

Tuesday, 14 July 2020

Movement data in CBDs remains far below pre-COVID-19 levels

A special analysis of movement data in the Sydney and Melbourne CBDs shows neither have returned to anything like the levels of earlier in the year even before the latest Stage 3 lockdown in Melbourne and renewed fears of an outbreak in Sydney.

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 charts below track the movement data from a number of key locations around Melbourne and Sydney during 2020.

The number of devices seen in the Sydney CBD during the first week of July averaged only 53% of the levels seen earlier in the year during January and February. In recent days, several new cases of COVID-19 have been discovered around Sydney and the prospect of a return to lockdown appears to be rising.

Further south, the number of devices seen in the Melbourne CBD during the first week of July averaged only 39% of the levels seen earlier in the year. The Melbourne metropolitan area has had restrictions progressively tightened since mid-June and returned to a Stage 3 lockdown during the past week.

Although restrictions eased in both cities during May, and early June, the movement data for both CBDs remained well below the average levels in the pre-COVID-19 period as working from home has remained the norm for many city office workers throughout this period.

Michele Levine, CEO of Roy Morgan, says the renewed outbreak of COVID-19 in Melbourne since mid-June has seen a decline in movement data in recent weeks and the full lockdown will see this decline further:

"The threat of COVID-19 never went away but many Australians might have felt the worst was behind us as new cases dropped rapidly in April and May. However, the events of recent weeks show the virus remains a significant threat to our health and economic wellbeing.

"Melbourne has been dealing with a growing COVID-19 outbreak over the last month and restrictions began re-tightening in the Victorian capital more than three weeks ago on June 20. The renewed restrictions halted the increasing movement seen in the Melbourne CBD during May and early June and during the first week of July movement was at only 39% of the level seen earlier in the year.

"In Sydney movement continued to trend up throughout June but in the first week of July was still at only 53% of the average seen during January and February. Despite the relatively effective handling of COVID-19 by the NSW Government these figures illustrate the tough environment faced by CBD retailers reliant on significant foot traffic.

"Melbourne's return to lockdown provides a sobering reminder that the price of dealing successfully with COVID-19 is maintaining a high level of vigilance. The NSW Government's decision to close Victorian border and introduce tighter restrictions on pubs in the wake of the outbreak at the Crossroads Hotel shows they are keen to avoid following Melbourne into a second lockdown."

As second wave hits Metrotechs are an increasing share of visitors to Melbourne & Sydney CBDs

In both the Melbourne CBD and Sydney CBD, it is the young and trendy Metrotechs who have been the most likely to return to their respective city centres. In the Melbourne CBD Metrotechs now comprise 39% of the movement data, up from 34% during the summer months, and in the Sydney CBD Metrotechs comprise 41% of the movement data, up from 38%.

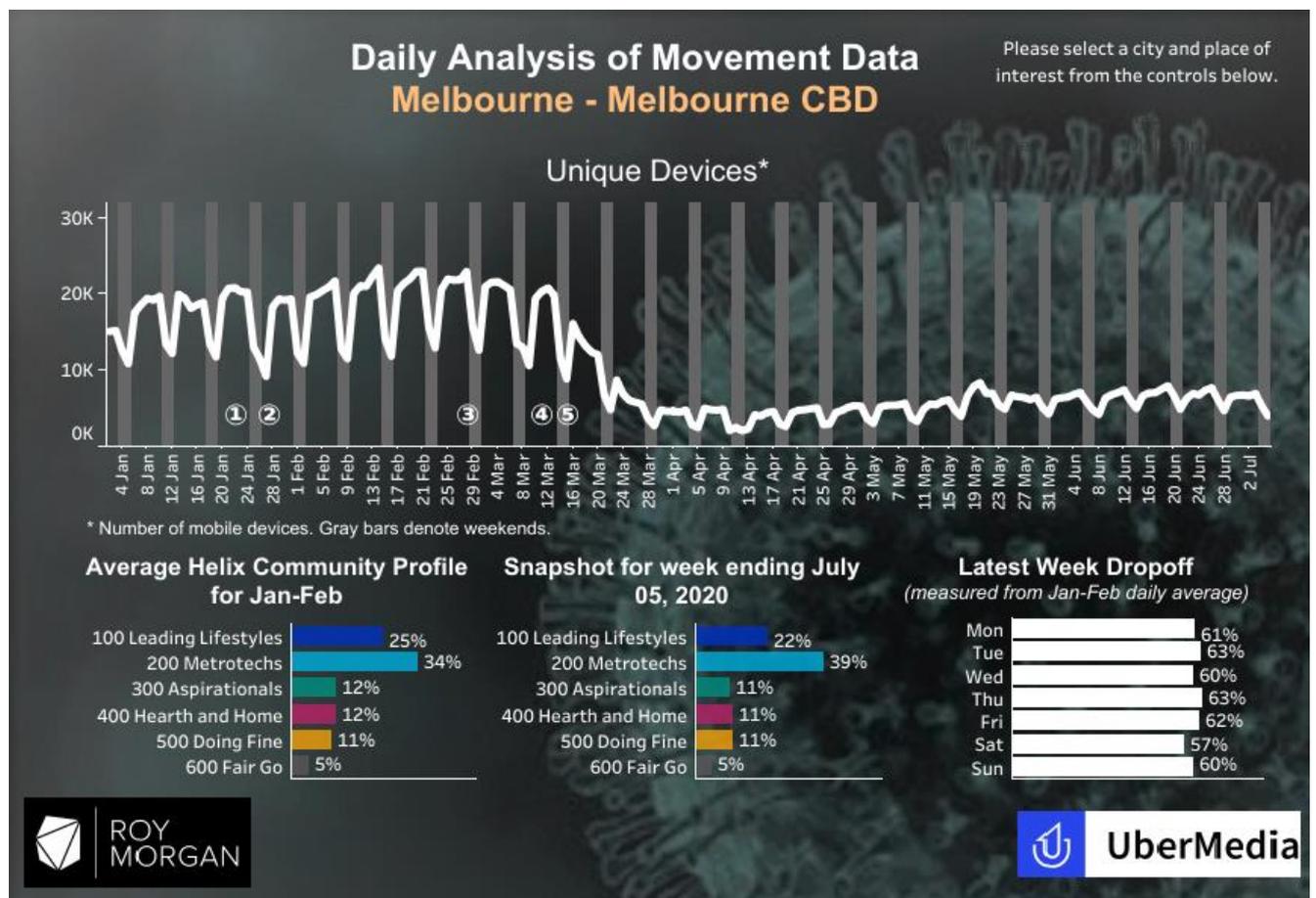
FOR IMMEDIATE RELEASE

The share of movement data for each of the five other Helix Personas communities is equal to, or less than, it was earlier in the year. In both CBDs *Leading Lifestyles* now comprise the second largest share of the movement data at 22% in Melbourne CBD and 34% in the Sydney CBD.

- **200 Metrotechs:** Socially aware, successful, career focused 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.
- **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.

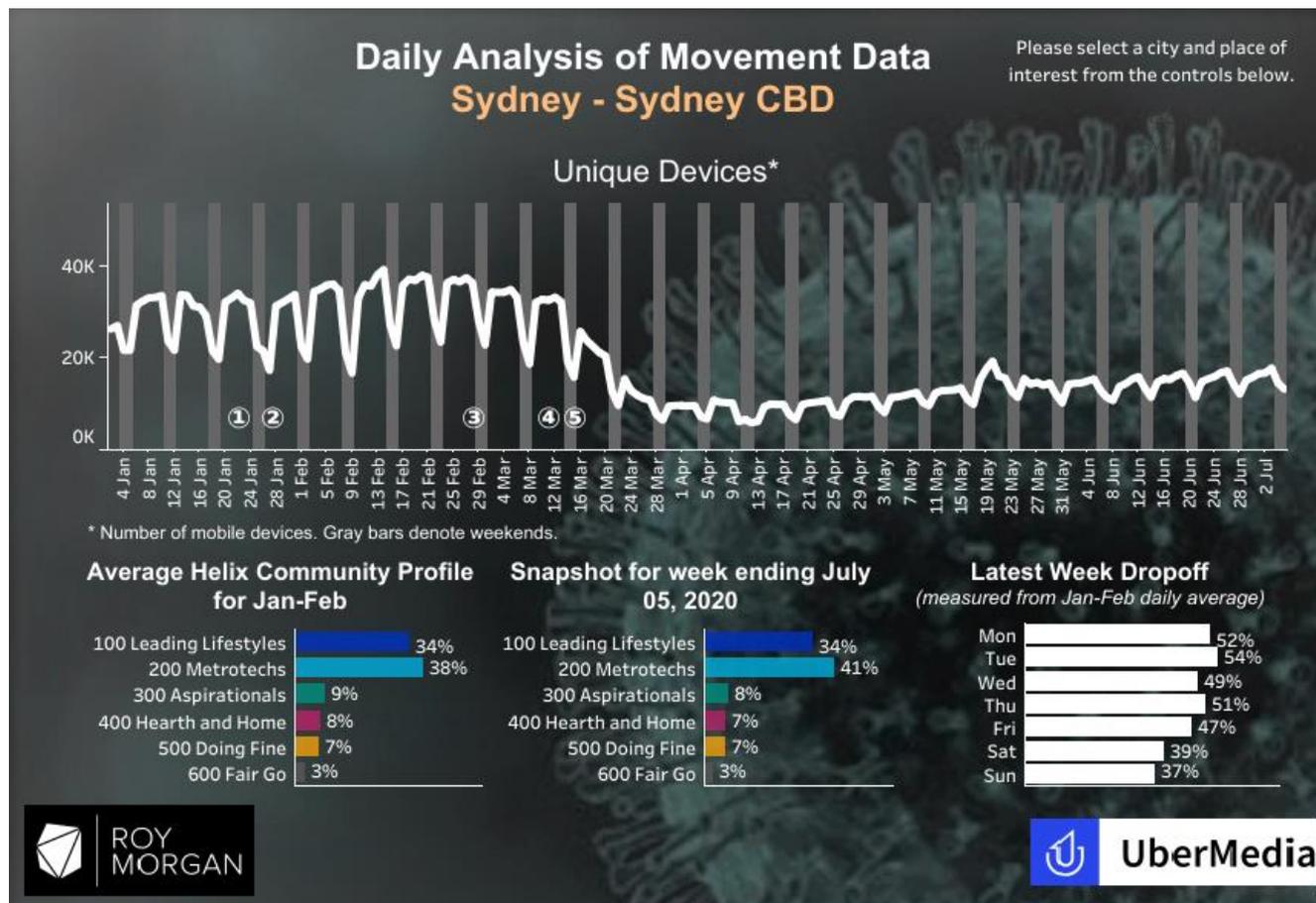
Roy Morgan's Helix Personas (www.helixpersonas.com.au) uses deep psychographic insights, far beyond simple demographics, to segment consumers into targetable groups. The tool incorporates values, beliefs and attitudes which are the best predictors of consumer behaviour, so you can reach your customers most effectively with messages that resonate.

Daily Analysis of Movement Data for Melbourne CBD in 2020



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

Daily Analysis of Movement Data for Sydney CBD in 2020



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

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, Aspirationals are highly ambitious and culturally diverse up-and-comers. Careful spenders, they're working hard today to create a more successful tomorrow.

Explore



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.