

oOh!media Covid-19 Pulse Report

Getting you ahead of the curve

Monday 21st September 2020

Edition 20 – Australian states at a glance: South Australia market spotlight

Making Brands Powerfully Unmissable



Ahead of the Curve

As the nation continues to welcome Spring and an opportunity for localized holidays across the upcoming October Long Weekend, most Australians continue to enjoy destinations outside the home with fewer/low active Covid-19 cases in their communities.

With encouraging news coming out of Victoria of declining new case numbers and the slight relaxing of restrictions extending time spent outdoors, Victorians continue to gain hope from neighbouring South Australia and life on the other side of the outbreak curve.

With South Australia declared a success in early April 2020 given the states' quick containment of Covid-19 as part of the initial nationwide lockdown, South Australia has at the opportunity to reopen their state economy quicker than bordering states. Professionals are reuniting with colleagues at their place of employment, state-based travel to SA's natural wonders has recommenced, and confidence towards future discretionary spend levels sit above those observed pre Covid-19.

As a continuation of our state-specific insights series, this week's report takes a deep dive into South Australians and their confidence towards the future of the state, their employment and financial wellbeing, and the trajectory of business performance. This report also takes a look into resident's future intentions when it comes to how they plan to spend their time and money across key categories inside and outside the home.



Trends covered

Here and Now:

National consumer confidence update

A Look to the Future:

Updated spending behavior and consumer attitudes and intentions data for SA residents vs. the national average

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Here & Now

National view: A surge in Consumer Confidence in September!

The Westpac-Melbourne Institute Index of Consumer Sentiment surged by 18% from 79.5 in August to 93.8 in September, with the index now just 1.6% below the average six-month period prior to the emergence of COVID-19 on home soil¹.

Current Consumer Confidence compared to June 2020 state reopening's

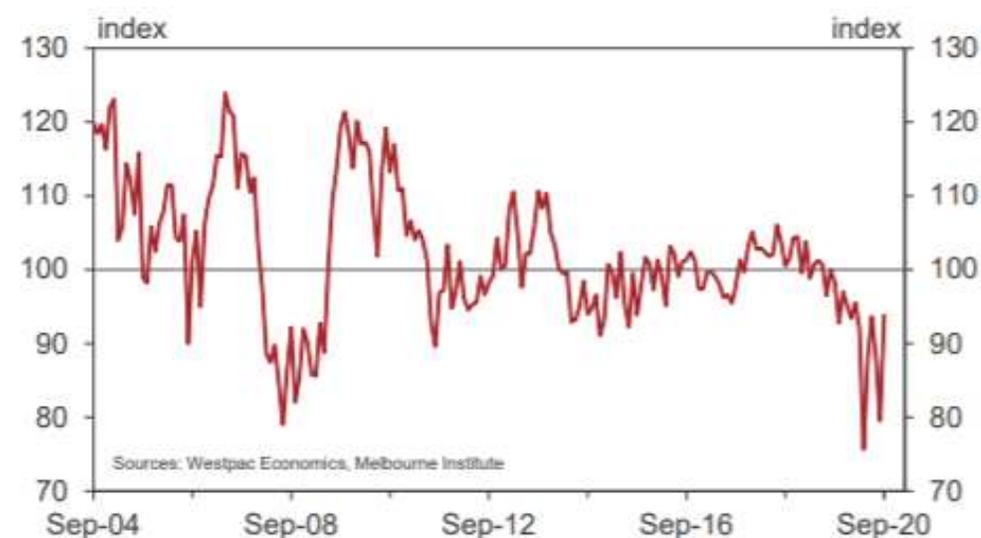
June 2020 across the nation saw the reopening of states prior to Victoria's second wave of outbreak. By comparing September 2020 confidence by state compared to June, **consumer confidence is tracking ahead for much of the nation¹** with a resurgence in confidence anticipated with the further relaxation of current restrictions.

QLD	NSW	VIC	SA	WA
+2%	+0%	-5.6%	+3.8%	+11.2%

Consumer Confidence extends to the future

Westpac-Melbourne Institute Index of Consumer Sentiment in September 2020 also reports **YOY uplift for confidence towards the horizon** with 'Family Finances vs. a year ago' up 3.7%, 'Family Finances next year' up 4.5% and '**Economic conditions** over the next 5 years' up 2.1% compared to same time last year¹.

Consumer Sentiment Index





**A Look to the Future:
Australian States At A Glance:
South Australia Market Spotlight**

Current State Of Play – South Australia

Leading into 2020 South Australia was in a position of building momentum, with rising Gross State Production and Household Consumption Expenditure experienced across the state¹. Fast forward to early signs of Covid-19 outbreak on home soil, South Australia was quick to exterminate the potential health threat in the community, resulting in the 1.76 million residents calling South Australia 'home'² enjoying a head-start in regaining daily routines and social activities outside the home.

SA Covid-19 Community Outbreak

With the **third highest rates of testing** conducted nationally, long periods of no new Covid-19 cases and the **lowest positive case test rates** recorded along with Queensland³, **South Australia** has been in an enviable position on the other side of the outbreak curve for some months.



SA State Mobility to outdoor destinations

With no active cases of Covid-19 in the state³ life in **South Australia has recovered** from initial nation-wide lockdowns earlier in the year. Google mobility data this month reports an almost full **return to workplaces**, as well as **visitation to retail, grocery and parks above** pre Covid-19 levels⁴.



SA Travel Modes

Apple South Australia Mobility data for 11th September reports **driving and walking tracking ahead** compared to Jan 2020 levels, +19% and +10% respectively. Additionally **travel by transit** is only marginally down at -3% compared to patterns recorded at the start of the year⁵.



South Australian's are returning to places of work!

Audiences in Adelaide CBD at 80% of 2019 levels, +40% higher vs. the national average

Confidence in the south

With Australian states in recovery post initial nation-wide lockdowns, August has seen an uptick in businesses conditions in South Australian. And as the state continues build momentum along with other key domestic economies, South Australia's residents are getting behind actions taken by the State Government to ensure community wellbeing.

NAB State Economic August 2020 Overview reports **positive business conditions in SA** for the month prior, the **second highest across the nation** behind Tasmania².

Across the three months ending July 2020, **61% of SA residents report their jobs haven't been impacted by Covid-19**, 5% points higher than the national figure and sharing top-position with Queensland¹.

Commsec using ABS data reported **payroll jobs in SA rose 1.1%**, for the period 8th-22nd August 2020, the **second highest gain across the nation** behind Tasmania³.

And looking to the future, **94% of SA residents are confident their employment position** will be maintained or improve, 4% points **higher than the national average** and the **highest confidence** across the states¹.



SA residents leading confidence in their State!

At the end of April 2020 as case numbers drastically dropped across South Australia, **State Premier Steven Marshall** had the **backing of 82% of local voters** with regards to the handling of Covid-19⁴.

More broadly across the three months ending July 2020, **94% of SA residents** say their **confidence has maintained or grown towards the State Government given their response to Covid-19**¹.

Confidence held by SA residents towards the State Government is **8% points higher than the national average** and the **highest confidence across the nation**, a position shared equally with Western Australia¹.

The Joy of Outdoor Destinations

With South Australians in an enviable position, effectively eliminating widespread community outbreak of Covid-19 very early in the nations outbreak timeline, residents across South Australia continue to take advantage of destinations outside the home with very little restrictions still imposed.

With SA oOh! roadside audience volumes at **94% of 2019 levels** for w/e 7th September 2020², audiences within the state continue to track towards YoY mobility levels.

So too are SA residents continuing to take full-advantage of the retail experience with **oOh! Retail audiences in SA** at **93%** for w/e 7th September 2020 compared to same time last year².

Compared to before the Covid-19 outbreak, SA residents agree...



74% are generally **more appreciative of the outdoors** and outdoor destinations¹



6 in 10 are eager to be **out for longer amounts of time**¹



7 in 10 are **more appreciative of once mundane day-to-day activities that allow me to be out and about** such as commuting to work, 4% points higher than the national average¹



76% are **more alert and aware** of their surroundings¹



78% are **generally happier** to be out and about¹

Compared to pre Covid-19 levels, SA residents intend to maintain or increase visitation to destinations outside the home ...



81% visit **entertainment precincts** e.g. cinema¹



77% attend **live sports events**¹



81% attend **state-based festivals** and/or events¹



86% visit **cafes, pubs and venues**¹

The Natural Beauty of SA

With the announcement of South Australian state borders reopening to ACT residents without mandatory 14-day quarantine, the state continues to encourage and welcome visitation across most Australian states ahead of the October Long Weekend. With sweeping landscapes formed from mother nature, travel is high on the agenda for those in South Australia.

SA Tourism Industry bounce-back

Historically, SA's **share of international tourists has been much lower** than its share of domestic tourists. With the state tourism industry protected by the global impacts of Covid-19 a **quicker bounce-back is expected** in the industry compared to the position of other states².

Since May 2020, with the reopening of the state post lockdown, there has been an **increase in tourism activity**; Big 4 reported that **SA had the highest surge** in interest and bookings across the country, a boutique luxe villa complex in the **Adelaide Hills had 100 bookings in 10 days**, and campground bookings into the **National Parks website** were **up 120%**³.

*"There's been a slight **silver lining to the COVID-19 for regional tourism**. People who have traditionally, in winter, travelled overseas are now saying: 'Well, look, let's make this an annual trip to **outback South Australia** or an annual **trip to regional South Australia**. There's an uptick at the moment in terms of **transactions in regional South Australia**, but that could flow on to a permanent uptick"⁴, State Premier Steven Marshall in September 2020*

South Australian Road Trips

64% of SA residents are **keen to travel and explore** their state, 7% points higher than the national average, making SA residents most keen to explore their own backyard, a position shared equally with Queenslanders¹.

Half of all SA residents intend to take **long road trips of 2+ more nights** stay as restrictions continue to ease¹.

In SA w/e 7th September 2020, **spend on fuel** continues to track to pre Covid-19 levels with spend for road related travel at 94% of baseline⁵.

Interestingly, **SA residents are 18% less likely** than the average Australian to be open **to travel interstate**, with only 1 in 3 SA residents keen to explore another state/s within Australia when easing restrictions are announced¹.

Australians across the border keen to travel to SA

With the announcement of borders reopening to most Australians without the need to quarantine, Australians outside the state are keen to explore SA...



6 in 10 Australians living outside SA are **planning to holiday in another Australian state** in the next 12 months¹.



Over half of Australians living outside the state **would be happy to travel to South Australia** with easing border restrictions¹.

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 Wave 4: 24th - 28th July 2020 | Research Panel: Dynata | Australians aged 16+, n=3,726, Wave 1: n=2,212 / Wave 2: n=423/ Wave 3: n=318/ Wave 4: n= 773. All SA reported above n=278. Source: 2 ABC.com.au, Why South Australia could lead the nation in economic recovery from coronavirus, 7th May 2020. Source: 3 Mumbrella, South Australia welcomes people back as domestic tourism becomes a possibility, 18th May 2020. Source: 4 ABC.net.au, \$20 million fund to boost SA tourism industry's 'silver lining' coronavirus recovery, 13th September 2020. Source: 5 Dspark data, Roadside locations, week ending Sept 7th 2020 vs. same week 2019.

Big-Ticket Purchases

South Australians optimism is reflective in current purchasing behaviours across key categories and their future intentions when it comes to big-ticket purchases.

Money Power

Looking to the future, 83% expect their **discretionary income** i.e. ability to buy products and services **will be maintained or increase**, 3% points higher than the national average¹.

SA Property Market

Properties are selling, with the **Adelaide clearance rate** the **second highest across the nation** for weekend 12th/13th September²

"We are in a **better position** than other states. Our market is **less reliant on foreign investment**, it's **less reliant on investor activity**" Real Estate Institute of SA GM, Andrew Shields³

With eased restrictions, **SA residents aged under 40...**



Over 1 in 5 intend to **buy a new home or apartment**¹.



Over 1 in 10 intend to **move to a regional area**, as opposed to the city¹.



Other big purchases on the agenda

In the "new-normal" once all social distancing restrictions are removed and borders reopen to all, SA residents intend to...



Over 1 in 4 intend to **buy a new car**¹.



Half intend to **plan a holiday in an overseas destination/s**, once international borders permit¹.

Retail Wallet of SA Residents

Over the past 4 months South Australians have been transacting at levels higher than that recorded before Covid-19 hit Australian shores. Not only is this visible across big-ticket items but also extends across smaller purchases in categories both in and outside the home.

SA residents are **4.9x more likely** to intend to **shop more at physical stores** in the future compared to reducing purchases at retail destinations¹.

63% of SA residents intend to buy **more Australian owned/made** products and/or services¹.

In the future **SA residents intend to purchase...**



89% **banking and financial products**, of which 64% intend to go to a branch only or blend with online¹.



80% **health products**, of which 68% intend to buy instore for every purchase¹.



93% **pharmaceuticals**, of which 82% intend to buy instore only¹.



76% **home improvements**, of which 82% intend to buy instore only¹.



80% **large home appliances** e.g. fridges, stove, of which 77% intend to buy instore only¹.



85% **electronics**, of which 64% intend to buy instore for all purchases¹.



78% **alcohol**, of which 79% intend to be bought instore only¹.



6 in 10 **lottery tickets**, of which 76% intend to buy instore only or a blend of instore and online¹.

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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.

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=3,726 Wave 1: n= 2,212 Wave 2: 423 Wave 3: 318 Wave 4: 773
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 4: 24 th - 28 th July, 2020

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Wave 4



Location:

