How Covid-19 is changing the movement of your customers

Data for week ending 21st February 2021

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EXECUTIVE SUMMARY

For the first time this year movement has seen a marked increase – driven by weather, half-term, and the success of the vaccine roll-out

The UK has seen a 5 percentage point (5pp) increase in movement for the first time this year from 54% to 59%. This follows 5 weeks of unchanging mobility and reflects a number of changes that have occurred this week. It is not possible to disentangle these, but all of them are contributing to the overall shift.

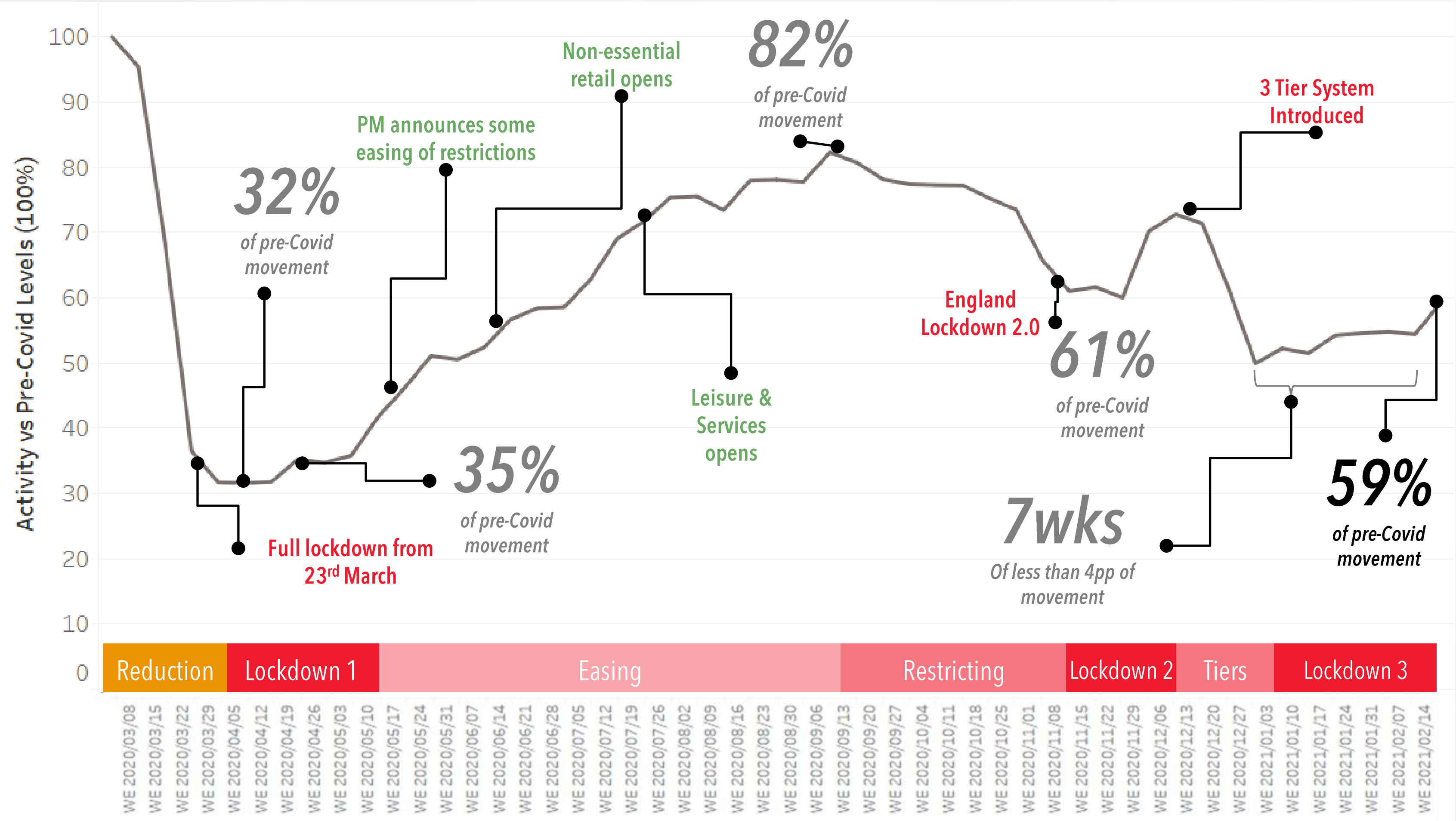
The weather showed the first signs of Spring with typical double digit daytime temperatures after weeks of snow and freezing weather. This coincided with half-term, releasing many children from their screens if not their homes. As a result many of the parents who were able will also have taken the opportunity to have a break and spend the time engaging a little more with their surroundings. This meant that whilst we have seen some movement in commercial spaces such as retail parks the drivers of the movement are non-commercial space: residential neighbourhoods and parks.

This week also saw the government hit the mid-February vaccination target of the top 4 cohorts, including all over-70's and a shift in media narrative from vaccine roll-out to easing of restrictions (with plans formally announced the day after the time period covered). History demonstrates that the public react first to media narrative and then to legal policy with an average +5pp shift immediately following announcements – as has been seen this week.

These trends are apparent in Acorn changes with older, vaccinated groups accelerating their movement, alongside affluent family groups. The most static, relative to their pre-Covid movements are the young, less affluent and unvaccinated.

THE NATIONAL PICTURE

For the first time in Lockdown 3.0 we have seen a notable shift in movement with 5pp growth to 59%, closer to Lockdown 2.0 levels

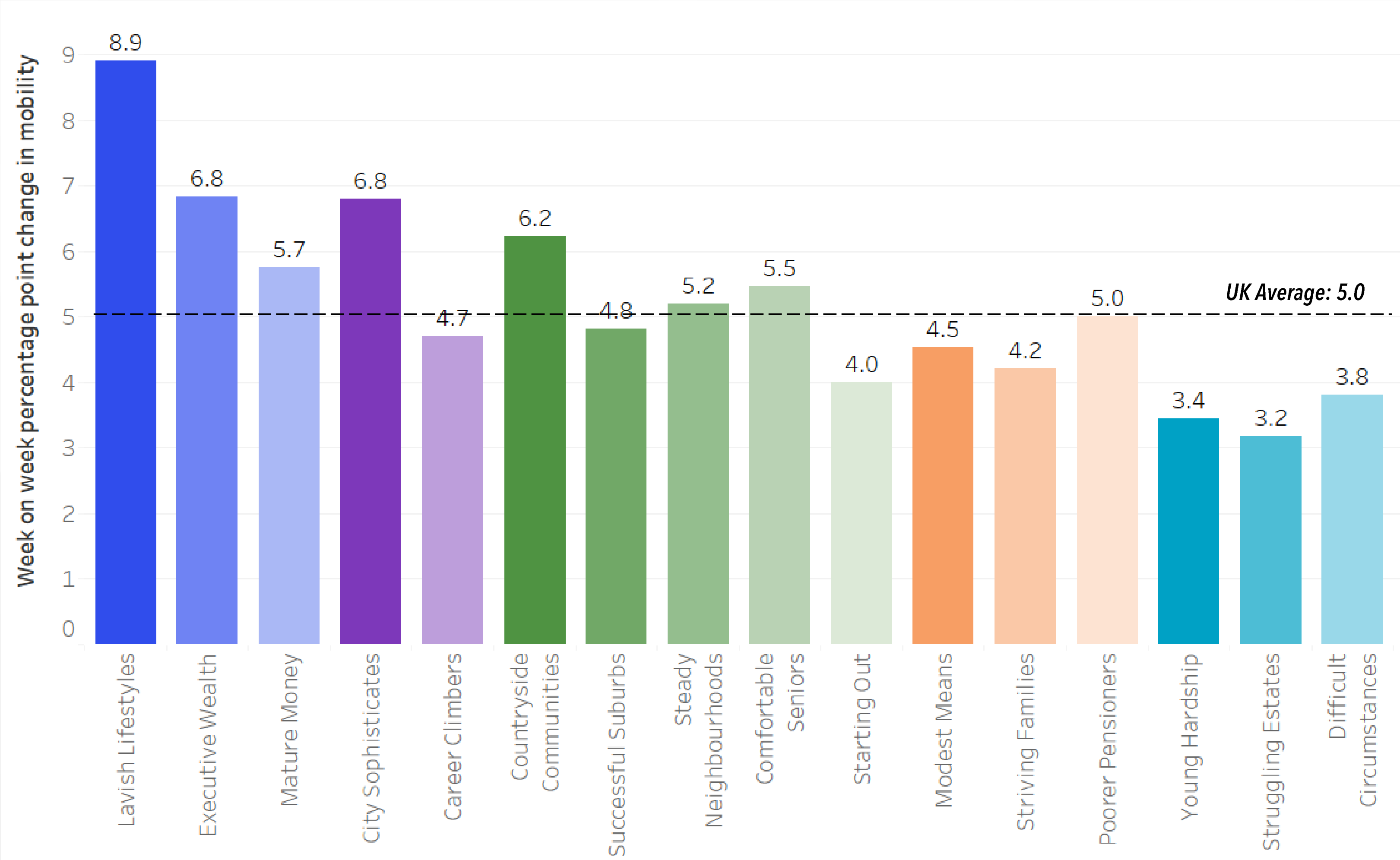


- After the longest period of flat movement, last week saw the first meaningful increase in movement this year, up 5pp from 54% to 59%. This follows a remarkable run of 7 weeks with only a 4pp increase in movement in total.
- The reasons for this are three-fold:

1. **Weather**: after an extended cold snap running from Christmas and culminating in a week of snow across the UK we finally burst into the early days of Spring.
2. **Half-Term**: whilst most of the country has been home-schooling half-term nonetheless represents a break from the routine and an opportunity for families to spend some time away from screens and getting out and about.
3. **Vaccine roll-out & looking forward:** a minor trend seen earlier in the year has come through again of mobility in older groups greater than the UK average. With the focus moving into how we move out of lockdown are we seeing the start of the psychological shift to returning back to normal?

HOW HAS MOBILITY VARIED BY ACORN?

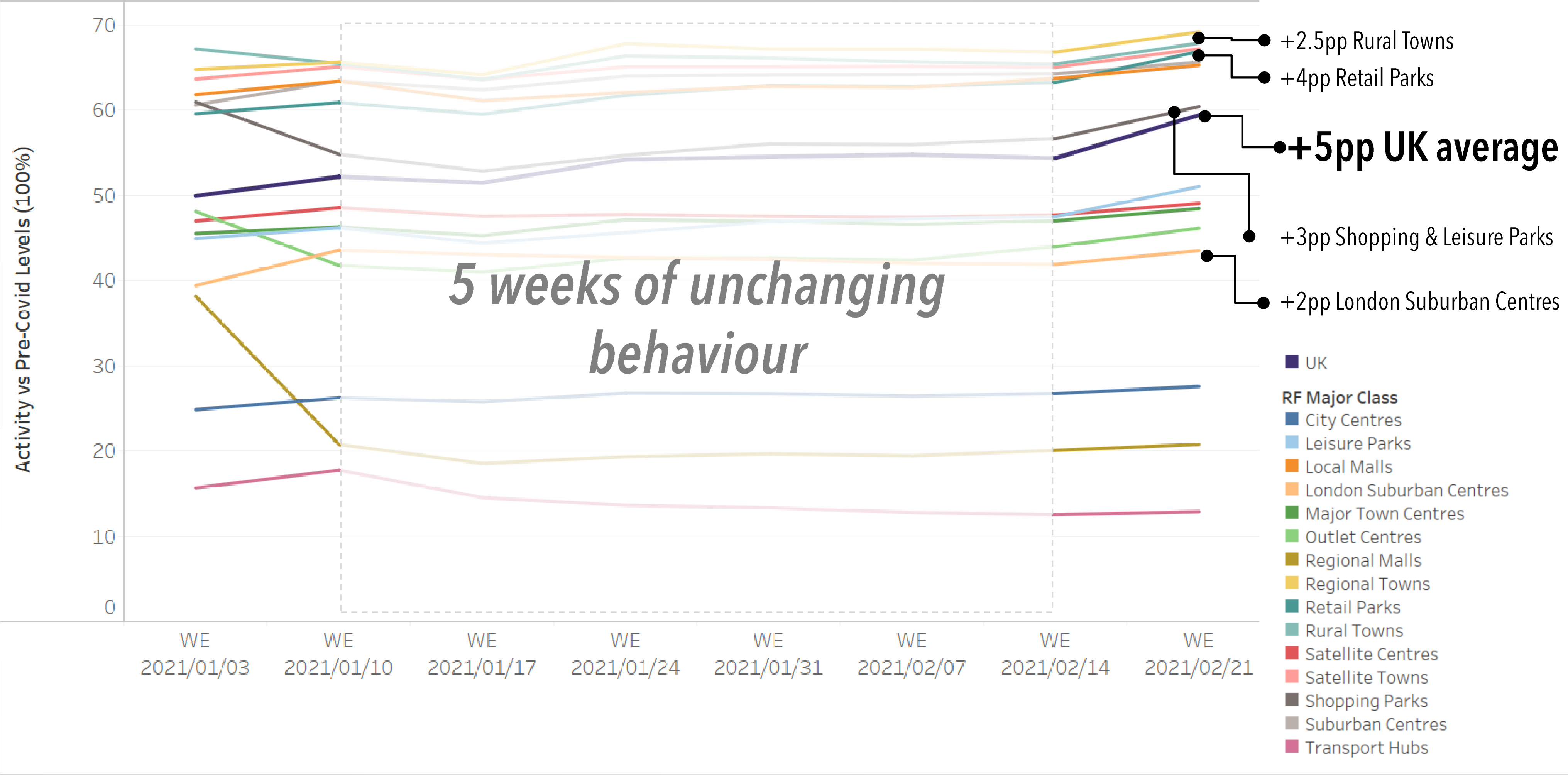
The more mobile groups this week are the most affluent family groups and older groups – the young and less affluent remain below the UK average



- Whilst all groups have increased their movement this week the 5pp increase in UK movement from 54% to 59% is not equal. Whilst there is a broad trend towards more movement by the most affluent they are starting from a lower base. This trend also masks some notable other underlying patterns:
- Mature Money, Comfortable Seniors, Poorer Pensioners are all at or above the UK average, in contrast to Lockdown 1.0 where they were restricting their exposure. With vaccines now largely complete for these groups they will be feeling more comfortable engaging in their local areas.
- More affluent family groups with older school age children - Executive Wealth, Comfortable Communities, Steady Neighbourhoods are all above the UK average. These groups are arguably more able to take annual leave from professional jobs over half term.
- In contrast Starting Out, Young Hardship, Career Climbers are less likely to have children, or to have children below school age and have seen below average increases in movement this week.

WHAT TYPE OF LOCATIONS HAVE WE VISITED?

The UK increase in mobility is driven by movement outside of retail destinations, in non-commercial spaces such as parks and residential neighbourhoods



- The mobility tracker works by understanding how overall mobility of people has changed in any space. Pre-Covid, with retail and leisure open, most movement would occur in towns, cities and retail destinations.
- However, in Lockdown 3.0 with non-essential retail and catering closed, these locations are not the footfall drivers they once were. Out of town retail is up 4pp but remains below the UK average of 5pp.
- The growth in movement is driven outside of retail – in parks, green space and residential areas, reflecting half-term and permitted exercise.

THE POWER OF THE MEDIA

Public behaviour changes with the announcement of incoming policy change rather than legal implementation – has that driven this weeks movement?

Restrictions imposed

First Lockdown:	-32.0pp
Rule of 6:	+4.5pp
3 Tier System:	-0.1pp
Second lockdown:	-7.8pp
Christmas is cancelled:	-10.1pp
Third lockdown:	+2.3pp

-4pp

Median change

Restrictions lifted

+5pp

Median change

Schools re-open:	+5.9pp
Retail re-opens	+5.0pp
Groups meet outdoors	+1.7pp
Hospitality re-opens	+4.3pp
Indoor venues re-open	+4.6pp

- The importance of messaging and media narrative can often be over-stated, however it is a subject we have covered before and return to here. Looking back across the previous year we can see that each major announcement in what is allowed is followed by an immediate shift in movement *regardless* of whether the rules legally changed at the same time.
- Whilst announcements of increasing restrictions see varied responses, dependent on severity, all announcements of easing of restrictions see an immediate uptick in movement, averaging a 4pp increase, often followed by a lower increase when the restrictions are legally lifted in the weeks after. This points to the eagerness of the public to re-engage and the strength of media message over what is legally permitted.
- This week has seen the media narrative shift from a long period focussing on vaccine roll-out to what the easing of restrictions may look like, with many of the steps leaked to the media ahead of the announcement that came the day after this time period, on Monday 22nd.
- Will next week move upwards again or was the 5pp seen here the shift that comes with each announced change?

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