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Tuesday, 4 August 2020

‘Second wave’ of COVID-19 sinks Sydney CBD movement levels

A special analysis of movement data in Sydney’s CBD shows a new decline in movement in recent weeks as concerns about a second wave of COVID-19 striking the city have increased.

The number of devices seen in the Sydney CBD during week ending July 27 averaged only 48% of levels during January and February. These levels are also down on movement [the first week of July that had returned to 53% of the pre-pandemic level](#) —a high point in movement in the Sydney CBD over the last few months.

There has been a steady stream of new cases of COVID-19 discovered around Sydney over the past month as an outbreak centred on the Crossroads Hotel in Casula has seeded several new clusters. During July, over 350 new cases of COVID-19 were announced in Sydney as part of this ‘second wave’, triggering new restrictions across the city.

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 chart below tracks the movement data for those visiting the Sydney CBD during 2020, excluding CBD residents. Movement data from a number of key locations around Sydney is also available to view by using the interactive dashboard on the website.

Michele Levine, CEO of Roy Morgan, says just when Australians thought we had got on top of COVID-19 after a lockdown period extending from April until early June the virus has returned, with a devastating second wave forcing renewed restrictions around Australia:

“The onset of COVID-19 in Australia forced a long lockdown of the country during April, May and June, and the effort was largely successful in suppressing the virus from large parts of the country.

“However the second wave of COVID-19, which began with hotel quarantine breaches in Melbourne in late May and early June, has caused a new lockdown in the southern city and restrictions to be re-imposed on restaurants and licensed establishments in Sydney and other cities around the country.

“As Sydney attempts to contain the viral outbreaks the NSW Government is hopeful a return to a full lockdown won’t be necessary. The decline in movement seen in the Sydney CBD during the latter half of July shows Sydneysiders are taking the evolving situation seriously.

“NSW Premier Gladys Berejiklian has advised Sydney residents to wear masks in four situations: enclosed spaces such as supermarkets or public transport, if you’re in a customer service job, whilst attending places of worship, or if you’re in a COVID-19 ‘hotspot’ with elevated levels of community transmission.”

‘Metrotechs’ continue to comprise a larger share of CBD visitors than pre-pandemic

Over three-quarters of visitors to the Sydney CBD in the final week of July were drawn from the big spending [Leading Lifestyles](#) and [Metrotechs](#) Helix Communities.

The ‘young and trendy’ *Metrotechs* now comprise 42% of the most recent movement data around the Sydney CBD, up from 39% during the summer while the career oriented *Leading Lifestyles* are at 34%, almost identical to the 33% of movement data seen earlier in the year.

- [200 Metrotechs](#): Socially aware, successful, career-focused and culturally diverse, Metrotechs are also 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.

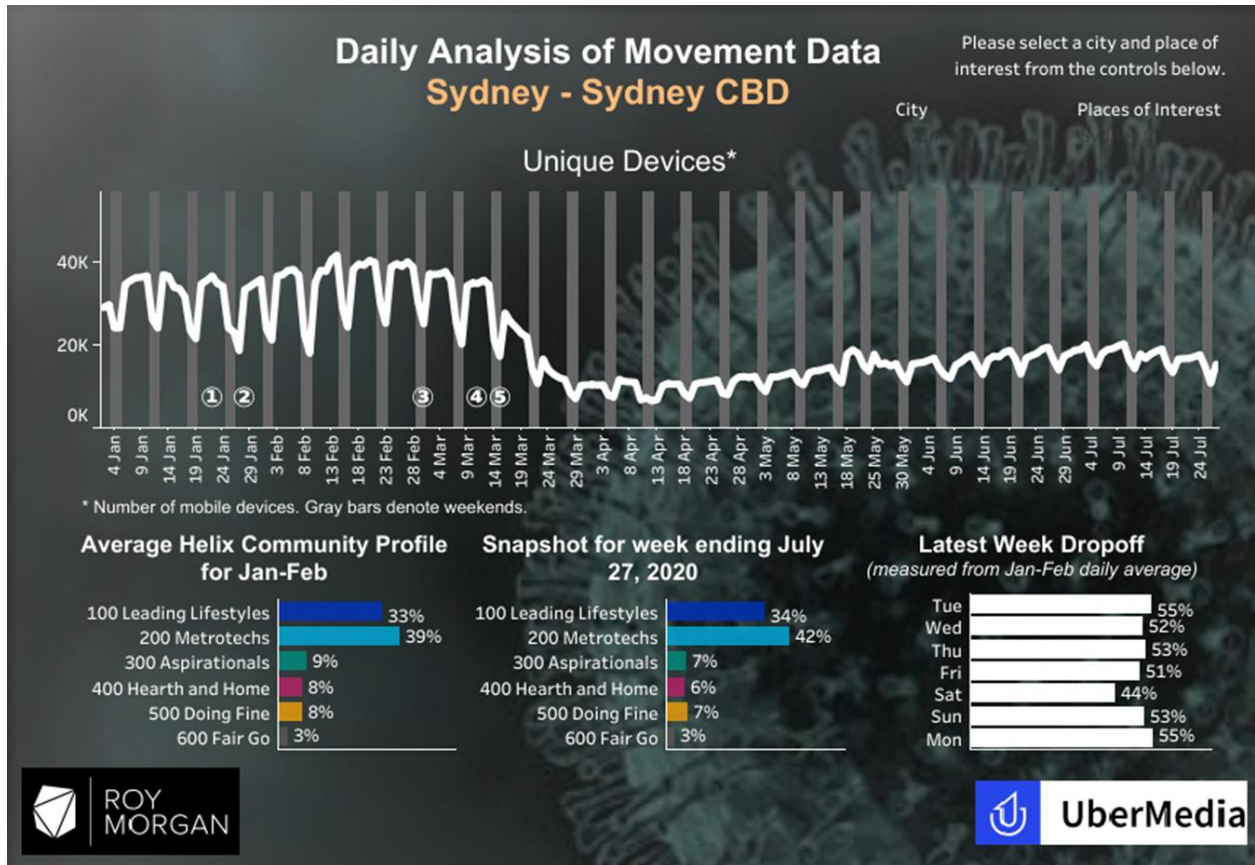
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• [100 Leading Lifestyles](#): Focused on success, career and family, people in this Community are proud of their prosperity and achievements. They are big spenders and enjoy cultured living to the max.

All other communities including *Aspirationals*, *Heath and Home*, *Doing Fine* and *Fair Go* comprise smaller shares of the movement data around the Sydney CBD than they did earlier in 2020.

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 in 2020 for the Sydney CBD



Source: Roy Morgan collaboration with UberMedia who provide anonymous aggregated insights using mobile location data. **Note:** Movement data for Sydney CBD excludes residents of the Sydney CBD.

For comments or more information about Roy Morgan's collaboration with UberMedia and aggregated insights using mobile location data please (03) 9224 5309 or email askroymorgan@roymorgan.com.

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.