

Friday, 27 November 2020

Movement in Melbourne CBD at only 27% of normal after lockdown ends, well behind Sydney CBD (42%)

A special analysis of movement data in Australia's Capital City CBDs during 2020 shows movement levels remain well below those seen earlier in the year in all six State capitals.

Movement in the Melbourne CBD during mid-November was at an average of only 27% of the pre-COVID-19 levels earlier in the year during January and February – although this has almost doubled since being at only 14% during the final week of lockdown in late October.

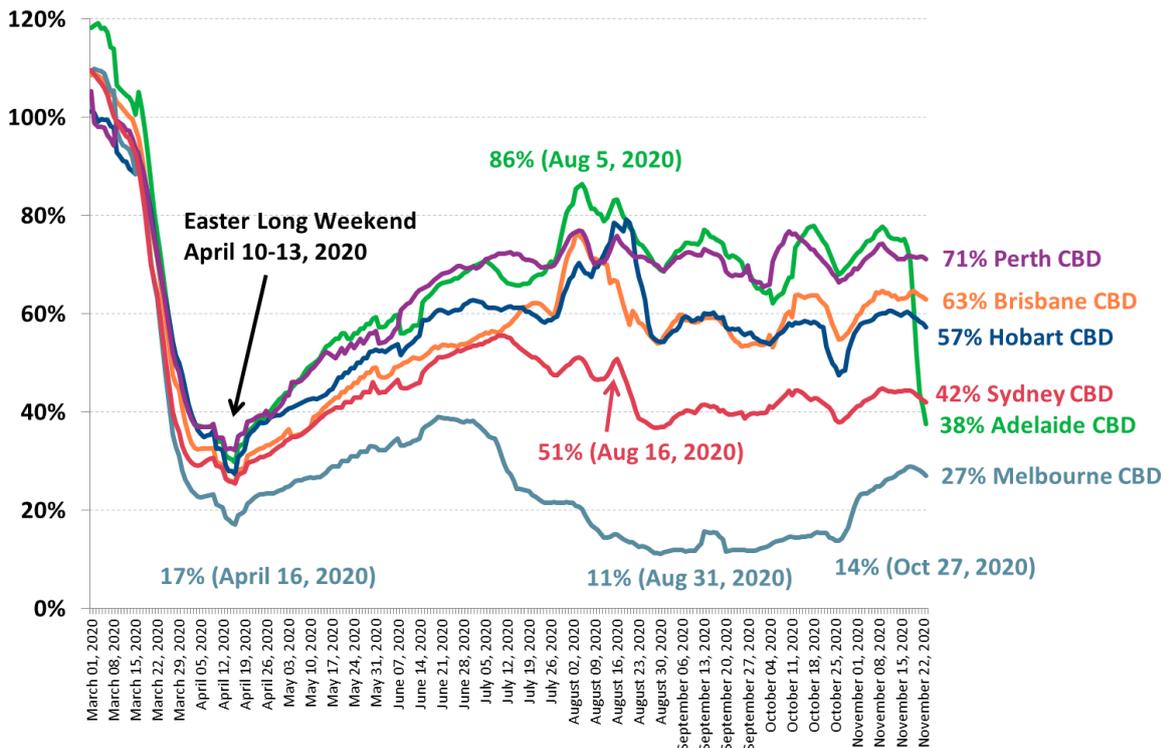
Comparing movement levels during 2020 shows that movement levels in the Melbourne CBD have been lower than all other Capital City CBDs every week since late March when the first national lockdown began and hit a low of only 11% of normal in the final week of August.

Movement levels in the Sydney CBD have tended to track lower than smaller cities since the 'second wave' began in early July and have not been above 50% of normal since hitting 51% in mid-August. At the time there were significant fears in Sydney that the city would soon follow the path trodden by Melbourne in the preceding weeks and also enter a second lockdown.

The Adelaide CBD and Perth CBD have been the standouts for most of 2020 with movement levels consistently between 70-80% of the pre-COVID-19 levels including a high of 86% of normal in the Adelaide CBD in early August.

However, Adelaide's good run came to an abrupt end last week with the three-day shutdown causing the city's weekly movement average to tumble to only 38% of normal in the week to November 23 and drop from first place (at 75%) before the shut-down to now be above only Melbourne.

Australian Capital City CBDs average 7-day movement levels March – November 2020: % Movement is compared to the 7-day average in Jan-Feb 2020



Source: Roy Morgan collaboration with UberMedia who provide anonymous aggregated insights using mobile location data. **Note:** Movement data for the Capital City CBDs excludes the residents of the respective CBDs.

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Roy Morgan has partnered with leading technology innovator UberMedia to aggregate data from tens of thousands of mobile devices to assess the movements of Australians as we deal with the restrictions imposed in response to the COVID-19 pandemic.

The interactive dashboard available on the website tracks the movement data for those visiting the Capital City CBDs during 2020, excluding the CBD residents of each city. Movement data from several key locations around Australia is also available to view by using the interactive dashboard.

Michele Levine, CEO of Roy Morgan, says closely analysing the movement data in Australian cities during 2020 shows the large impact measures taken to combat COVID-19 have had around with Melbourne an outlier as the hardest hit:

“Melburnians finally emerged from a near four-month lockdown in the last week of October but analysing movement data during the month of November shows there’s still a long way for the southern capital to go to catch up to interstate rivals when it comes to returning people to the Central Business District.

“In the week to November 23 the average movement data in the Melbourne CBD was at only 27% of the average level during January-February 2020 pre COVID-19 and the associated lockdowns. This is nearly double the movement in the final week of lockdown to October 27 (14%) but still well below all other Capital City CBDs.

“The long-running trends show movement in the Melbourne CBD plunged further and harder than any other CBD in late March and has tracked lower than other cities ever since.

“Sydney CBD has consistently been the second lowest and particularly since early July when the ‘second wave’ of COVID-19 threatened to lockdown the ‘Harbour City’. However, extensive contact tracing and testing eventually suppressed the outbreak although the average movement in the Sydney CBD has not been above 50% since mid-August more than three months ago.

“The big mover (in the wrong direction) over the past week has been the Adelaide CBD for which average movement data has plunged to only 38% of normal after the city experienced a short-lived 3 days of lockdown last week. For the three days of lockdown (November 19-21) average movement in the Adelaide CBD was at only 16% of the pre COVID-19 level.

“The underlying take-out from comparing the movement data of the Capital City CBDs of all six States is that so-called ‘COVID-Normal’ is still significantly different to pre COVID-19 with movement levels well below pre-pandemic averages.

“The key reasons movement levels remain significantly lower are the millions of city office workers that are still working from home around the country and the closure of domestic and international borders. The closed borders prevent interstate or overseas tourists from visiting the Capital Cities and also mean many international students that tend to congregate near the CBDs have been blocked from re-entering Australia over the past few months.

“As long as international borders remain closed there will clearly be only a trickle of international tourists, and students, allowed into Australia from countries such as New Zealand. Because of this it is vital that to revitalise and reinvigorate the CBDs of Australia’s great cities that office workers are encouraged to return to the office as soon as it is safe to do so.”

View the latest Roy Morgan UberMedia movement data for Australian Capital City CBDs including the [Melbourne CBD](#), [Sydney CBD](#), [Perth CBD](#), [Adelaide CBD](#) and [Hobart CBD](#) here.

MORE INFORMATION

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About Roy Morgan

Roy Morgan is Australia's largest independent Australian research company, with offices in each state, as well as in the U.S. and U.K. A full-service research organisation, Roy Morgan has over 75 years' experience collecting objective, independent information on consumers.

About UberMedia

UberMedia provides the highest quality mobile data solutions to creatively solve businesses persistent challenges. The company's products process billions of social, demographic, and location signals daily across retail, automotive, and entertainment to better understand modern consumers with the most accurate business decision science.

Roy Morgan Helix Personas



100 Leading Lifestyles

Focused on success and career and family, people in the Leading Lifestyles Community are proud of their prosperity and achievements. They are big spenders and enjoy cultured living to the max.

Explore



200 Metrotechs

Socially aware, successful, career focussed and culturally diverse, Metrotechs are trend and tech focused. They are committed experience seekers, willing to spend big on the best of city life and thrive on being out and about in the world.

Explore



300 Aspirationals

Driven by dreams of a big future, Aspirational are highly ambitious and culturally diverse up-and-comers. Careful spenders, they're working hard today to create a more successful tomorrow.

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400 Hearth and Home

Closest to the average Australian, life revolves around the home for these contented Australians who embrace conventional family life. Perennial home improvers, they see their homes as an expression of their status and achievements.

Explore



500 Doing Fine

Modest but contented, people in the Doing Fine Community are happily making their way through life and value simple pleasures. Price sensitive and light spenders, they take a pragmatic approach to what they buy.

Explore



600 Fair Go

Struggling to make ends meet, looking for a better deal in life, making the best of things or simply pessimistic, cynical and likely to feel they get a raw deal out of life; the Fair Go community are lower income Australians.

Explore

Learn more by visiting www.helixpersonas.com.au.