

oOh!media Covid-19 Pulse Report

Getting you ahead of the curve

Tuesday 29th September 2020

Edition 21 – Australian states at a glance: NSW & ACT market spotlight

Making Brands Powerfully Unmissable

Ahead of the Curve

With glimmers of 'summer-like' weather gracing parts of the country, this week kicks-off spring school holidays for NSW, ACT, SA and WA school students who join those in Queensland and Victoria, as well as Tertiary students nationally, on a much needed break! And with the countdown to Labor Day in sights, Australians outside of Victoria are taking advantage of the warmer weather and no or low community Covid-19 cases with road-trips and planned travel to some of Australia's most iconic coastal and regional destinations.

And while school holidays and the upcoming long weekend takes a slightly different shape for Victorians compared to previous years, life on the other side of the outbreak curve is almost in arms-reach with easing restrictions and lower new case numbers.

As a continuation of our state-specific insights series, this week's report takes a deep dive into ACT and NSW residents as they forge-ahead, with ACT recording 70+ days since the last reported case of Covid-19 and NSW with very little threat of cases in the community as it continues to be the largest driver of the Australian economy, generating approx. a third of national GDP.

This week's reports takes a look into how residents in NSW and ACT have adjusted behaviours to ensure the continued safety and wellbeing of residents as they continue to travel to destinations outside the home, their current spending behaviour above pre Covid-19 levels, their sentiment when it comes to the future of the world, the nation and Australian businesses, and a glimpse into their future plans when it comes to their consumer wallet and time spent outside the home.



Trends covered

Here and Now:

Year on Year Out of Home audience volumes and movement trends

A Look to the Future:

Updated spending behavior and consumer attitudes and intentions data for NSW/ACT residents vs. the national average

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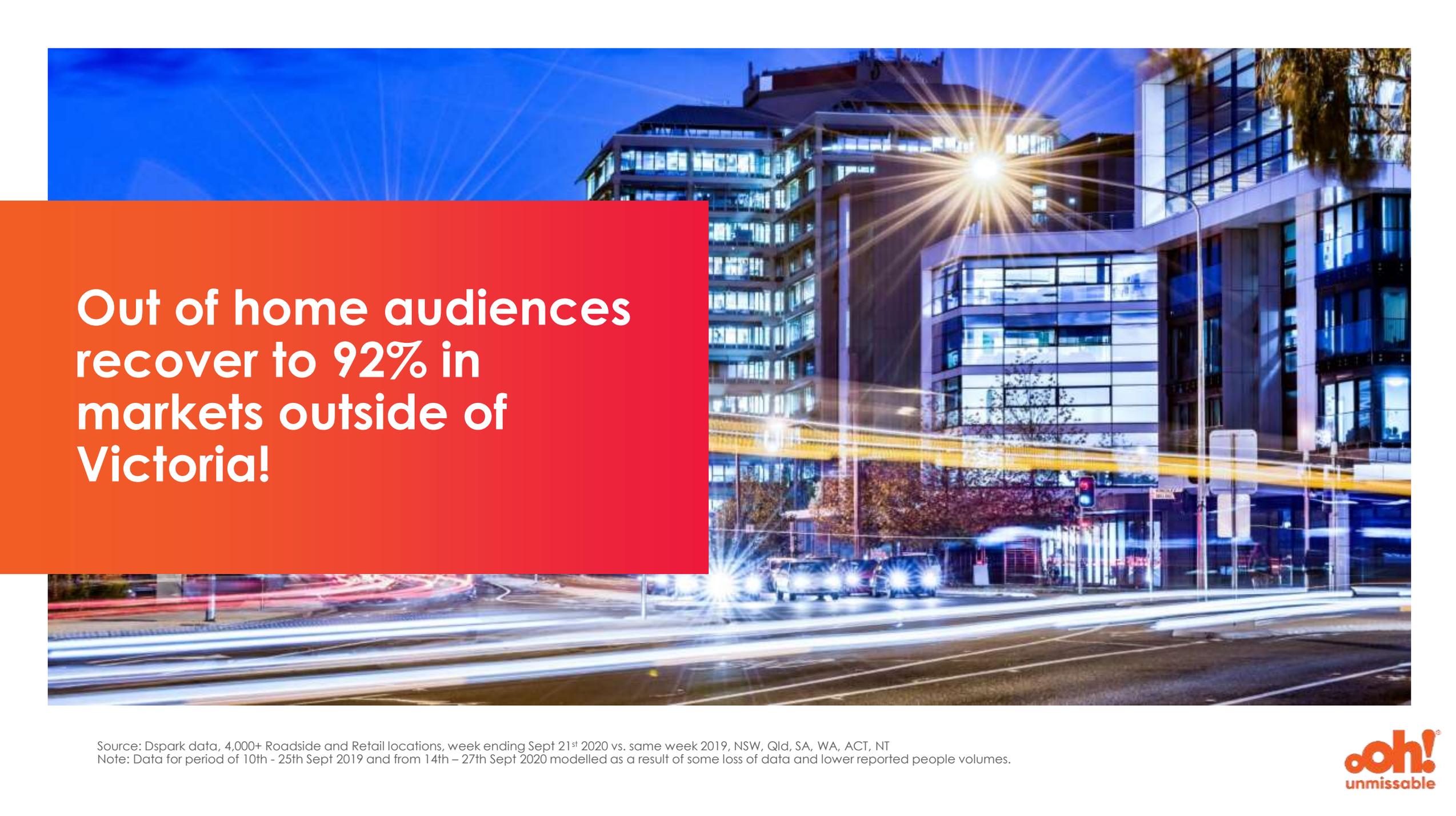
Here & Now

Notification of mobile data network upgrades

Due to upgrades across our audience mobility data providers from **10th - 25th Sept 2019** and **14th – 27th Sept 2020**, oOh! and DSpark have identified that outages over the upgrade periods resulted in some loss of data and lower reported people volumes over those periods.

Using data points across 4,000+ locations nationally over 80+ weeks from 2019 through 2020, **oOh!DataScience have implemented a robust method to model total volumes across impacted weeks to adjust for loss of data.**

Data outputs and modelled volumes have been validated.

A nighttime photograph of a city street intersection. The scene is illuminated by streetlights and building lights, creating a vibrant blue and white color palette. Light trails from moving vehicles are visible in the foreground. A prominent red rectangular overlay is positioned on the left side of the image, containing white text. The background features modern multi-story buildings with lit windows and a pedestrian bridge crossing the street.

**Out of home audiences
recover to 92% in
markets outside of
Victoria!**

Source: Dspark data, 4,000+ Roadside and Retail locations, week ending Sept 21st 2020 vs. same week 2019, NSW, Qld, SA, WA, ACT, NT
Note: Data for period of 10th - 25th Sept 2019 and from 14th – 27th Sept 2020 modelled as a result of some loss of data and lower reported people volumes.

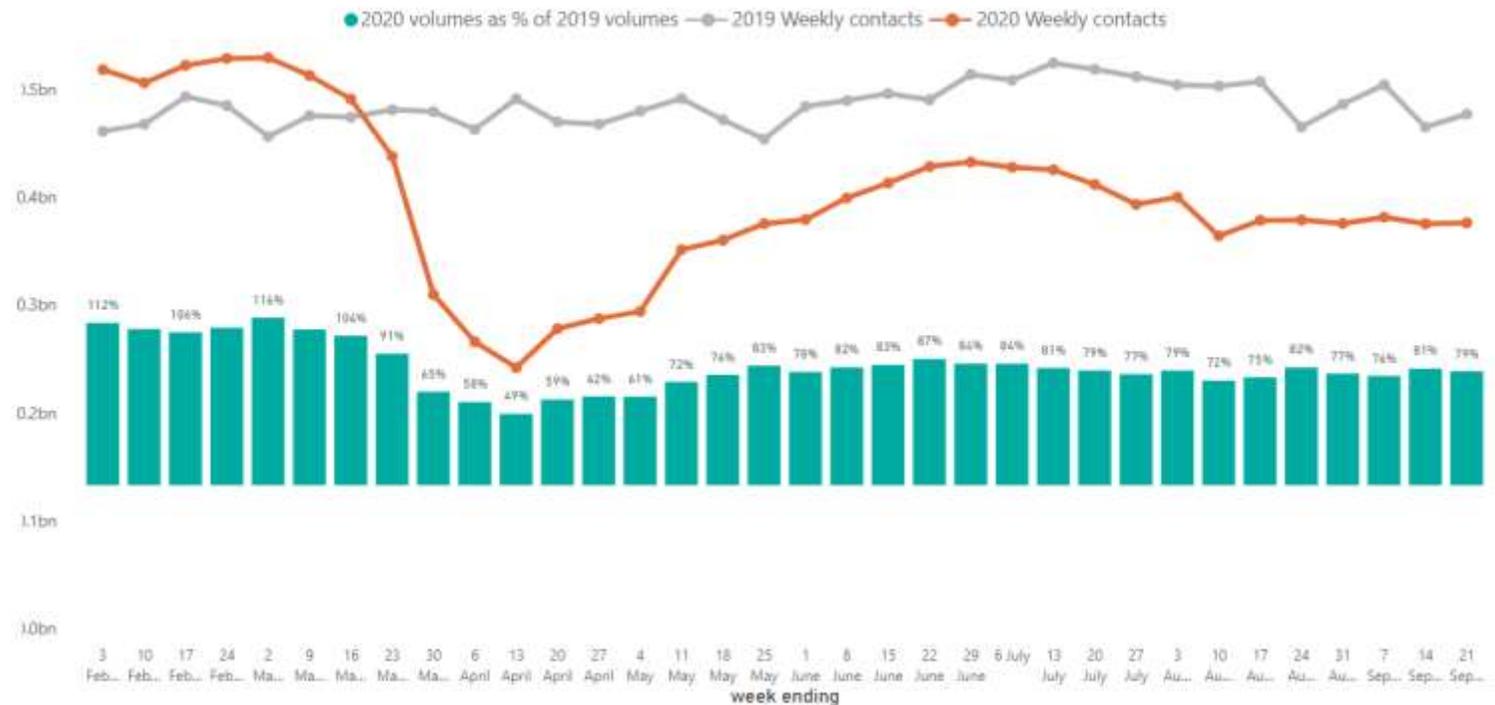
National roadside and retail audience at 79% of 2019 levels

Consistent roadside and retail audience levels over the past 6 weeks saw audience levels remain at near 80% recovery to 2019 levels

- Roadside and Retail audiences delivered **376mil contacts** nationwide in w/e 21st September
- In **Victoria**, with a path forward and lower new Covid-19 cases, **audiences grew for the fourth week running, up +3.9% to 41% of 2019 levels**
- **Regional markets** continue to perform strongly, up week on week to **96%** of 2019 levels as life returns to normal and in lead up to school holidays and an influx of travel within state across much of the country

National Retail and Roadside

79% of 2019 levels



Source: Dspark data, Roadside and Retail locations, week ending Sept 21st 2020 vs. same week 2019
 Note: Data for period of 10th - 25th Sept 2019 and from 14th - 27th Sept 2020 modelled as a result of some loss of data and lower reported people volumes.

Six of seven states and territories at 92% recovery

With limited new Covid-19 cases, life returns to normal across the majority of the nation, with audiences back to 92% of 2019 levels

Across NSW, Qld, SA, WA, ACT and NT....

Roadside audiences at **91% yoy** and up nearly 2% WoW as regular commute and trip making patterns resume

Retail audiences at **93% yoy** as a return to the in store shopping experience continues. Visitation to **Local and Medium centres** hit **95%** yoy

Regionally, audiences at 97% of 2019 levels

86% of 2019 levels in NSW

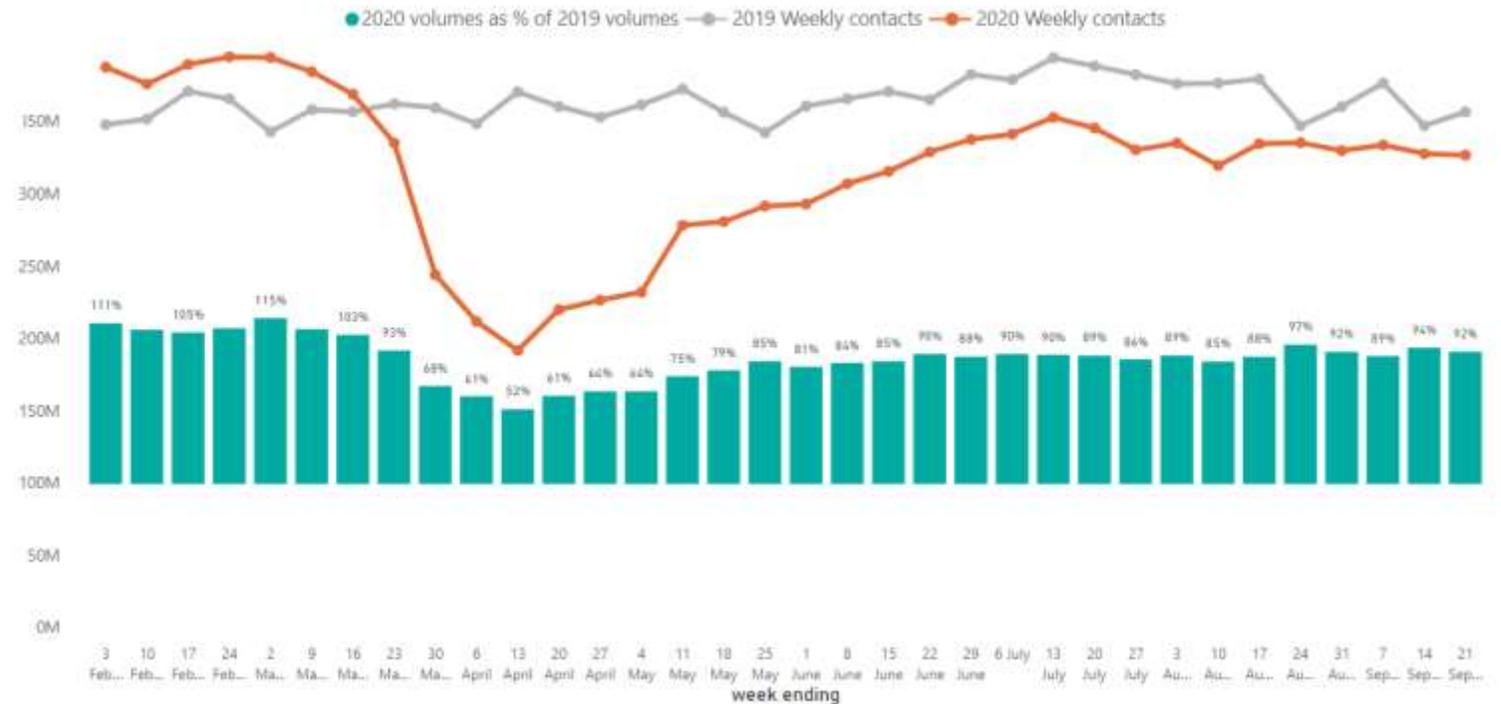
97% of 2019 levels in Qld

94% of 2019 levels in SA

95% of 2019 levels in WA

87% of 2019 levels in ACT & NT

92% of 2019 levels in NSW, Qld, SA, WA, ACT & NT



Source: Dspark data, Roadside and Retail locations, Qld, SA, WA, ACT, NT, week ending Sept 21st 2020 vs. same week 2019.
 Note: Data for period of 10th - 25th Sept 2019 and from 14th - 27th Sept 2020 modelled as a result of some loss of data and lower reported people volumes.

Regional audiences continued recovery drives weekly roadside growth

National roadside audience recovery at **81%** of 2019 levels for the past 2wks, with the network up 2% week on week in w/e 21st September

In markets **outside of Victoria** roadside audience recovery continues, hitting **91%** of 2019 levels. In **suburban metro areas outside of Melbourne** audience recovery hit **88%**.

Regionally, audiences near 2019 levels and in metro areas **suburban** assets continue to see an above average return

72% of 2019 levels in Metro areas

94% of 2019 levels in Regional areas

74% of 2019 levels in Suburban areas

59% of 2019 levels in CBD areas

81% of 2019 levels across oOh! Road locations



Source: Dspark data, 3,200 Roadside locations nationally, week ending Sept 21st 2020 vs same week 2019
 Note: Data for period of 10th - 25th Sept 2019 and from 14th - 27th Sept 2020 modelled as a result of some loss of data and lower reported people volumes.

Retail audiences up +3% week-on-week

Retail audiences at **76%** of 2019 levels across the oOh! Retail network in w/e 21st September

In **markets outside of Victoria** audience return continues, reaching **93% yoy** as Australians return to regular shopping habits.

Retail audiences in **Victoria** have grown for the past 5wks, and up +3% across **local and medium centres** in the past week

Regional audiences fully recovered

70% of 2019 levels in Metro areas

76% of 2019 levels in Local centres

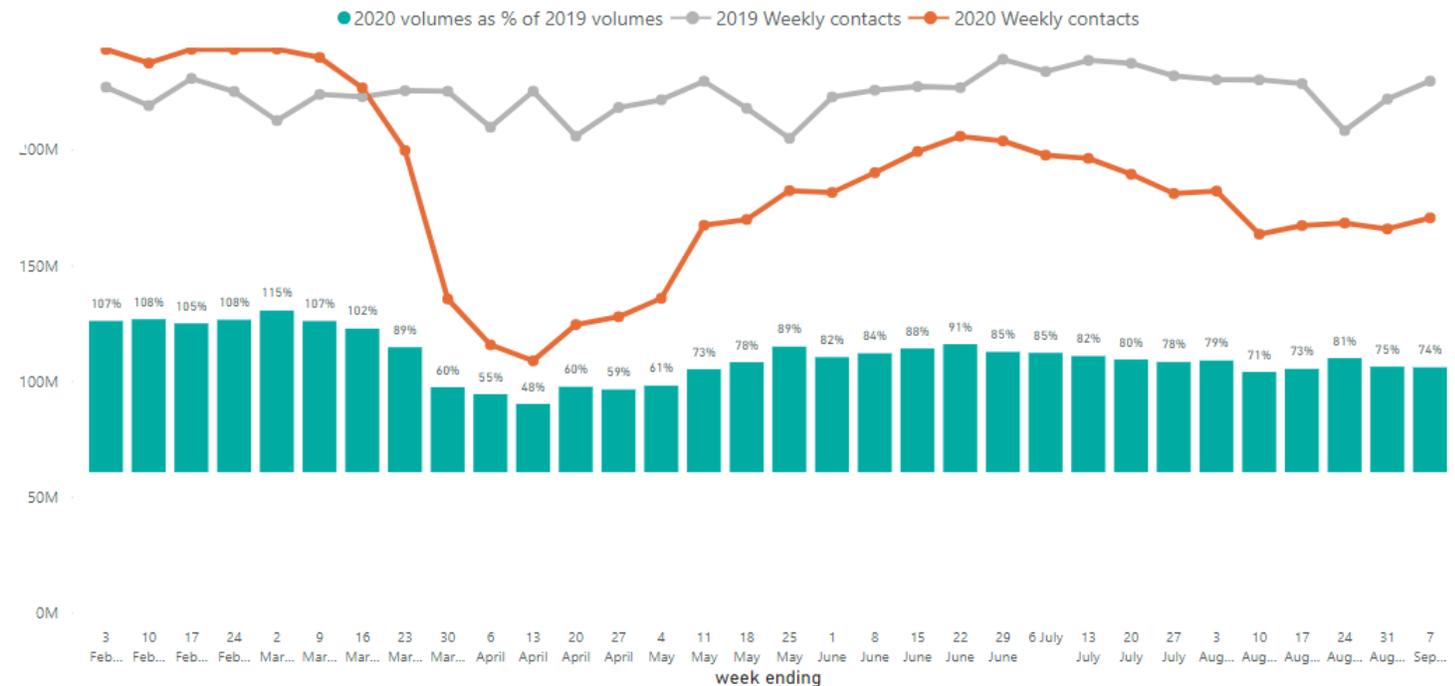
102% of 2019 levels in Regional areas

87% of 2019 levels in Medium centres

89% of 2019 levels in Homemaker centres

69% of 2019 levels in Large centres

76% of 2019 levels across oOh! Retail locations



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

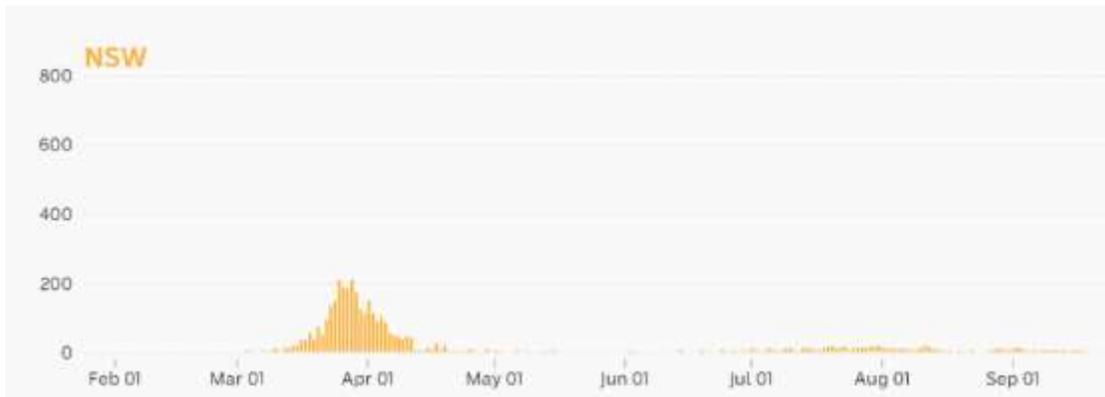


Current State Of Play – New South Wales

As the most populated state with over 8 million people calling NSW home, Covid-19 community outbreak earlier this year put a temporary hold on mobility and travel plans. However the success of contact-tracing has allowed the state to reopen albeit, with some minor behavioural changes. And as the warmer months fast approach with summer nearing our doorstep, residents are taking full advantage of New South Wales' iconic coastal and regional destinations.

NSW Covid-19 Community Outbreak

With NSW representing **approx. 4.5% of all confirmed Covid-19 cases** nationally, the state has been successful in suppressing Covid-19 in the community. And with the **second highest rates of testing** conducted nationally, the state **now records very few new daily cases** with the majority/all being from returned overseas travelers required to conduct mandatory quarantine¹.



NSW State Mobility to outdoor destinations

With very few new cases of Covid-19 in the state, **life in NSW has recovered** for the most part with Google mobility data this month reporting visitation to **supermarkets and parks above pre Covid-19 levels** and **travel to retail and workplaces** across the state **tracking towards baseline** figures².



NSW Travel Modes

Apple NSW Mobility data for 16th September reports **driving tracking +14% ahead** compared to Jan 2020 levels³.

Confidence Towards The Horizon

With the largest economy in Australia representing approx. a third of the nations GDP, NSW is a key driver in Australia's overall economic performance; and with consumer confidence recovery, residents in the state are optimistic about the future.

Westpac-Melbourne Institute Index of Consumer Sentiment in September 2020 reports **NSW consumer confidence has made a full recovery** back to its **June position as states began to reopen** from initial lockdown².

ABS latest **NSW unemployment rate has dropped** from 7.2% to 6.7% in August, just below the national average of 6.8% with 70% of **jobs lost in the pandemic in the state now restored**. NSW Treasurer Dominic Perrottet "**Jobs created in NSW account for about half the jobs created across the country, so it's pretty pleasing figures**"³.

With **JobKeeper payments** injecting \$18.6 billion into NSW helping 1.2 million employees in the state⁴, 80% are **confident their employment position** will be maintained or improve in the future, the same level of confidence viewed towards **Australian Businesses** on the horizon¹.

70% of NSW residents are **confident the Australian Economy** will be maintained or positively impacted once all social distancing restrictions are removed. Conversely 61% are **confident in the World Economy** recovering at or above previous¹.



Adjusting behaviours for community wellbeing into the future

Given the large number of Australians calling NSW home, residents are adjusting behaviours to support the wellbeing of the community. 89% of NSW residents are likely to continue with social distancing, maintaining personal hygiene and wearing face masks in public into the future¹.

While adjusting behaviours, NSW residents are returning to regular travel patterns...

For w/e 21st September 2020 **NSW roadside audience volumes** are **at 82% of 2019 levels** and **NSW retail audiences at 92% of 2019 levels**, as the state continues to track towards YoY mobility levels⁵.

Iconic NSW Destinations

With iconic Sydney beaches and parks, holiday destinations such as Byron Bay, Coffs Harbour, South Coast, and regional wine country Orange, Mudgee and the Hunter, there is so much to love about NSW. And with NSW school holidays in full-swing and a fast approaching October long weekend, residents are racing to book getaways to these idyllic locations.

Holidays away have always been a top priority for NSW residents

Last year NSW residents took almost **2 million international leisure trips**. Tourism Minister Stuart Ayres “there is a **huge opportunity to entice** our overseas holidaymakers to become NSW’s next top travelers”²

Rob Jeffress, chairman of the Australian Short Term Rental Association, “The people who are staying in **NSW are spending more travelling** within NSW than foreign and interstate travellers would have spent in NSW”³

Over half of all NSW residents are keen to travel and **explore their state** and 51% intending to take **long road trips** of 2+ more nights stay¹.

Very little accommodation occupancy is left for upcoming school holiday period in Byron Bay (2%), Coffs Harbour (4%), Southern Highlands (4%), Yamba (5%), Jervis Bay (7%) and Port Macquarie (13%). School holiday **bookings at NRMA parks and resorts** also **up an average of 30% YOY**, with Dubbo, Port Macquarie and Murrumbidgee on the NSW south coast experiencing the biggest increases in visitors³.

And with the announcement of all NSW residents able to travel to SA and some to QLD, 2 in 5 NSW residents are **keen to holiday in another state**¹.

Good times continue as we roll into summer...

According to travel website Wotif, **top trending summer destinations in regional NSW** include **Forster** with accommodation interest up over 240% YoY, **Kingscliff** +215%, **Coffs Harbour** +180%, **Yamba** +170%, **Newcastle** +170%, **Bundanoon** +170%, **Port Macquarie** +160%, **Port Stephens** +150%, **Byron Bay** +140%, **Wollongong** up 65%⁴.

Wotif managing director Daniel Finch “if trends continue, **NSW’s North Coast will be very crowded this summer** as New South Wales travellers find alternates to crossing state borders or going overseas”⁴.

Airbnb also reports an influx in accommodation stays for w/c December 28th with 77% of **Shoalhaven area** already booked, 66% in **Byron Bay** and 65% in **Coffs Harbour**⁵.

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



75% are generally **more appreciative of the outdoors** and outdoor destinations¹



Over half are eager to be **out for longer amounts of time**¹



80% are **more alert and aware** of their surroundings, 3% points higher than the average Australian¹



76% are **generally happier** to be out and about¹

Bigger Ticket Purchases

With optimism towards future purchasing power, NSW residents continue to purchase bigger ticket items including property, cars and luxury items.

80% of NSW residents expect their discretionary income i.e. ability to buy products and services will be maintained or increase¹.

NSW Property Market

NSW housing clearance rates continue to track at or above the same period last year as new home-owners enter the market. Weekend of 19th /20th September, Sydney was host to 679 auctions, up 33 properties with a clearance rate of 72.4%³.

- 1 in 4 aged under 40 intend to **buy a new home or apartment**¹.
- 1 in 5 aged under 40 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, NSW residents intend to...
- 1 in 4 intend to **buy a new car**¹.
- Over 1 in 3 intend to **plan a holiday in an overseas destination/s**, once international borders permit¹.



Entertainment Purchases

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



75% visit **entertainment precincts** e.g. cinema¹



72% attend **live sports events**¹



73% attend **state-based festivals** and/or events¹



79% visit **cafes, pubs and venues**¹

NSW Purchasing Behaviour

Over the past 3 months NSW residents have been spending at levels higher than that observed before Covid-19 hit home soil. Just as NSW residents are purchasing big-ticket items such as housing and luxury items, they are also transacting smaller items with further intention to buy in the future.

NSW residents are **4x more likely** to intend to **shop more at physical stores** in the future compared to reducing purchases at retail destinations¹.

2 in 5 NSW residents intend to **buy products/services** they **had previously postponed**¹.

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



78% **large home appliances** e.g. fridges, stove, of which 65% intend to buy instore only¹.



75% **home improvements**, of which 70% intend to buy instore only¹.



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



90% **banking and financial products**, of which half intend to go to a branch only or blend with online¹.



85% **health products**, of which 60% intend to buy instore for every purchase¹.



93% **pharmaceuticals**, of which 75% intend to buy instore only¹.



61% **lottery tickets**, of which over 2 in 3 intend to buy instore only or a blend of instore and online¹.



76% **alcohol**, of which 68% intend to be bought instore only¹.

A scenic landscape featuring a road with a guardrail in the foreground, rolling hills, and several hot air balloons floating in the sky at sunrise. The sun is low on the horizon, creating a warm, golden glow. The sky is blue with scattered white clouds. A tall tower is visible on a hill in the background.

A Look to the Future: Australian States At A Glance: ACT Market Spotlight

Current State Of Play – Australian Capital Territory

Home to just under half a million Australians, ACT has been relatively protected when it comes to community outbreak of Covid-19, winning the battle very early on and leading the nation to victory with an extended period of no new infections. As such, residents in the capital continue to go about life outside the home with very few restrictions still in-place¹.

ACT Covid-19 Community Outbreak

With almost no visible outbreak 'curve' in ACT recorded, it has done exceptionally well in the successful suppression and elimination of Covid-19. ACT leads the nation with the **longest straight run** of 70+ days with **no new cases**, and currently has **no active cases** present².



ACT State Mobility to outdoor destinations

Given the longevity of no cases recorded in ACT, life in the capital has returned almost entirely, with **visitation to parks, retail and grocery** at or above pre Covid-19 levels, and the vast majority of employed residents back at their **place of work**³.

Parks	Workplaces	Retail and recreation	Supermarket and pharmacy
+73%	-11%	-1%	+13%
compared to baseline	compared to baseline	compared to baseline	compared to baseline

ACT Travel Modes

Apple ACT Mobility data for 16th September reports **driving and walking tracking ahead** compared to Jan 2020 levels, +18% and +8% respectively⁴.

Life in the Capital

Earning the highest average full-time income across the country² ACT residents have a higher propensity to travel and along with TAS and NT are currently spending in key categories above those observed pre Covid-19.

ACT Ooh! Audiences

With ACT oOh! roadside audience volumes at **81% of 2019 levels** for w/e 21st Sept 2020, audiences within the state continue to track towards YoY mobility levels. So too are ACT residents looking for the full retail experience with **oOh! Retail audiences in the ACT at 83%** for w/e 21st Sept 2020 compared to same time last year³.

Upcoming Travel For Act Residents

SA and QLD are welcoming back ACT residents and ACT's Chief Minister Andrew Barr said earlier this month that the new travel bubble with Queensland was timely for Canberrans ahead of the school holidays⁴.

- 69% of ACT residents plan to travel to holiday destinations within Australia, 6% points higher than the average Australian¹.
- Over half of all ACT residents intend to take long road trips of 2+ more nights stay as restrictions continue to ease¹.

Visitation outside the home

As Canberrans return to large events e.g. at Canberra Stadium, residents intend to maintain or increase visitation compared to pre Covid-19 levels to...

- 75% attend live sports events¹
- 75% visit entertainment precincts e.g. cinema¹
- 79% attend festivals/events in ACT¹
- 87% visit cafes, pubs and venues¹

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 ACT reported above n=63. Source: 2 ABS, Average Weekly Earnings, Australia, 13th August 2020. Source: 3 Dspark data, Roadside and Retail locations, week ending Sept 21st 2020 vs. same week 2019. Source: 4 ACB.net.au, Relief as Queensland opens border to ACT in time for Canberra's school holidays, 19th September 2020.

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



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



Over half are eager to be **out for longer amounts of time**¹



6 in 10 are **more appreciative of once mundane day-to-day activities that allow me to be out and about** such as commuting to work¹



83% are **more alert and aware** of their surroundings¹



83% are **generally happier** to be out and about¹

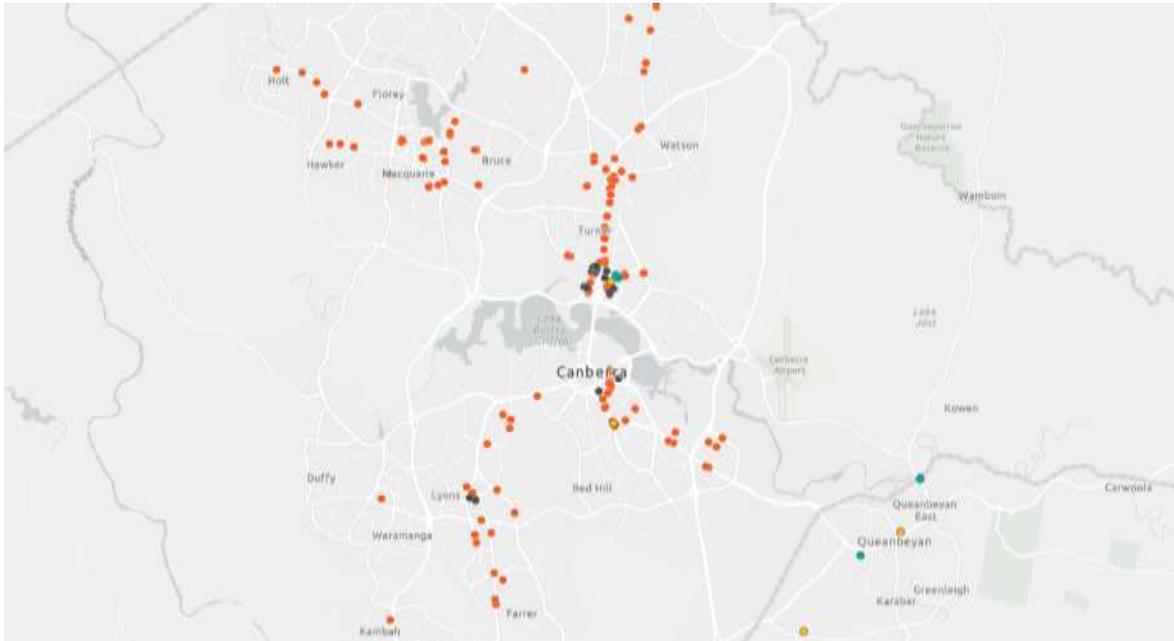
ACT residents are spending more and want the full retail experience in-store...

ACT residents are **4.4x more likely** to intend to **shop more at physical stores** in the future compared to reducing purchases at retail destinations¹.

Capital Coverage

Canberra, the nation's capital, and largest inland city, was designed as a compromise between rivals Melbourne and Sydney. Home to Parliament House and over 450,000 people, Canberra listed the highest wages and lowest unemployment in Australia and maintains the status for having the most highly educated population in Australia.

When it comes to reaching people in Canberra, oOh! has got you covered. **With over 475+ assets located in key locations across the CBD, Suburbs and Queanbeyan** no other OOH provider can reach Canberra like we can!



RETAIL

oOh! Combination of centres deliver an annual footfall of over 40m people and represent \$1.35bn in MAT. With products in the 6 main Canberra retail centers, our 74 Shopalite, 36 Shopalive and 2 Evoke ensure you can connect with Canverage shoppers.



STREET

With over 320 Classic Street touchpoints across Canberra city and suburbs including overage Northbourne & Canberra Avenue – two major arterials in Canberra, our ACT Network can drive impact against Canberra residents & visitors as they move about their day.

BILLBOARDS

We have billboards targeting the heart of Canberra ensuring your campaign delivers substantial reach and unmissable impact. Our premium sites hug the Canberra Centre, a high footfall precinct hitting locals and tourists alike.



OFFICE, CAFÉ & FLY

Covering the major business district and Airport, oOh!'s Office, Café and Fly network reaches highly influential political, financial & media audiences across 15+ Café and Office locations and within both the Club and Business Lounge environments in Canberra Airport.

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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

Source: 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. Wave 4 results displayed right.

Wave 4



Location:

