How Covid-19 is changing the movement of your customers
Data for week ending 7th March 2021

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EXECUTIVE SUMMARY

No change in movement levels nationally, in a mirror of the start of emergence from Lockdown 1, as we await the return to school

- National movement **remained at 62 percent** of pre-Covid levels following last week's 3 percentage point (3pp) jump, that immediately followed the announcement of the UK's Road Maps for the lifting of restrictions, and the 5pp rise that preceded the announcements.

- This pattern is **remarkably consistent** to that seen throughout the pandemic – with the public pre-empting the announcements, releasing pent-up activity and then movement is capped by the reality that no new destinations are actually open to receive their visits. Indeed, we also witnessed **no change** nationally in the week **before the partial opening of schools** on 1st June as we emerged from Lockdown 1. That week also **briefly paused a trend of steep rising activity**. With a full re-opening of schools this time we can expect to see a considerable rise in activity next week, and it will be interesting to see whether the higher starting point this time will cap some of this rise.

- As you would expect with a no change headline there is little difference at a demographic level.   However, there is some evidence of an **income divide**, with less affluent Acorn Groups offsetting some of the previous week's movement increases. With the return of colder weather pushing people back indoors.   Meanwhile a few of those in Acorn Groups with fewer child-care constraints may have made the most of the more positive sentiment to slightly increase their activity.

- There was greater solidarity across the regions this week than there has been for a long-time. The only region that showed any measurable change in activity was the **North East**, where warnings of the countries most concerning **R Rate** appears to have slightly reduced movement across a wide range of demographic groups.

- Major destinations, worker and transport hubs in **London** continue to sleep whilst **local communities** continue to benefit and we wonder whether this pattern will remain as many workers hope to continue to work from home.

- But we anticipate a **rebalancing of the Acorn mix** across all destinations in the coming months as more affluent groups emerge from their **deeper lockdown**, as seen in the emergence from Lockdown 1.

THE NATIONAL PICTURE

After the knee-jerk reaction we await the impacts of the actual *Road Map steps, as patterns reflect those of emergence from Lockdown 1*
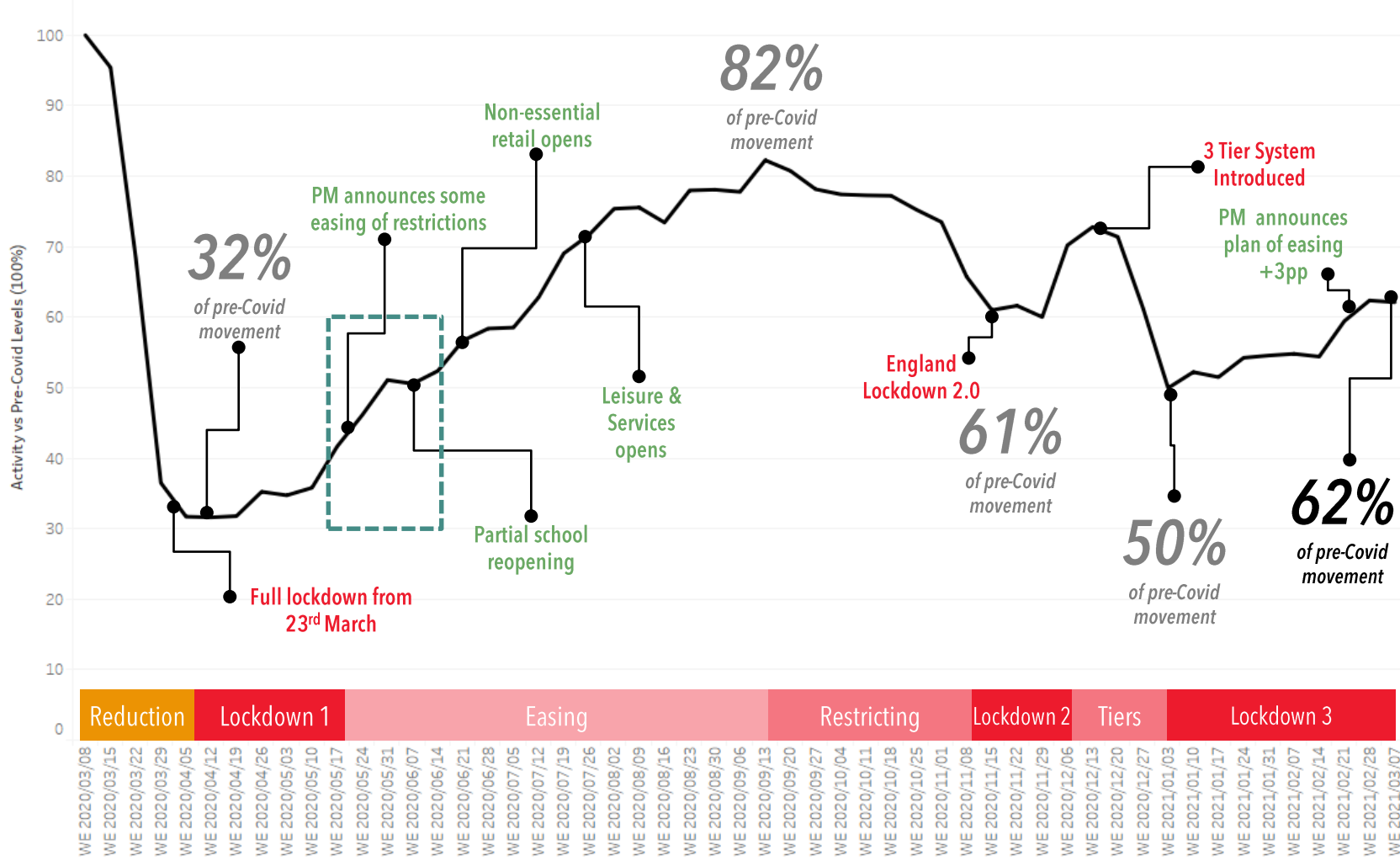
- In last week's report we discussed the immediate 3 percentage point (3pp) increase in activity in response to the Prime Minister, and devolved leaders', announcements of *future* easing – when actually nothing had changed in terms of restrictions.

- This week we have seen **no change in movement** as, after the initial knee-jerk reaction, reality has set in. With no *actual* rule changes introduced yet, movement has stabilised now that this bubble of pent–up movement has been released.

- Comparing recent weeks to the dashed area in May, as we emerged from Lockdown 1, we see a similar pattern – a relatively steep climb in movement immediately preceding and following an announcement and then a **pause before action**. Specifically, the week before the partial re-opening of schools on 1st June also saw flat-lining at a national level.

- The government and public health will be closely monitoring next week's figures, which will show how much the re-opening of schools in England has impacted overall movement levels – both directly and through people's perceptions of wider safety.

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HOW HAS MOBILITY VARIED BY ACORN?

Pent-up movement returns to normality for last week's biggest movers – and those without childcare challenges may be moving more
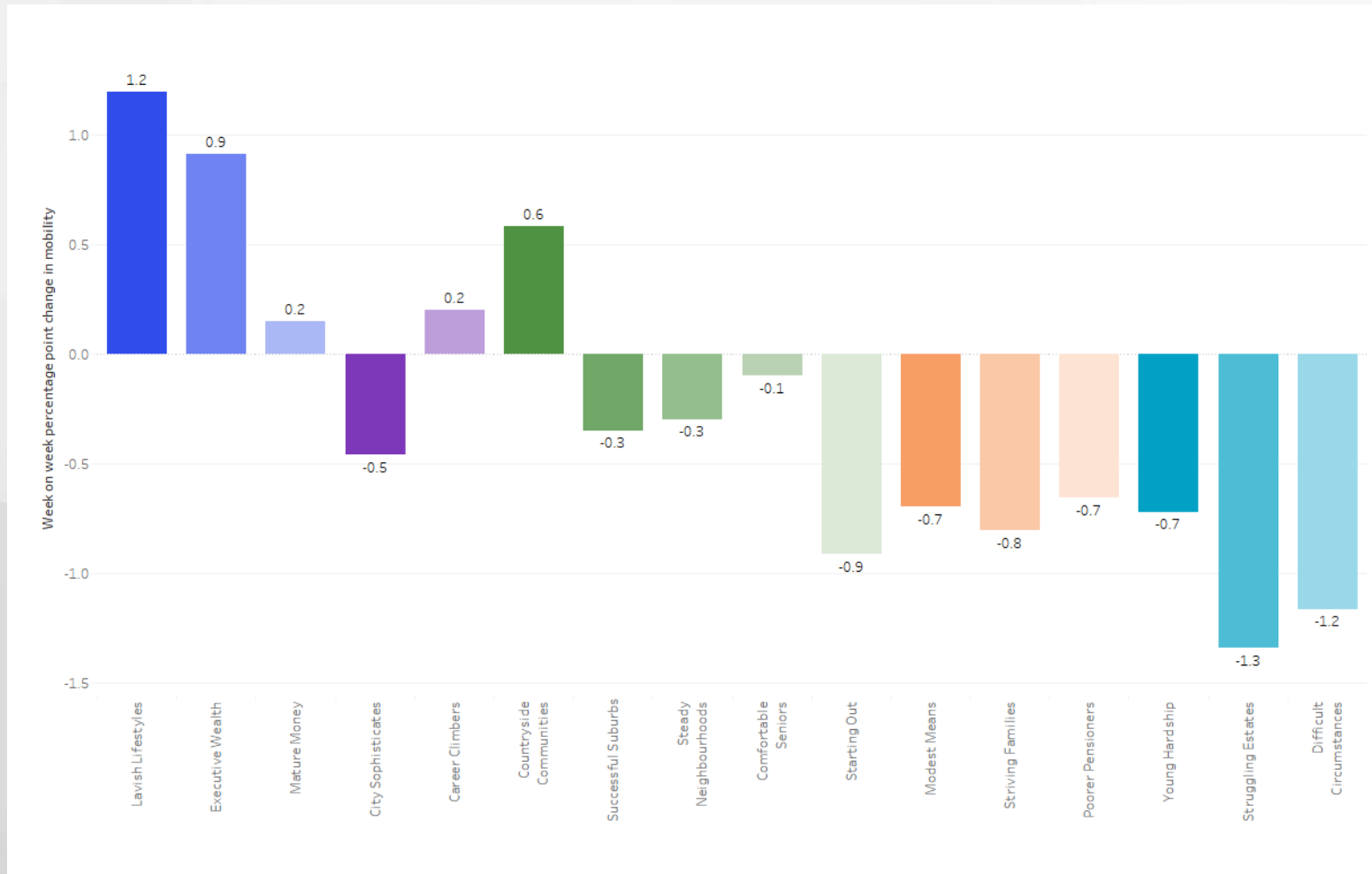
- This chart shows that there may be a very slight demographic factor in the changes in movement this week, but numbers are marginal.

- The **seven lowest income groups** (to the right of the chart) have seen a consistent, marginal, drop movement of about **1pp**. Last week these same groups saw the largest increases, at about **4pp** – a point higher than other groups. Perhaps it is not surprising that with good weather, these groups with less indoor space, made the most of the Road Map announcement to move a little more than usual. Whilst this week they fell back into line, with the return of cold weather and the fact that nowhere new is open for business.

- The 3 groups with the most movement increases this week are three of the groups least limited by the presence of young children at home. **Lavish Lifestyles**, **Executive Wealth** and **Countryside Communities** have relatively few young children. Could a few of these groups have jumped the gun and made a few more trips to work or for leisure – and will we see others do the same next week, with some of the home-school burden lifted?

REGIONAL VARIATIONS

All regions are holding firm whilst we await the impact of the first easing measures – but the North East may be influenced by the R number
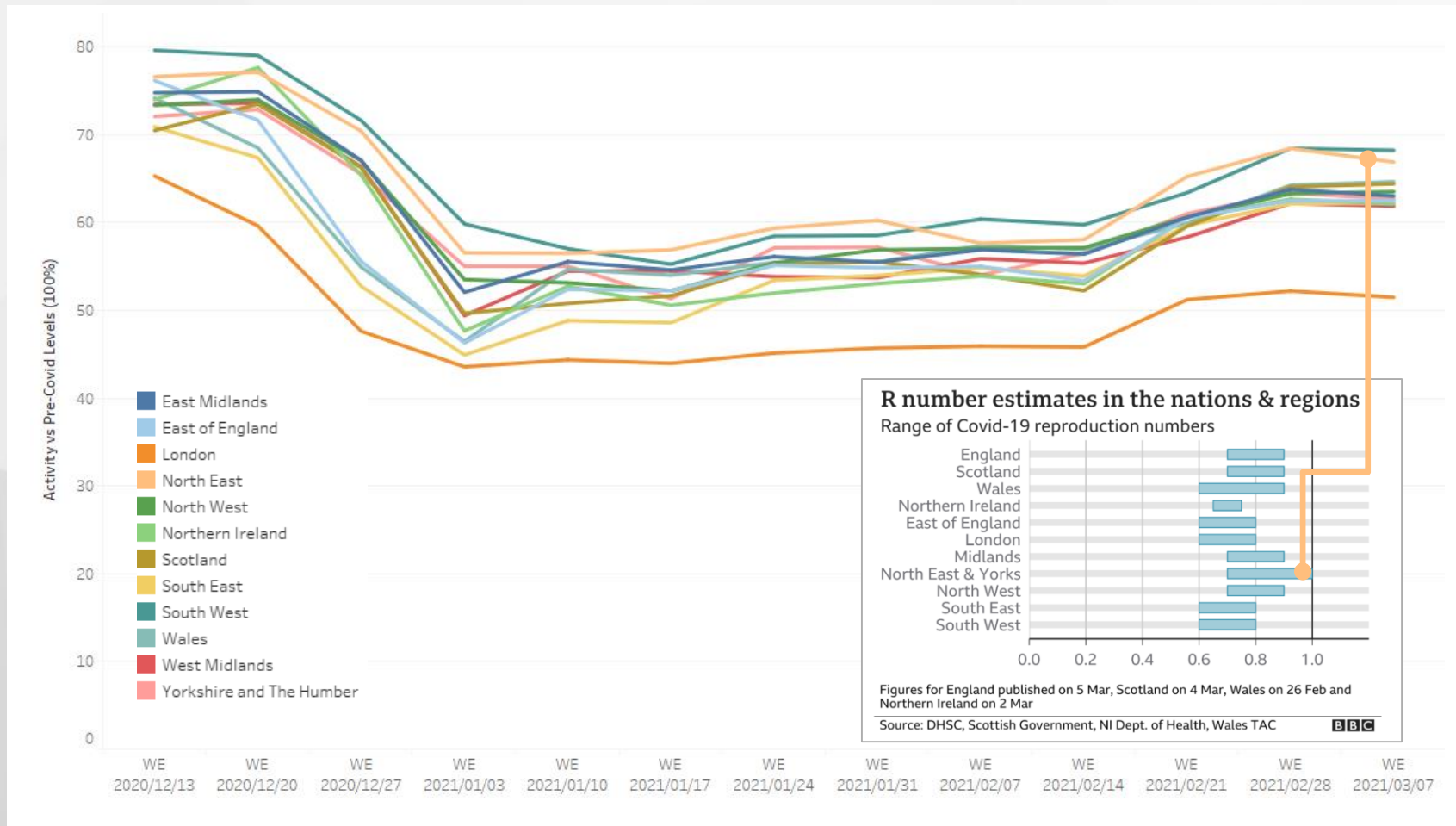

- Having seen regional differences in movement patterns across the latest lockdown this week has shown remarkable consistency at a regional level.

- Only one region has seen a change in movement of more than **1 percentage point** in either direction.

- Notably this largest drop is in the **North East** region, where the latest published **R number** figures show the greatest risk exists for virus transmission.

- The drop in movement in the North East is shared across demographic groups with drops in activity of **2pp** or more amongst:
  - Lavish Lifestyles
  - Starting Out
  - Difficult Circumstances
  - Poorer Pensioners

WHERE ARE WE VISITING?

The tale of two cities continues – major destinations, worker and transport hubs sleep whilst local neighbourhoods continue to thrive
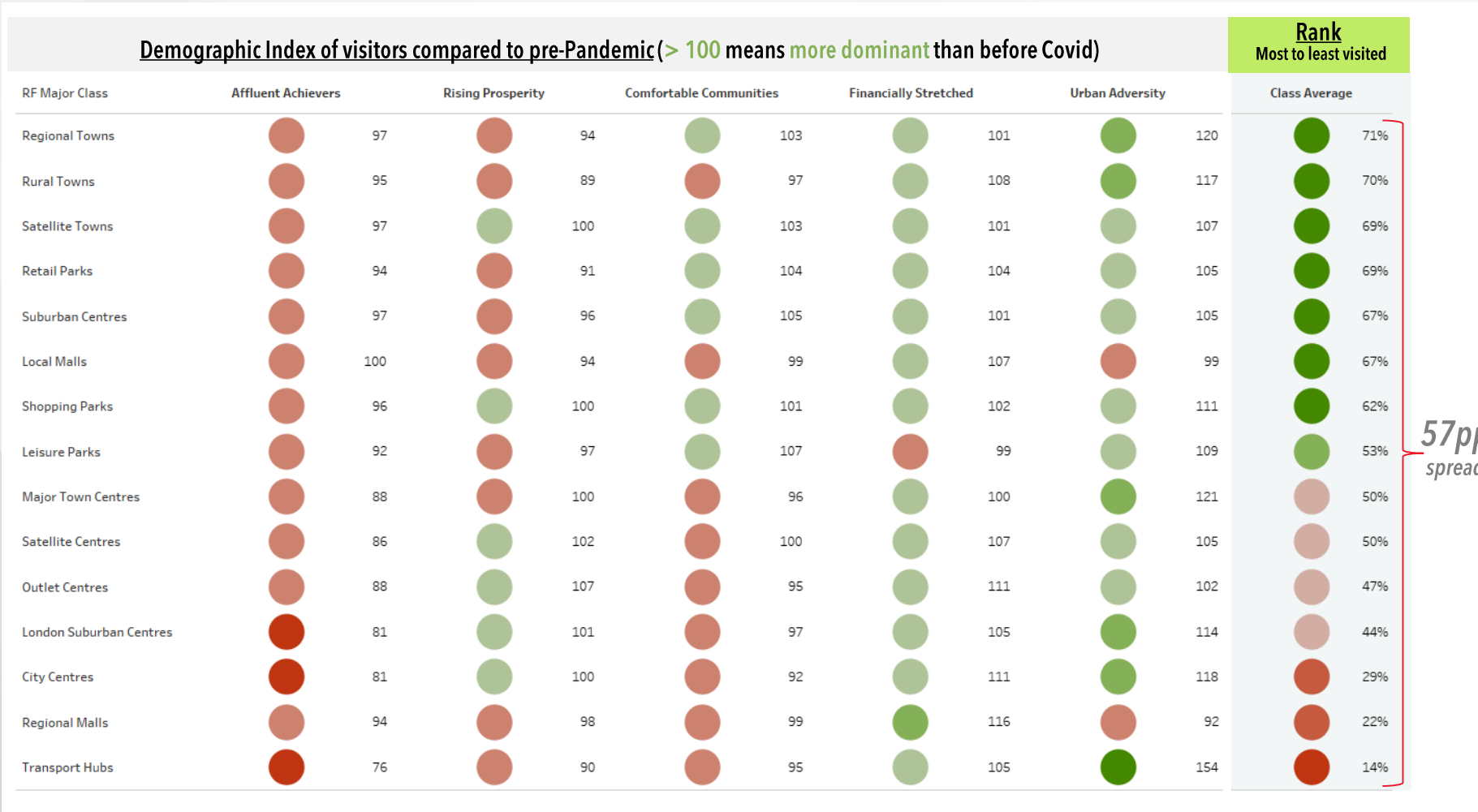
Visits in week ending 7th March relative to pre-Covid at London's Convenience Cluster destinations
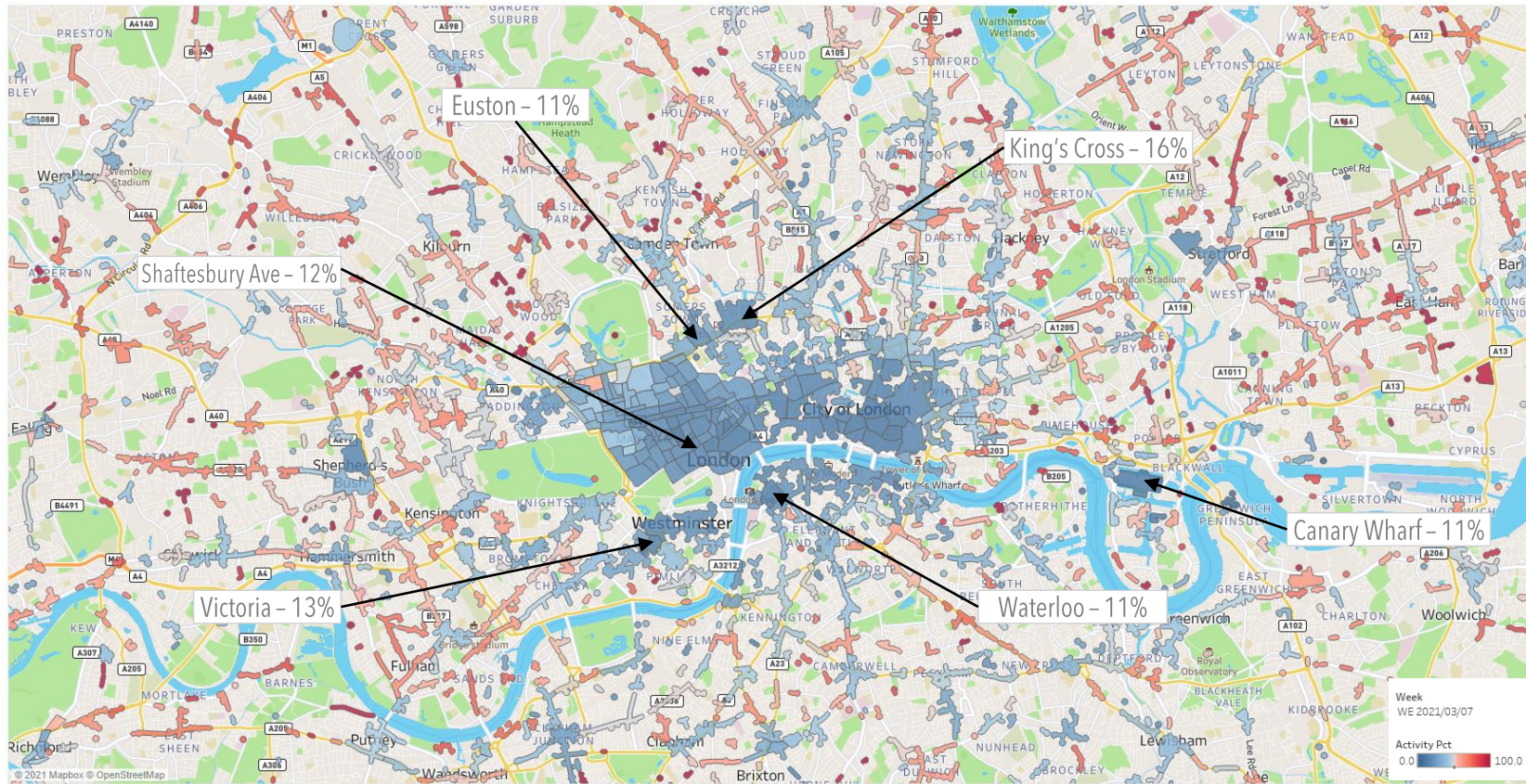
- Those who have been following our reports throughout lockdown will recognise the patterns in this map, but it's a timely reminder of the stark impacts that lockdown is having on London, and similarly across other cities.

- The dark blue shading shows movement levels close to **10%** of pre-Covid activity in the **heart of London**. These figures are witnessed in all of the major worker, leisure and destination hubs.

- However, the scattering of red in smaller neighbourhood locations **across the rest of the city** show **local destinations** maintaining community even almost a year into the pandemic.

- This map will no doubt change in the months ahead as we work through the stages of the Road Map but, with our recent survey showing that the average worker only wants to return to the office **2.8 days per week**, will the future be a slightly less extreme version of this map?

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WHO IS VISITING WHERE?

Will the order of destinations visited and the demographic balance change as we work through the Road Map?

RF Major Class	Demographic Index of visitors compared to pre-Pandemic (> 100 means more dominant than before Covid)					Rank Most to least visited
	Affluent Achievers	Rising Prosperity	Comfortable Communities	Financially Stretched	Urban Adversity	Class Average
Regional Towns	97	94	103	101	120	71%
Rural Towns	95	89	97	108	117	70%
Satellite Towns	97	100	103	101	107	69%
Retail Parks	94	91	104	104	105	69%
Suburban Centres	97	96	105	101	105	67%
Local Malls	100	94	99	107	99	67%
Shopping Parks	96	100	101	102	111	62%
Leisure Parks	92	97	107	99	109	53%
Major Town Centres	88	100	96	100	121	50%
Satellite Centres	86	102	100	107	105	50%
Outlet Centres	88	107	95	111	102	47%
London Suburban Centres	81	101	97	105	114	44%
City Centres	81	100	92	111	118	29%
Regional Malls	94	98	99	116	92	22%
Transport Hubs	76	90	95	105	154	14%

57pp *spread*

- The 57 percentage point spread in relative movement from the most active (**Regional Towns**) to least active (**Transport Hubs**) will surely start to narrow as we progress through the various stages of the Road Map. But how quickly, and what will be the new order?
- The predominance of red to the left of this graphic shows that **Affluent Achievers** are now under-represented in **every** type of destination.
- This contrasts starkly with **Financially Stretched** and **Urban Adversity** consumers who are now over-represented compared to before Covid, due to their relatively higher movement levels.
- Will we see **the same balancing out of demographic patterns** as we saw emerging from Lockdown 1 – as more affluent groups emerge after locking down more deeply than other groups?

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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

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.

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

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

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