



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

## Data for week ending 4<sup>th</sup> April 2021

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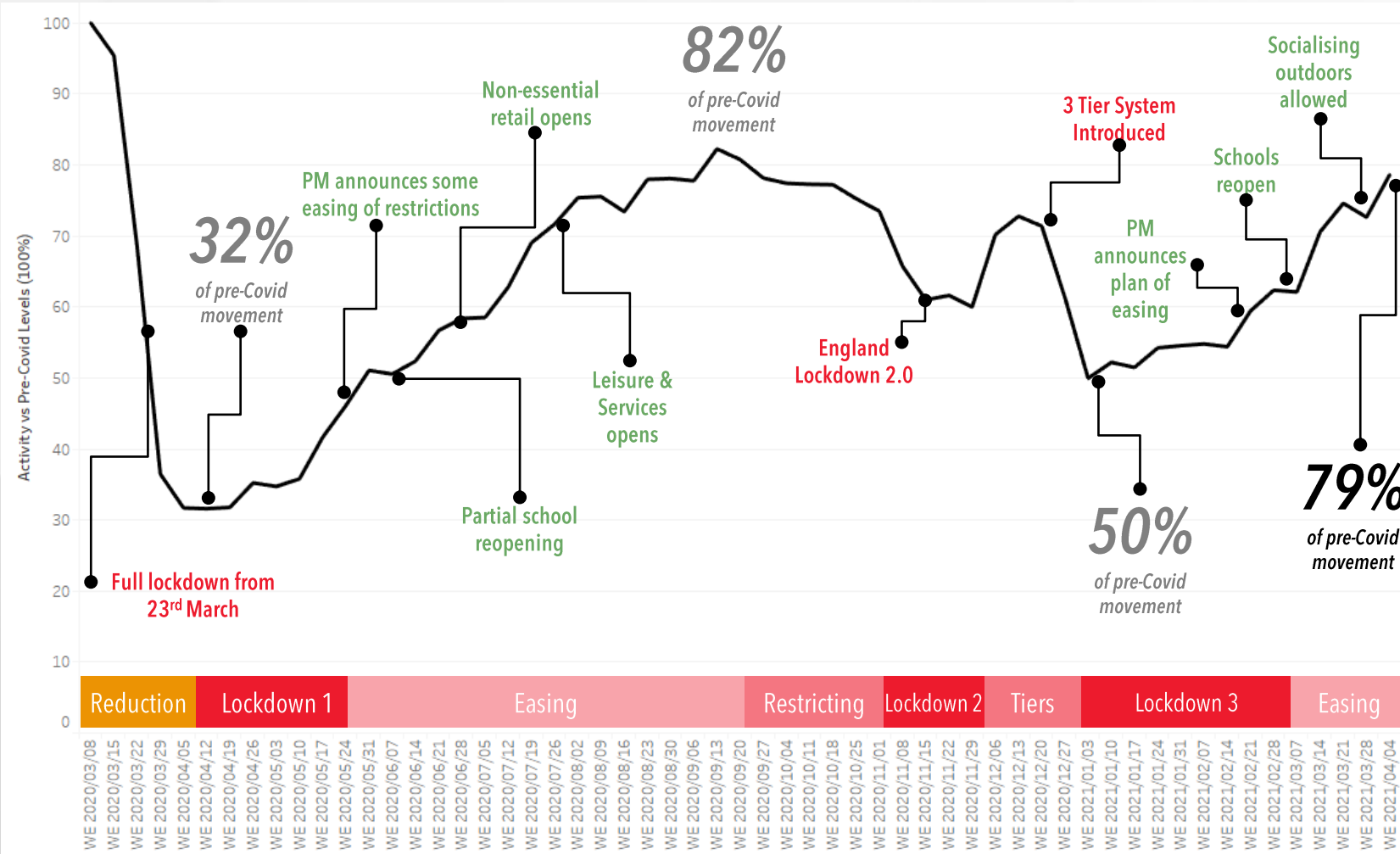
# EXECUTIVE SUMMARY

*The first major easing of social restrictions plus the Easter weekend have seen mobility rise to a 7 month high of 79% of pre-Covid levels*

- The week ending 4<sup>th</sup> April was the first full week that we were allowed to meet up to six people socially in private gardens and public spaces, it also included ¾ of the long Easter Bank Holiday weekend. This has led to a 6 percentage point (pp) increase in mobility with national movement of people now standing at 79% - the highest since mid-September 2020.*
- As is often the case, it is the more affluent groups that are driving this increase in mobility as they have the freedom and flexibility to restrict and increase their movement according to the guidelines. There were no significant regional variations this week as the whole country embraced the first major step towards freedom.*
- No location type saw mobility increase anywhere near the overall UK figure of 6pp, showing that the increase is being driven by people socialising in private and public spaces in line with guidelines. Motorway service stations saw a 9pp rise in mobility suggesting lots of people were travelling across the country to visit friends and family.*
- This week almost marked the end of step 1 of Boris' 4 step roadmap to recovery. During the 5 weeks of step 1 we have seen an overall increase in mobility of 17pp. This is driven by the most affluent households and the more rural parts of the UK. The more local locations as well as outdoor managed spaces have performed the best from a location point of view.*

# THE NATIONAL PICTURE

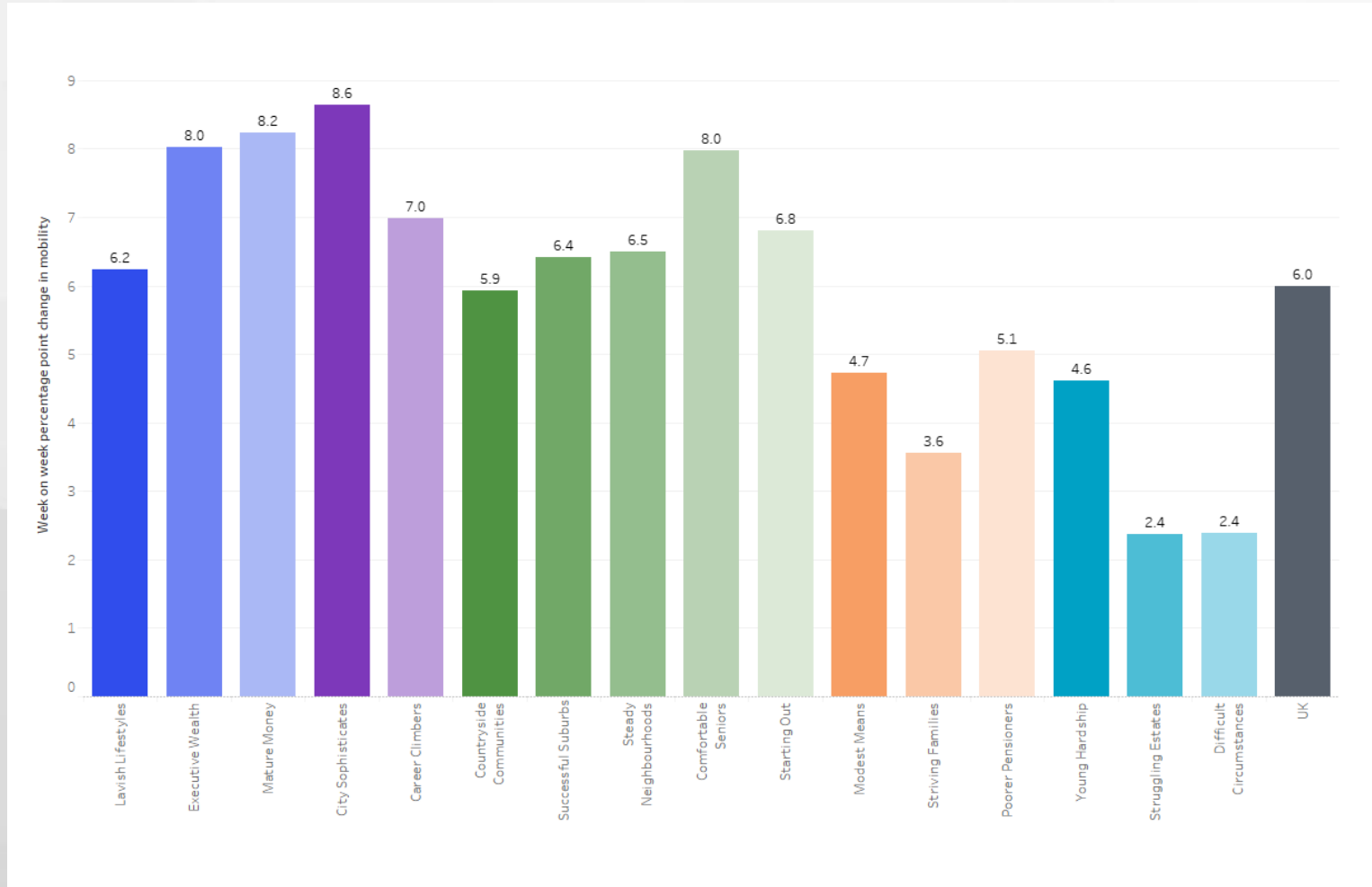
Mobility is at a 7 month high as people take advantage of the biggest easing in social restrictions so far this year



- The week ending 4<sup>th</sup> April saw the biggest easing of social restrictions so far this lockdown - with people being able to meet in groups of six in private gardens and public spaces. It also included ¾ of the Easter Bank Holiday weekend. Unsurprisingly both of these events led to an increase in movement of people with mobility now standing at 79% of pre-Covid levels. This is a 6pp increase on last week and is the highest mobility we have witnessed in almost seven months, going back to mid-September 2020.
- In September of last year restrictions were some of the lightest they have been throughout the whole pandemic – the rule of 6 was yet to be implemented, all retail was open and many leisure locations were extending the Eat Out to Help Out scheme. This is a big contrast to where we are today with non-essential retail and hospitality not even open yet. The fact that mobility is comparable to September 2020 could be a sign of lockdown fatigue, with the majority of the population chomping at the bit to get out of lockdown.

# HOW HAS MOBILITY VARIED BY ACORN?

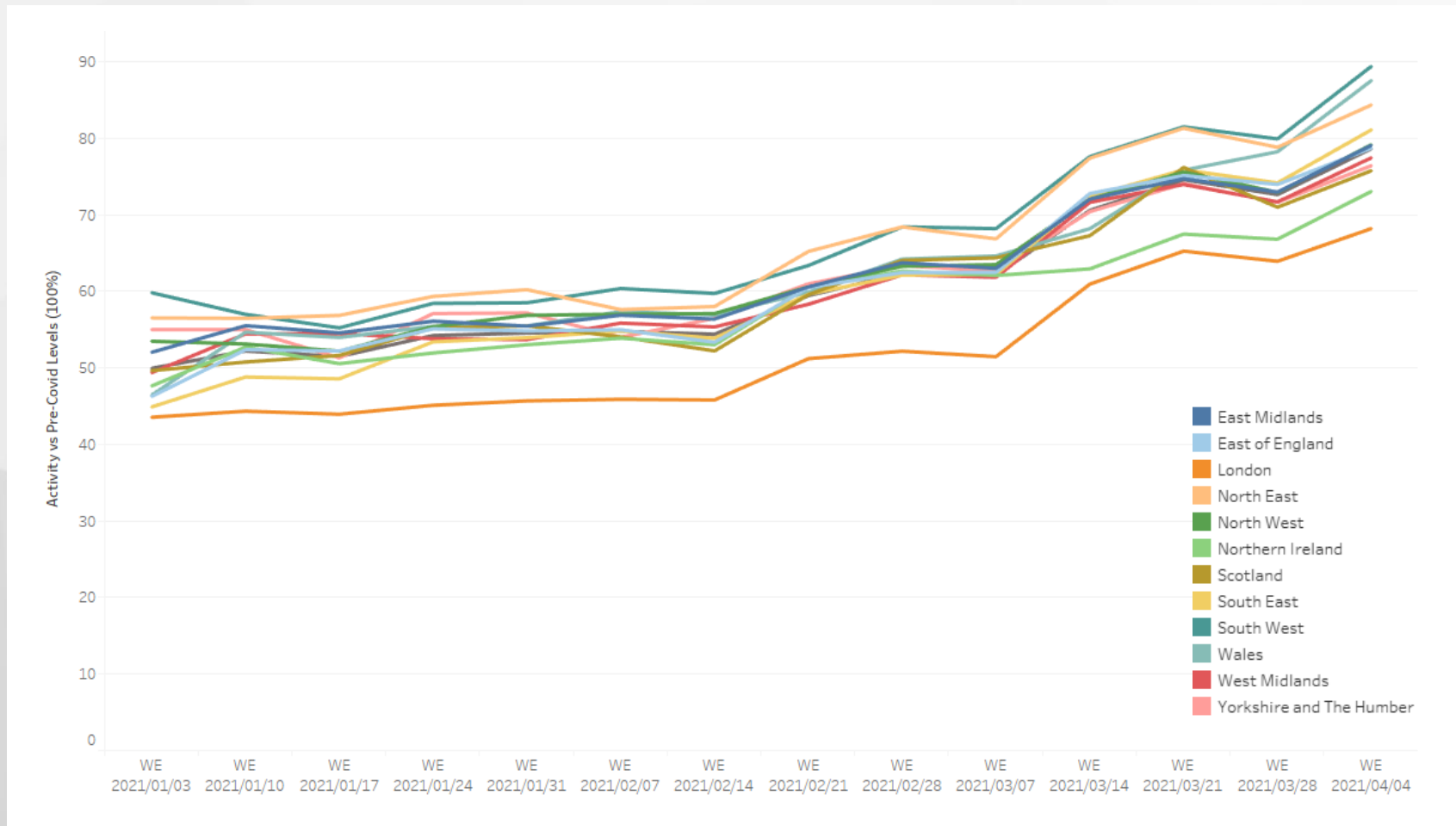
*The increase in mobility is driven by the most affluent consumers with the least affluent groups at around 1/3 of the UK levels*



- As we have seen on a regular basis throughout the pandemic, there is a clear relationship between affluence and mobility. The more affluent consumers have the freedom and flexibility to lockdown quicker when needed but can equally increase their mobility quickly when guidelines allow. That is exactly what we have seen this week with the most affluent and middle income groups having a significantly higher increase in mobility than the six least affluent groups.
- Housing type will also be playing some part, with the lower affluence groups less likely to live in properties with outside spaces and therefore unable to host family and friends in line with the guidelines. But more likely, it is these less affluent groups that are key workers who did not have an extended Easter break from work meaning they couldn't change their behaviours as much as those people who did not have to work the Easter weekend.

# REGIONAL VARIATIONS

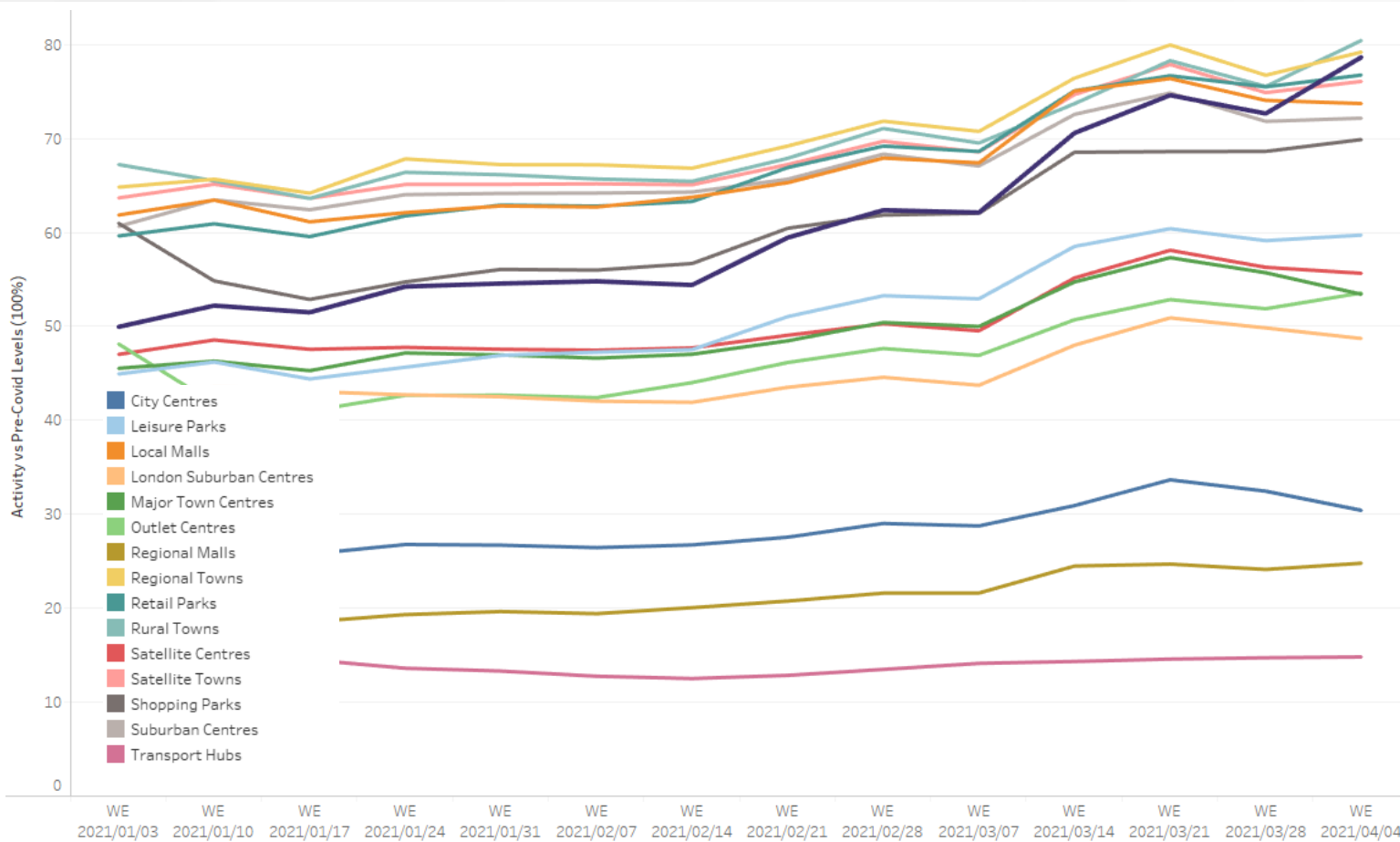
*All regions of the UK saw a jump in mobility as the country takes advantage of the easing of lockdown*



- All regions of the UK saw an increase in mobility over the past seven days as people took advantage of the easing of lockdown and visited friends and family during the Easter period.
- The more rural regions of the South West and Wales saw the biggest increases in mobility of 10pp and 9pp respectively.
- London saw the lowest increase in mobility of just 4pp and a gap is starting to open up again between London and the other regions at the bottom of the mobility ranking. With the City Sophisticates, who are the dominant Acorn group in London, being the most mobile group this week, you would expect London to see a sharper increase. This suggests that it is City Sophisticates in other regions of the UK who have significantly increased their mobility over the past week.

# WHAT TYPE OF LOCATIONS ARE WE VISITING?

*No location type sees the same level of mobility increase as the UK average, showing that people are mixing in private gardens and public spaces*

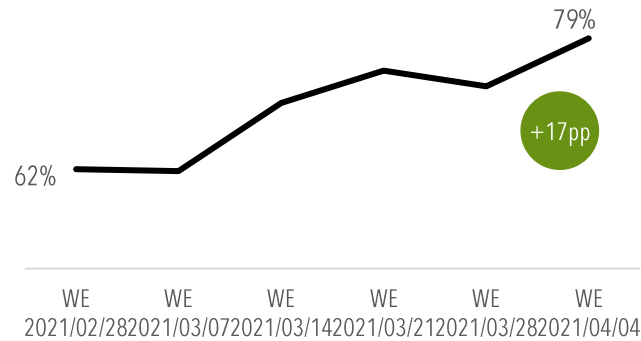


- No location type saw an increase in mobility close to the overall UK average increase of 6pp this week. This is not overly surprising as people were likely socialising in private gardens or public spaces in line with regulations. The fact that motorway service stations saw a 9pp increase suggests that lots of people were travelling across the country to visit friends and family.
- Of the 15 different location types, 5 saw a decline in mobility this week with a further 4 seeing an increase of less than 1pp. The only location type to see mobility increase by more than 3pp was Regional Towns.
- As non-essential retail reopens and restrictions continue to ease it will be interesting to see which asset classes bounce back strongest.

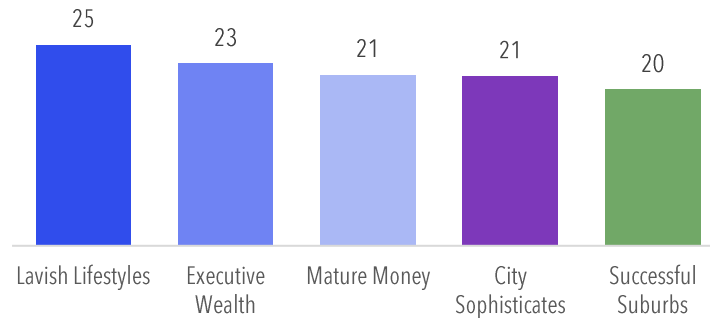
# A SUMMARY OF STEP 1 OF BORIS' ROADMAP

*This week sees the end of step 1 of the government's 4 step roadmap to recovery and we have summarised movement over that period.*

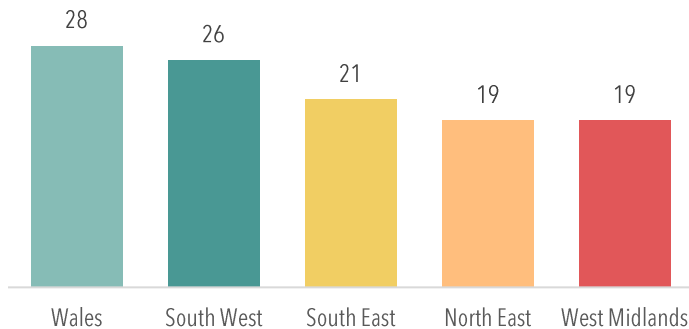
**Overall change in UK mobility**



**Which Acorn groups have increased the most?**



**Which regions have increased the most?**



**Which locations have increased the most?**



- Boris Johnson announced the 4 step roadmap to recovery on 22<sup>nd</sup> February. This week sees us reach the end of the first step of that roadmap. Over that 5 week period we have seen a 17pp increase in mobility across the UK.
- That increase in mobility is clearly driven by the most affluent consumers in society with the four most affluent Acorn groups taking up the top four places in the ranking of most mobile Acorn groups.
- Geographically it is the more rural regions of Wales and the South West that have seen a significantly higher increase in mobility than other parts of the UK.
- From a location perspective it is smaller, local towns and outdoor managed spaces that have fared best.

*Data shows percentage point change from week ending 28<sup>th</sup> February to week ending 4<sup>th</sup> April*

# 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](mailto: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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