



How Covid-19 is changing the movement of your customers

Data for week ending 11th April 2021

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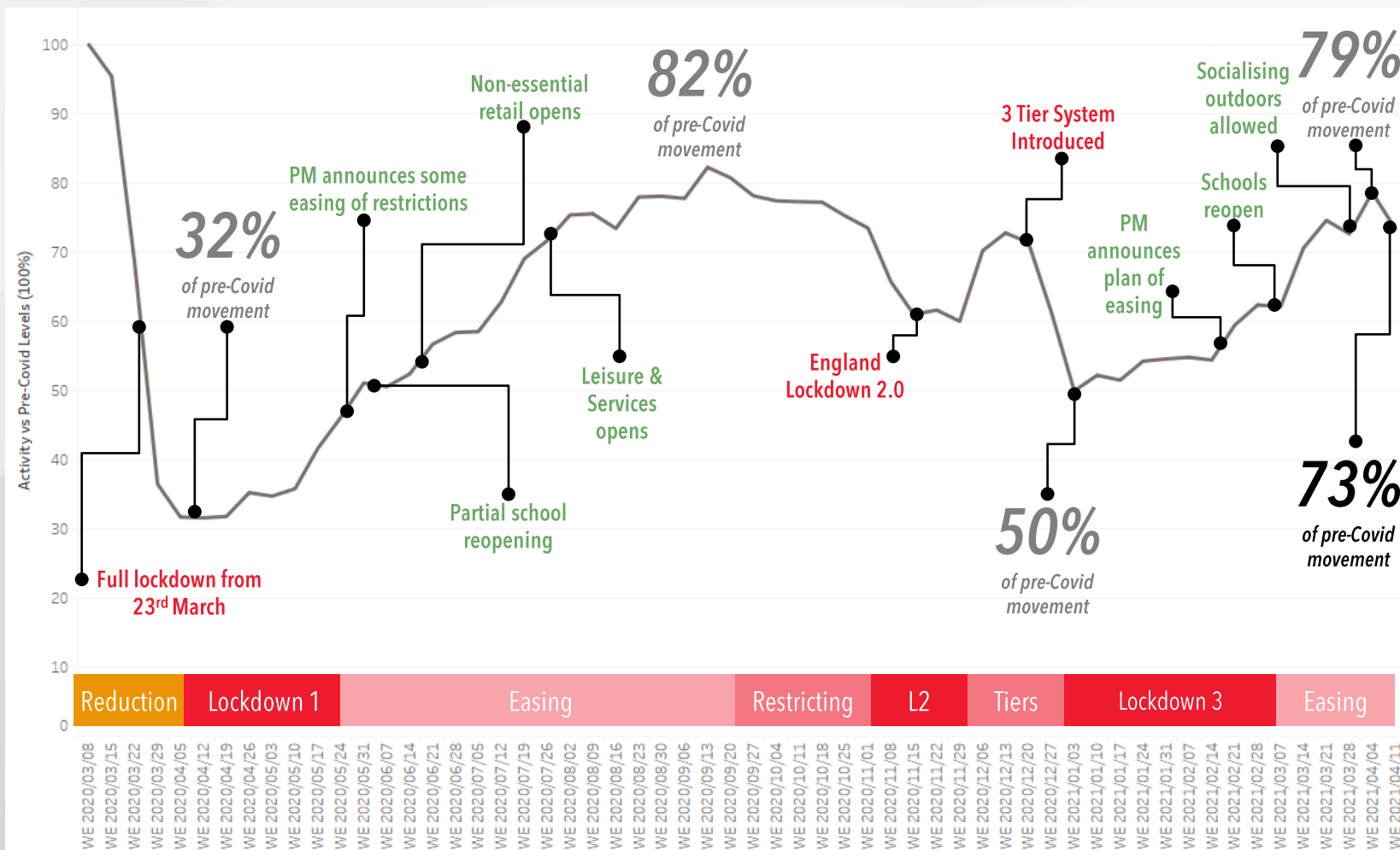
EXECUTIVE SUMMARY

Movement levels settle back to 73% of pre-Covid levels as customers await the great unlocking of retail and leisure

- In the week-ending 11th April, after the fun of the Easter weekend, the reality set in for consumers. They returned to work and accepted that they still have a week to go until they can shop for non-essential treats, meet their friends in a beer-garden, or get that much-needed haircut in most of the UK.*
- The pause in activity is typical of that seen before the implementation of the lifting of restrictions – often some weeks after they have been announced. We also witnessed the hiatus before the opening of schools and non-essential retail after Lockdown 1. Next week we will see how much the opening up triggers movement levels. If we see the same 16 percentage point (16pp) step-up in activity levels that we saw at the equivalent point after Lockdown 1 then movement could be back to pre-Covid levels by mid-May.*
- This week's report focusses on Scotland, as it is important to note that the roadmaps are not synchronised across the UK nations. This is reflected in Scotland's weekly change in activity being markedly different from the rest of the UK this week. The difference is driven by Scotland's transition from "Stay at Home" to "Stay Local" rules that were phased in from Good Friday to Easter Monday – with Easter Monday being the start of the week of data included in this report.*
- In Scotland we again see that the most affluent Acorn groups are the quickest to start moving as restrictions are eased, reflecting their greater levels of choice and their deeper observance of lockdown.*
- Mapping activity in Glasgow, the heart of the Scottish retail capital, we see a stark reminder of how far city centres, and specialist retail and leisure destinations generally, have to recover.*
- Whilst providers south of the border will be reading this report with an understanding of how the opening up of non-essential retail and pub gardens has impacted their incomes, spare a thought for those north of the border, who still need to wait until the 26th April for the next round of retail easing, despite the Scottish government bringing forward some other easing measures in an announcement made this morning.*

THE NATIONAL PICTURE

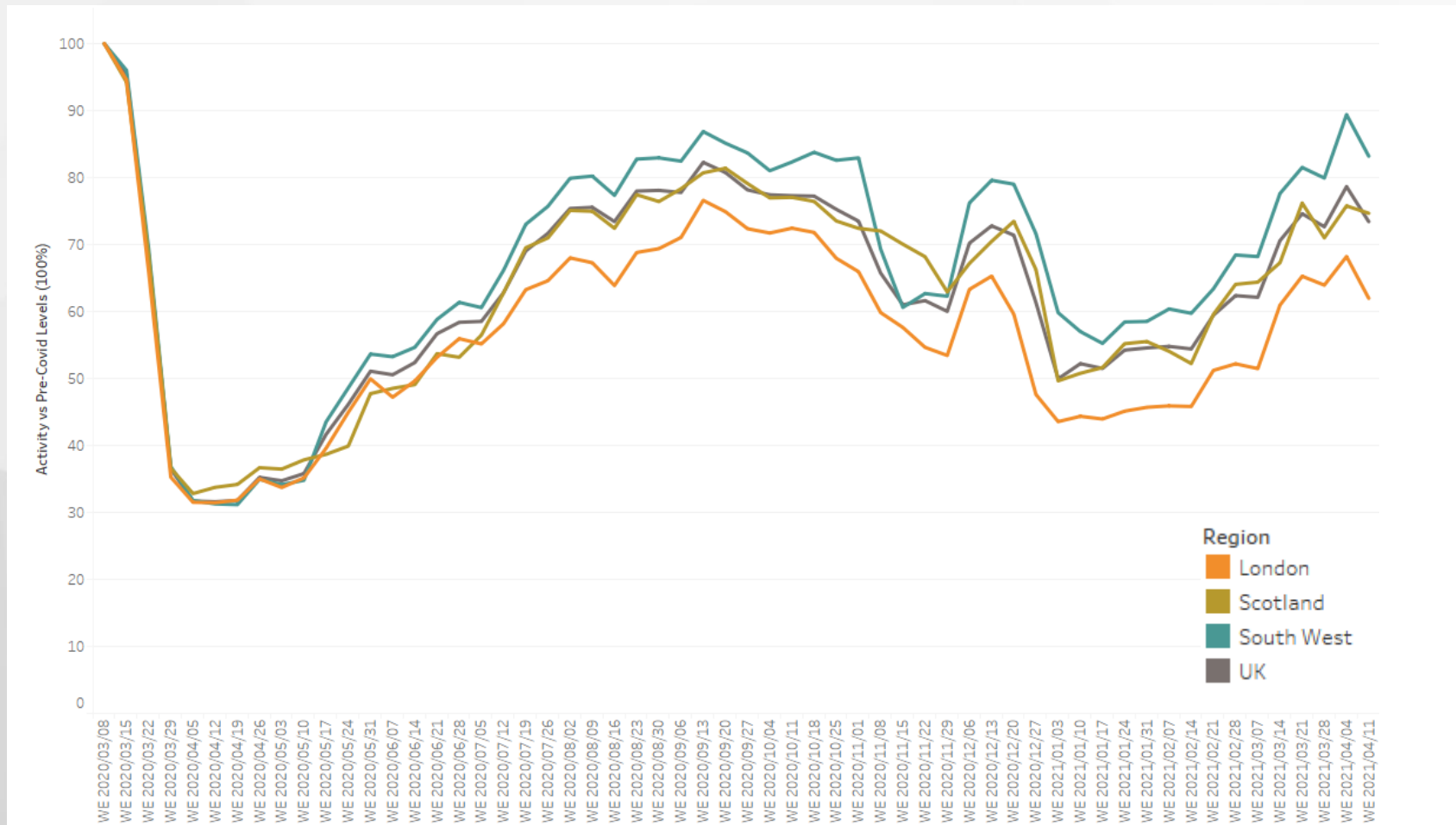
Movement levels settle back to 73% after the Easter weekend, as customers await the re-opening of non-essential retail and pub gardens



- After the fun of the Easter weekend the reality set in – that customers in much of the UK still have a week to go until they can shop for non-essential treats, meet their friends in a beer-garden or get that much-needed haircut.
- As a result, in the week ending 11th April, most of the Easter peak has been undone, and movement levels have dropped back 6 percentage points (6pp) to 73% of pre-Covid activity.
- This pause before a big lifting of restrictions has been seen before. Example include the week before the opening of schools in both Lockdown 1 and 3, and when non-essential retail opened after the first lockdown.
- Whilst no Easter peak was witnessed in 2020, this was because last Easter was just 3 weeks into Lockdown 1, and a very different experience to this year, when it was seen as a time of release.
- We see shops re-opening with movement levels at 73%. If we see the same 16pp increase in movement over the next 5 weeks, that we saw after Lockdown 1, we could be at 99% by mid May.

REGIONAL VARIATIONS

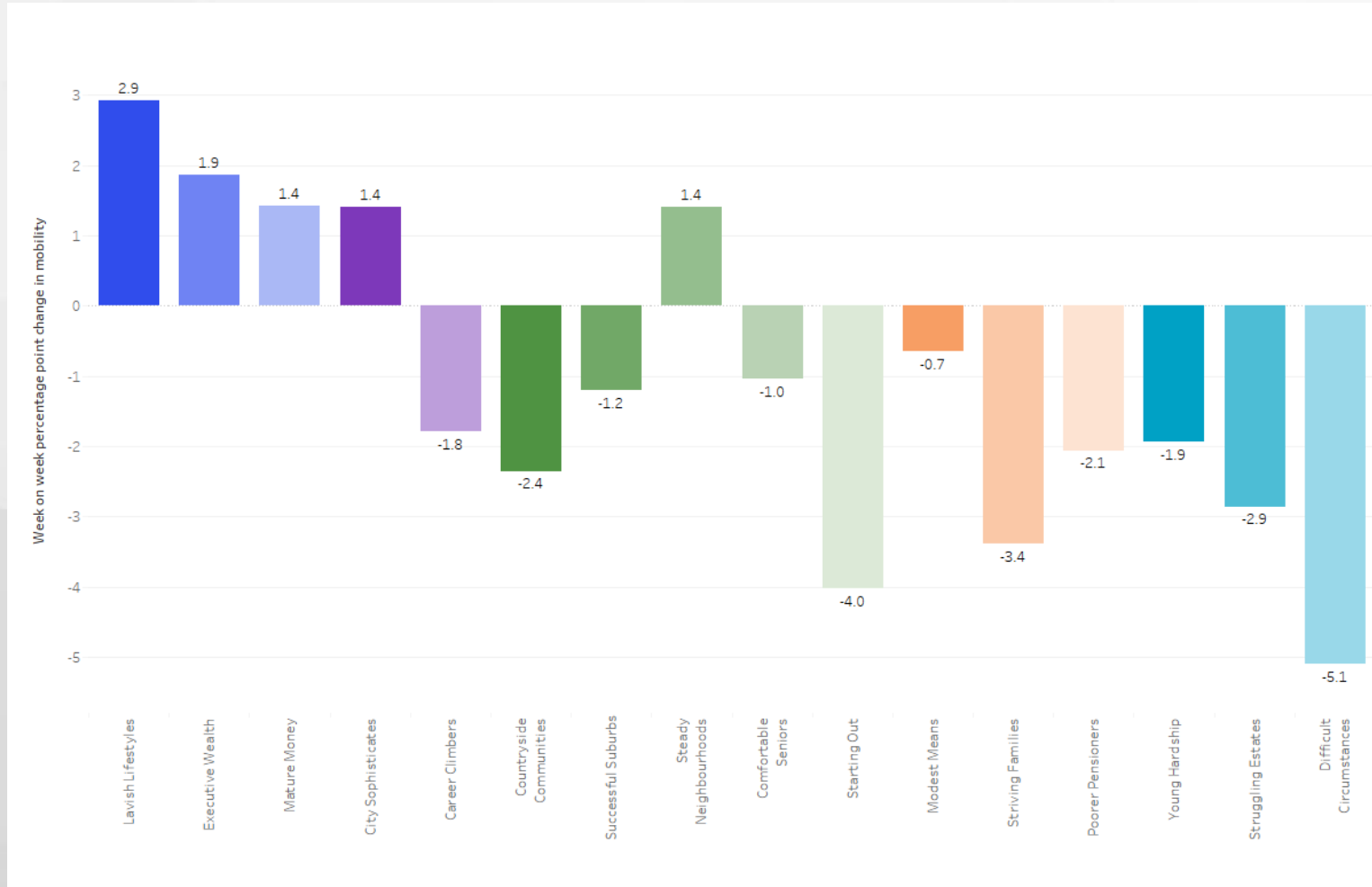
Scotland bucked the national trend as a result of the move from "Stay at Home" to "Stay Local" rules



- Scotland is the clear exception to the national and regional changes in movement this week. Here movement levels stayed at much the same level as the Easter week as a result of the replacement of the “Stay at Home” policy with the more relaxed “Stay Local” rules.
- Customers north of the border could now get a haircut, visit a garden centre or furniture store and click-and-collect non-essential items. Whilst this is not a wholesale change, it is enough difference in policy from the rest of the UK to be reflected in the different patterns in the data.
- Elsewhere in the UK the gap between the South West, the most active, and London, the least active region, remains at 21 percentage points, spread equally above and below the UK average. This pattern is most likely being driven by the relative population densities and avoidance of public transport in the capital.

HOW HAS SCOTTISH MOBILITY VARIED BY ACORN?

In Scotland the most affluent Acorn groups are again the quickest to respond to the partial release from restrictions

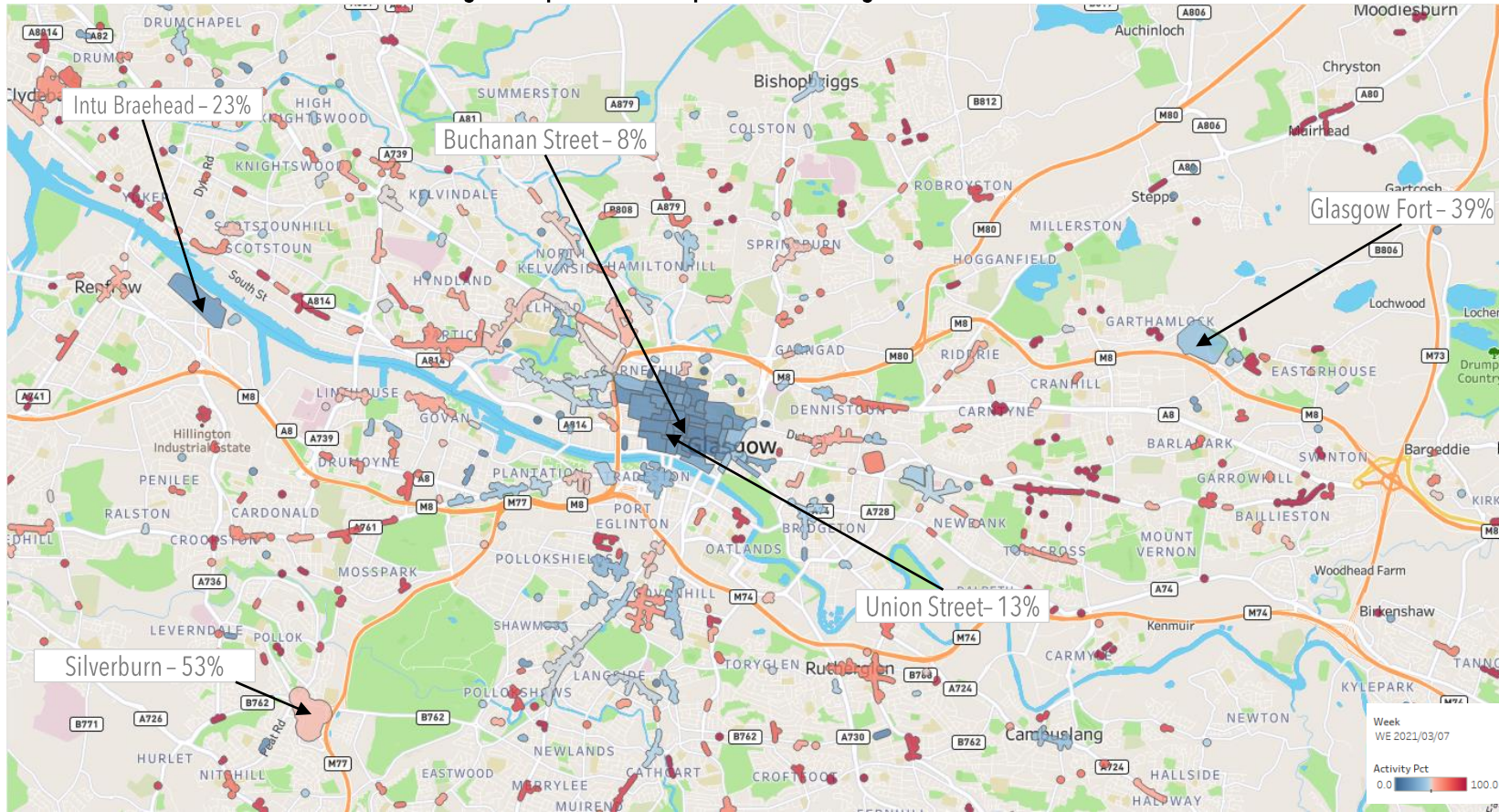


- Keeping the focus on Scotland, where the most significant changes occurred in the week, we see another occurrence of the now expected demographic patterns as restrictions ease.
- Again we see that the most affluent Acorn groups, to the left of the chart, are the ones quickest to start moving when restrictions are unlocked. As we've seen before, this is because they have been the ones that have been able to reduce their movement the most during the times of deeper restrictions.
- As this week also included Easter Monday and school holidays for many, it is also likely that these more affluent groups have been able to enjoy the new restrictions a little more, and take more leisure trips. Whilst, for the rest of the population, the UK-wide pattern of a return to normality after the Easter weekend saw movement levels decline.
- Similarly, elsewhere in the UK, whilst all Acorn Groups saw a decline in activity, it was the 3 blue "Wealthy Achiever" Acorn Groups that saw the smallest drop, as they continued to enjoy the Easter break the most.

WHERE ARE WE VISITING?

Movement levels in Scotland's retail heart show the extent of the recovery needed to bring major centres back to life – with another 2 weeks to wait

Visits in week ending 11th April relative to pre-Covid at Glasgow's Convenience Cluster destinations



- Glasgow is the beating heart of retail north of the border. Yet its major arteries, Buchanan Street and Union Street, saw activity at just 8% and 13% of pre-Covid levels respectively.
- People are clearly starting to move a little more widely: to see friends; socialise; or get a haircut or bedding-plants. But they are still not returning to their offices, and can't go shopping for most of the non-essential treats of the retail capital.
- The blue shading at the heart of Glasgow's retail, highlighting areas where activity is furthest below pre-Covid levels, is darker than equivalent locations south of the border – reflecting tougher retail restrictions. Intu Braehead (23%) compared to Intu Trafford (31%) and Glasgow Fort (39%) compared to Birmingham Fort (54%) are further examples.
- Only Silverburn (53%), anchored by a Tesco Extra, enters the red, whilst neighbourhood retail performs well in comparison.
- Scottish retailers will be watching England enviously as they await their release on 26th April, with further to recover.

USEFUL LINKS & RESOURCES

CACI are focussed on using all the resources and approaches available to us to help our clients successfully navigate the crisis

To read more of our thought leadership on the new consumer reality please click [here](#).

We will be increasing our content in the coming weeks on the CACI Blog: [Click here](#)

Official govt guidance on Covid-19 [Click here](#)

ONS Covid-19 Hub: [Click here](#)

An updated map tracking Covid-19 cases: [Click here](#)

For access to the specific analysis relevant to your business locations and customers please contact your account manager or email locationintelligence@caci.co.uk

In partnership with Location Sciences, CACI analyse billions of up-to-date events captured from a range of apps on smart phones. These provide a highly accurate geocode of places visited from the pings of their handsets.

By coding this UK wide sample of mobile location data with Acorn we are uniquely placed to understand how different consumers are re-engaging as we come out of lockdown.

Only CACI can provide the power of Mobile Location Analytics with the consumer insight of Acorn.

During the Covid-19 restrictions we will now be publishing weekly findings looking at weekly variations in how people are moving across different:

- Acorn demographic groups
- Regions
- Types of destination

Through this regular tracking we aim to provide an evidence base that can be applied to scenarios of how different groups will move as restrictions change, in order to support our clients in focussing on the correct locations to meet their customers' needs.

Our methodology tracks changes in the number of events occurring outside of the neighbourhood in which people live or work compared to baseline levels at the beginning of March 2020.



- Location Sciences is a UK AIM listed location data and insights company.
- UK's largest location data lake – 4 million monthly devices
 - Privacy and GDPR at the heart of all our systems and technology

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