ROY MORGAN

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FOR IMMEDIATE RELEASE

Movement in the Melbourne CBD is now at 47% of pre-pandemic levels and ahead of the Sydney CBD (43%)

A special analysis of movement data in Australia's Capital City CBDs since the COVID-19 pandemic began shows that movement levels in the two largest cities of Sydney and Melbourne are slowly increasing and now approaching 50% of pre-pandemic levels for the first time since April 2021.

The average 7-day movement level in the Melbourne CBD was at 47% of pre-pandemic levels by the end of November, its highest level for more than seven months. Movement in the Melbourne CBD is approaching the highest level it's been all pandemic, which was 52% of pre-pandemic levels in early April 2021.

Further north the average 7-day movement level in the Sydney CBD was at 43% of pre-pandemic levels by the end of November with the recovery slowing down over the last few weeks. Even so, the average movement levels in Australia's largest city are now at their highest for over six months since mid-May 2021.

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%).

Australian Capital City CBDs average 7-day movement levels March 1, 2020 – November 29, 2021: % Movement is compared to the 7-day average in Jan-Feb 2020
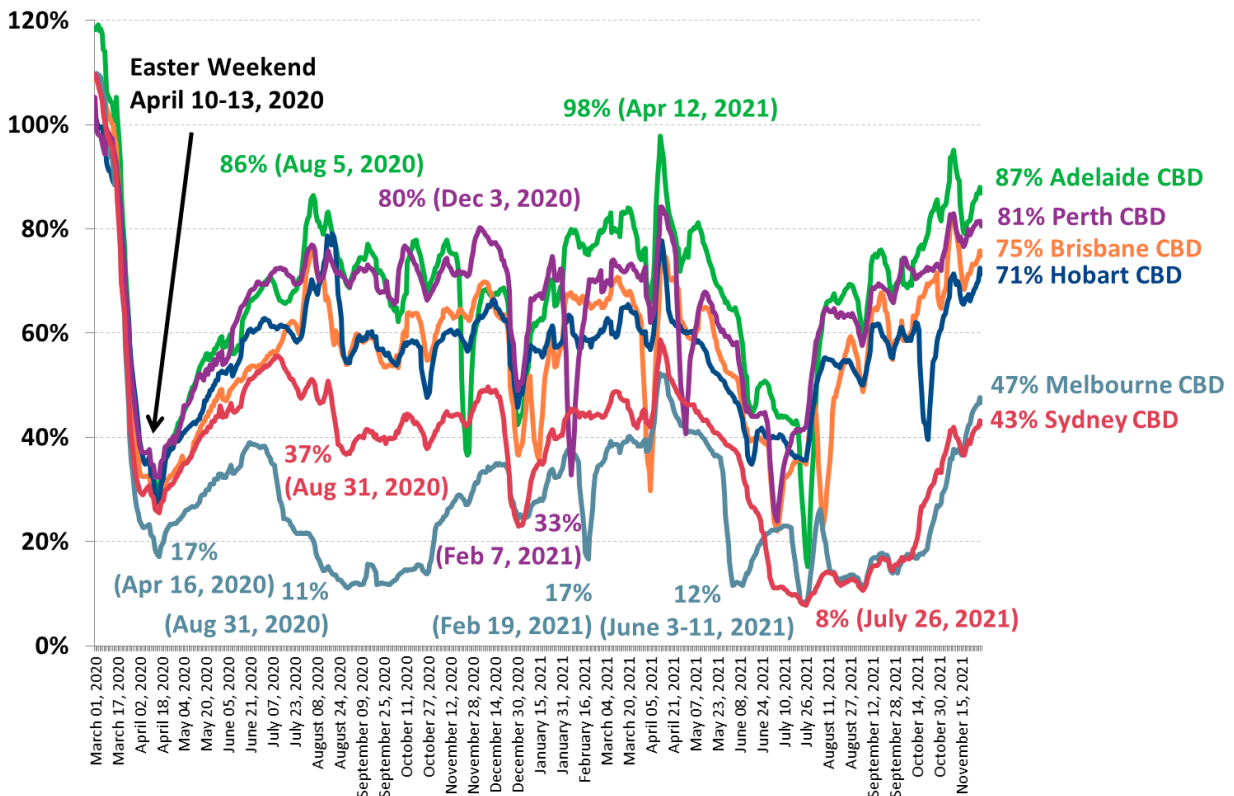
Source: Roy Morgan collaboration with Near who provide anonymous aggregated insights using mobile location data.
Note: Movement data for the Capital City CBDs excludes the residents of the respective CBDs.

The latest vaccination figures from the Health Department show over 39.6 million vaccination doses have been administered to 93% of the adult population and over 88% 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 to domestic travellers, and Australian citizens and residents returning from overseas who are fully vaccinated, in early November.

South Australia, which re-opened its borders last week, now has 83% of its adult population fully vaccinated while 88% of Tasmanians and 79% of Queenslanders are fully vaccinated. Tasmania and Queensland are both set to reopen their borders next week.

Western Australia, which is not set to re-open its borders until early next year, trails all three of these States with only 78% of its adult population 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 people continued to return to Australia's Capital Cities during November but despite the improvement movement levels in the Sydney and Melbourne CBDs still remain at less than half of their pre-pandemic averages:

"The average movement levels in Australia's two largest cities 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."

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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ROY MORGAN

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.