

Tuesday, 16 March 2021

## Movement in Melbourne CBD plunged 89% during February lockdown compared to smaller declines in other cities

There have been five localised lockdowns in Australian cities or states in the last few months caused by COVID-19 outbreaks starting with a state-wide lockdown of South Australia in late November up to the most recent state-wide lockdown in Victoria in mid-February.

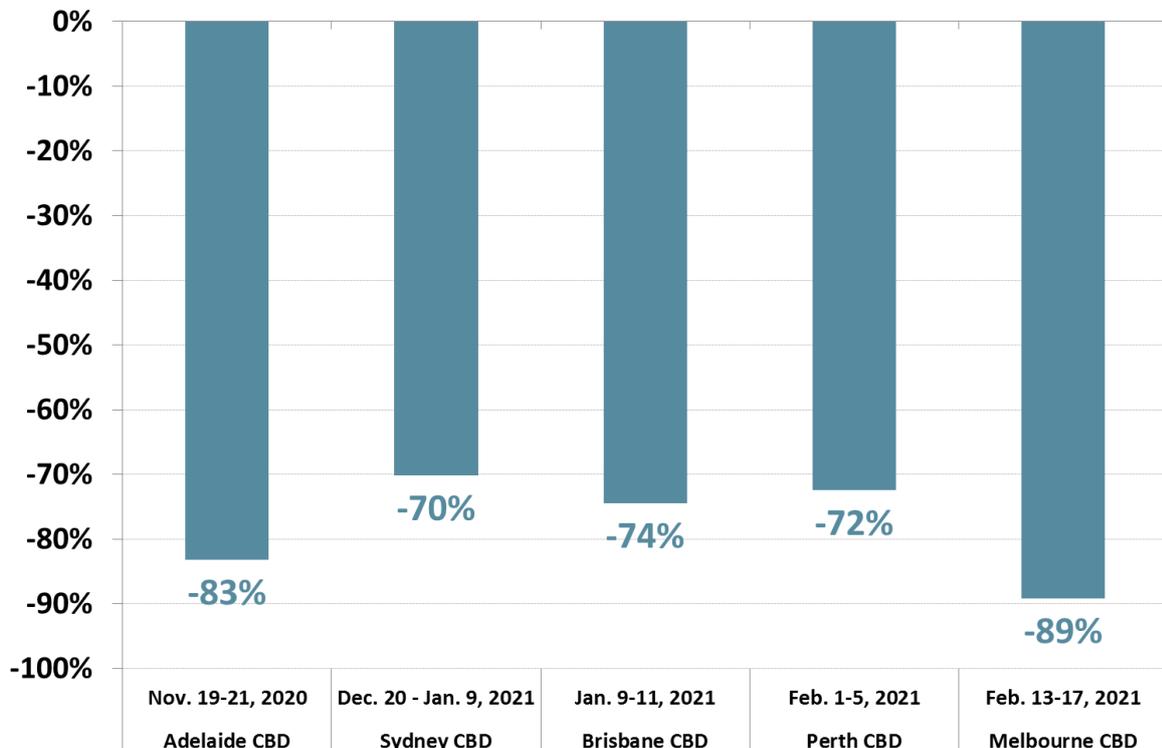
A special analysis of movement data in Australia's Capital City CBDs during the five localised lockdowns shows movement levels in the Melbourne CBD plunged the most – by 89% - when Victoria went into a snap state-wide five day lockdown from February 13-17, 2021 to get on top of the Holiday Inn outbreak

These results show the recent Victorian state-wide lockdown was the severest of all five localised lockdowns followed by the state-wide lockdown in South Australia from November 19-21, 2020.

The South Australian lockdown was caused by a COVID-19 outbreak at a Woodville pizza bar and was cut short when further information was discovered about the chains of transmission but nevertheless movement in the Adelaide CBD during the three-day state-wide lockdown plunged by 83%.

In comparison to the state-wide lockdowns in Victoria and South Australia there have also been three more localised lockdowns during the last few months. There were two city-wide lockdowns of Greater Brisbane (January 9-11, 2021) and Greater Perth (February 1-5, 2021) and a localised lockdown of the Northern Beaches council area in Sydney's north which went for three weeks over the Christmas/New Year period and dealt with easily the largest outbreak (December 20, 2020 – January 9, 2021).

**% decline in movement in Australian Capital City CBDs during five recent lockdowns**  
**% movement decline is compared to the daily averages in January - February 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 short lockdowns of Greater Brisbane in January and Greater Perth in February caused large reductions in movement in both CBDs – down 74% in Brisbane CBD and down 72% in Perth CBD. However, these two lockdowns caused reductions that were noticeably lesser than those seen in the Adelaide CBD and Melbourne CBD during the respective State-wide lockdowns in South Australia and Victoria.

Although the Northern Beaches lockdown only directly affected 270,000 people, the reduction in movement in the Sydney CBD was still substantial with movement down 70% on average movement earlier in 2020.

There are a few factors at play with workers from other locations in Sydney reluctant to commute to a high density area such as the Sydney CBD. Even during the Northern Beaches lockdown people in that area were allowed to commute to work – anywhere in Sydney – if they were unable to do their work from home.

Another factor is that the Christmas/New Year period is a time of year when many people are already on holidays and not commuting to the office anyway. Nevertheless, the results show that even localised lockdowns within a larger suburban area do cause large impacts as people in other areas modify their own behaviour in response to the perception of an increased risk.

### **Michele Levine, CEO of Roy Morgan, says comparing the movement data in Australia's Capital City CBDs during five recent lockdowns shows the huge impact they cause:**

*"Since Victoria (and Melbourne) emerged from its second wave of the virus in late October 2020, after nearly four months of hard lockdown, there have been several outbreaks of COVID-19 around Australia – including in all five mainland capital cities.*

*"The cities have handled the outbreaks differently with State-wide lockdowns in South Australia/Adelaide (November 2020) and Victoria/Melbourne (February), city-wide lockdowns in Brisbane (January) and Perth (February) and a localised three-week lockdown in the Northern Beaches of Sydney (December 2020/January 2021).*

*"The third Victorian lockdown, which ran for five days from February 13-17, 2021, caused the biggest drop in the movement of people of all of these short-term lockdowns. Movement in the Melbourne CBD plunged 89% on the average level during January/February 2020 during the five-day lockdown.*

*"The strong adherence to the restrictions in Melbourne should probably come as no surprise as Victorians have been the most practiced at working from home and constraining their movement over the last year. However, the results do show how devastating these lockdowns are for businesses trading in the Melbourne CBD who rely on foot traffic and people working in the office.*

*"The second largest decline was for movement in the Adelaide CBD during South Australia's brief lockdown in late November with the metric down 83% on the average level of early 2020. The fact the COVID-19 outbreak in Adelaide came only a few weeks after Victoria and Melbourne finally emerged from its long lockdown may explain why South Australians adhered so well to the threat of a renewed outbreak in their State.*

*"The three lockdowns in Brisbane, Perth and Sydney's Northern Beaches caused movement in the respective Capital City CBDs to plunge between 70%-74% compared to pre-COVID-19 averages.*

*"The most interesting aspect here is that while the Brisbane and Perth lockdowns were of the entire metropolitan area the Sydney lockdown was of only one local council area for the 275,000 people living in the Northern Beaches.*

*"Movement in all three Capital City CBDs plunged by a similar amount but the real differences emerge when looking at other areas around Sydney not in either the Northern Beaches or CBD. Movement in suburban locations around Sydney such as in Lidcombe, Bondi and Leichhardt declined by far less than it did in the Sydney CBD during the Northern Beaches lockdown."*

### **MORE INFORMATION**

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## Roy Morgan's partnership with technology innovator UberMedia

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, 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.

## Comparing the short and sharp localised lockdowns (November 2020 – February 2021).

- **South Australia: State-wide lockdown** – Thursday November 19, 2020 – Saturday November 21, 2020 (3 days) and impacting 1.8 million people in South Australia.
- **New South Wales: Northern Beaches lockdown** – Sunday December 20, 2020 – Saturday January 9, 2021 (21 days) and impacting 275,000 people in the Northern Beaches local council.
- **Queensland: Greater Brisbane lockdown** – Saturday January 9, 2021 – Monday January 11, 2021 (3 days) and impacting 2.5 million people in Greater Brisbane.
- **Western Australia: Greater Perth lockdown** – Monday February 1, 2021 – Friday February 5, 2021 (5 days) and impacting 2 million people in Greater Perth.
- **Victoria: State-wide lockdown** – Saturday February 13, 2021 – Wednesday February 17, 2021 (5 days) impacting 6.7 million people in Victoria.

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](#).

### 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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