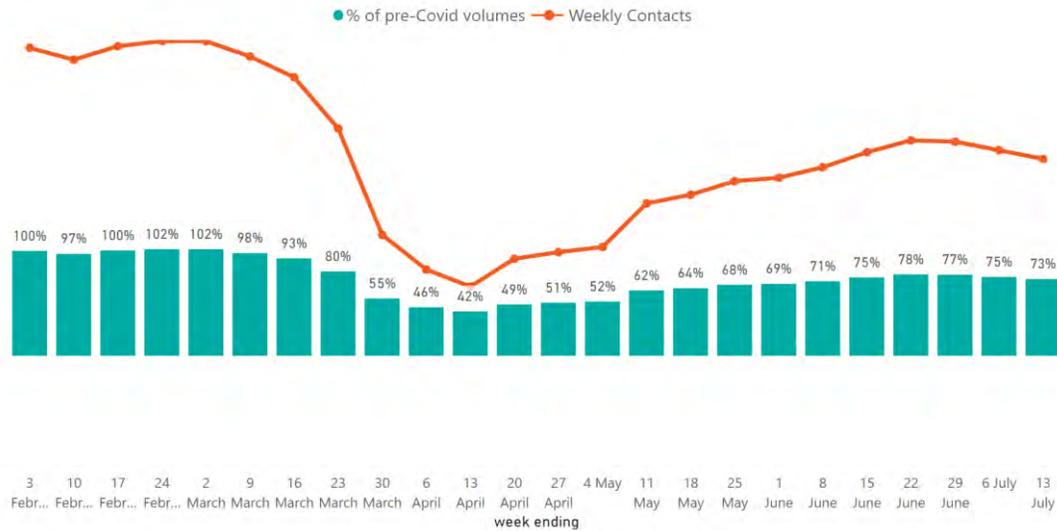


Source: Dspark data, Roadside and Retail locations Victoria, week ending Jul 6<sup>th</sup> 2020

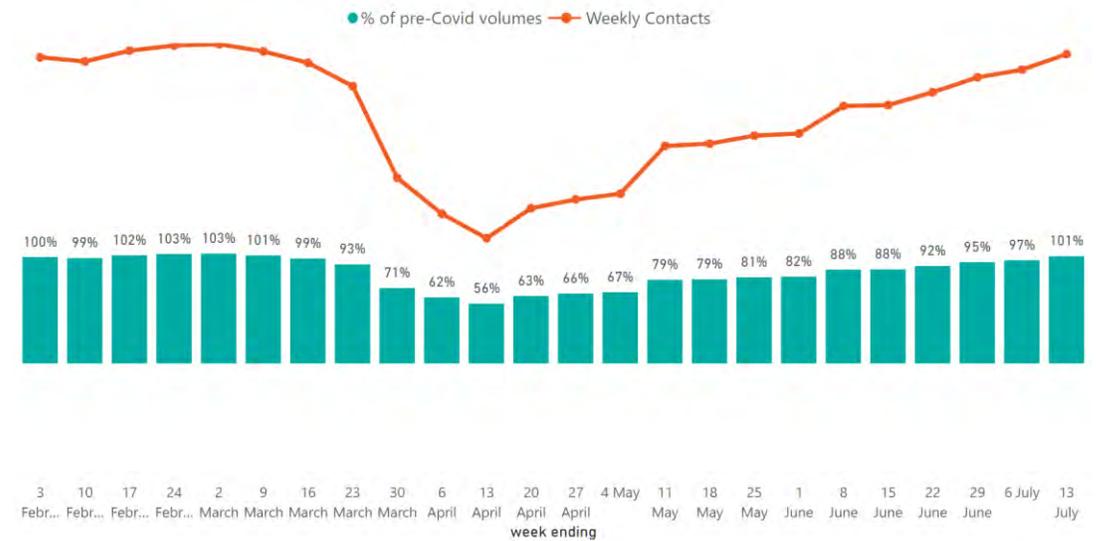
# Regional markets are back!

The school holidays are seeing audience increases in regional markets and for the first time they have hit pre Covid-19 levels.

5 metro Australia –  
73% of pre Covid-19 levels (-2% WoW)



Regional Australia –  
101% of pre Covid-19 levels (+4% WoW)



Source: Dspark data, Roadside and Retail locations Victoria, week ending Jul 6<sup>th</sup> 2020

# Roadside audience update

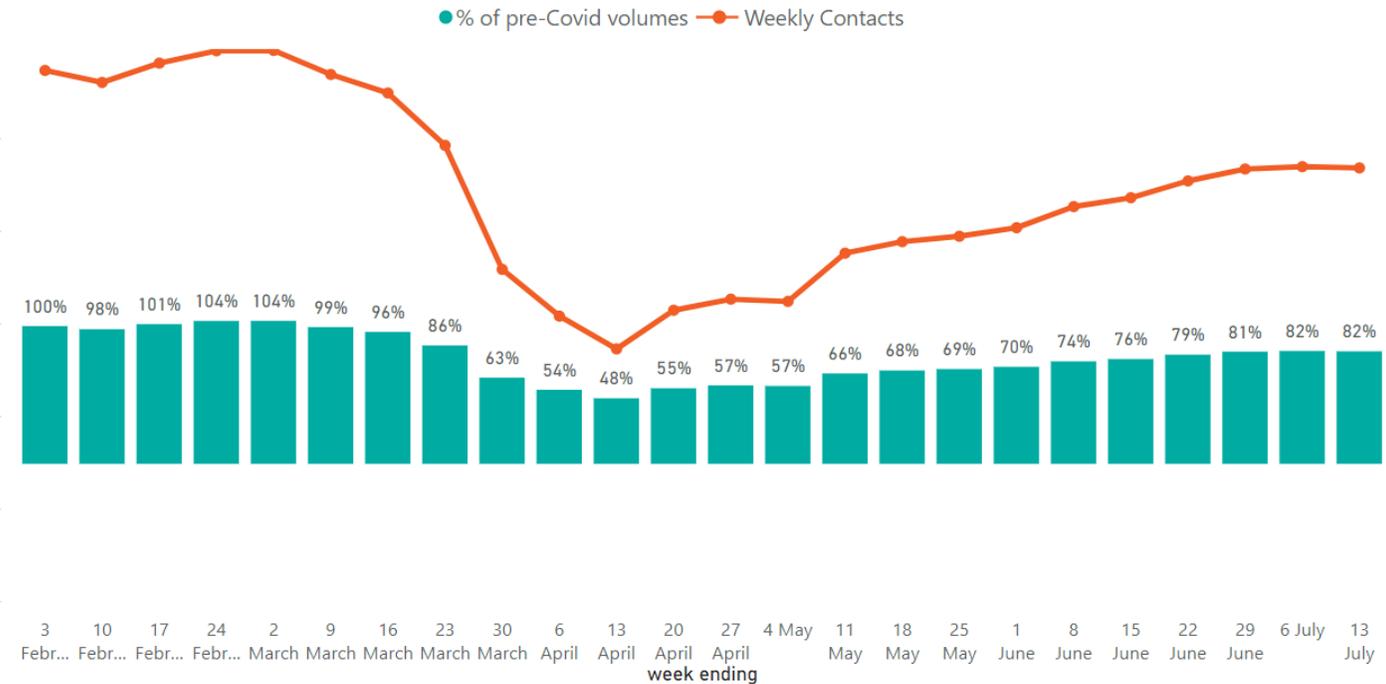
Roadside audience recovery has paused, with regional audiences at the same level as pre Covid and assets in suburban areas in metro markets reaching consumers at an increased rate

Restrictions in Melbourne have steadied roadside audience growth, with national audiences at the same level as last week.

70% of pre Covid-19 levels in Metro areas

100% of pre Covid-19 levels in Regional areas  
(+2.8% WoW)

82% of pre Covid-19 levels across oOh! Road locations



# Retail audience update

Audience recovery has also paused in retail environments, with regional audiences higher than pre Covid levels in the recent week.

Impact of Melbourne based restrictions contributed to a -0.7% WoW change

76% of pre Covid-19 levels in Metro areas

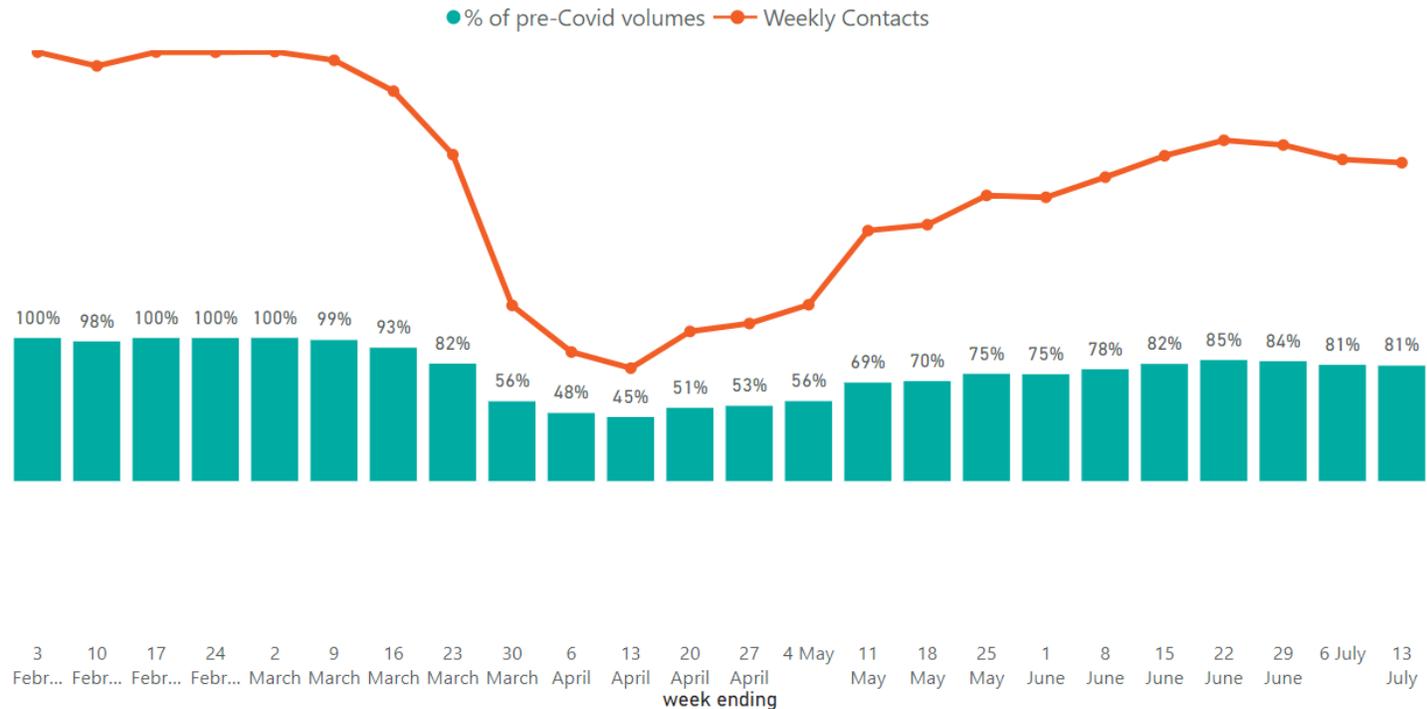
102% of pre Covid-19 levels in Regional areas

88% of pre Covid-19 levels in Local centres

88% of pre Covid-19 levels in Medium centres

76% of pre Covid-19 levels in Large centres

81% of pre Covid-19 levels across oOh! Retail locations

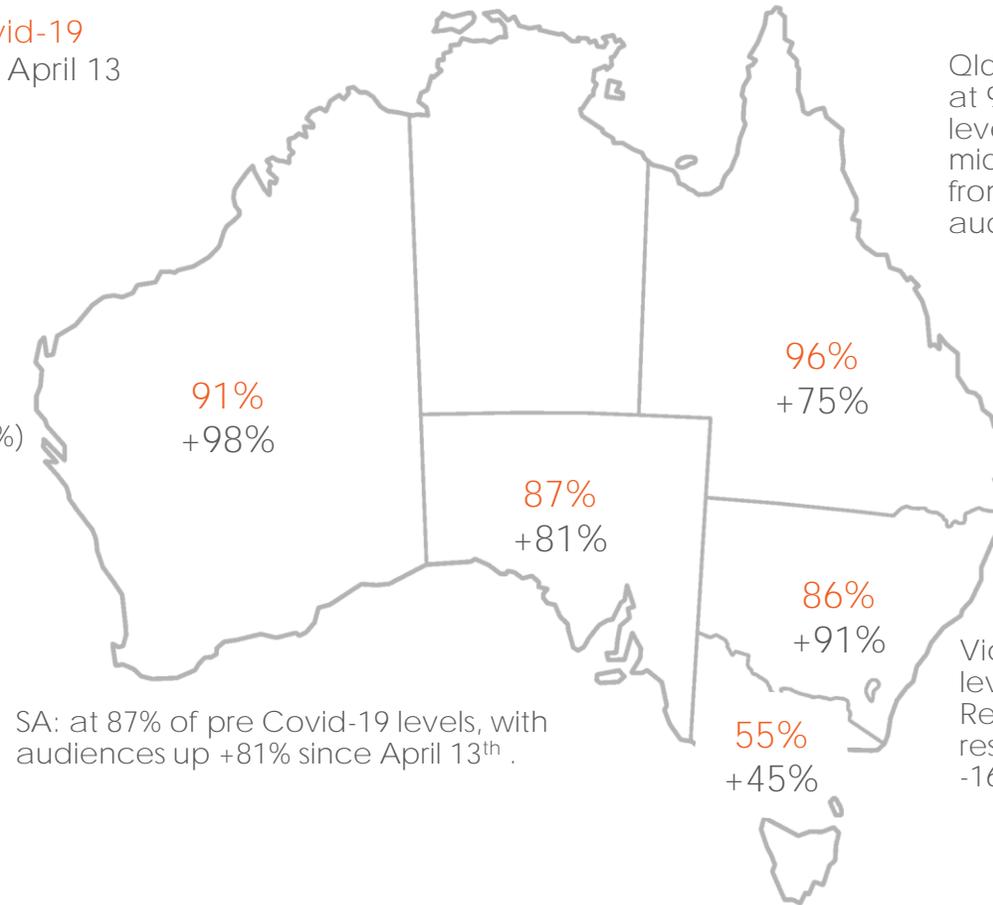


# State based audience update

State based results reflective of the relaxation or reintroduction of restrictions by region, with all states experiencing significant growth since mid April.

% vs. pre Covid-19  
Growth since April 13

WA: at 91% of pre Covid-19 levels and nearly double (up +98%) since April 13<sup>th</sup>.

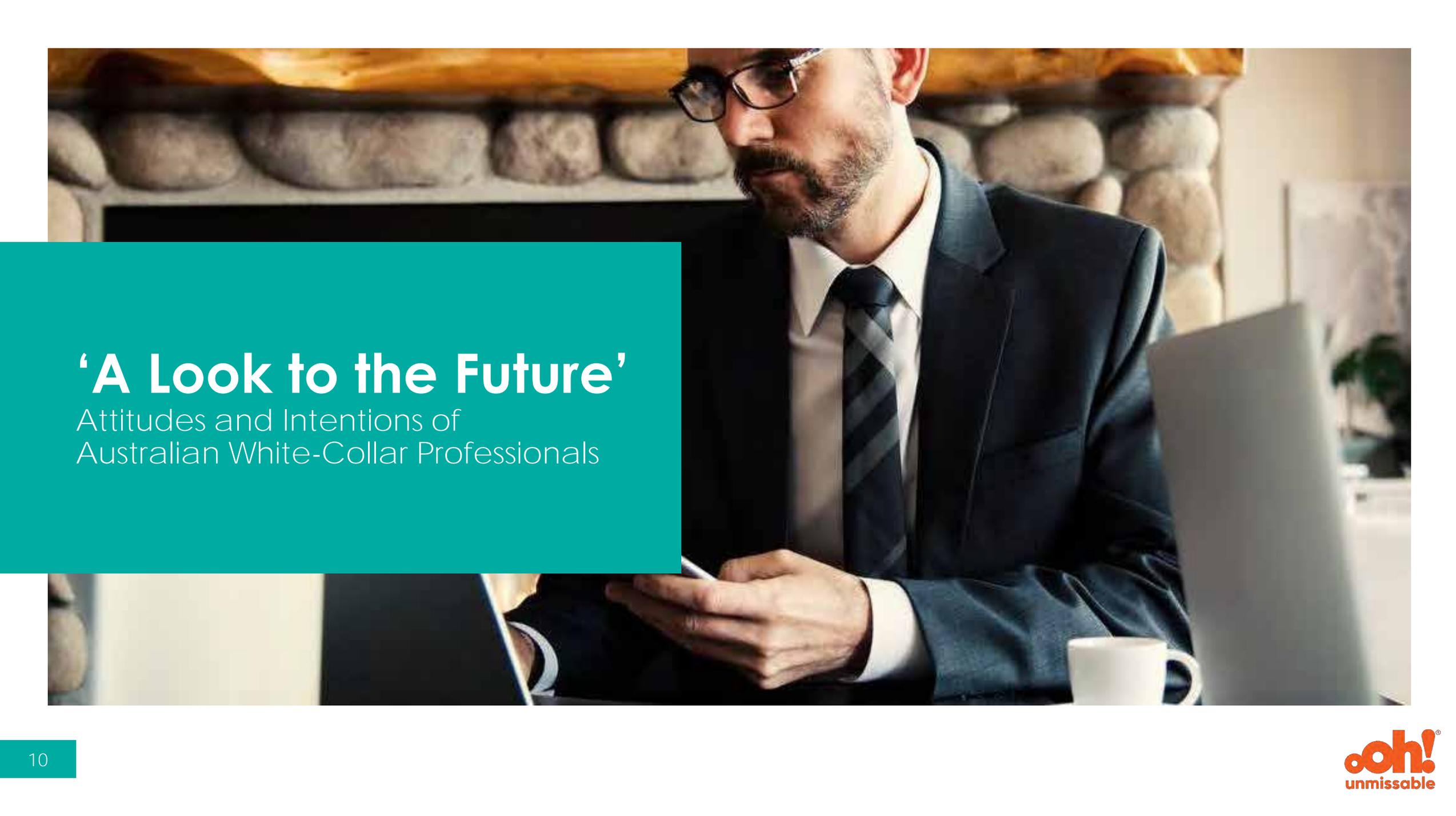


Qld: nearing full recovery at 96% of pre Covid-19 levels and up +75% since mid April, Qld benefited from the least drop in audience volumes.

NSW: at 86% of pre Covid-19 levels and up +91% since mid April.

SA: at 87% of pre Covid-19 levels, with audiences up +81% since April 13<sup>th</sup>.

Vic: at 55% of pre Covid-19 levels, up +45% since mid April. Recent re-introduction of restrictions in Melbourne saw a -16% WoW decline.

A man with a beard and glasses, wearing a dark blue suit, white shirt, and striped tie, is looking down at a smartphone in his hands. He is sitting at a desk with a laptop and a white mug. The background features a stone fireplace mantel.

# ‘A Look to the Future’

Attitudes and Intentions of  
Australian White-Collar Professionals

# Ahead of the Curve

As the majority of Australian states lift social distancing restrictions, Australia's major cities and hubs reemerge from the storm of Covid-19 outbreak, redefining what it means to work, live and play in these densely populated areas.

As key business and leisure hubs across the nation reopen, major cities welcome Australian White-Collar Professionals back to office towers and business destinations, albeit with adjustments in aid of maintaining tenant and visitor wellbeing whilst on premises.

This report takes a deep dive into Australian White-Collar Professionals return to the office, their view on workplaces of the future as well as their confidence in the Australian and World economy, their employment position and their confidence in Australian Businesses to bounce-back from this economic downturn.

This report also captures Australian White-Collar Professionals current and future intentions when it comes to their consumer wallet as well as their intentions to travel both domestically and abroad in the future.

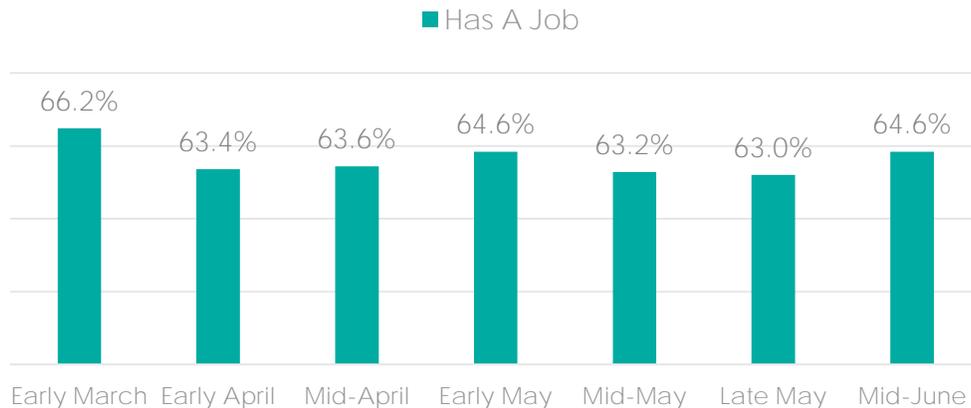


# Re-emerging Australian Professionals

Industries have enjoyed minimal interruption to operations since the mid-1800's when labour unions introduced '9-5 working hours', however Covid-19 outbreak has forced businesses, employers and employees globally to rethink how and where they partake in professional employment.



With the aid of the Australian Governments Job Keeper program, the Australian Bureau of Statistics reports the bulk of Australian jobs were maintained during the months of Covid-19 lockdown<sup>2</sup>



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 | Gen Z (16-24) n=267, Gen Y (25-39) n=777, Gen X (40-55) n=769, Baby Boomers (56-74) n=970, Pre Baby Boomers (75+) n=170, Australian White-Collar Professionals n=1,180. Australian White-Collar Professionals results shown above. Source: 2 Australian Bureau of Statistics, 4940.0 - Household Impacts of COVID-19 Survey, 10-15 June 2020. Source: 3 SMH, 'How Sydney is returning to work, step by sterilised, staggered step', 22nd June 2020. Source: 4 Roy Morgan, 'Hard to switch off work for many Australians working from home', 5th May 2020

However the Covid-19 outbreak did force a proportion of working professionals to adapt quickly to working from home, whilst others were left to continue with work from the office.

- Across 1st May to 3rd June, 33% of Australians were working from home as opposed to the office<sup>1</sup>
- However according to commercial property operator Dexus, a quarter of Dexus tenants kept working in their offices during lockdown<sup>3</sup>
- Recently the Australian Bureau of Statistics confirmed that 77% of Australians had reported they had already returned or would be returning to their workplace in person shortly<sup>2</sup>
- 66% of working Australians expected to spend about the same amount of time or more time at their workplace as they did prior to the Covid-19 restrictions<sup>2</sup>

During lockdown, some generational cohorts were particularly eager to get back to work in the office



Australians under 40 and Baby Boomers aged 56-74 were keen to return to the office, 62% respectively<sup>1</sup>

Those on the eastern seaboard were particularly keen to return to the office

	NSW	VIC	QLD	SA & WA
	60%	58%	65%	56%



Interestingly 52% of those working from home say they **"find it difficult to switch off from work" while at home**, supporting a return to the office setup<sup>4</sup>

# Workplace Of The Future

For Australian White-Collar Professionals returning to work in the office, there is an expectation that adjustments will be made to workplaces to ensure both tenant and visitors wellbeing.

Australian White-Collar Professionals expect workplaces of the future to include...

- 71% hygiene items supplied e.g. hand sanitizer<sup>1</sup>
- 57% increased amount of cleaning on premises<sup>1</sup>
- 1 in 3 automatic equipment/items to reduce the spread of germs e.g. automatic doors, hand washing dispensers<sup>1</sup>
- 30% No hot-desking<sup>1</sup>

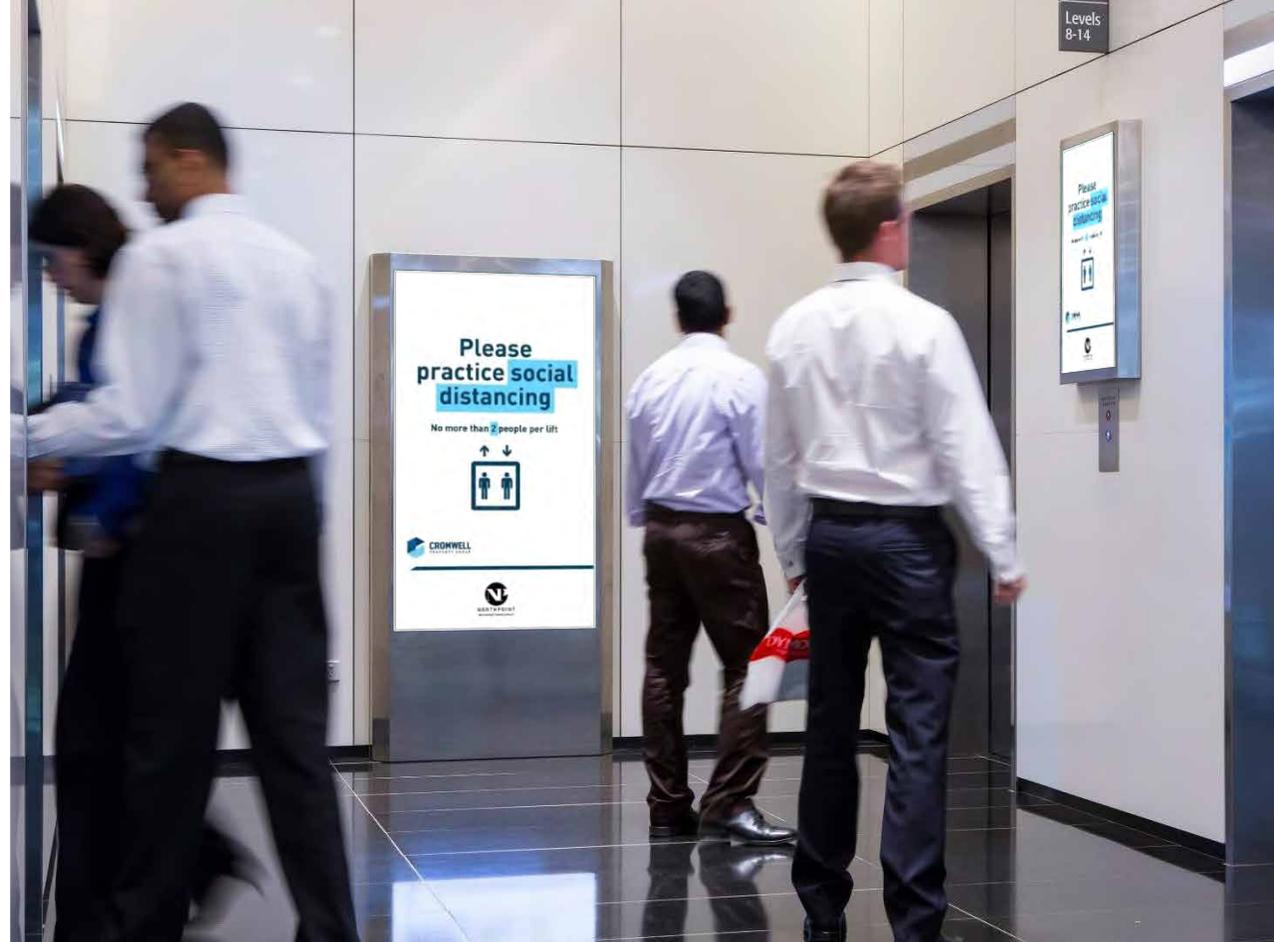


Australian White-Collar Professionals also expect more from their employers, with 61% in-support of employers promoting sick employees to stay home<sup>1</sup>

When they are in the office they are eager to reconnect with colleagues...



78% of those under 30 and 87% of those aged 50-64 wish to have more face to face meetings in the future, whilst slightly less for those aged 30-49 with 71% keen to have more face to face meetings with colleagues and business stakeholders<sup>2</sup>



Despite the need to reconnect...



7 in 10 are willing to keep social distance from others<sup>1</sup>



87% intend to maintain personal hygiene e.g. wash hands for extended amount of time and use hand sanitizer<sup>1</sup>

# Commuter Journey

With society re-emerging, Australian White-Collar Professionals are looking forward to reconnecting with tasks previously taken for granted such as their commute to and from work. And whilst Covid-19 has made some changes to the way they commute, it remains that the commute continues to be seen as 'me-time', connecting home-life in the suburbs and work-life in major city hubs.

## Once back to their typical routine...



7 in 10 intend to get out and about more



79% agree they will feel generally happier to be out and about<sup>1</sup>



72% agree they will feel more appreciative of once mundane day-to-day activities that allow them to be out and about, for example commuting to work<sup>1</sup>

Once all social distancing restrictions have been removed, during the commute to/from work Australian White-Collar Professionals expect to feel...



2 in 3 relaxed<sup>1</sup>



70% productive<sup>1</sup>



76% alert<sup>1</sup>

## And as they return to their typical routine...

- 8 in 10 agree they will be generally more alert and aware of their surroundings<sup>1</sup>
- 2 in 3 agree they will be more open to messages about products/services available in their local area<sup>1</sup>
- 62% are eager to be out for longer amounts of time<sup>1</sup>

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 | Gen Z (16-24) n=267, Gen Y (25-39) n=777, Gen X (40-55) n=769, Baby Boomers (56-74) n=970, Pre Baby Boomers (75+) n=170, Australian White-Collar Professionals n=1,180. Australian White-Collar Professionals results shown above.



# Here and Abroad

**With Qantas Business Lounges reopening this month, followed by Qantas Club Lounges as state restrictions lift, Australian White-Collar Professionals are eager to get back in the sky for work trips.**

Qantas CEO Alan Joyce forecasts domestic passenger capacity to be at 40% to pre Covid-19 levels by end of July 2020, increasing to 70% within the year<sup>2</sup>

When it comes to travelling for work the majority of Australian White-Collar Professionals are happy to travel by air across Australia

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



82% are comfortable to travel domestically for work purposes<sup>1</sup>



Once international borders reopen 77% of Australian White-Collar Professionals are comfortable to travel to international destinations for business requirements in the future<sup>1</sup>

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 | Gen Z (16-24) n=267, Gen Y (25-39) n=777, Gen X (40-55) n=769, Baby Boomers (56-74) n=970, Pre Baby Boomers (75+) n=170, Australian White-Collar Professionals n=1,180. Australian White-Collar Professionals results shown above. Source: 2 Qantas, Qantas and Jetstar increase domestic flying as restrictions ease, 4<sup>th</sup> June 2020 & ABC recording of Alan Joyce speech to media, 24<sup>th</sup> June 2020

# Future Outlook

Despite concerns surrounding the future of the Australian workforce, Australian White-Collar Professionals are confident the economy and businesses will bounce-back, and are willing to undergo further education to ensure they remain competitive in the workforce of the future.

Prior to Covid-19, 80% of the workforce was predicted to be in a less secure position by 2030<sup>2</sup>. As a result of the uncertainty of a post Covid-19 world, Australian White-Collar Professionals are looking to upskill to keep-up in the workforce of the future.



Once all social distancing restrictions are removed over 1 in 5 are looking to take-up further education, 3% points higher than all Australians<sup>1</sup>

However despite future uncertainties towards the workforce, Australian White-Collar Professionals are confident in their employment, the economy and the ability of Australian Business to bounce-back post economic downturn.



84% expect their confidence towards Australian businesses bouncing back will be maintained or improve, with Australian White-Collar Professionals being 1.5x more likely to expect their confidence to improve compared to all Australians<sup>1</sup>



oh! data science™

## Once all social distancing restrictions are removed...



81% expect their employment position to be maintained or improve, on par with all Australians<sup>1</sup>



84% expect their ability to pursue their career goals will be unimpacted, on par with all Australians<sup>1</sup>



66% expect their confidence in the Australian Economy to be maintained or be positively impacted, on par with all Australians<sup>1</sup>



6 in 10 expect their confidence in the World Economy to be maintained or be positively impacted, although 3% points less confident than all Australians<sup>1</sup>

# Money Power

**Australian White-Collar Professionals confidence in their spending power translates to a higher propensity to shop and travel compared to the average Australian.**

## Once all social distancing restrictions are removed...

 77% expect their discretionary income i.e. ability to buy products/services will be maintained or increase, on par with all Australians<sup>1</sup>

 1 in 2 intend to buy products/services they had postponed, 1.2x more likely than all Australians<sup>1</sup>

## Purchase intention extends across a variety of categories...

 92% intend to buy banking and finance products<sup>1</sup>

 85% intend to buy travel/holiday items<sup>1</sup>

 88% intend to buy health products<sup>1</sup>

 87% intend to buy electronics<sup>1</sup>

 82% intend to buy large home appliances<sup>1</sup>

 83% intend to buy entertainment products e.g. books, games<sup>1</sup>

 81% intend to buy home improvement items<sup>1</sup>

 2 in 3 intend to buy lottery tickets<sup>1</sup>



6 in 10 agree they intend to shop more at physical stores, 1.6x more likely to shop at bricks and mortar locations compared to buying more online<sup>1</sup>

Australian White-Collar Professionals are also keen to return to wining and dining



83% intend to visit cafes, pubs and venues the same amount or more frequently compared to pre Covid-19 levels once social distancing restrictions are removed<sup>1</sup>



Over 2 in 3 intend to eat out the same amount or more frequently compared to pre Covid-19 levels<sup>1</sup> once social distancing restrictions are removed<sup>1</sup>

## And their spending power also extends to large ticket items...



Over 1 in 4 intend to buy a car, 1.3x more likely than all Australians<sup>1</sup>



1 in 5 intend to buy a house or apartment, 1.4x more likely than all Australians<sup>1</sup>



2 in 5 plan to holiday in New Zealand when borders reopen, 1.2x more likely than all Australians<sup>1</sup>



62% plan to travel to holidays destinations across Australia<sup>1</sup>

Contact your oOh!  
Representative for an  
Unmissable SmartReach™  
solution targeting  
Professionals today!



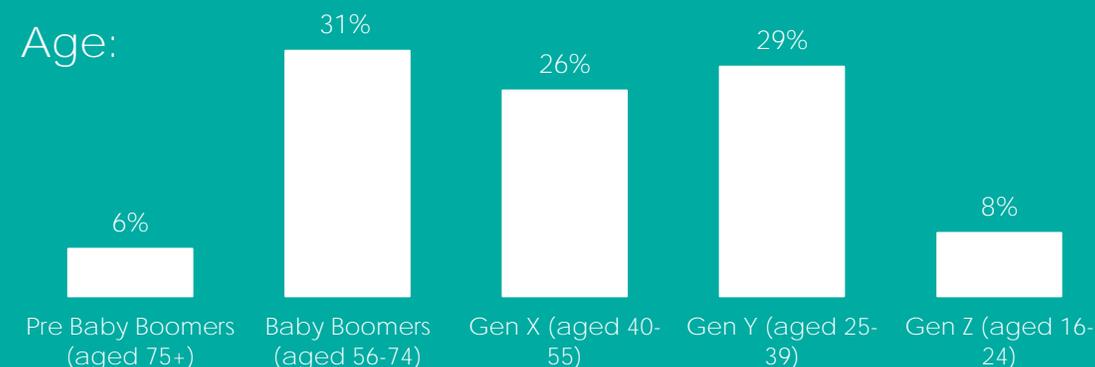
**ooh!**<sup>®</sup>  
**unmissable**

# 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 <sup>th</sup> -20 <sup>th</sup> May, 2020 Wave 3: 1 <sup>st</sup> – 3 <sup>rd</sup> June, 2020

## Wave 3



## Location:

