ROY MORGAN

Tuesday, 28 July 2020

Melbourne enters "Lockdown 2.0" but movement in the CBD higher than during initial stages of first lockdown

A special analysis of movement data in the Melbourne CBD shows few people moving around in the CBD and a plunge in movement in Melbourne in the week ending July 13 as "Lockdown 2.0" began – but movement still significantly higher than during the initial stages of the first lockdown in late March.

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 chart below tracks the movement data for those visiting the Melbourne CBD during 2020 excluding the residents who normally live there. Movement data from a number of key locations around Melbourne, and Sydney, is also available to view by using the interactive dashboard on the website.

The number of devices of visitors seen in the Melbourne CBD during the second week of July averaged 35% of the levels seen earlier in the year during the summer months. However, during the first lockdown in late March movement in the Melbourne CBD crashed to an average only 28% in a matter of days.

The higher degree of movement seen thus far as the second lockdown in Melbourne has begun suggests a level of 'fatigue' for residents who have been subjected to the most stringent restrictions of any Australian city over the last four months, although now the challenge appears greater than ever.

Late last week (Thursday July 23) a new measure of mandatory mask wearing was introduced for all Melburnians when outside the home and this is expected to help prevent the spread of the COVID-19 virus although its projected impact on movement levels is uncertain.

Michele Levine, CEO of Roy Morgan, says the second lockdown of Melbourne which began on Thursday July 9 has not had the same immediate impact on people's movement as the first in late March which suggests a level of lockdown 'fatigue' among Melburnians:

> *"Roy Morgan has been tracking movement data in the Melbourne CBD throughout the COVID-19 pandemic and the associated lockdowns, and periods of relaxing restrictions, over the last four months since late March.*

> *"The first lockdown in late March produced an immediate and sharp drop in the movement of devices in the Melbourne CBD to an average of 28% of earlier movement levels in a matter of days, and well below 20% of movement levels during early April.*

> *"The epidemiological experts have suggested that for the spread of COVID-19 to be flattened and suppressed a compliance rate of 80% plus is required to get on top of the virus. This was achieved during the first lockdown and the curve was flattened quickly in Melbourne and around Australia.*

> *"The early movement data from "Lockdown 2.0" shows Melburnians haven't been as quick to restrict their movement the second time round with movement during the first week of the second lockdown at 35% of the average levels seen during the summer months.*

> *"Unfortunately, this level of movement is unlikely to be enough to suppress the spread of COVID-19. The introduction of mandatory mask wearing in Melbourne last week has introduced an additional measure designed to halt the spread of the virus but it's impact on movement levels is uncertain.*

> *"Will the seriousness indicated by mandatory mask wearing result in a further decline in movement for Melburnians or will the perceived safety of wearing a mask provide comfort for Melburnians who might want to nip out quickly to pick something up at the local shops?"*

FOR IMMEDIATE RELEASE

Daily Analysis of Movement Data for Melbourne CBD in 2020
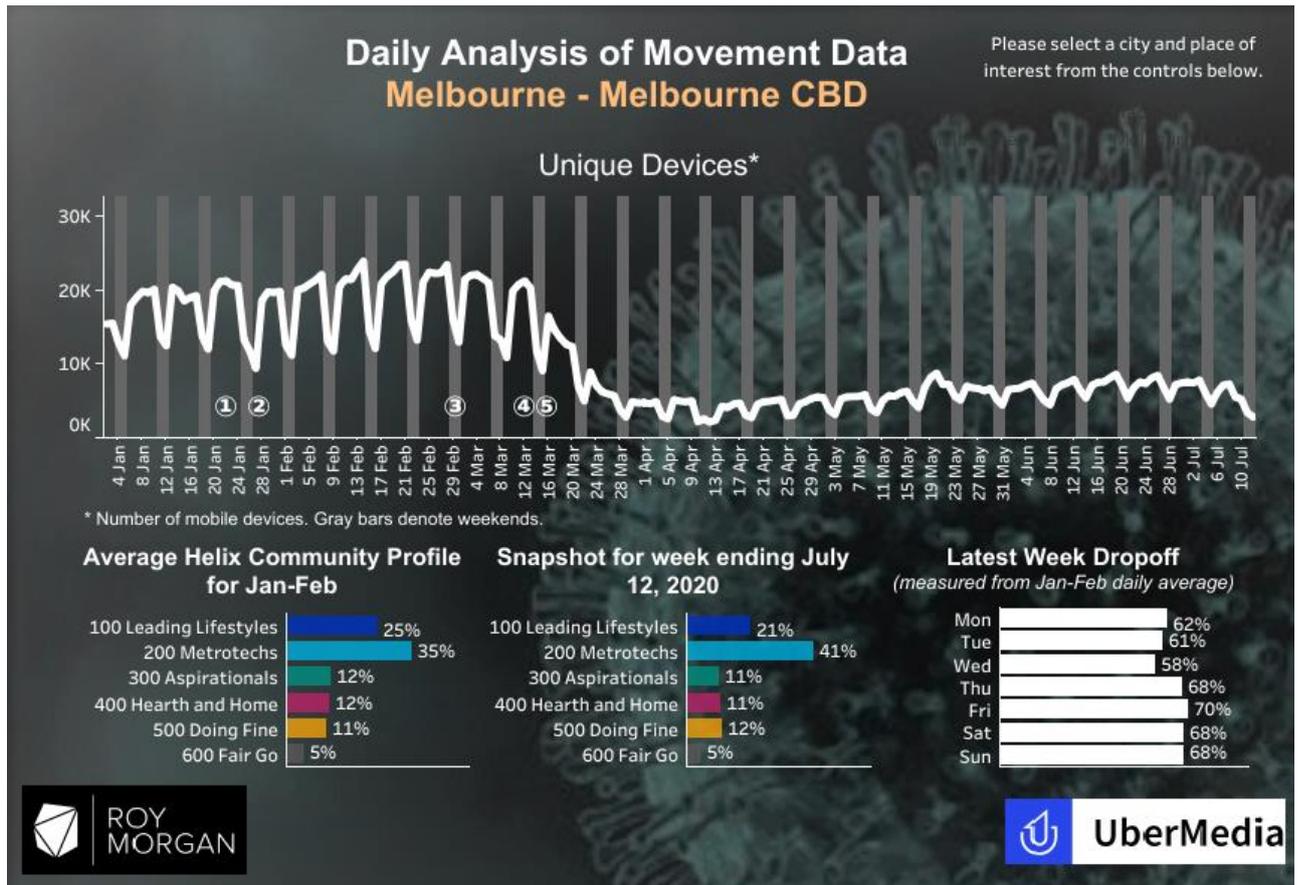
Source: Roy Morgan collaboration with UberMedia who provide anonymous aggregated insights using mobile location data. **Note**: Movement data for Melbourne CBD excludes residents of the Melbourne CBD.

Metrotechs comprise an ever increasing share of visitors to the Melbourne CBD

As we have noted previously, it is the 'young and trendy' *Metrotechs* who are the most likely to have returned to the city centre, although their movement is clearly down compared to earlier in the year. In the Melbourne CBD *Metrotechs* now comprise 41% of the movement data, up from 39% a week ago and up from 34% during the summer months.

- **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.

The share of movement data for *Doing Fine* has also increased marginally to 12% from an average of 11% during the summer months but each of the four other Helix Personas communities is equal to, or less than, it was earlier in the year.

- **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.

Although their share of the movement data in the Melbourne CBD has declined the *Leading Lifestyles* community still comprises the second largest share of the movement data at 21% in Melbourne CBD, down from 22% a week ago, and down from 25% earlier in the year.

- **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.

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.

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, 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.