

Tuesday, 14 December 2021

Movement in the Sydney and Melbourne CBDs is still stuck below 50% of pre-pandemic levels in the run-up to Christmas

A special analysis of movement data in Australia's Capital City CBDs since the COVID-19 pandemic began shows that movement levels in the Sydney and Melbourne CBDs are still stuck below 50% of pre-pandemic levels in the run-up to Christmas.

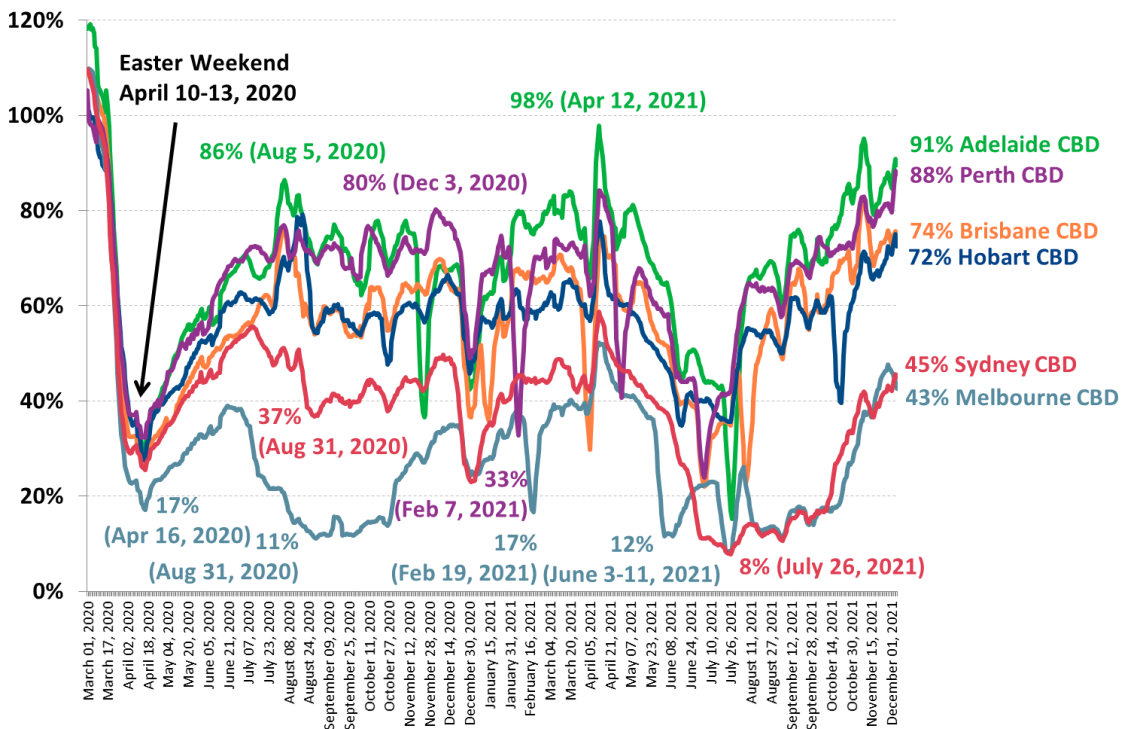
The average 7-day movement levels in both cities increased rapidly in October and early November after both cities exited long lockdowns, however the recovery in movement levels has stalled in recent weeks with neither city managing to breakthrough 50% of pre-pandemic levels.

In the Melbourne CBD the average 7-day movement level has been rangebound between 43-48% of pre-pandemic levels since mid-November and in the Sydney CBD the average 7-day movement level has been stuck between 40-46% of pre-pandemic levels.

A big reason movement levels are yet to recover is likely due to the continuing high case load of new COVID-19 cases in both cities. Since exiting lockdown in mid-October Victoria has averaged over 1,000 new cases of COVID-19 per day and this week daily cases in NSW jumped to over 800 as the new Omicron variant began to spread in the community.

Notably, movement levels in the Perth CBD have now jumped to 88% of pre-pandemic averages – the highest they have been since the pandemic began in mid-March 2020. The increase in movement in the Perth CBD comes as WA Premier Mark McGowan has finally announced a date for the re-opening of the State's borders – set for the first week of February 2022.

Australian Capital City CBDs average 7-day movement levels March 1, 2020 – December 5, 2021: % Movement is compared to the 7-day average in Jan-Feb 2020



Source: Roy Morgan collaboration with Near who provide anonymous aggregated insights using mobile location data.
Note: Movement data for the Capital City CBDs excludes the residents of the respective CBDs.

FOR IMMEDIATE RELEASE

The latest vaccination figures from the [Health Department show over 40.2 million vaccination doses](#) have been administered to 93% of the adult population and over 89% of Australian adults are now fully vaccinated.

Vaccination rates are highest in the ACT (99%+ fully vaccinated), NSW (93%) and Victoria (91%). All three jurisdictions fully re-opened in early November.

In the three States which just re-opened, or are set to re-open, vaccination rates continue to increase led by Tasmania, now with over 90% of its adult population fully vaccinated. Tasmania is re-opening tomorrow, on Wednesday December 15. South Australia, which re-opened its borders in late November, has 85% of its adult population fully vaccinated while 81% of Queenslanders are fully vaccinated.

Western Australia has finally announced it is set to re-open its borders on February 5, 2022 when it expects to have 90% of its population aged 12+ fully vaccinated. The latest vaccination figures for Western Australia shows 80% of the State's adult population are now fully vaccinated.

Roy Morgan has partnered with leading technology innovator Near 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 movement levels in the Sydney and Melbourne CBDs are stuck under 50% of pre-pandemic levels as many CBD workers are set to continue working from home until at least early next year:

"The movement levels in Australia's two largest cities increased rapidly when the two cities exited long lockdowns in mid-October, however the increases have stalled over the past few weeks as many workers continue to work from home. The average movement levels in the Melbourne CBD have been rangebound between 43-48% of pre-pandemic levels since mid-November and stuck between 40-46% of pre-pandemic levels in the Sydney CBD.

"There are a few reasons we can point to that explain why the increases in movement levels have yet to return to pre-pandemic levels. One is the continuing high level of cases in both cities. Victoria has averaged well over 1,000 cases of COVID-19 per day since exiting lockdown in mid-October while there has also been a steady stream of hundreds of new cases per day in NSW.

"In recent week the emergence of the new 'Omicron variant' has created new concerns for workers about returning to the office. Soon after first being identified in late November, Australia closed its borders to eight southern African countries and over the past week cases have begun to rise in NSW. Today's announcement by NSW Health that there were over 800 new cases of COVID-19 was the highest daily total for over two months since October 2.

"Even before the emergence of the 'Omicron variant' many businesses had already decided to allow many workers to continue working from home for the rest of the year with new policies on returning to the office to be implemented in 2022. For workers who prefer to work from home this has allowed them to continue as they have been over the last few months with barely a change.

"The test for these cities will come in the New Year after the summer holidays conclude and many businesses will be expecting workers to return to the office in greater numbers. There is no doubt 'flexible work' is here to stay with employees not expected to work in the office every day of the week, but many businesses are pushing for workers to head into the office at least three days a week to help build a productive work culture and strengthen relationships between employees."

View the latest Roy Morgan Near 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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However, both of Australia's largest cities trail well behind their counterparts' interstate for the return of people to the city. Highest of all is the Adelaide CBD which had an average 7-day movement level of 87% of pre-pandemic levels at the end of November as South Australia re-opened its domestic borders.

The domestic borders are still to re-open in the other States which all have high levels of movement in their respective Capital City CBDs led by the Perth CBD (81% of pre-pandemic levels) and followed closely by the Brisbane CBD (75%) and Hobart CBD (71%).

are increasing slowly although still remain at less than half of their pre-pandemic levels. The average movement level in the Melbourne CBD was at 47% of pre-pandemic levels in the last week of November, just ahead of the Sydney CBD (43% of pre-pandemic levels).

"Both cities still have a long way to go to recover from the long lockdowns that ended in October, but the signs are positive that the 'return to the office' will strengthen in the new year when Australians return from a long-sought 'COVID-normal' holiday season.

"The high vaccination rates in NSW and Victoria, which are both over 90% fully vaccinated, are slowly being caught by other States with 88% of Tasmanians, 83% of South Australians and almost 80% of people in Queensland and Western Australia now fully vaccinated.

"The high, and increasing, rates of vaccination around Australia are set to lead to the relaxation of border restrictions that persist in Queensland and Tasmania over the next few weeks and eventually in Western Australia as well.

"In the meantime, Australians are returning to the shops at a stunning rate. The latest ABS Retail Sales figures for October show Australians spent over \$31.1 billion on retail goods during the month, an increase of 4.9% on September 2021, and up by 5.2% compared to October 2020.

"These strong retail sales are expected to continue in the run-up to Christmas with the annual pre-Christmas retail sales forecasts by Roy Morgan in conjunction with the Australian Retailers Association (ARA) showing Australians are set to spend \$58.8 billion on retail goods during the pre-Christmas period

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 Near

Near 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.