

Friday, 27 August 2021

Movement in the Brisbane CBD recovers quickly after recent lockdown, but Sydney & Melbourne lockdowns extended again

A special analysis of movement data in Australia's Capital City CBDs since the COVID-19 pandemic began shows movement in the Brisbane CBD continuing to recover after the recent lockdown in early August. Restrictions in South-East Queensland eased further over the weekend with up to 100 people now allowed to attend weddings although mask-wearing remains mandatory at all indoor venues.

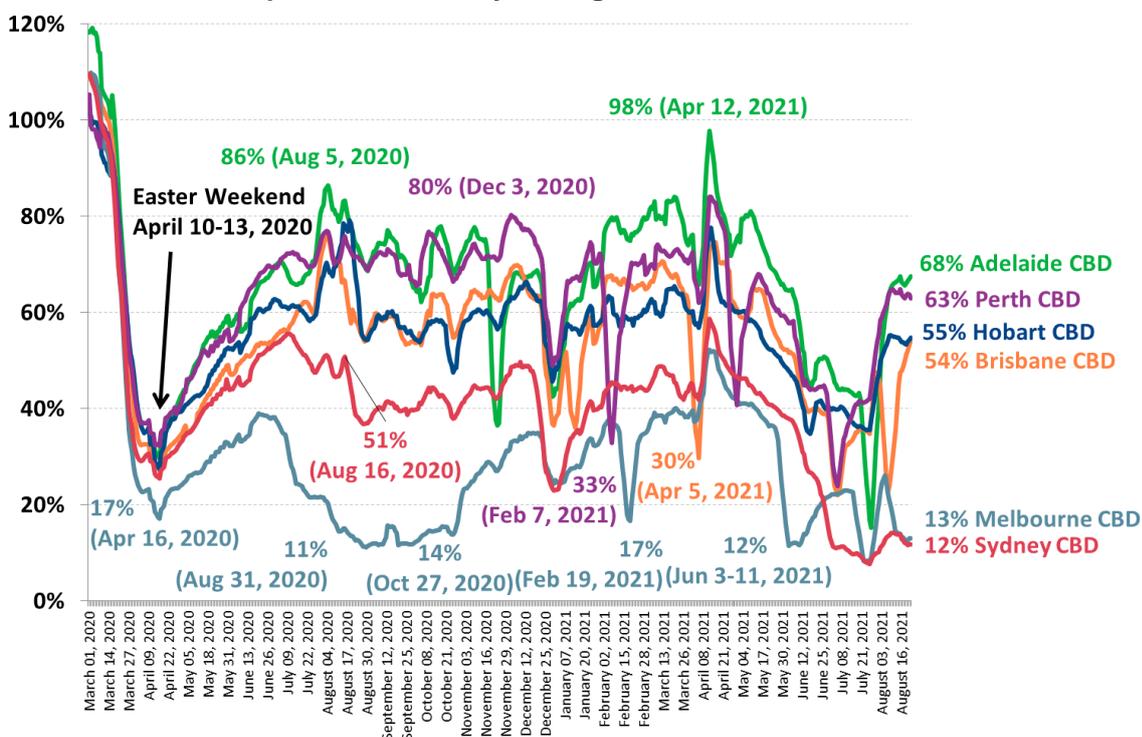
The average 7-day movement level in the Brisbane CBD was at 54% of pre-pandemic levels in late August, up from a low of only 23% in early August and its highest for nearly three months since late May. Over the last three months South-East Queensland, including the Brisbane CBD, has experienced two short lockdowns in late June/early July (4 days) and again a month later in the first week of August (8 days).

In contrast, movement levels in the two largest cities of Sydney and Melbourne remain at only a fraction of pre-pandemic levels in late August as both cities endure extended Winter lockdowns which are set to continue well into September and even October.

In late August average movement levels in the Sydney CBD were at only 12% of pre-pandemic averages and at only 13% of pre-pandemic levels in the Melbourne CBD. Movement levels in both cities is slightly above the record low of 8% reached in both cities in late July.

The two cities closest to pre-pandemic 'normal' are the Adelaide CBD with average movement levels at 68% of pre-pandemic averages and the Perth CBD with average movement levels at 63% of pre-pandemic averages. In third place is the Hobart CBD at 55% of pre-pandemic averages.

Australian Capital City CBDs average 7-day movement levels March 1, 2020 – August 22, 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.

The latest vaccination figures from the [Health Department show over 19 million vaccination doses](#) have so far been administered to 58% of the adult population. If herd immunity requires 80% of Australia's 20.6 million adults to be fully vaccinated, we require another 14 million vaccination doses to be administered over the next few months. At an average rate of 1 million vaccinations per week we should reach the target of 80% of Australians fully vaccinated by mid-December.

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 the lockdowns in NSW, Victoria and the ACT are set to continue for several more weeks although the focus on achieving vaccination targets as a way to exit the lockdowns has increased this week:

“Over 15 million Australians remained in lockdown during the closing weeks of winter with the stay-at-home orders extended well into September for Sydney, Melbourne and Canberra as all three cities deal with outbreaks of the contagious Delta variant.

“The average movement levels in the Sydney CBD and Melbourne CBD remain at a fraction of pre-pandemic levels, at only 12% in the Sydney CBD and 13% in the Melbourne CBD.

“Although the increasing number of cases in both cities suggests the exits from lockdown can't be expected for several weeks there, was a renewed focus on reaching vaccination targets this week by both Prime Minister Scott Morrison and NSW Premier Gladys Berejiklian.

“Premier Berejiklian announced that in just over two weeks' time, from Monday September 13, fully vaccinated people will be able to gather in greater numbers in Sydney than those who remain unvaccinated.

“The decision to grant extra freedoms to those who are fully vaccinated is part of a push to reward those who have taken the initiative to become vaccinated and provide a further spur to those yet to receive a vaccination dose. The latest figures from the Federal Health Department show 35% of NSW residents aged 16+ are now fully vaccinated and nearly two-thirds, 64%, have received at least one vaccination dose.

“The good news to emerge from analysis of movement levels this week is to see the quick rebound in movement levels in the Brisbane CBD over the last few weeks of August. South-East Queensland was in lockdown for the first eight days of August and COVID-19 restrictions have remained for the area ever since the lockdown ended.

“In late August average movement levels in then Brisbane CBD had increased to 54% of pre-pandemic levels, more than doubling the low of only 23% reached in the first week of August.

“This increase of over 30% points in only two weeks shows that when restrictions are finally eased in Sydney, Melbourne and Canberra there should be a quick rebound in movement and activity – the only question remaining is when that easing of restrictions will occur.”

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

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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.

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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.

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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.