

Friday, 14 August 2020

Movement in Melbourne CBD plunges to only 13% of pre COVID-19 levels by the end of first week of Stage 4 lockdown

A special analysis of movement data in the Melbourne CBD during the first week of the Stage 4 lockdown shows movement plummeting to an average of only 17% and a record low of only 13% of pre-COVID-19 levels by the end of the first week (Saturday August 8, 2020).

Victorian Premier Daniel Andrews announced on Sunday August 2 that Melbourne would enter a 'Stage 4 lockdown' to flatten the curve of new COVID-19 infections beginning with a city-wide curfew between the hours of 8pm-5am starting that night.

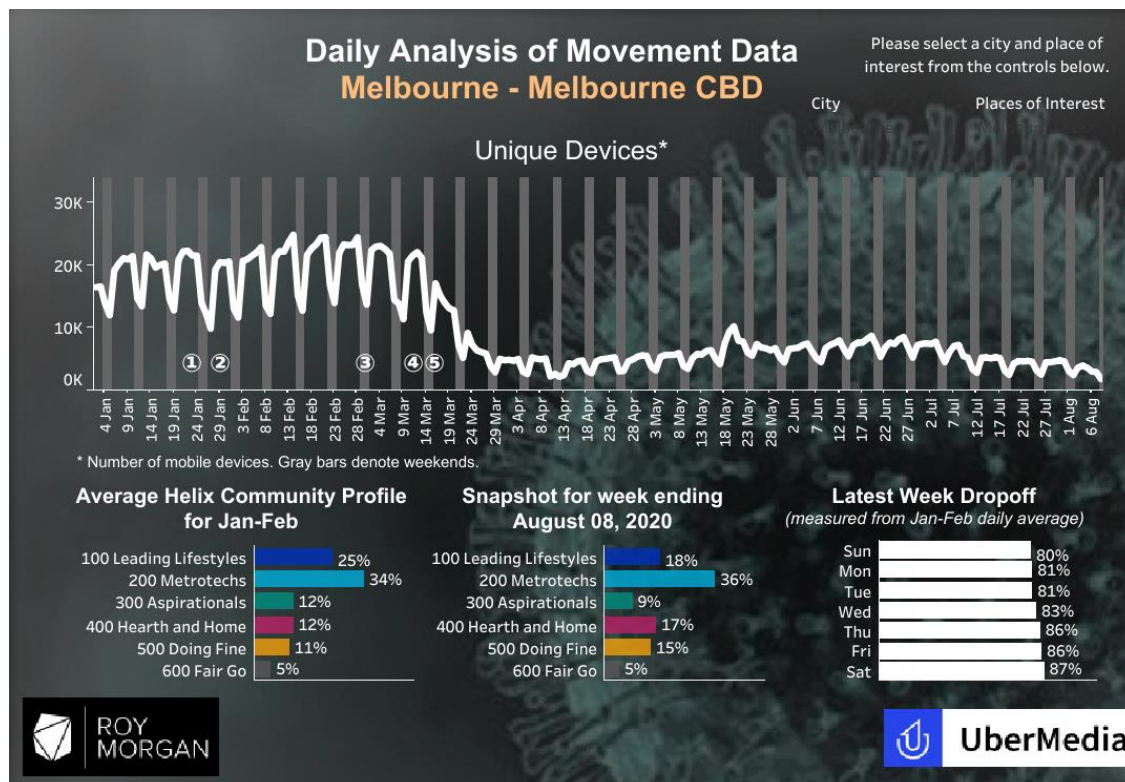
Further measures were introduced progressively over the following week with residents of the metropolitan area subject to a 5km travelling limit for essential supplies and exercise as well as the closure of all businesses deemed non-essential from Thursday August 6.

This movement data was drawn from the day the Stage 4 lockdown for Melbourne was announced running through to the following weekend. A day-by-day analysis shows movement decreased on each subsequent day and had dropped to only 13% of pre-COVID-19 levels by Saturday August 8.

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 Melbourne CBD during 2020, excluding the CBD residents. Movement data from several key locations around Australia is also available to view by using the interactive dashboard below.

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 Melbourne CBD excludes residents of the Melbourne CBD.

FOR IMMEDIATE RELEASE

Metrotechs, Hearth and Home and Doing Fine all increase share of movement data in Melbourne during Stage 4 lockdown

In the Melbourne CBD the *Metrotechs* comprise easily the largest share of movement data at 36% during the first week of Stage 4 lockdown, up by 2% points from 34% during the pre COVID-19 period in summer. However, this is down significantly from the [41% share the *Metrotechs* held during the final week of July during the less strict Stage 3 lockdown](#).

The high share for *Metrotechs* isn't surprising when one considers this community is concentrated in inner urban areas within 5km of the CBD and these people will be visiting the city to buy essential supplies such as food and drink.

- **[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.

A notable difference with the Stage 4 lockdown compared the earlier lockdowns is that nearly a third of movement in the city is now comprised of either *Hearth and Home* (17%) or *Doing Fine* (15%) – both up at least 4% points from their shares during the summer months.

The greater share of movement of these two communities – who don't live near the CBD – indicates the greater likelihood that these communities work in essential industries such as construction, essential retailing such as supermarkets and convenience stores and wholesale delivery.

- **[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.
- **[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.

The community that has departed the city to the greatest extent is the career-focused *Leading Lifestyles* that have seen their share of movement in the city decline by 7% points in Stage 4 lockdown compared to the pre-COVID-19 period earlier in the year.

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.

Michele Levine, CEO of Roy Morgan, says Stage 4 lockdown has caused a record drop in movement in the Melbourne CBD with movement averaging only 17% of pre COVID-19 levels in its first week, down another 10% points from late July:

"The second wave of COVID-19 has hit Melbourne hard and the surging rate of infections during July led to the State Government progressively tightening restrictions during the month. These restrictions included introducing Stage 3 restrictions on July 9, compulsory mask wearing for all Melburnians from July 22 and the introduction of Stage 4 restrictions in the first week of August.

"The move to Stage 4 restrictions seemed likely during July as infections kept increasing in Victoria and the Stage 3 lockdown ([35% of normal movement](#)) didn't see the same reduction in movement as seen even before the first lockdown period in March-April-May ([28% of normal movement](#)).

"The more stringent lockdown now in place in Melbourne has seen a change in the composition of people still going into the Melbourne CBD. Inner urban [Metrotechs](#) who live nearby and still need to visit the city centre for essential supplies comprise the largest share at 36% - but this is only marginally up on pre COVID-19 levels.



“The most noticeable change in Stage 4 lockdown is the increasing share of movement in the Melbourne CBD for people in the [Hearth and Home](#) and [Doing Fine](#) communities that now comprise almost a third of visitors to the CBD between them compared to only 23% during the summer.

“Members of these two communities don’t live in the inner urban areas and their higher share of the movement data in the Melbourne CBD during the Stage 4 lockdown shows these people are more likely to work in essential industries such as construction, essential retail such as supermarkets and convenience stores and wholesale trade.

“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.”

MORE INFORMATION

Michele Levine – direct: 03 9224 5215 | mobile: 0411 129 093 | Michele.Levine@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, Aspirational 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.