

Tuesday, 11 August 2020

Movement in Melbourne CBD now 27% of pre COVID-19 levels

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

Movement in both the Perth and Adelaide CBDs is closest to the pre COVID-19 levels. Movement in late July has returned to an average of 71% of the levels earlier in the year during January and February.

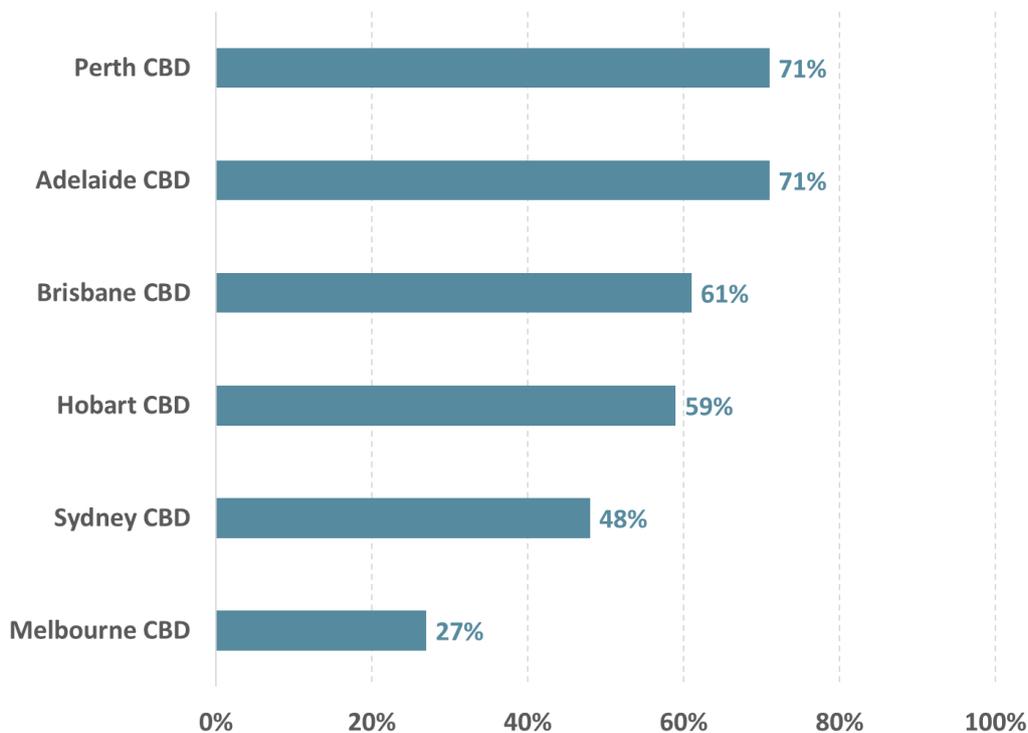
The Queensland capital is ranked third with movement levels in the Brisbane CBD at 61% of the pre COVID-19 levels just ahead of the Hobart CBD at 59%.

The two laggards are Australia's largest cities and most impacted by the second wave of COVID-19. Movement in the Sydney CBD has dropped to just under half of the pre COVID-19 levels at 48% while the Melbourne CBD, which entered Stage 3 lockdown in early July, was at only 27% in late July. This movement data was drawn before Melbourne entered the more restrictive Stage 4 lockdown last week.

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 below.

**Australian Capital City CBDs ranked by average movement levels in late July:
% Movement in the week of July 27 compared to 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.

Michele Levine, CEO of Roy Morgan, says unlike the first wave of COVID-19 to hit Australia in March and April the second wave is concentrated in Melbourne with a large secondary impact on Sydney while the rest of Australia has largely been spared so far:

“The first wave of COVID-19 in March and April prompted a nationwide shutdown of movement across the whole country that succeeded in flattening the curve and eliminating the virus from large parts of the country.

“The success of the first lockdown means there has been no community transmission of COVID-19 in the States of South Australia or Western Australia for nearly four months since early April and not for more than two months in either Queensland or Tasmania.

“Given the success these States have had in eliminating the virus it is no surprise movement in the respective Capital City CBDs has returned closest to pre COVID-19 averages in both Adelaide and Perth at 71% and followed by Brisbane (61%) and Hobart (59%).

“In contrast the second wave of COVID-19 has hit Melbourne at a far higher rate than earlier in the year with over 10,000 new cases diagnosed in the last month and the city returning to lockdown on Thursday July 9.

“Three weeks into this second lockdown movement in Melbourne was at only 27% of average levels and is set to plunge further in August as the city has now entered an even more restrictive Stage 4 lockdown set to run until at least mid-September.

“Over the next few weeks, the disparity in movement around Australia is likely to increase as Victoria is effectively quarantined from the rest of the country as it fights to regain control of the latest outbreak of COVID-19.

“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.”

Metrotechs (41%) comprise easily the largest share of visitors to Melbourne CBD in lockdown

It is the ‘young and trendy’ *Metrotechs* who are the most likely to be in the city centre during this second lockdown, although their movement is clearly down compared to earlier in the year. In the Melbourne CBD *Metrotechs* comprised 41% of the movement data, up from 34% during the summer months.

- **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.

The share of movement data for *Doing Fine* has also increased marginally to 12% from an average of 11% during the summer months but each of the four other Helix Personas communities is equal to, or less than, it was earlier in the year.

- **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.

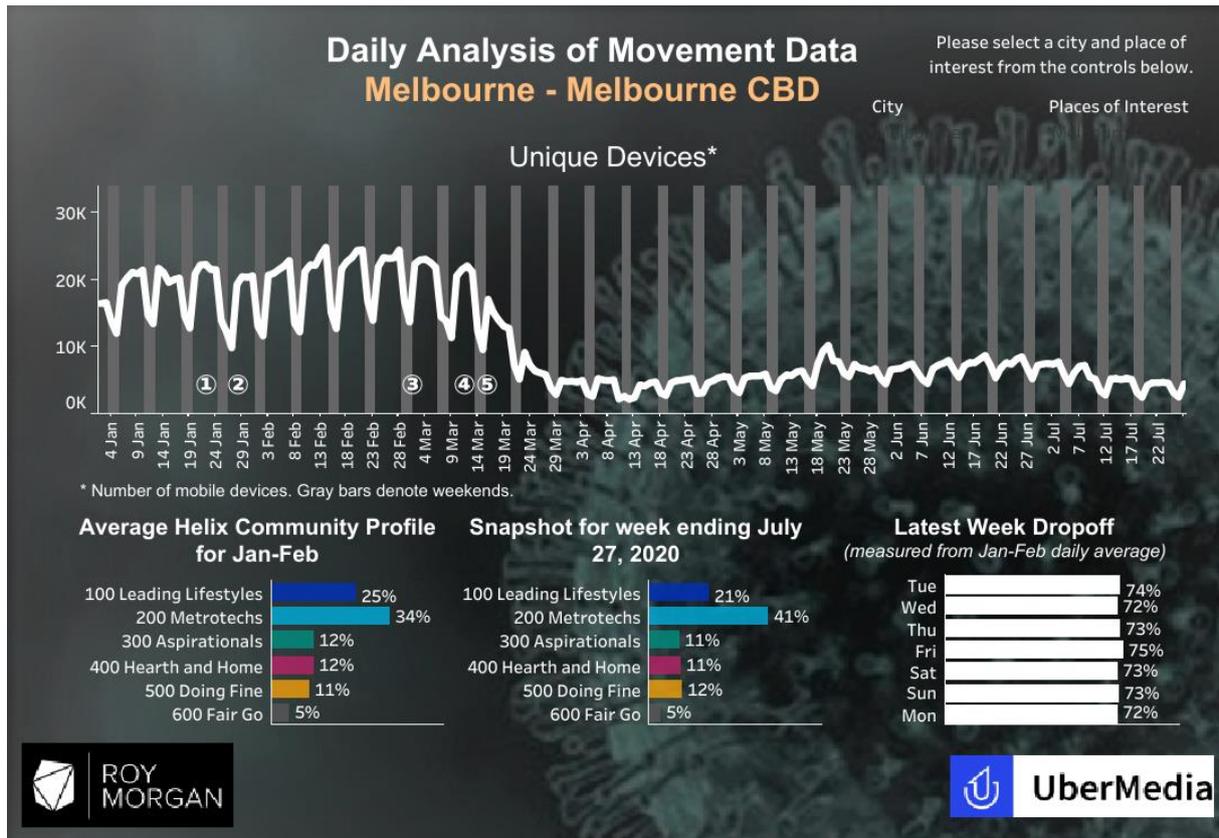
Although their share of the movement data in the Melbourne CBD has declined the *Leading Lifestyles* community still comprised the second largest share of the movement data at 21% in Melbourne CBD, down from 25% earlier in the year.

- **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 Perth CBD excludes residents of the Perth 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.