# How Covid-19 is changing the movement of your customers

## Data for week ending 14th February 2021

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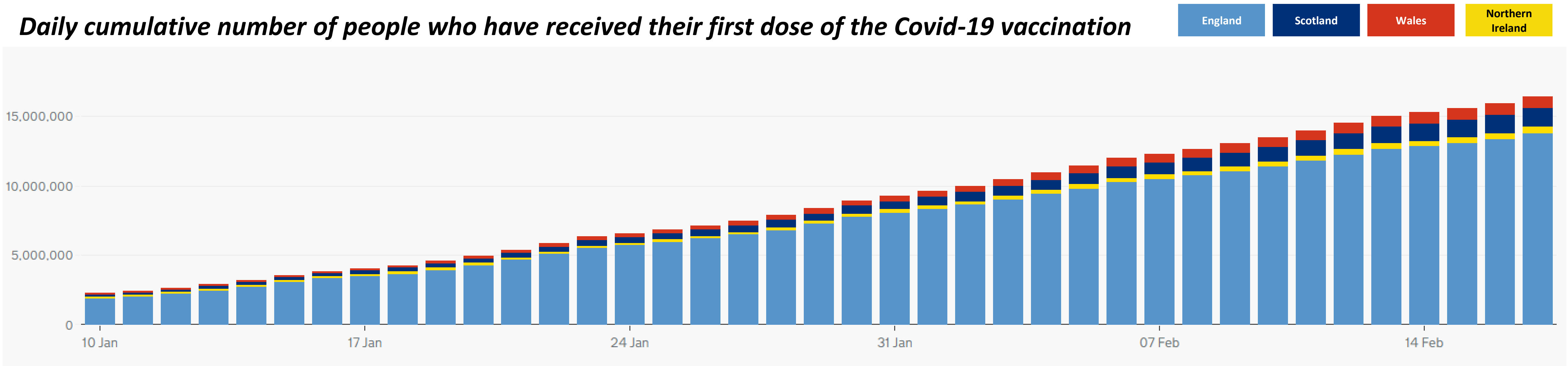
# EXECUTIVE SUMMARY

## *Consumer movement holds for another week, as lockdown routines become established in our daily lives*

*As this week is our 50th instalment of "**How Covid-19 is changing the movement of your customers**",* we reflect on the key demographic, sector and locational trends that have emerged over the 50 week period. As we remain in the grips of the third national lockdown, mobility is unchanged from the previous week – demonstrating the effectiveness of the restrictive measures. However, compared to previous lockdowns, there is much to be optimistic about. Over 16 million people have now received the first dose of their vaccine and the Bank of England has announced that it expects the UK economy to bounce back "strongly" in the spring. We haven't had greater cause for optimism throughout this whole pandemic. There is no doubt it will be a very different future, with the pandemic permanently changing the consumer and how they engage with brands and locations - but it will be a bright future.

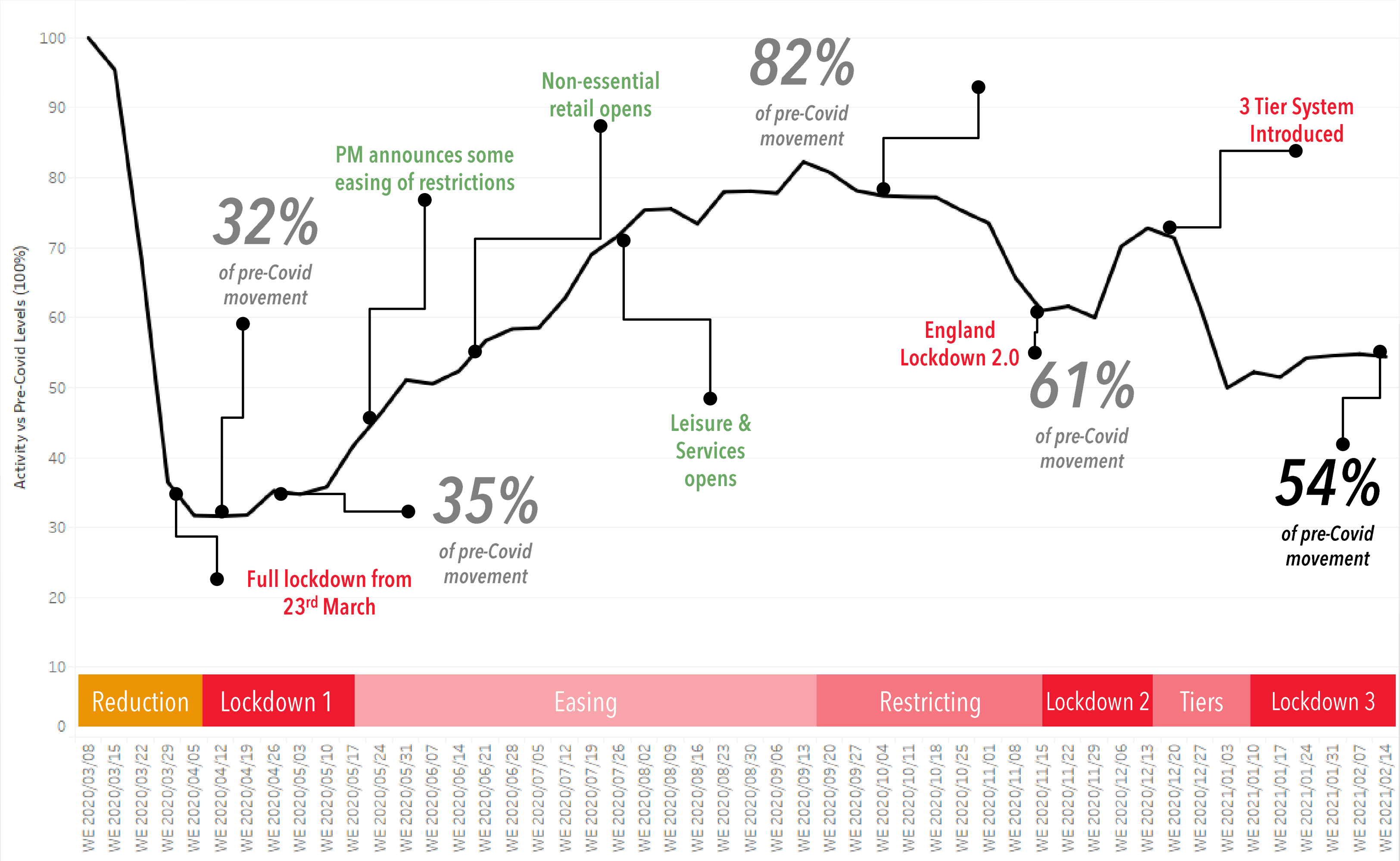
***Daily cumulative number of people who have received their first dose of the Covid-19 vaccination***




*Source: https://coronavirus.data.gov.uk/details/vaccinations*

# THE NATIONAL PICTURE

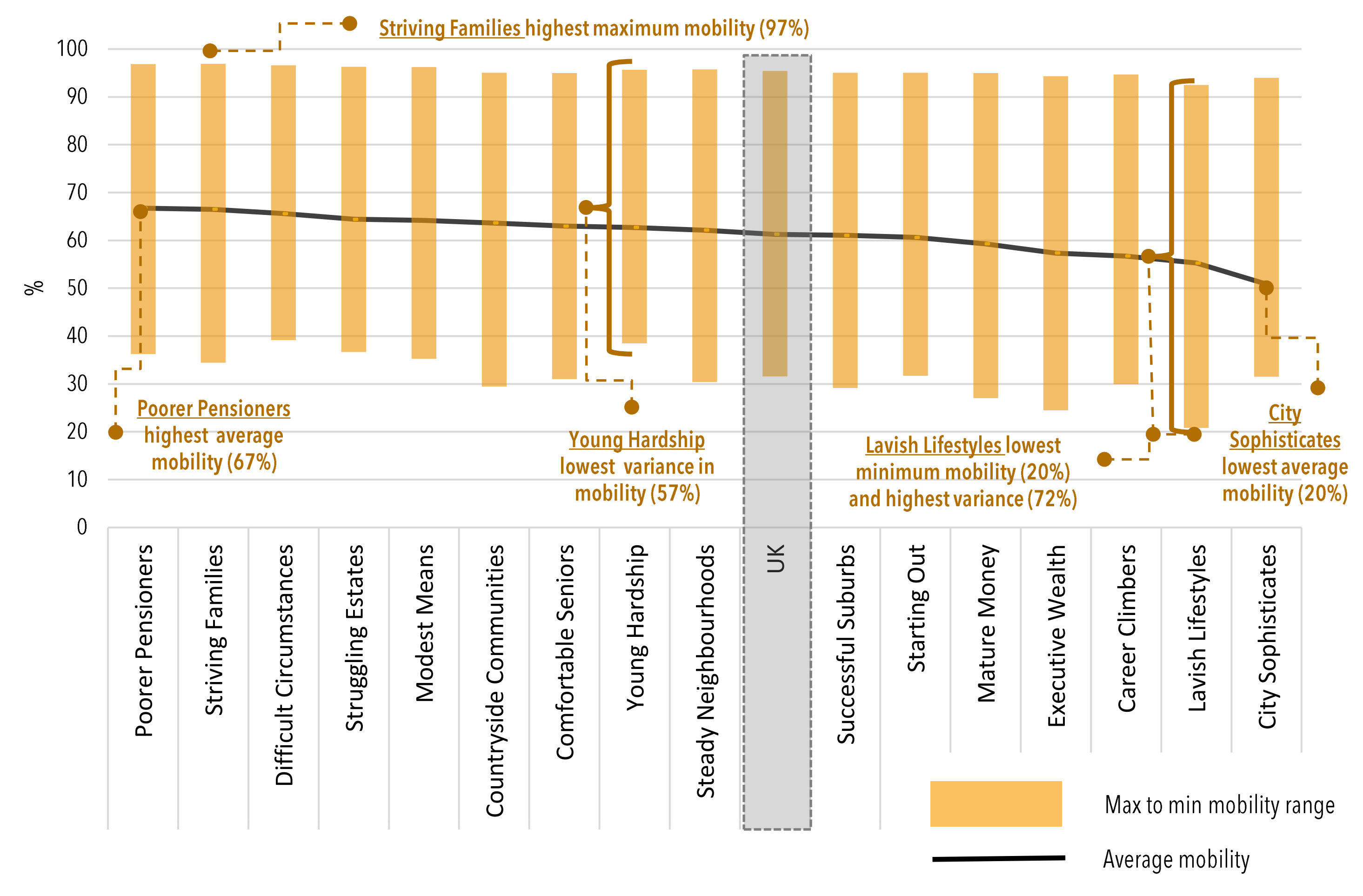
*Lockdown 3.0 routines are now well and truly embedded in our daily lives as mobility holds for a 4$^{th}$ consecutive week*




- At the time of writing, essential retail still remains closed, children continue to be home schooled and a significant part of the population remain working from home. This means there is very little to drive any new demographic or locational variation compared to recent weeks. **The result is a -0.5pp drop in movement on the previous week, taking overall movement for the UK to 54% of pre-Covid levels** for the week ending 14$^{th}$ February.
- However, whilst everyone is still feeling the frustrations of the ongoing restrictions, there is certainly a lot to be positive about in the near future. The government is beginning to draw up its plans to emerge from lockdown, the effective vaccine rollout is creating confidence amongst the most vulnerable groups and our most recent consumer survey reveals there has been gradual build up of demand throughout the pandemic - with consumers now  ready to start spending their money.

# HOW HAS MOBILITY VARIED BY ACORN?

***Over the past 50 weeks affluence, age and life-stage have played a key role in determining the variation in consumer movement across the UK***




- For a second week running, there has been **no further variation in the mobility of different demographic groups**. Established lockdown routines mean that levels of movement are holding - with the lowest income Acorn groups continuing to see more movement relative to pre-Covid times than the more affluent categories.
- This week we take a look at how different Acorn groups have fared over the entire 50 week period. The graph displays the minimum, maximum and average values (excluding the first week), summarising the level of variation we have recorded in our weekly reports.
- Whilst the usual trends remain visible, there are some interesting points to reflect on. For instance, since the first lockdown, **Lavish Lifestyles** have recorded both the **lowest levels of movement** and the **greatest levels of recovery** (variance between min and max). We know that this group have been working from home for long periods, yet when restrictions were lifted, they also embraced the recovery in the Summer – visiting UK holiday destinations and embracing "Eat Out to Help Out". As one of the most affluent consumer groups, they will no doubt be an important group to engage, once non-essential retail is deemed safe to open once again.

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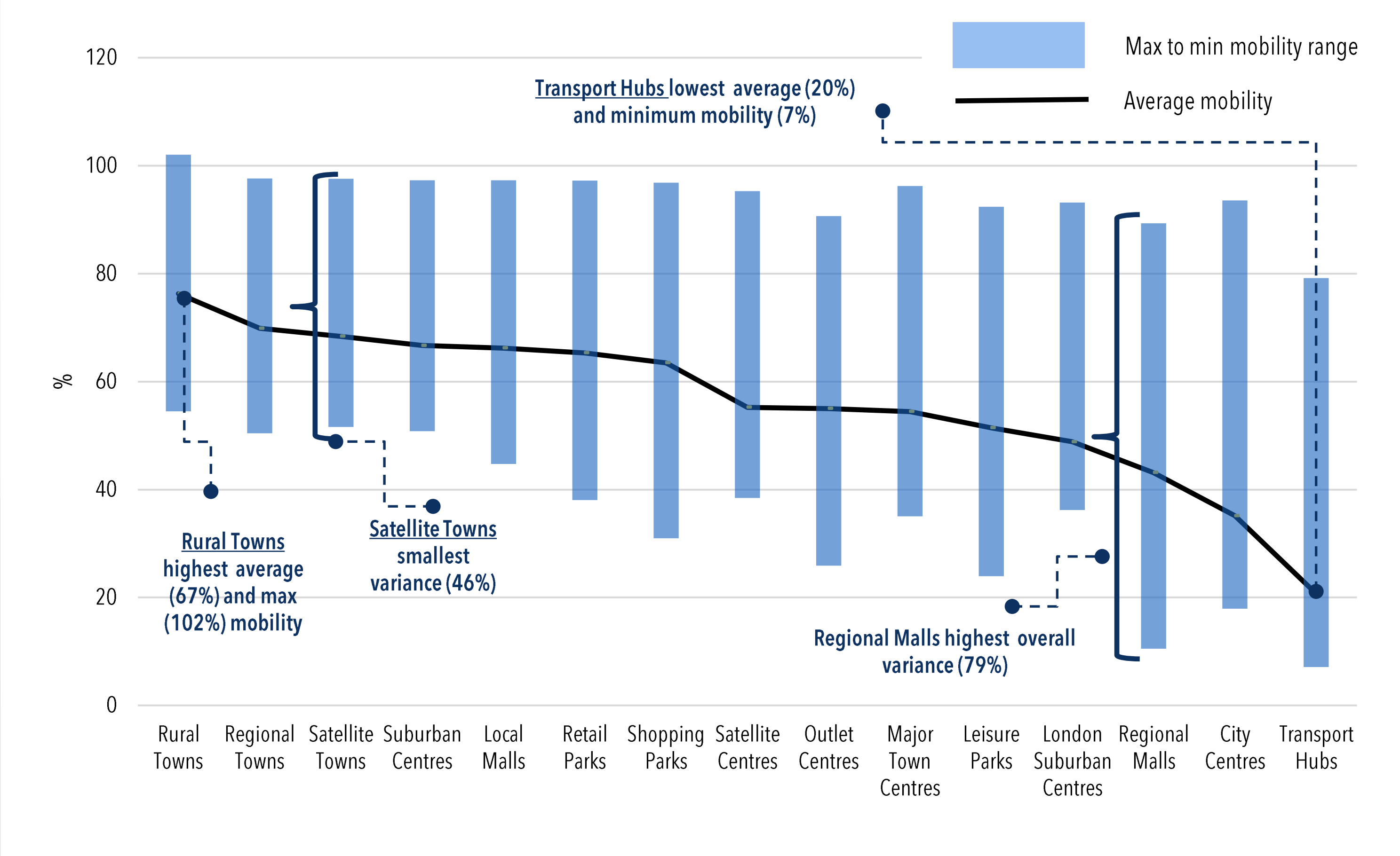
# WHAT TYPE OF LOCATIONS HAVE WE VISITED?

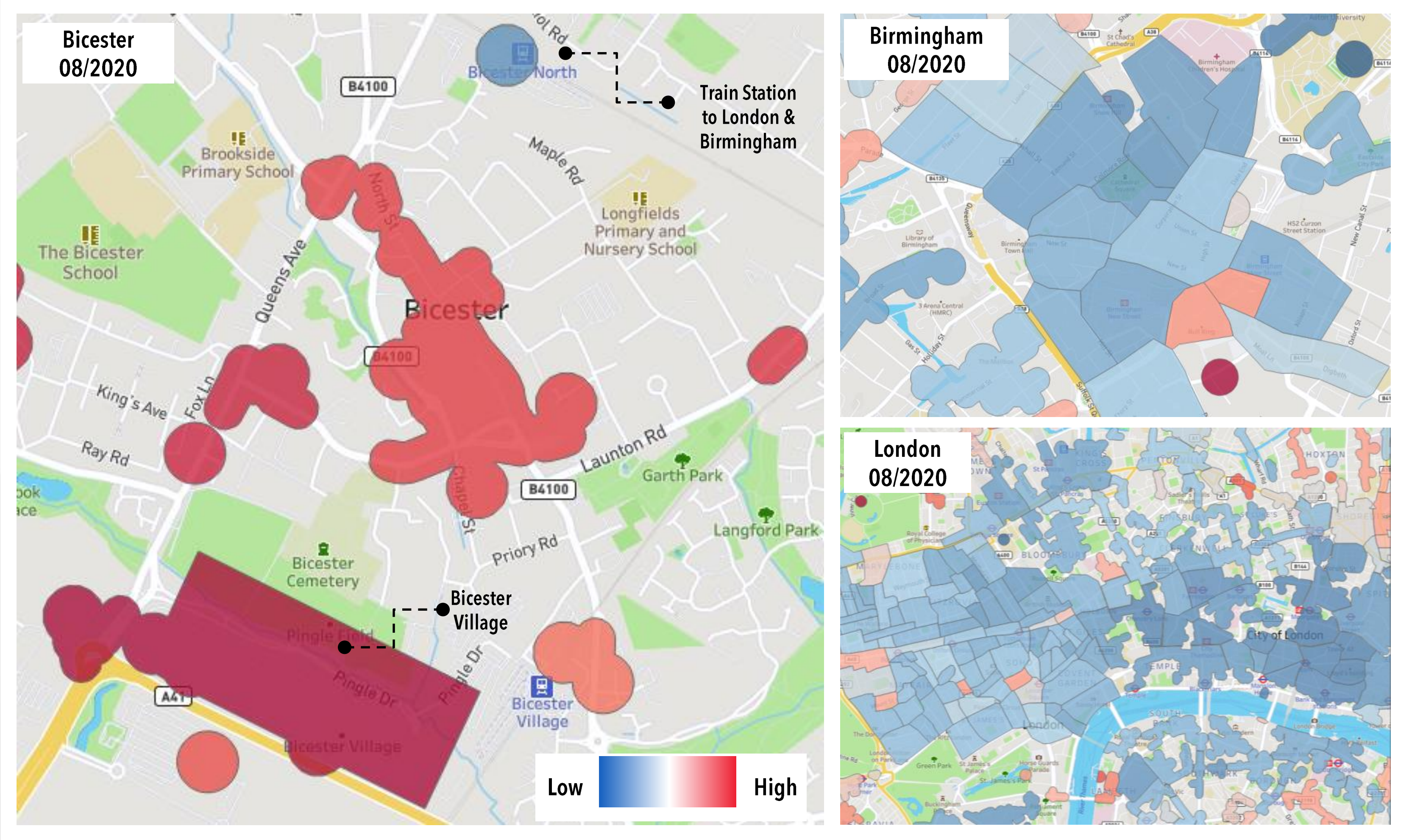
***The fallout from Covid-19 has varied heavily by location, reinforcing the need to better understand local markets and the resilience of retail destinations***




- If we take the same analysis and apply this to the UK's retail locations, we see a far more varied picture – highlighting just how unequal the fallout from the pandemic has been. Throughout our weekly reports and research, the **success of Rural, Regional and Satellite Towns** has been well documented. This is evident in the analysis as they show the highest levels of mobility and least variation over the 50 week period. Working from home, avoiding public transport (seen in **Transport Hubs**) and reduced travel have been a catalyst for many local hubs.
- **Regional Malls** demonstrate the **greatest levels of variation** – highlighting the impact of forced closures and the perception out-of-town shopping in managed spaces is a safer option for consumers who are looking for destination shopping.
- A deeper dive into specific locations reveal it was popular tourist destinations on the coast (e.g. Whitstable & Whitby) that recorded the highest levels of movement in 2020. Our recent survey reveals the approaching Summer will be no different – as almost half of those planning on taking a holiday intend to stay in the UK.
- Unsurprisingly, only non-comparison retail **Supermarkets and Motorways (+2pp) recorded any growth this week–** as the simple pleasures of grocery shopping and driving become one of the few available escapes from life in lockdown.

# BICESTER: A CASE STUDY

*A focus on Bicester shows how staying close to home continued throughout 2020, with local hubs thriving over the busier centres and transport hubs*




- In addition to the infamous Bicester Village, Bicester is known for being a popular commuter town - due to its accessibility to Oxford, Birmingham and London. Pre-Covid, residents would spend much of their time travelling from Bicester into one of these cities for work or shopping.
- However, as Covid-19 restrictions and general consumer behaviour have caused people to become more comfortable engaging with their local hub - places like Bicester are now benefiting from a rise in localism.
- This is presented in the maps, which clearly show how mobility was far higher in Bicester than central Birmingham and London during August – a time when people were allowed to move relatively freely in 2020. Whilst the Outlet has had mixed success over the year, the data shows the Summer presented a resurgence in local visitors and domestic tourists. Something we have seen in many other outlet centres in the last 11 months. The combination of brands, outdoor space and value ticking many Covid boxes.

# 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 February.*

LOCATION SCIENCES

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