

Thursday, 2 April 2020

Self-isolation measures lead to plunge in movement of people in Sydney, Melbourne and at places of interest

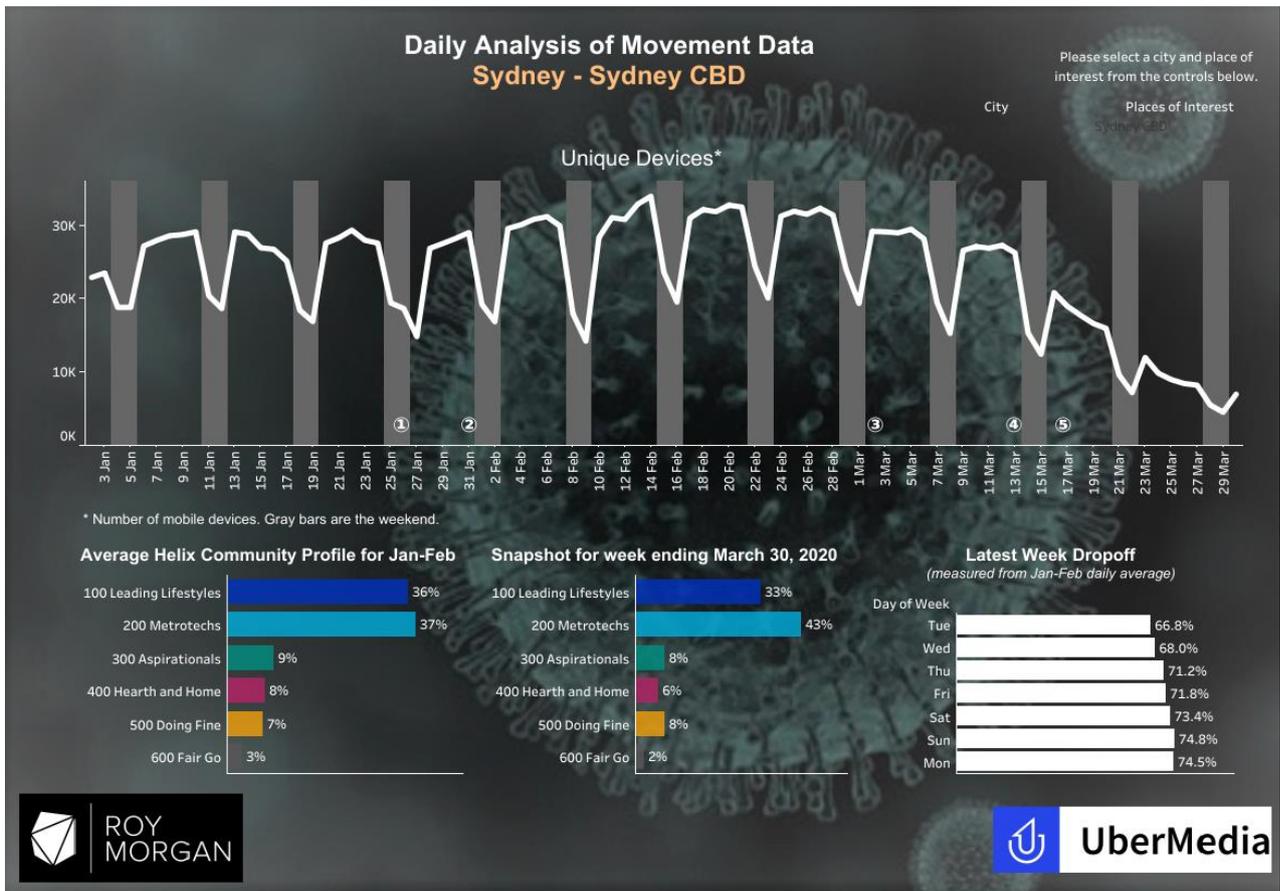
A special analysis of movement data in Australia's leading cities, and at selected places of interest throughout Sydney and Melbourne ([see Melbourne data here](#)), reveals a sharp drop-off in foot traffic in the central business districts of both cities and key places of interest in the last two weeks of March.

The emergence of COVID-19 changed the weekly tempo of movement in the city and over the last two weeks in particular movement has tailed off into the end of the week as retailers have increasingly closed and increasing numbers of office workers have begun working from home.

Roy Morgan has partnered with leading technological innovator UberMedia to aggregate data from tens of thousands of mobile devices to assess the impact of new Government regulations on social distancing designed to slow the spread of the COVID-19 coronavirus throughout Australia.

The aggregate data compiled allows governments and health agencies to assess what types of Australians are still visiting Australia's cities and places of interest via integration of the movement data with the in-depth psychographic profiling capabilities of Roy Morgan Helix Personas (www.helixpersonas.com.au).

Daily Analysis of Movement Data for Sydney CBD in 2020



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 IMMEDIATE RELEASE

Michele Levine, CEO of Roy Morgan, says in a time of self-isolation and social distancing it is vital the movement patterns around Australia's cities, shopping centres, transport hubs and other places of interest are understood at a granular level:

"Roy Morgan's partnership with UberMedia provides aggregated data on the types of people who are frequenting Australia's cities and additional places of interest even when new government regulations have mandated travel can only be undertaken for four specific purposes: work, education, shopping for essentials, exercising and medical appointments.

"These regulations are designed to slowdown the spread of the COVID-19 coronavirus and prevent the pandemic from careening out of control amongst the Australia populace. Early signs are encouraging that the spread of the virus in Australia has slowed down as further measures have been introduced over the last few weeks since mid-March.

"The aggregated data shows a peak in movement in Sydney's CBD in mid-February followed by gentle declines over the following four weeks and much steeper declines since mid-March as social distancing and self-isolation directives have been issued by governments.

"These declines in movement have been observed not only in Sydney's CBD but also in key meeting points such as Central and Redfern Stations, Sydney Airport, Sydney's Taronga Zoo and also at large suburban shopping centres such as Chatswood and Westfield Bondi and Warringah.

*"Taking the example of the Sydney CBD shows that different types of people are changing their movement patterns at different rates. Normal movement patterns suggest just over a third of those in the CBD are part of the well-off **100 Leading Lifestyles** community and slightly more again are the younger, trendy and career-focused **200 Metrotechs**.*

"The latest figures from the end of March show 200 Metrotechs now comprise well over 40% of the people movement in Sydney CBD (up over 5% points) while 100 Leading Lifestyles have declined by 3% points to a third (33%) of those now in the Sydney CBD.

"Although the movement of all Helix Communities has declined over the last two weeks the younger 200 Metrotechs are far more likely to still be coming into the city than the older 100 Leading Lifestyles for which 'Working From Home' (#WFH) has become a new mantra in this age of self-isolation and social distancing."

Impact of COVID-19 coronavirus builds through March

The first Australian death from COVID-19 coronavirus was reported on March 1 and from that point the trend for movement data in the Sydney CBD has changed and rapidly declined since mid-March. The emergence of COVID-19 changed the weekly tempo of movement in the city and over the last two weeks in particular movement has tailed off into the end of the week as retailers have increasingly closed and increasing numbers of office workers have begun working from home.

Analysis of the daily movement data for the Sydney CBD throughout 2020 shows the usual weekly pattern prior to COVID-19 has been a build towards a weekly spike later in the week on Thursday or Friday as people increasingly visit the city not only for work during the day, but also to socialise and catch up with friends in the evening.

The movement data on weekends, and public holidays such as Australia Day (Monday January 27) drops off significantly without office workers and with many retailers closed.

Analysing this movement data via Helix Communities reveals sharp drop-offs in movement data for [100 Leading Lifestyles](#), [300 Aspirational](#)s, [400 Health and Home](#) and [600 Fair Go](#) compared to average movement levels. The sharpest drop-off has been for [100 Leading Lifestyles](#).



- **[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.

Other Helix Communities have also declined, but in a relative sense now make up a larger share than before. This is particularly clear for [200 Metrotechs](#).

Before March those in the 200 Metrotechs community comprised 37% of all visitors to Sydney CBD, however this has spiked over 5% points and now comprises 43% for the most recent data available. Metrotechs have now had a higher average share of movement within the Sydney CBD every day for over two weeks since Saturday March 14 when restrictions were set to be introduced.

- **[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.

Although comprising only a small share of just under 10% of visitors to the city on average the lesser decline in visitation for [500 Doing Fine](#) means their share has risen slightly in recent weeks as the Government measures to restrict movement have ratcheted up.

Sharp declines in movement data for the Central Station, Sydney Airport, Zoo and elsewhere

Roy Morgan and UberMedia aren't just measuring movement data in Sydney's central business district but also in key places of interest around the city and surrounds. The utility of the data allows precise targeting of locations throughout Australia to assess how movement data is changing as Australia's are required to self-isolate to stop the spread of the COVID-19 coronavirus.

In Sydney we have noticed sharp drop-offs in movement data for several key locations including the Airport, Central and Redfern Stations, Sydney's Taronga Zoo and shopping centres including Chatswood, Marketplace Leichhardt, Stockland Balgowlah, Westfield Bondi and Warringah.

The drop off in movement has not been as significant at particular locations including stores stocking essential goods such as Coles Broadway, Woolworths Erskineville and Costco Lidcombe.

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, 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.