

Tuesday, 27 October 2020

## Movement in Adelaide CBD closest to pre COVID-19 levels while movement in Melbourne CBD at only 15% of normal

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

Movement in the Adelaide CBD in mid-October is closest to the pre COVID-19 levels at an average of 78% of the levels earlier in the year during January and February, up 7% points since late July. Adelaide CBD has moved ahead of the Perth CBD which is now at 74% of pre-COVID-19 levels, up 3% points.

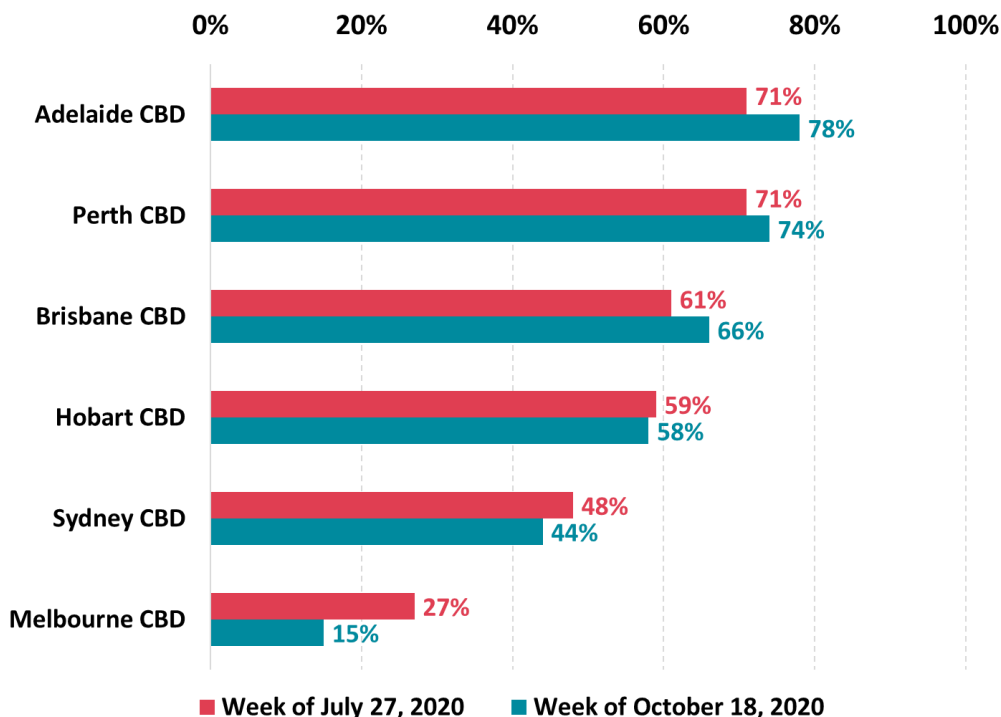
The Queensland capital is ranked third with movement levels in the Brisbane CBD at 66% of the pre COVID-19 levels, up 5% points while there has been little change for the Hobart CBD now at 58%.

Movement in both the Sydney CBD and Melbourne CBD is lower in mid-October than it was in late July as both cities have dealt with a second wave of COVID-19 in recent months. NSW authorities have dealt largely successfully with sporadic outbreaks of COVID-19 without resorting to a harsher lockdown but nevertheless movement in the Sydney CBD in mid-October is at only 44% of pre COVID-19 averages, down 4% points since late July.

The Melbourne CBD entered a Stage 4 lockdown in early August which has continued to this day and movement in the Melbourne CBD averaged only 15% of the pre COVID-19 level in mid-October, down 12% points from late July. It is worth remembering that Melbourne was already in a Stage 3 lockdown starting in the first week of July.

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.

### Australian Capital City CBDs ranked by average movement levels in mid-October cf. late July: % Movement in the weeks to Oct. 18 & July 27 compared to daily averages 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 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 Premier Dan Andrews has this week announced the ending of Melbourne's more than three-month long second lockdown with retail and hospitality businesses to re-open tomorrow (Wednesday October 28):**

*"The long-awaited lifting of restrictions in Melbourne from this Wednesday signals the end of Melbourne's nearly 16 week-long lockdown which began on Thursday July 9. However, the lifting of the lockdown is only the first step on a long road back to normality.*

*"The experience of other cities around Australia demonstrates that a pre-vaccine 'COVID-Normal' is very different to conditions pre-COVID-19. In cities including Adelaide and Perth there has been little to no local transmission of the virus for months – not since late April for Perth and not since early May for Adelaide – more than five months ago.*

*"However, despite being largely free of COVID-19, movement in the Adelaide CBD in mid-October was only at 78% of the pre COVID-19 average and at 74% of the pre COVID-19 averages in the Perth CBD. Both have increased slightly since late July but remain well below the levels that hospitality and retail businesses in the city centres are accustomed to.*

*"The movement in the Melbourne CBD was at only 15% of pre COVID-19 average levels in mid-October, down from an already low 27% during a Stage 3 lockdown in late July. The staged re-opening of retail and hospitality businesses in Melbourne this week is a step in the right direction but city office workers are still being encouraged to work from home for the foreseeable future and mask wearing remains mandatory in the Victorian capital.*

*"Nevertheless, the movement data for the Melbourne CBD is set to increase substantially in the next few weeks and retailers and traders in the city will be closely watching to see how quickly Melbourne can close the gap on interstate counterparts such as Sydney or Brisbane*

*"Keep an eye on the Roy Morgan-UberMedia dashboards for your Capital City to closely monitor how Australians continue to react to the threat posed by COVID-19."*

**The composition of visitors to the Adelaide CBD is virtually identical to before COVID-19 – but at only 78% of average movement earlier in the year**

In the Adelaide CBD the young and trendy *Metrotechs* now comprise 25% of movement data compared to 24% during the summer months. Close behind in second place, and different to other mainland capital cities, is the community closest to the average Australian *Hearth and Home* who represent a 22% share of movement data – unchanged from the average pre-COVID-19.

- **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.
- **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.

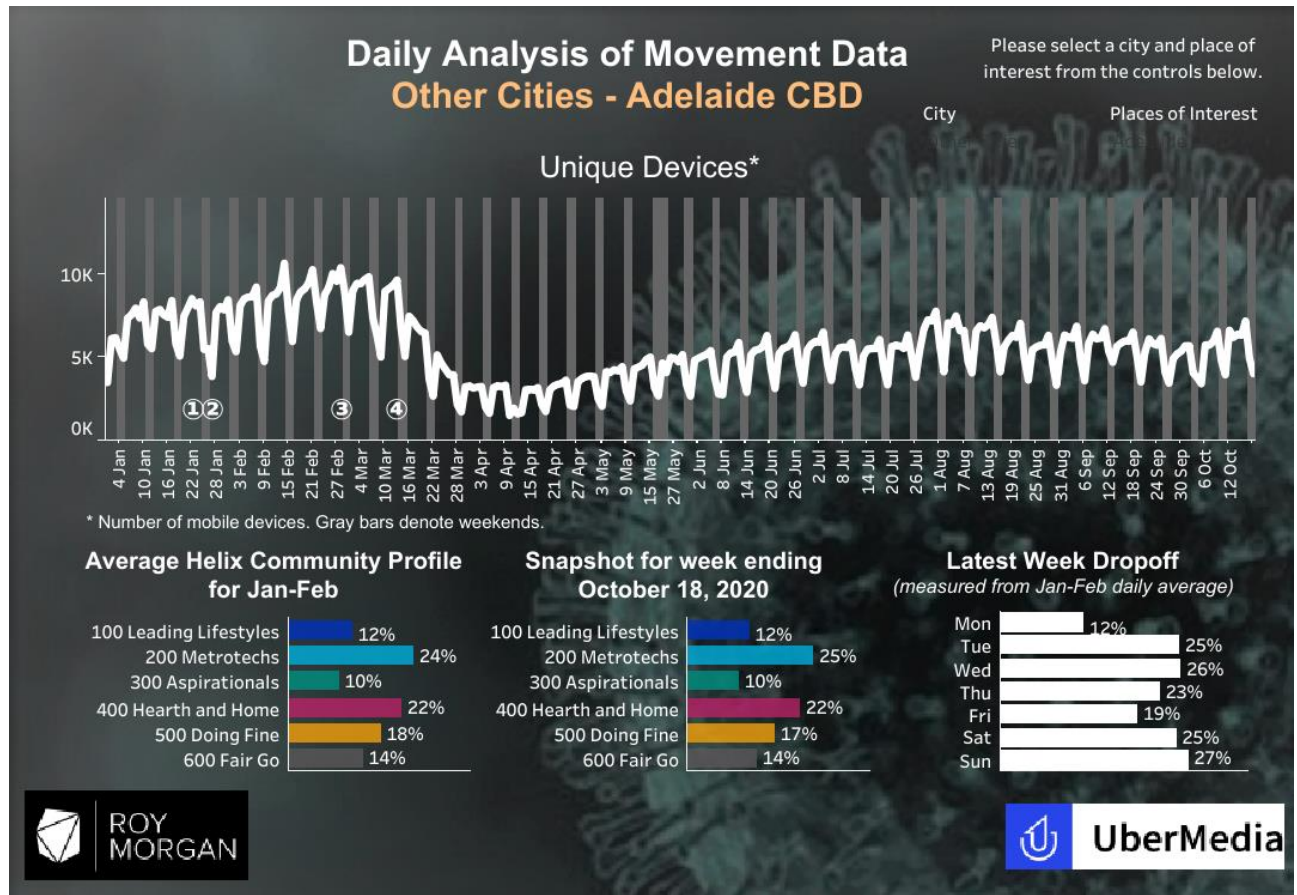
The share of movement data in the Adelaide CBD for each of the four other Helix Personas communities in mid-October is virtually identical to that seen earlier in the year with *Doing Fine* comprising 17%, *Fair Go* (14%), *Leading Lifestyles* (12%) and *Aspirationals* (10%).

The spread of movement data for Helix Persona communities in the Adelaide CBD between the highest share – *Metrotechs* (25%) and the lowest for *Aspirationals* (10%) is the most even spread in Australia.

Roy Morgan's Helix Personas ([www.helixpersonas.com.au](http://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.

FOR IMMEDIATE RELEASE

## Daily Analysis of Movement Data for Adelaide CBD in 2020



**Source:** Roy Morgan collaboration with UberMedia who provide anonymous aggregated insights using mobile location data. **Note:** Movement data for Adelaide CBD excludes residents of the Adelaide 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](http://www.helixpersonas.com.au).