

Monday, 21 June 2021

Movement in the Melbourne CBD and Sydney CBD well below pre-pandemic averages as cities deal with COVID-19 outbreaks

A special analysis of movement data in Australia's Capital City CBDs since the COVID-19 pandemic began shows movement in the Melbourne CBD at only 12% of pre-pandemic averages in early June while movement in the Sydney CBD is at 28% as the city deals with a new outbreak.

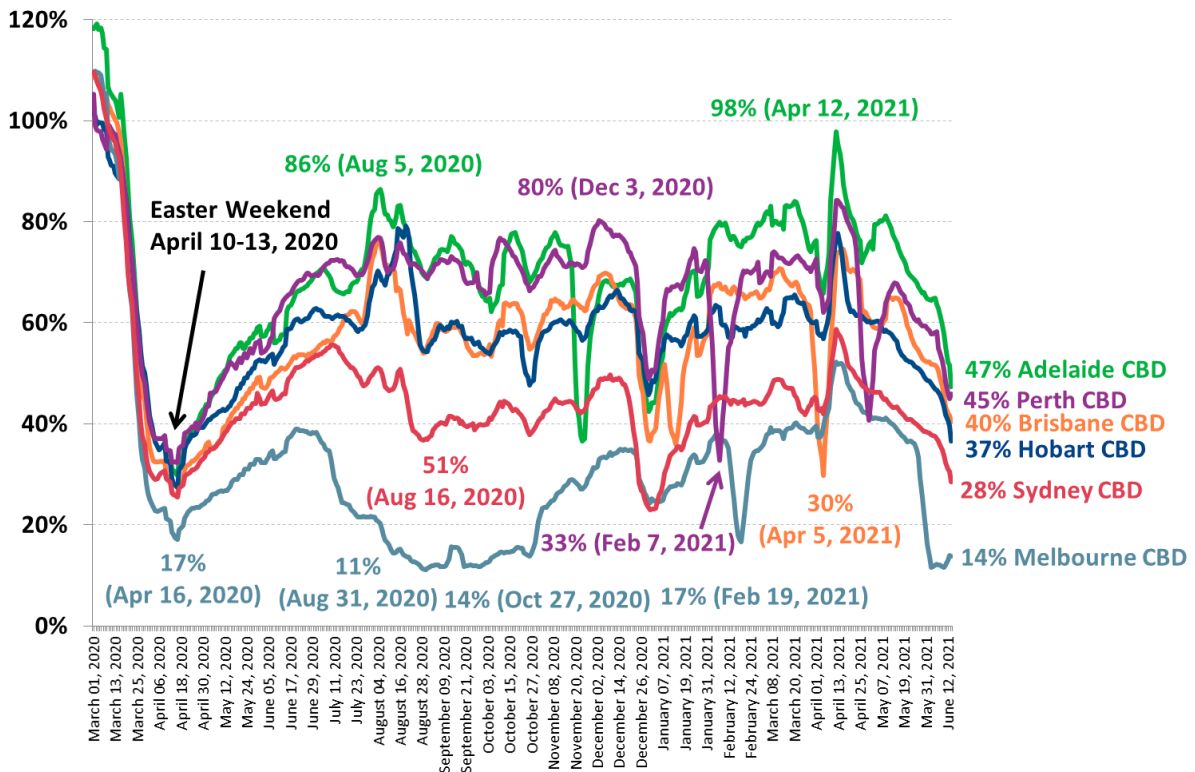
The average 7-day movement level in the Melbourne CBD plunged to only 12% of pre-COVID-19 averages in early June during the recent two-week 'circuit-breaker' lockdown. Since the end of the lockdown movement levels have picked up slightly to 14% of pre-pandemic levels. These are the lowest levels of movement in the Melbourne CBD since October 2020 during the city's long second lockdown.

Movement levels in the Sydney CBD were also on the way down even before confirmation of a new outbreak of COVID-19 in the city and were at only 28% of pre-COVID-19 averages in mid-June. This is the lowest level of movement in the Sydney CBD since the three-week Northern Beaches outbreak over the Christmas/New Year's period.

Movement levels have declined in other Capital City CBDs during May and June as Australia enters the winter months despite no significant outbreaks or lockdowns in other cities since late April.

Notably, movement levels in the Hobart CBD are at their lowest in over a year since the nation-wide lockdown in April 2020 at only 37% of pre-pandemic averages. Movement levels in the Adelaide CBD (47%), Perth CBD (45%) and Brisbane CBD (40%) are all below 50% of pre-COVID-19 averages.

Australian Capital City CBDs average 7-day movement levels March 1, 2020 – June 14, 2021: % 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.

The latest vaccination figures from the Health Department show over 6 million vaccination doses have so far been administered to Australians covering around a quarter of the population. If herd immunity requires 80% of Australia's 20 million adults to be vaccinated, we are still many months away from administering the 32 million vaccination doses required to reach this mark.

As the latest outbreaks of COVID-19 in Melbourne and Sydney show until a sizeable majority of Australians are vaccinated against COVID-19 there will remain the ongoing threat of snap border closures and restrictions as well as lockdowns being enforced to get on top of any viral outbreaks.

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 and 2021, 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 outbreaks of COVID-19 in Melbourne and Sydney are keeping people 'working from home' long past the time many had hoped movement levels in both cities would have returned closer to the pre-pandemic averages:

"Melbourne's fourth lockdown ended in mid-June but nevertheless average movement levels in the Victorian capital's CBD area remain at only 14% of pre-pandemic averages, up slightly from a low of 12% in the first week of June.

"There are ongoing restrictions in the Melbourne metropolitan area that act as a deterrent for workers contemplating heading into the office including compulsory mask wearing on public transport and indoors. Tighter restrictions including compulsory mask wearing outside and the 25km travel limit on Melburnians only ended on Friday June 18.

"This week has also seen a new outbreak of COVID-19 in Sydney with three new cases centred on the Eastern suburbs of Sydney linked to an unvaccinated limousine driver transporting foreign air crew during their stop-overs in Sydney.

"The new cases have caused the re-instatement of mandatory mask wearing on Sydney's public transport and prompted other states to impose restrictions on travelers from the effected areas of the Sydney metropolitan area. Even before this most recent outbreak the average movement in the Sydney CBD was at only 28% of its pre-pandemic levels in early 2020.

"Given under 3% of Australians have been fully vaccinated against COVID-19 there is the ongoing possibility small outbreaks can cause lockdowns, increased restrictions and border closures for some-time to come, and now without the added support of the JobKeeper wage subsidy.

"The uncertainty about when snap border closures may be introduced continues to put a dampener on interstate travel and particularly when Australia's two largest States, comprising nearly 60% of the nation's population, are dealing with outbreaks and their citizens are restricted from travelling interstate.

"The closure of the Tasmanian border to Victorians over the last few weeks is likely to be partly responsible for the dip in the average movement in the Hobart CBD to only 37% of pre-pandemic levels – the lowest figure for the capital since the nation-wide lockdown in April 2020. Victorians are traditionally the [largest group of interstate visitors to Tasmania](#) by a significant margin."

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



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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.

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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.

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300 Aspirationals

Driven by dreams of a big future, Aspirationals 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.

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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.