

Monday, 3 May 2021

## Movement in the Sydney, Melbourne and Adelaide CBDs drops in late April after hitting COVID-19 highs over the Easter holidays

A special analysis of movement data in Australia's Capital City CBDs since the COVID-19 pandemic began shows movement levels plunging in late April after hitting pandemic highs in several cities in the school holiday period in the week following Easter.

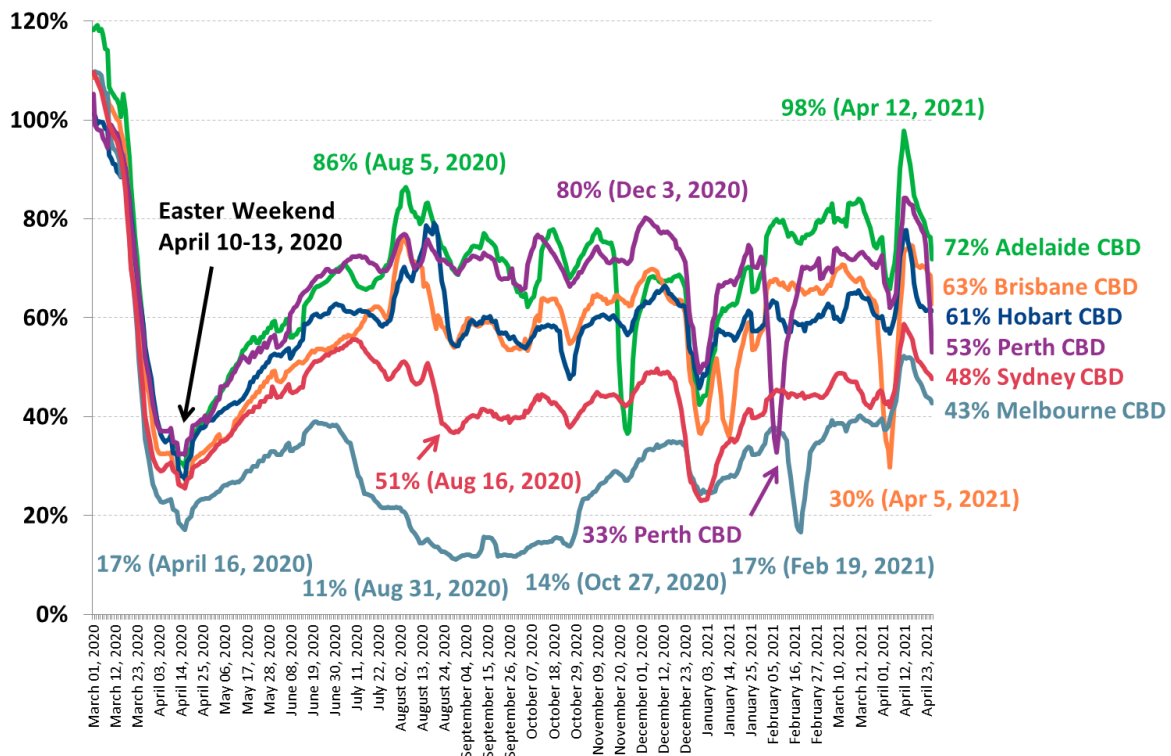
Since school holidays ended average 7-day movement levels have declined across all Capital City CBDs including the Melbourne CBD (down 9% points to 43%), Sydney CBD (down 11% points to 48%), Brisbane CBD (down 12% points to 63%) and Hobart CBD (down 16% points to 61%).

The largest declines in average movement were seen in the Adelaide CBD (26%-point decline to 72%) and the Perth CBD which experienced a sharp 31%-point decline to 53% average movement as the city entered a snap three-day lockdown over the three-day ANZAC Day weekend.

In the week after Easter through to April 12 average 7-day movement levels were at pandemic highs in several Capital City CBDs including the Sydney CBD (59% of pre-COVID-19 levels), Melbourne CBD (52%), Perth CBD (84%) and Adelaide CBD (98%) – a record high for any Australian Capital City CBD since the COVID-19 pandemic began.

However, the week after Easter was right in the middle of school holidays for most of Australia and the high levels of movement seen that week have not been sustained in the following two weeks with the kids back in school.

**Australian Capital City CBDs average 7-day movement levels March 1, 2020 – April 26, 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.

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The figures illustrate the ongoing issue facing Capital City Lord Mayors striving to return city office workers to the office rather than continuing to work from home – as many prefer to do.

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 average movement levels in Australia’s Capital City CBDs remain well down on those prior to the COVID-19 pandemic although the recent Easter school holidays saw movement levels spike to their highest in more than a year:**

*“The recent Easter school holidays brought life back into Australia’s Capital Cities quite literally – average movement levels in the week after Easter hit their highest since the COVID-19 pandemic began in four Capital City CBDs: Adelaide CBD (98% of pre-COVID-19 levels), Perth CBD (84%), Sydney CBD (59%) and Melbourne CBD (52%).*

*“However, the movement spike during the Easter school holidays was short-lived and average movement levels have largely returned to their levels prior to the Easter holidays in the CBDs.*

*“Average movement levels in the Perth CBD fell more sharply than elsewhere and down to a 7-day average of only 53% of pre-COVID levels in the week to April 26 as the city entered a second short lockdown over the three-day ANZAC weekend.*

*“The end of school holidays also led to steep falls in movement levels in other cities as well with average movement levels falling 26% points in the Adelaide CBD, down 12% points in the Brisbane CBD, down 11% points in the Sydney CBD and down 9% points in the Melbourne CBD.*

*“On a comparative level the average movement level in the Adelaide CBD was at 72% of normal in the last week and higher than anywhere else ahead of the Brisbane CBD (63% of normal), Perth CBD (53%), Sydney CBD (48%) and Melbourne CBD (43%).*

*“The latest results show Capital City CBDs are still operating at levels well below those they were used to before the COVID-19 pandemic began in March 2020. The large number of office workers continuing to work from home, as well as the ongoing lack of international tourists, continue to place added pressure on businesses in Capital City CBDs that rely on passing foot traffic.*

*“The latest news out of India, which is dealing with a surge in COVID-19 cases, shows how important it is for Australia’s population to be vaccinated against the virus before international borders can be re-opened.*

*“However, the flexibility of working-from-home is likely to remain a key point of appeal for many office workers and provides an ongoing challenge for Inner City Councils looking to revitalise their cities and return activity closer to pre-COVID ‘normality’.”*

**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.

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