

Monday, 1 November 2021

Movement in the Melbourne CBD was at only 23% of pre-pandemic levels in late October as the city begun re-opening

A special analysis of movement data in Australia's Capital City CBDs since the COVID-19 pandemic began shows movement in the Melbourne CBD was at only 23% of pre-pandemic levels in late October as the city began to re-open after over two months of lockdown.

The average 7-day movement level in the Melbourne CBD hit a low of 8% of pre-pandemic levels in late July and had increased to 23% on the first weekend after the end of the lockdown on Friday October 22.

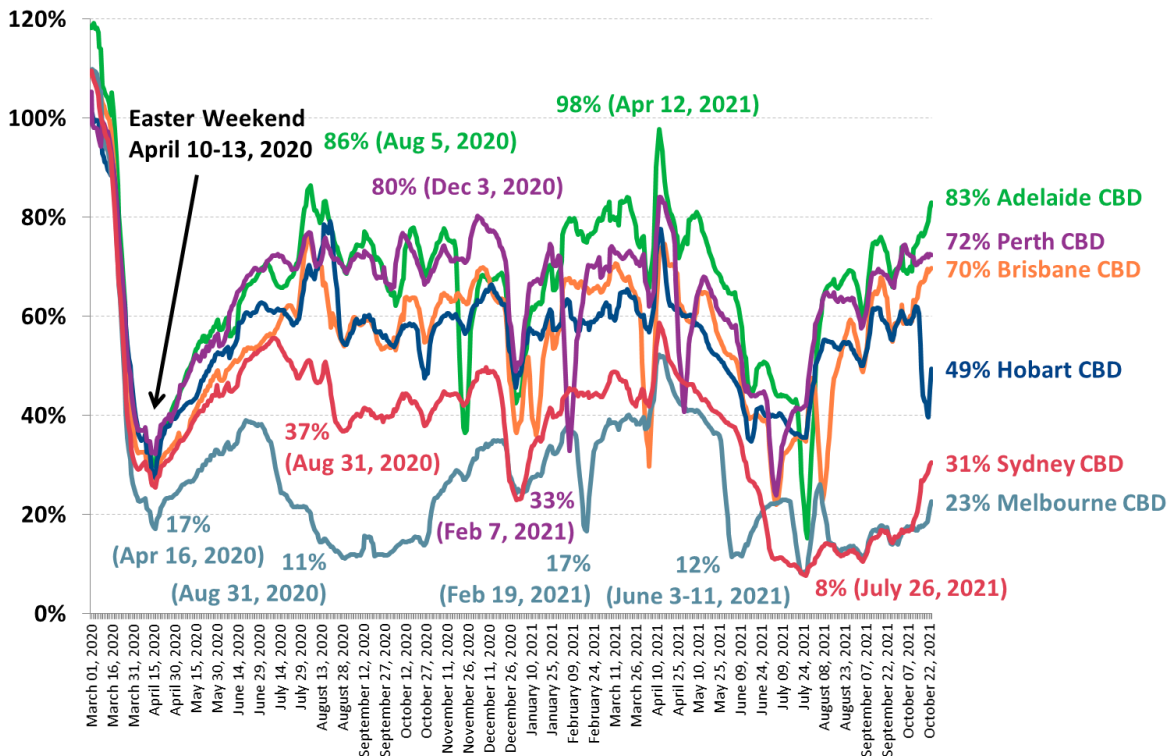
Although Melbourne's lockdown officially ended over a week ago many stores remained closed during the first week post-lockdown. Melbourne's non-essential retail stores were only allowed to fully re-open over the last weekend and many hospitality venues remained close to in-store dining due to ongoing restrictions.

Life has continued to return to the Sydney CBD and in late October the average 7-day movement levels were at 31% of pre-pandemic levels, up 4% points from a week earlier. Almost 90% of adults in New South Wales are now fully vaccinated against COVID-19.

Following the end of the short and sharp three-day lockdown in southern Tasmania the average 7-day movement levels in the Hobart CBD had recovered to 49% of pre-pandemic levels by late October.

The movement levels in other Capital City CBDs continued to improve over the last few weeks as we move into the warmer months. The Adelaide CBD is again the standout with average movement levels closest to pre-pandemic 'normal' at 83% - the highest level of movement for over six months since mid-April.

Australian Capital City CBDs average 7-day movement levels March 1, 2020 – October 24, 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 35 million vaccination doses](#) have been administered to 88% of the adult population and over 77% of Australian adults are now fully vaccinated.

Vaccination rates are highest in jurisdictions that have recently been in lockdown with over 85% of the adult population in NSW and the ACT and over 75% of the adult population in Victoria and Tasmania now fully vaccinated. All four jurisdictions have emerged from lockdowns of varying lengths during October.

However, vaccination levels remain far lower in South Australia (66% fully vaccinated), Queensland (64%) and Western Australia (63%). The South Australian Government has announced the State's borders will re-open to fully vaccinated travellers from NSW and Victoria in three weeks' time on November 23.

The re-opening of South Australia is set to come before both Queensland and Tasmania re-open their borders to all parts of Australia in mid-December – Tasmania on December 15 and Queensland two days later on December 17. However, the Western Australian border is set to remain closed until next year.

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 the end of the long lockdowns in Greater Sydney and Greater Melbourne is finally leading to a sustained, albeit slow, increase in movement in the respective CBDs of both cities:

“Australia’s two largest cities emerged from long lockdowns during the month of October and hopes are high that the next two months in the run-up to Christmas will be relatively normal for both as workers return to the office and people return to shopping and socialising in the cities.

“However, the latest figures on movement levels in the Sydney and Melbourne CBDs show there is a long way to go before both cities catch up to their counterparts interstate.

“Average movement levels in the Melbourne CBD were at only 23% of pre-pandemic levels on weekend after Melbourne emerged from its sixth lockdown, up 5% points from a week earlier. Although the lockdown had ended there were still many restrictions that meant non-essential retail and many hospitality venues remained closed.

“There has been a similarly slow increase in movement levels in the Sydney CBD. Average movement levels in the Sydney CBD were at only 31% of pre-pandemic levels last week, an increase of 4% points on a week earlier.

“The small increases seen so far should accelerate as further restrictions are eased and workers return to the office in greater numbers. At present people in both cities are required to wear face masks on public transport and Melbourne office workers are still mandated to wear face masks in the office. These restrictions are set to be eased later in November when full vaccination rates exceed 90% of the population.

“Another big sign of the transition to ‘COVID-normal’ is the return of international travel to both cities this week. Fully vaccinated Australian citizens and residents are now allowed to leave the country, and return, for the first time since the pandemic began early last year. The expectation is that in the near future these new travel arrangements will allow for the return of international tourists and holiday-makers.”

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.

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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.

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.