



How Covid-19 is changing the movement of your customers

Data for week ending 9th May 2021

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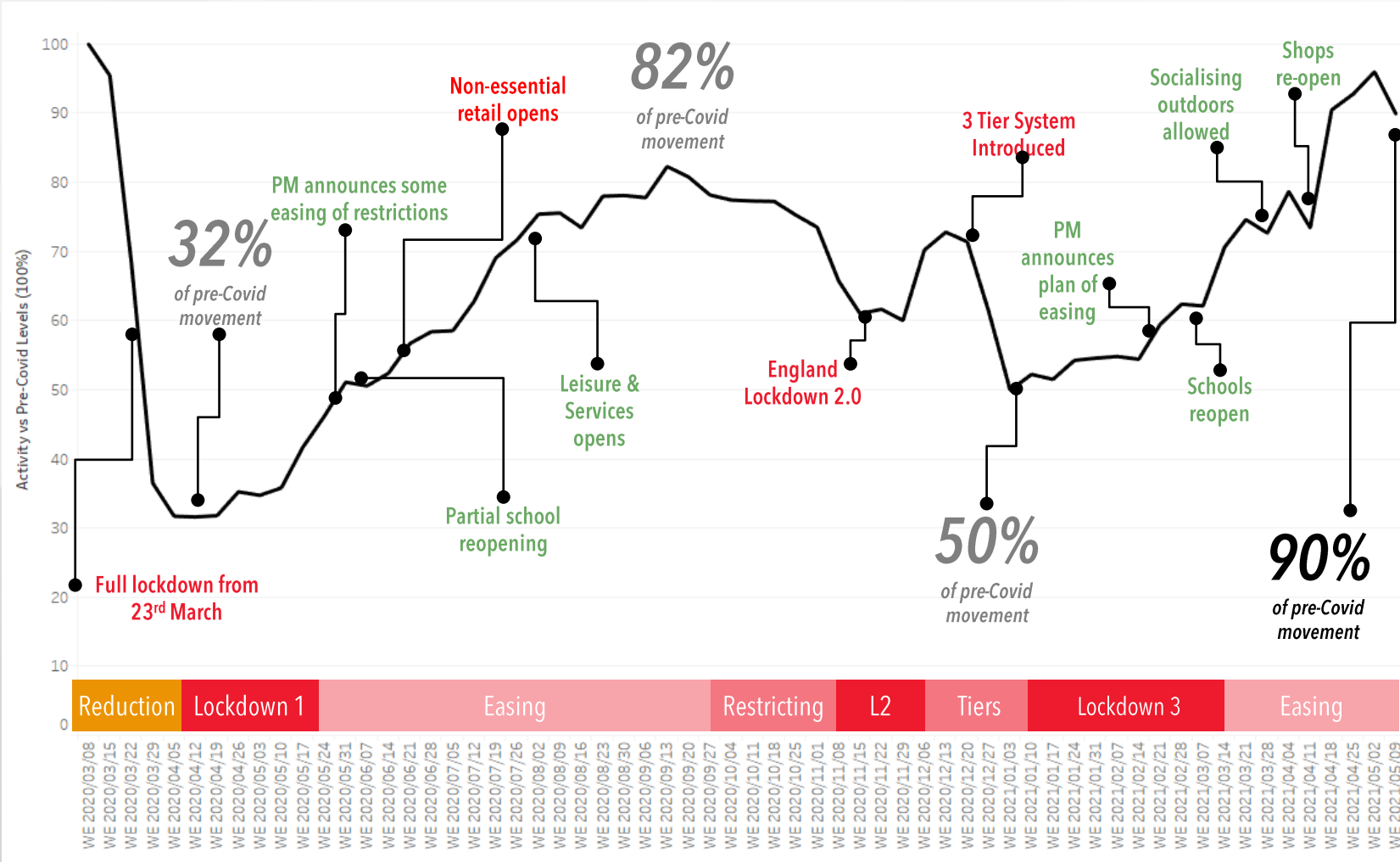
EXECUTIVE SUMMARY

Cold and wet weather sees overall mobility decline, but a good week for retail as managed assets buck the trend and see healthy growth

- The week ending 9th May saw UK mobility drop by 6 percentage points to 90% of pre-Covid levels. The country was hit with unseasonably cold weather over the Bank Holiday weekend and many parts of the nation experienced rain. Consumers have quickly realised that socialising outside in the cold and wet is not much fun and have likely decided to hold out until indoor hospitality opens up on 17th May.*
- The decline was consistent across all corners of the UK and all demographic groups. It is the youngest groups that have seen the smallest reduction in mobility - These consumers are likely to be the most keen to socialise and will be willing to sit outside a pub, bar or restaurant whatever the weather.*
- It has been a good week for managed retail assets with regional malls, outlet centres and shopping parks all bucking the national trend and seeing an increase in mobility or, in the case of shopping parks, no change. Shopping parks are now the most mobile asset type for the first time this year.*

THE NATIONAL PICTURE

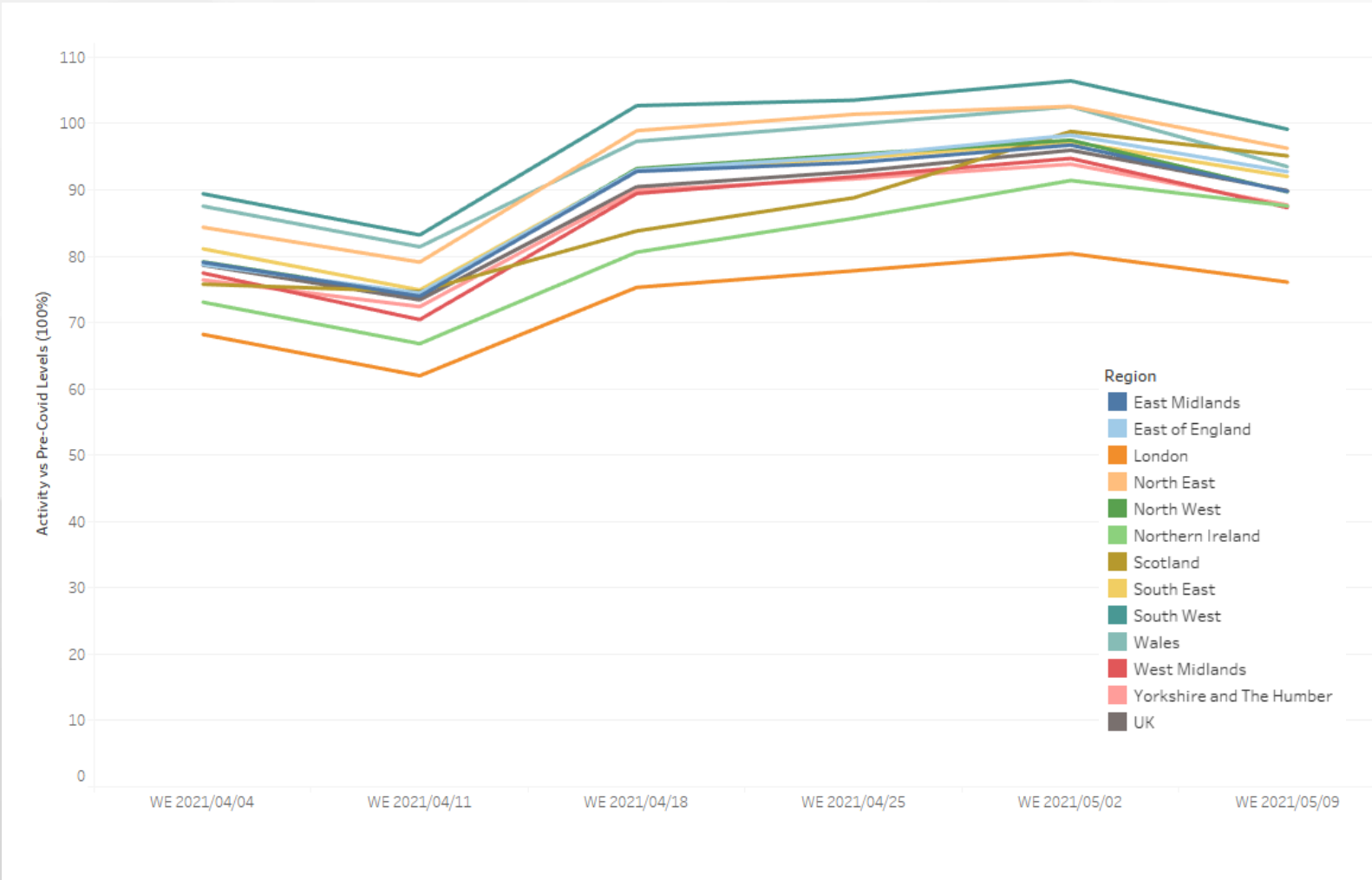
The novelty of outdoor hospitality wears off, as national mobility drops by 6 percentage points to 90% of pre-Covid levels



- The week ending 9th May saw UK mobility drop by 6 percentage points (pp) to 90% of pre-Covid levels.
- This week included the May Bank Holiday Monday and usually we would expect to see mobility increase over a long weekend. However, the country was hit with unseasonably cold weather and many parts of the nation experienced rain. Consumers have quickly realised that socialising outside in the cold and wet is not much fun and have likely decided to hold out until indoor hospitality opens up on 17th May.
- As this report will show, people were still mobile last week but they chose to stay indoors and shelter from the weather – with the likes of regional malls performing well and, almost all, seeing an increase in movement.

REGIONAL VARIATIONS

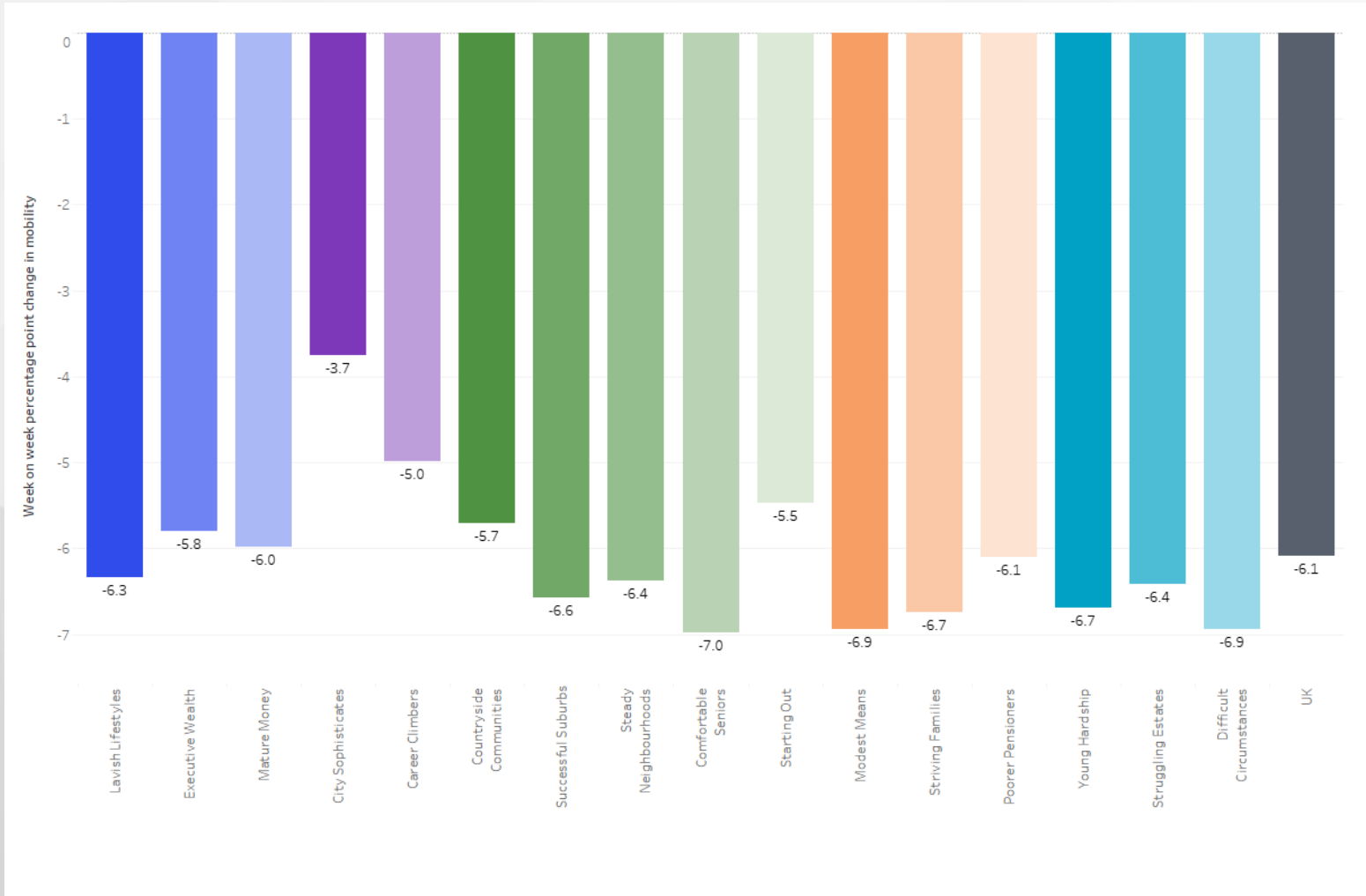
Mobility down across all corners of the UK as consumers hold out for the next easing of restrictions



- All regions of the UK saw a decline in mobility this week as a combination of wet and cold weather, plus the novelty of outdoor hospitality wearing off, slowed the strong increase in mobility of recent weeks.
- The biggest decline was seen in the more rural regions (Wales down 9pp and South West down 7pp). This means that all regions are now back below 100% of pre-Covid levels.
- London saw a 4pp decline, keeping it firmly adrift at the foot of the regional mobility league table.
- With the next easing of restrictions just days away it will be interesting to monitor regional variation. Will London see a big jump as the young, affluent, sociable demographic that dominate the city flock to pubs and restaurants on mass?

HOW HAS MOBILITY VARIED BY ACORN?

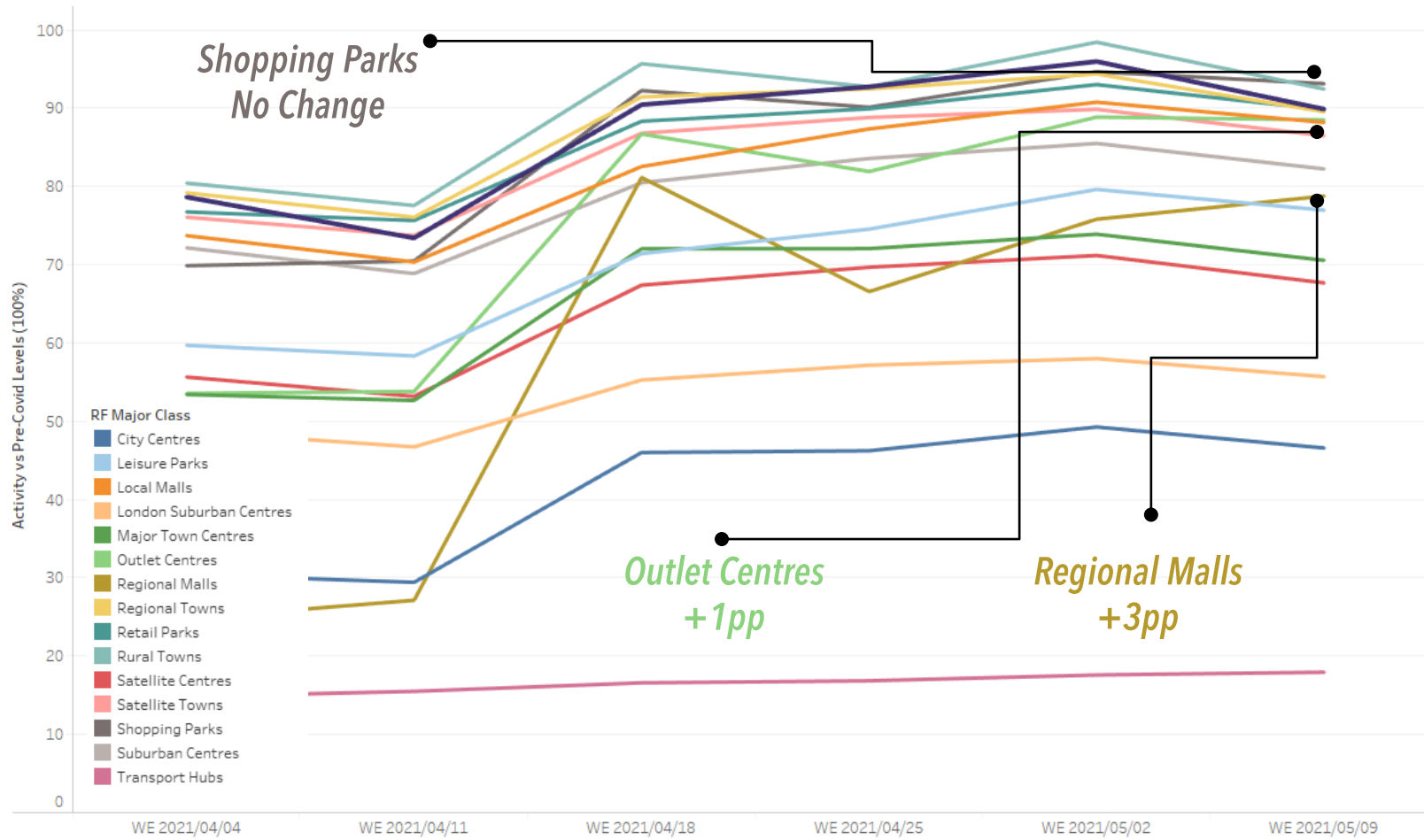
Even the security of the vaccine couldn't halt the decline in mobility this week, as wet weather kept people indoors



- In recent weeks we have seen the Acorn groups most likely to have had two doses of vaccine, and therefore have the highest chance of immunity, increase their mobility the most. This week, even the security of the vaccine hasn't been able to stop the decline in mobility, with **all groups seeing a reduction in movement**.
- It is the **youngest groups that have seen the smallest reduction** in mobility this week – Starting out -5pp, Career Climbers -5pp and City Sophisticates -4pp. These consumers are likely to be the most keen to socialise and will be willing to sit outside a pub or bar whatever the weather.

WHERE ARE WE VISITING?

A good week for retail as shopping parks become the most mobile location for the first time this year

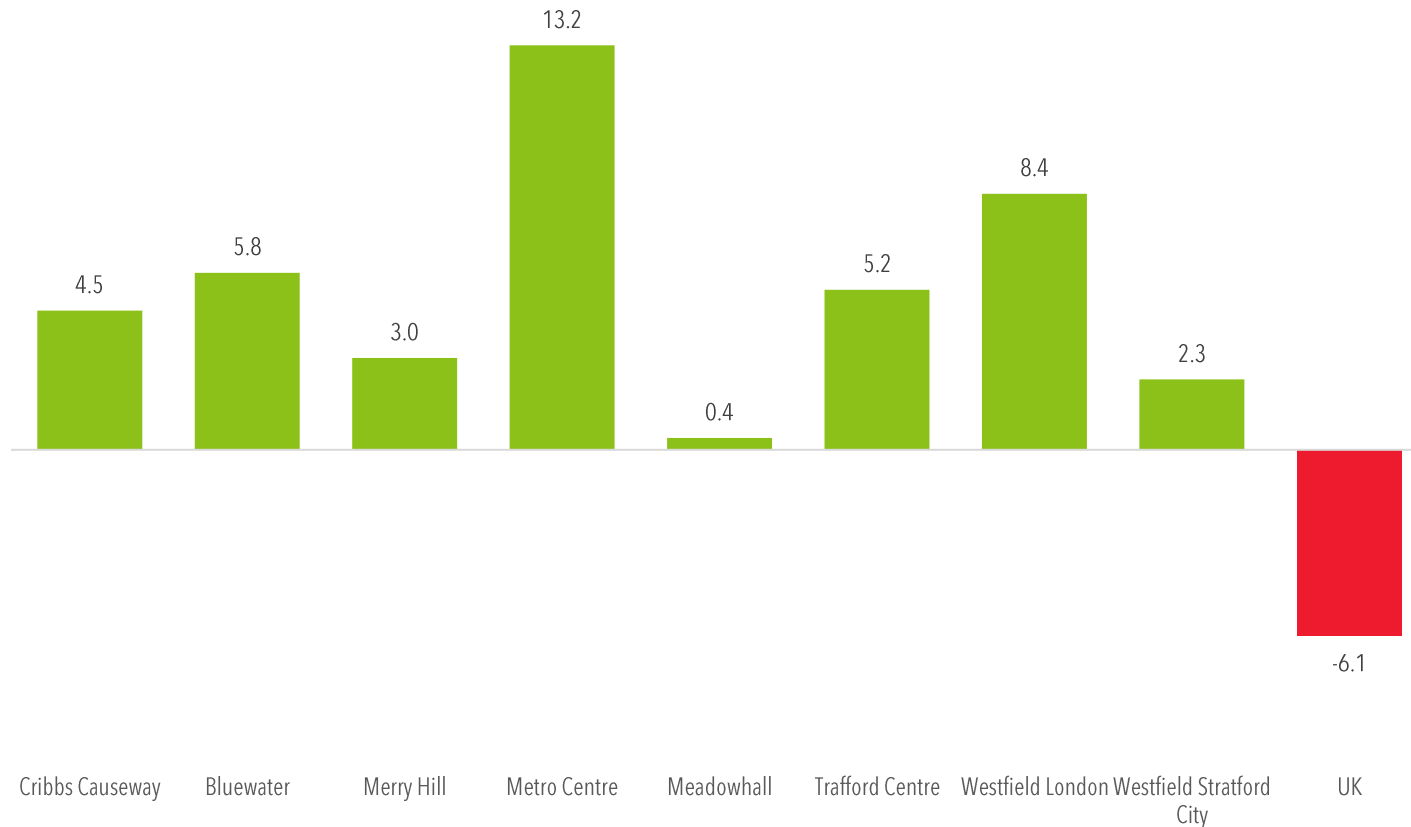


- It has been a **good week for retail with managed retail destinations bucking the trend and witnessing an increase in mobility**. The likes of regional malls, outlet centres and shopping parks, with plenty of indoor or covered spaces, have performed well in a wet and cold week as people turn to shopping over outdoor socialising.
- **Regional malls saw a 3pp increase**, a strong performance in the context of an overall decline across the UK of 6pp. Outlet centres saw a 1pp increase and shopping parks remained consistent with the previous week.
- Whilst shopping parks did not see an increase in mobility, the decline in mobility in rural towns means that **shopping parks, at 93% mobility, are now the most mobile location type across the country**. This is the first time that this has happened since December 2020.

REGIONAL MALLS BUCK THE NATIONAL TREND

Regional malls buck the national trend and most see a healthy increase in mobility, as consumers take cover from cold and wet weather

Weekly percentage point change in mobility for selected regional malls



- For the majority of the pandemic retail destinations have suffered more than most. The closure of non-essential retail has seen footfall drop off a cliff and changing consumer trends, such as the increased appeal of shopping local, has led some to question the long term future of these assets.
- **This week is a good week for managed retail spaces.** Regional malls, in particular, have bucked the downward trend seen across the UK and almost all have seen a decent increase in mobility. This is likely driven by the unseasonably cold and wet Bank Holiday weekend but the significant increase across this asset class is very encouraging.
- The pattern was consistent across the country with Metro Centre, in Gateshead, seeing the biggest increase in mobility across all regional malls at 13pp, followed by Westfield London (8pp) and Bluewater (6pp).

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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