

Monday, 8 November 2021

Movement in the Adelaide CBD is at 81% of pre-pandemic levels, well ahead of Sydney CBD (33%) and Melbourne CBD (27%)

A special analysis of movement data in Australia's Capital City CBDs since the COVID-19 pandemic began shows the Adelaide CBD is leading the way with movement at 81% of pre-pandemic levels, well ahead of all other cities, as South Australia prepares to re-open its borders in two weeks' time.

The 7-day movement level in the Adelaide CBD has averaged 66% of pre-pandemic levels since COVID-19 was declared a pandemic in mid-March 2020 – higher than any other Australian Capital City.

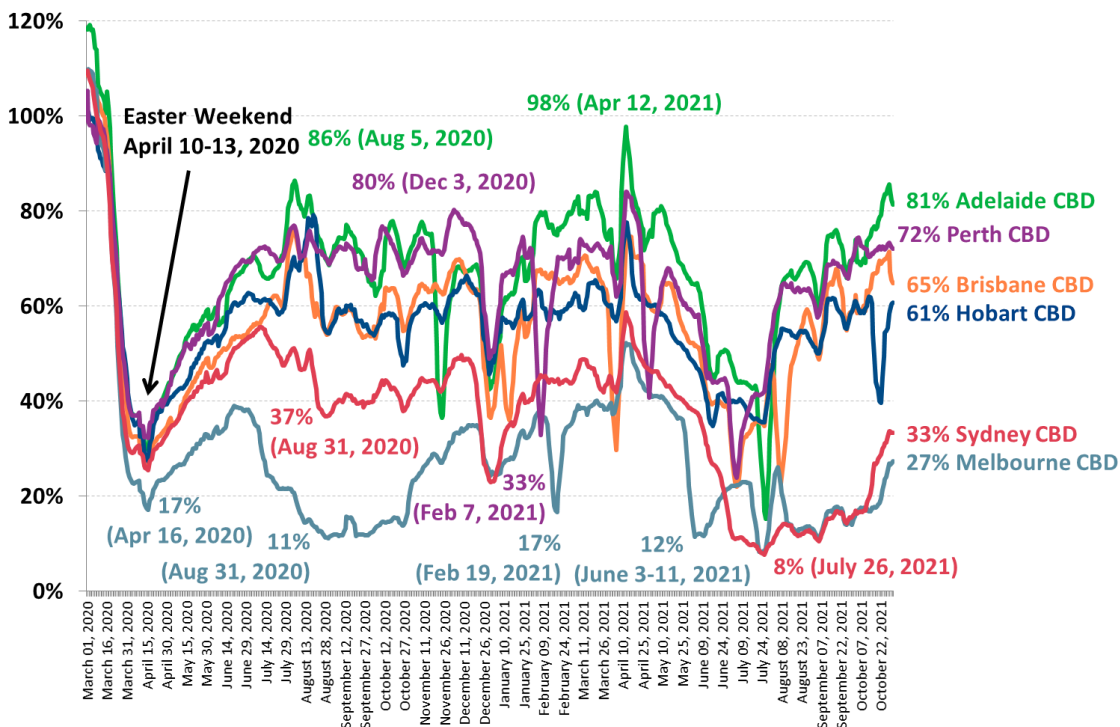
In comparison, the average 7-day movement levels in the larger cities of Sydney and Melbourne remain well below pre-pandemic levels after both cities recently emerged from long lockdowns during October. The average 7-day movement level in the Sydney CBD was at 33% of pre-pandemic levels and movement was even lower, at only 27% of pre-pandemic levels, in the Melbourne CBD.

The average 7-day movement levels in the Hobart CBD have bounced back following the short and sharp three-day lockdown in southern Tasmania during mid-October and are now at 61% of pre-pandemic levels.

Also performing well are the Capital Cities of two States that are yet to fully re-open to domestic travellers. The movement levels in the Perth CBD are now at 72% of pre-pandemic levels while movement levels in the Brisbane CBD are at 65% of pre-pandemic levels.

Western Australian Premier Mark McGowan has announced that the domestic border to WA will come down when the State reaches a full vaccination rate of 90% of all residents aged 12+. The current estimates are that this level of vaccination will not be reached in WA for another three months, in February 2022.

Australian Capital City CBDs average 7-day movement levels March 1, 2020 – October 31, 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 latest vaccination figures from the [Health Department show over 36.7 million vaccination doses](#) have been administered to 89% of the adult population and over 80% of Australian adults are now fully vaccinated.

Vaccination rates are highest in the ACT (95%+ fully vaccinated), NSW (90%) and Victoria (85%). All three jurisdictions are now fully open to domestic travellers, and Australian citizens and residents returning from overseas, who are fully vaccinated.

For the three States set to re-open during the next seven weeks vaccination rates are considerably lower. Now 79% of Tasmanians are fully vaccinated, 71% of South Australians and just 67% of Queenslanders.

South Australia is due to re-open to travellers from NSW, Victoria and the ACT in two weeks' time on Tuesday November 23, Tasmania is set to re-open on Wednesday December 15 and Queensland is set to re-open two days later on Friday December 17 – just over a week before Christmas.

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 restrictions continue to be eased around Australia with a significant easing of restrictions in New South Wales this week as the full vaccination rate in the State has now exceeded 90%:

“The average movement levels in Australia’s Capital City CBDs show both the Sydney CBD (33% of pre-pandemic levels) and Melbourne CBD (27%) lagging well behind their interstate rivals despite recently emerging from extended lockdowns. The Adelaide CBD continues to be the standout with movement levels in the ‘City of Churches’ at 81% of pre-pandemic levels.

“The slow recovery in movement levels is due to many workers in the two cities continuing to work from home as there have still been considerable restrictions on activities within both cities. The good news for businesses in the Sydney CBD is that there has been a significant relaxation of restrictions in NSW this week as the State crosses the 90% fully vaccinated mark.

“Those who are fully vaccinated in NSW will now be able to use the dancefloor in nightclubs for dancing rather than just drinking, while indoor density limits for restaurants, cafes and pubs have been further relaxed. Entertainment facilities in NSW such as theatres, cinemas and sports stadia will now be able to operate at 100% capacity again.

“These restrictions were originally slated to be removed in three weeks’ time in NSW but the high rate of vaccination has brought the relaxation of these restrictions forward. In Victoria, ongoing restrictions such as mandatory wearing off masks inside, are set to relax further in the last week of November when over 90% of Victorians are expected to be fully vaccinated.

“In an effort to encourage people to return to the Melbourne CBD Lord Mayor Sally Capp has this week announced a \$44 million ‘Midweek Melbourne Money’ subsidy to begin next week. The subsidy will allow diners spending between \$50-\$500 at restaurants, cafes and bars to claim 30% of the bill back when dining in the Melbourne CBD from Monday-Thursday.”

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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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

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