



How Covid-19 is changing the movement of your customers

Data for week ending 23rd May 2021

Paul Langston
plangston@caci.co.uk

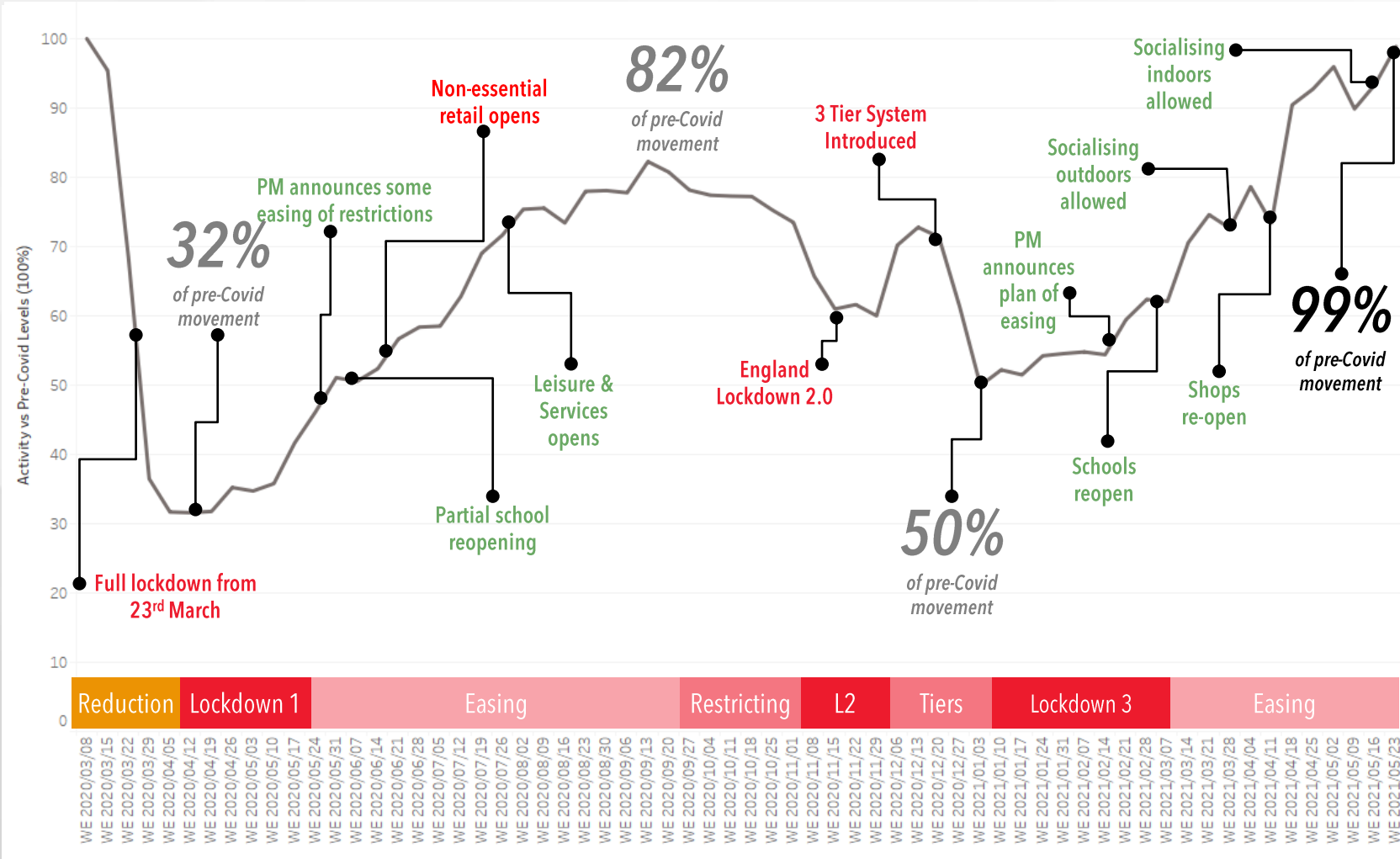
EXECUTIVE SUMMARY

The opening up of indoor leisure lifts national movement levels to 99% and changes the time and destination of trips

- *This week, the forecast we made at the beginning of the great unlocking of retail and leisure, has been fulfilled – as the 6 percentage point jump in movement overcame last week's decline to bring activity to 99% of pre-Covid levels.*
- *Rapid growth across four key retail destination types brings hope as leisure bolsters trips even into city centres, and for the first time in months we have witnessed a small increase in use of transport hubs.*
- *Leisure focussed Convenience Cluster destinations have seen both a rise in visitation and a big shift in the share of visits in the evening, as customers are no longer forced to brave the elements for an evening of fun.*
- *It is now urban / rural patterns, and possibly vaccine uptake, that shape the differences in movement – in the week when 7 Acorn Groups now exceed the 100% bar, with movement activity greater than in March 2020.*
- *These urban / rural patterns are clearly highlighted at a regional level, alongside the impact of national differences in guidance.*
- *On the day when I learnt that my 2020 family 'holiday of a lifetime' was finally officially postponed for yet another year a mapping focus on Crawley and Gatwick Airport shows clear evidence of how the pandemic's impact on international travel is influencing the local economy, and possibly local retail, in the shadow of one of Britain's busiest airports.*

THE NATIONAL PICTURE

Our forecasts are fulfilled as the 6 percentage point jump overcomes last week's decline, to bring movement to 99% of pre-Covid levels

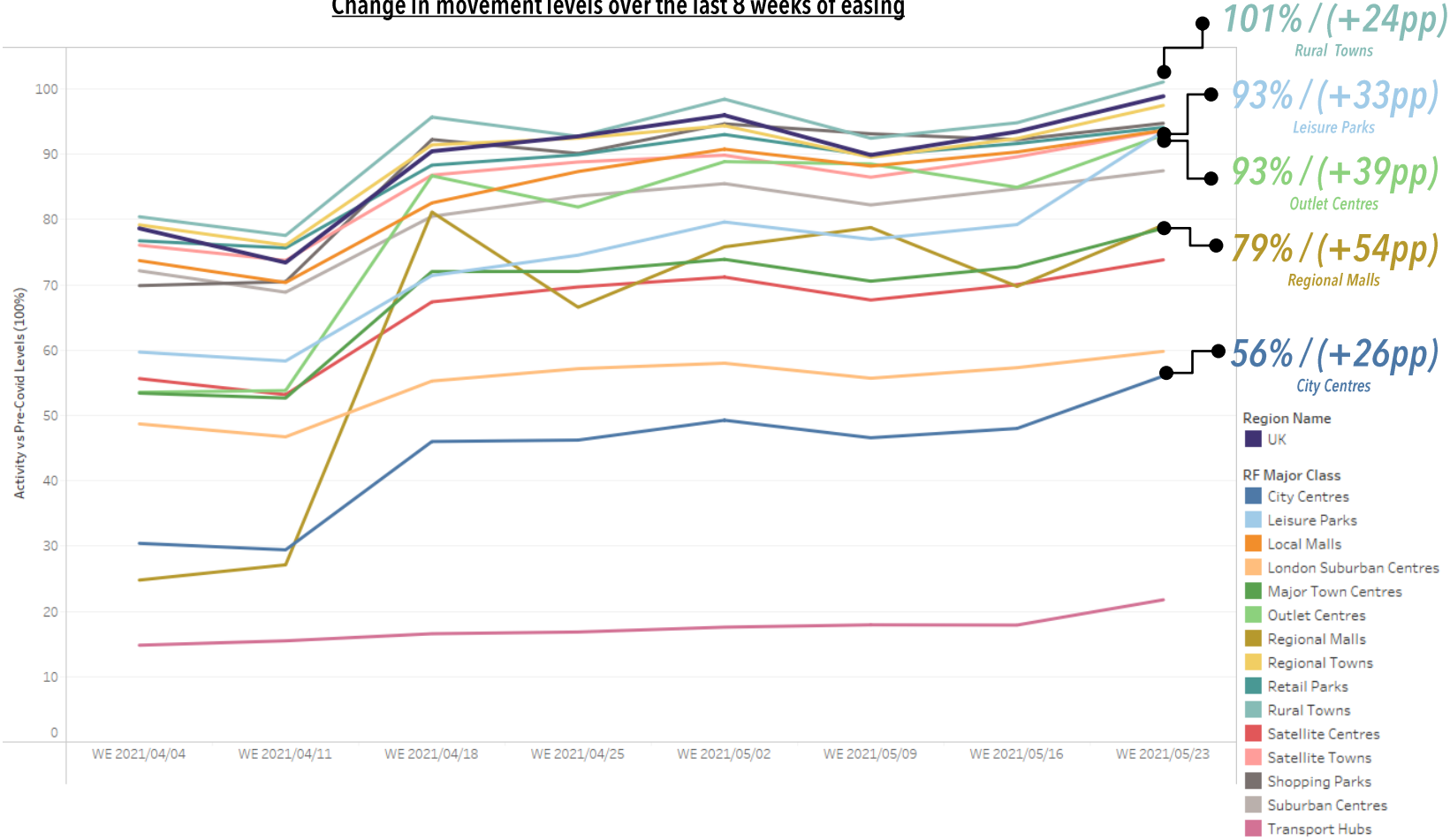


- Movement levels jumped 6 percentage points (6pp) in the week when indoor fun was allowed and outdoor restrictions were further relaxed in leisure venues and the home.
- Whilst the shape of the chart over the last couple of weeks may not have been exactly what we expected, national movement exactly matches the 99% that we predicted as the first round of easing began. 99% has been achieved by mid (to late) May.
- With the momentum in place, (dare I mention it again) the weather improving and the vaccination roll-out about to reach those in their 20s we should surely see movement levels continue to grow above the early March 2020 benchmark in the coming weeks.
- However, we need to keep an eye on the data, and hope that the possible new variant does not result in the need for local or national measures that would change the trajectory.
- Whilst the headline figure of 100% is close to being burst, it is very clear that many of these movements are remaining local, and not to retail and leisure destinations, as shown by the next slide.

WHERE ARE WE VISITING?

Rapid growth across four key retail destinations types offers hope as leisure bolsters trips even into city centres

Change in movement levels over the last 8 weeks of easing



- **Rural Towns** became the first Retail Footprint class to break the **100% barrier**, having led the recovery for much of the pandemic.
- However, the fact they are the only destination above the black line, that represents movement levels generally across the UK, clearly shows that retail and leisure trips lag behind the other activities of life.

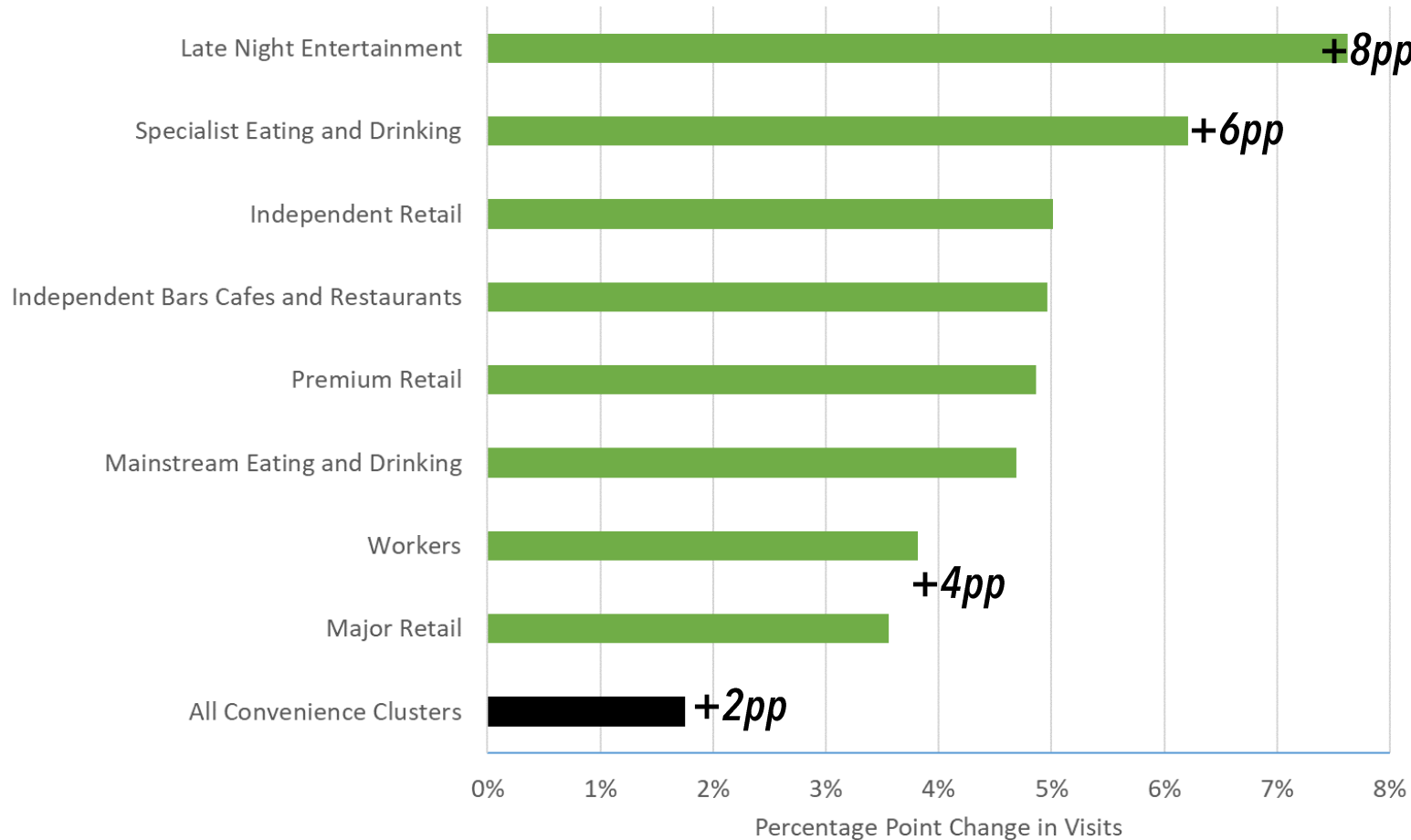
But let's celebrate the positives:

- The majority of destinations have seen a huge recovery over the last **8 weeks** of easing. Four key destinations have out-paced the UK increase of 20pp over the period. Leading the race are **Regional Malls** (+54pp) followed by **Outlet Centres** (+39pp) and **Leisure Parks** (+33pp).
- But possibly most encouraging is that **City Centres** are 4th fastest growers, having risen by 26pp, albeit from a low base. And, with a rise of 8pp this week alone, they have risen to 56% of pre-Covid levels. This implies city centres are becoming more appealing for both work and play. Only **Leisure Parks** grew more this week, with a 15pp growth, as the true leisure elements of these schemes really kicked in.
- There are even signs of a return to **Transport Hubs**, which rose slightly for the first time in many months.

ARE WE STAYING OUT LATE?

Leisure focussed Convenience Cluster destinations see a big shift to evening visits alongside a rise in numbers

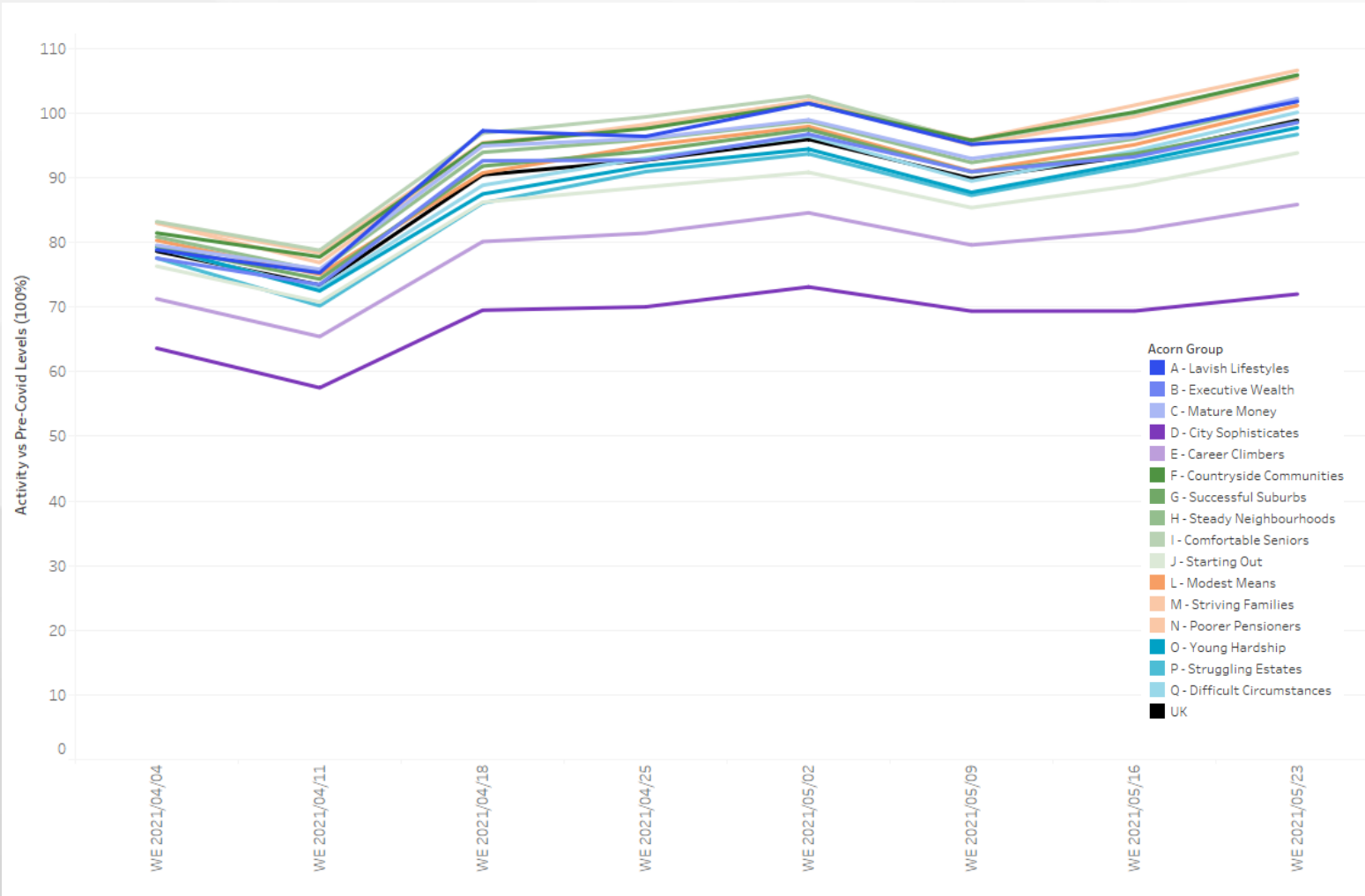
Weekly Percentage Point Change in Evening Visits WE 16th to 23rd May 2021



- The ability to enjoy a meal or drink inside for the first time has fundamentally changed the time of day of visits to destinations this week.
- The proportion of visits in the evening (from 5pm to midnight) has increased by almost 2pp across all of our Convenience Cluster definitions. This shows a gentle increase in people's willingness to stay out late, despite the continued rubbish weather, implying a take up of indoor leisure across the board.
- There has been a real shift in the time of day of visits to many of the destinations that focus on leisure. These have also, not surprisingly, witnessed the biggest step up in visits, in line with their mission.
- **Late Night Entertainment** venues increased in visits by a staggering 15pp this week and, as shown in the chart, saw an almost 8pp point swing in the proportion of visits after 5pm.
- The second biggest swing in time of day was in **Specialist Eating and Drinking** destinations, where there was a 6pp swing to the evening and a 17pp jump in the number of visits.
- **Worker** hubs and **Major Retail** destinations also saw an encouraging increase in the proportion of evening visits (+4pp), alongside an overall increase in visits, implying the return of a drink after work or after shopping for some.

HOW HAS MOBILITY VARIED BY ACORN?

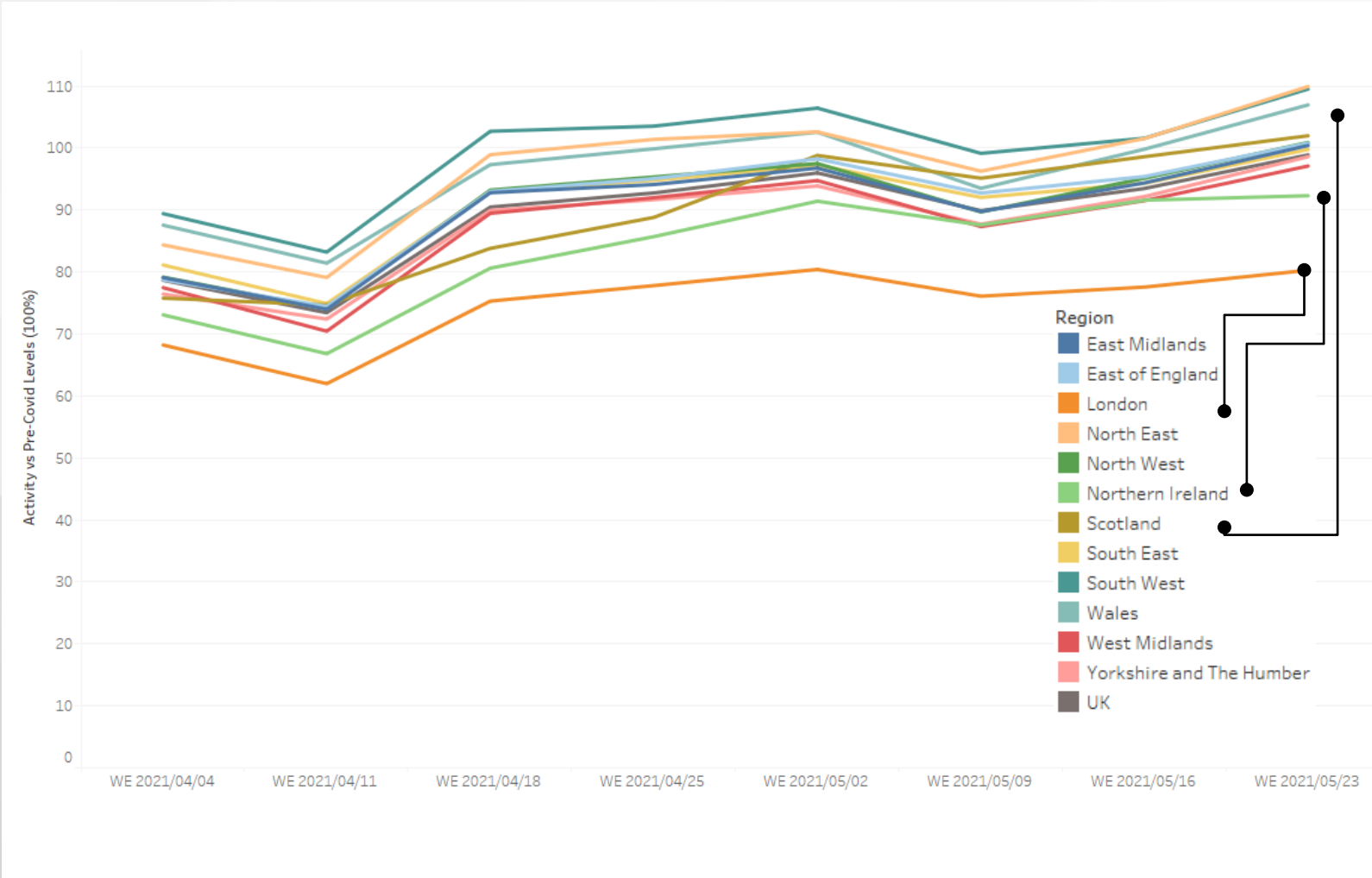
Urban / rural patterns and possibly vaccine uptake shape the differences in movement as 7 Acorn Group now break the 100% barrier



- This week a record 7 Acorn Groups broke the 100% barrier, three more than 2 weeks ago.
- **Modest Means, Mature Money** and **Difficult Circumstance** join **Poorer Pensioners, Countryside Communities, Striving Families** and **Lavish Lifestyles** that were already there 2 weeks ago, before dropping back as part of last week's national dip.
- As we've mentioned in recent weeks, affluence is no longer the key driver of relative movement – it is really about urban / rural patterns.
- The biggest risers this week were certainly not defined by income – with **Mature Money** at the top of the income spectrum, **Modest Means** in the middle and **Difficult Circumstances**, at the bottom, all seeing an increase in movement of 6pp or above.
- Age, and the associated likelihood of having received the vaccine, may also be a factor – evidenced by the long-term trend of 'suppressed' **City Sophisticates** and **Career Climbers** being joined in the last few weeks' by the young **Starting Out** group. They are now 3pp below the next lowest, the **Struggling Estates**.
- All 4 of these least active Groups saw below average increases this week.

REGIONAL VARIATIONS

The urban / rural pattern is clearly highlighted at a regional level, alongside national differences in guidance

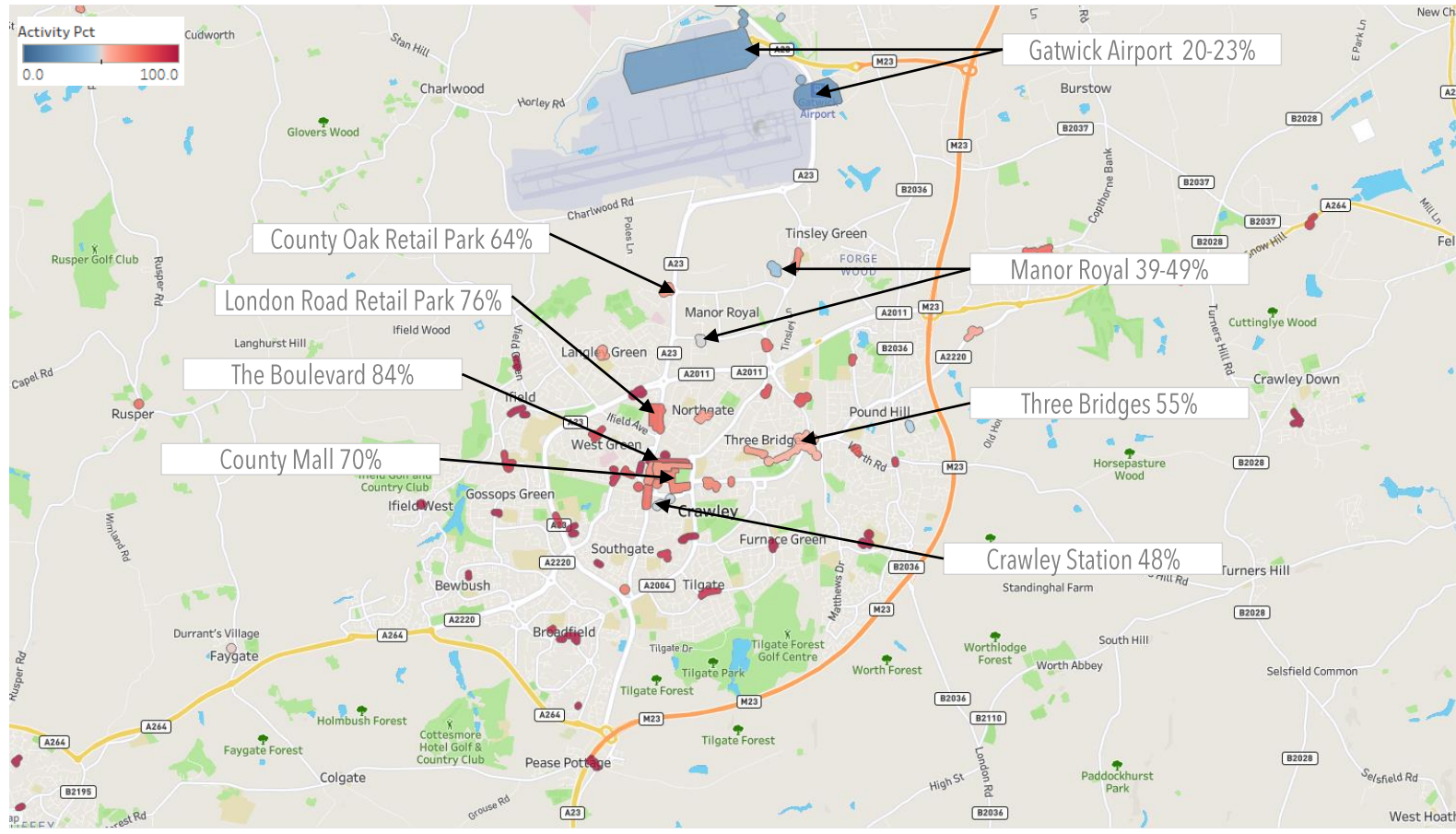


- **Scotland** became the second nation to join the 100% club this week, despite only a 3pp increase to 102% of early March 2020 levels.
- It joined the **North East, South West** of England Regions and **Wales** in what appears to be clear evidence that it is in the most rural areas where movement has returned most closely to pre-pandemic levels.
- **Northern Ireland** bucks the trend and flat-lined this week, reflecting local guidance.
- **London** rose just 2.5pp to continue to lag behind at 82%.

WHERE ARE WE VISITING?

The impact on international travel is felt in the commercial areas around Gatwick and may be feeding through to local retail

Visits relative to pre-Covid to Crawley, Gatwick and surrounding Convenience Cluster destinations



- Clearly the international travel sector remains one of the most heavily impacted, and the map of **Crawley** shows the impact on the local economy.
- The blue at the top of the map shows that movements around **Gatwick Airport** are still down at about 20% of pre-Covid levels, and remember, we are comparing May to the dead holiday time of early March.
- Moving south we see how the **Manor Royal** commercial area is also highly impacted, with blue shading reflecting movements well below half the norm – not surprising when the majority of businesses in these areas service the airport or are focussed on international commerce.
- Whilst local hubs are busy, there is some evidence of a disproportionate impact on the main local retail areas – **County Mall** at the heart of the town centre has risen to 70%, but is some way behind the class average of 79% and the two **retail parks** in the north lag behind the class average of 94% of pre-Covid activity by some margin.
- The town's 2 commuter **stations**, at **Three Bridges** and **Crawley** are also seeing movement levels at around 50% of pre-pandemic activity, which is probably a fair reflection of commuter levels in the area.

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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