

Monday, 15 November 2021

## Movement in the Brisbane CBD is at 81% of pre-pandemic levels; it's highest level of movement since the pandemic began

A special analysis of movement data in Australia's Capital City CBDs since the COVID-19 pandemic began shows that movement in the Brisbane CBD has reached 81% of pre-pandemic levels in early November – its highest level of movement since March 2020 when the pandemic began.

Queensland has ramped up its vaccination drive in recent weeks as the State gets set to fully re-open its domestic borders to NSW, Victoria and the ACT in just over a month's time on Friday December 17.

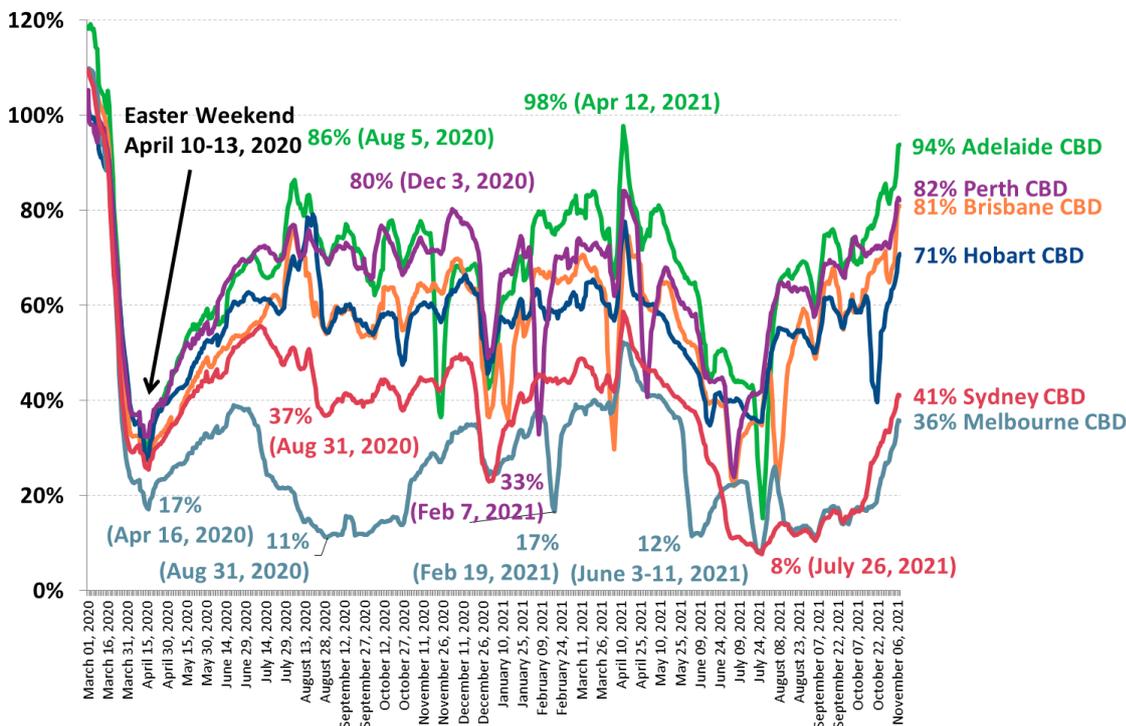
The 7-day movement level in the Brisbane CBD is 'streets ahead' of its southern counterparts in Sydney and Melbourne which emerged from lockdown during the month of October as restrictions began to ease.

The average 7-day movement level in the Sydney CBD was at 41% (up 8% points on a week earlier) of pre-pandemic levels in early November compared to 36% (up 9% points on a week earlier) of pre-pandemic levels in the Melbourne CBD. Despite these low numbers these are the highest average movement levels in both city CBDs for nearly six months since late May 2021.

Despite the increasingly busy Brisbane CBD the city still trails significantly behind the Adelaide CBD which returned to an average 7-day movement level of 94% of pre-pandemic levels – the highest level of movement for the 'City of Churches' since reaching a high of 98% during the Easter holidays in April 2021.

Also performing well are the Capital Cities of two States that are yet to fully re-open to domestic travellers. The movement levels in the Perth CBD are now at 82% of pre-pandemic levels while movement levels in the Hobart CBD are at 71% of pre-pandemic levels.

### Australian Capital City CBDs average 7-day movement levels March 1, 2020 – November 7, 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.

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The latest vaccination figures from the [Health Department show over 37.7 million vaccination doses](#) have been administered to 90% of the adult population and over 83% of Australian adults are now fully vaccinated.

Vaccination rates are highest in the ACT (97%+ fully vaccinated), NSW (91%) and Victoria (87%). All three jurisdictions fully re-opened to domestic travellers, and Australian citizens and residents returning from overseas who are fully vaccinated, in early November.

For the three States set to re-open during the next seven weeks vaccination rates are considerably lower. Now 82% of Tasmanians are fully vaccinated, 74% of South Australians and 70% of Queenslanders.

South Australia is due to re-open to travellers from NSW, Victoria and the ACT next week on Tuesday November 23, Tasmania is set to re-open on Wednesday December 15 and Queensland is set to re-open two days later on Friday December 17 – just over a week before Christmas.

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 November has brought increases in movement levels around Australia as restrictions continue to be eased in Sydney and Melbourne and vaccination rates continue to steadily increase in other States:**

*“The average movement levels in Australia’s Capital City CBDs have increased in early November with the average movement level in the Brisbane CBD hitting 81% of pre-pandemic levels – its highest since the beginning of the pandemic in March 2020.*

*“The impressive milestone for the Queensland Capital comes as vaccination rates in the State accelerate with domestic borders set to re-open to New South Wales, Victoria and the ACT in just over a month’s time on Friday December 17. As of this week over 70% of Queensland adults are now fully vaccinated.*

*show both the Sydney CBD (33% of pre-pandemic levels) and Melbourne CBD (27%) lagging well behind their interstate rivals despite recently emerging from extended lockdowns. The Adelaide CBD continues to be the standout with movement levels in the ‘City of Churches’ at 81% of pre-pandemic levels.*

*“The slow recovery in movement levels is due to many workers in the two cities continuing to work from home as there have still been considerable restrictions on activities within both cities. The good news for businesses in the Sydney CBD is that there has been a significant relaxation of restrictions in NSW this week as the State crosses the 90% fully vaccinated mark.*

*“Those who are fully vaccinated in NSW will now be able to use the dancefloor in nightclubs for dancing rather than just drinking, while indoor density limits for restaurants, cafes and pubs have been further relaxed. Entertainment facilities in NSW such as theatres, cinemas and sports stadia will now be able to operate at 100% capacity again.*

*“These restrictions were originally slated to be removed in three weeks’ time in NSW but the high rate of vaccination has brought the relaxation of these restrictions forward. In Victoria, ongoing restrictions such as mandatory wearing off masks inside, are set to relax further in the last week of November when over 90% of Victorians are expected to be fully vaccinated.*

*“In an effort to encourage people to return to the Melbourne CBD Lord Mayor Sally Capp has this week announced a \$44 million ‘Midweek Melbourne Money’ subsidy to begin next week. The subsidy will allow diners spending between \$50-\$500 at restaurants, cafes and bars to claim 30% of the bill back when dining in the Melbourne CBD from Monday-Thursday.”*



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**

Michele Levine – direct: 03 9224 5215 | mobile: 0411 129 093 | [Michele.Levine@roymorgan.com](mailto:Michele.Levine@roymorgan.com).

#### **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.

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<p>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.</p>	<p>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.</p>	<p>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.</p>	<p>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.</p>	<p>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.</p>	<p>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.</p>
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