How Covid-19 is changing the movement of your customers
Data for week ending 30th May 2021

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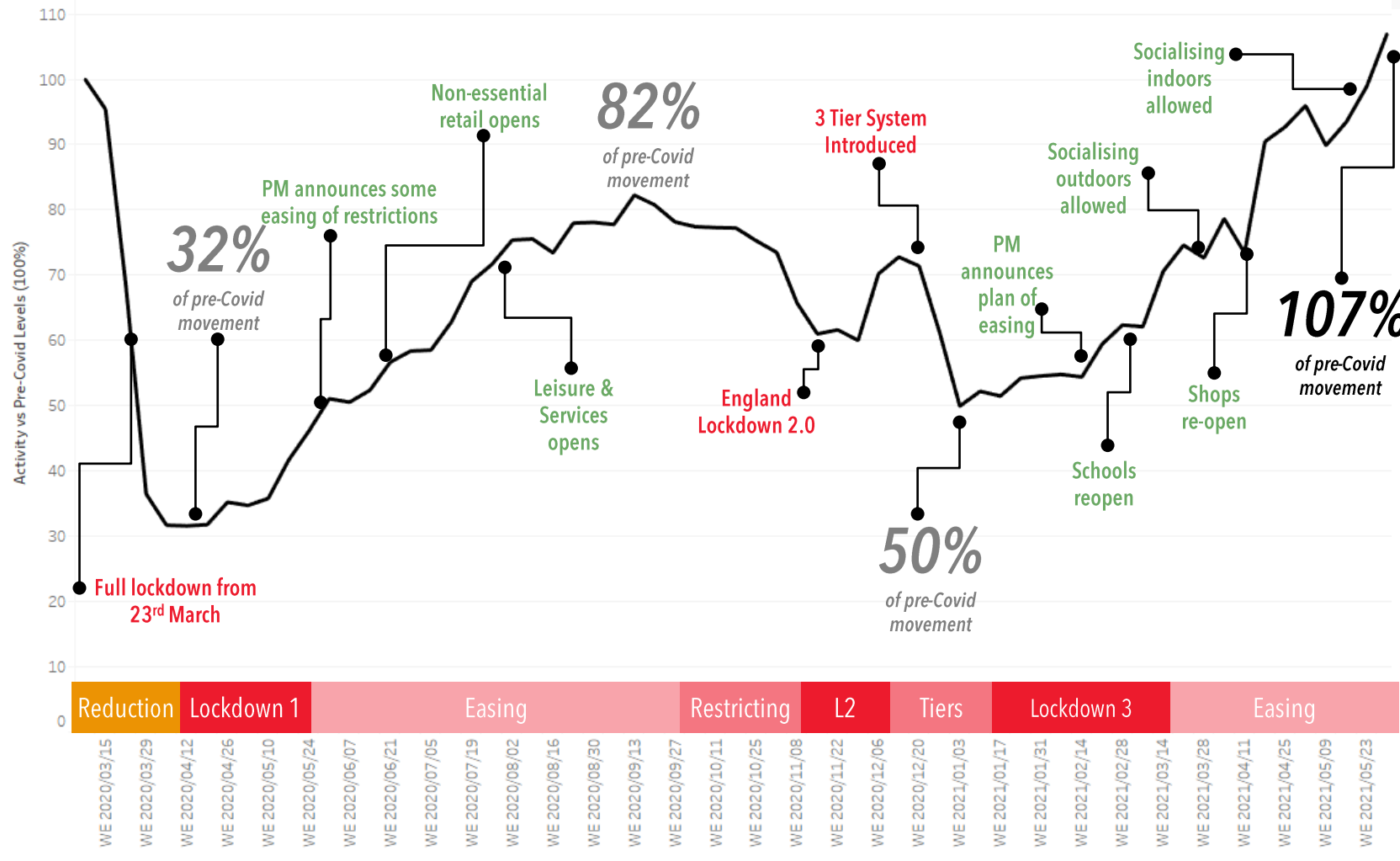
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EXECUTIVE SUMMARY

UK mobility back above pre-Covid levels as a hot Bank Holiday weekend drives mobility up by 8 percentage points to 107% of pre-Covid levels

- *It has been on the cards for a few weeks but finally, 63 weeks after Boris Johnson announced the first lockdown in March of last year, UK mobility is back above pre-Covid levels. The week ending 30th May saw mobility rise by 8 percentage points taking national mobility to 107% of pre-Covid levels.*

- *Every region and nation across the UK is now back above pre-Covid mobility levels with the exception of London which lags behind on 87% mobility.*

- *Demographically we have seen every Acorn group increase its mobility by at least 6 percentage points, but the rate of change is clearly linked to age and the likelihood of being vaccinated.*

- *Only one asset type saw mobility increase at a higher rate than the UK average. This highlights how the increase in mobility is being driven by a desire to socialise in private spaces and more rural / seaside locations - outside of our retail destinations or towns and cities.*

- *The hot Bank Holiday weekend saw a huge increase in mobility for seaside towns, with almost all seeing significant increases in mobility.*

THE NATIONAL PICTURE

After 63 weeks, UK mobility is back above pre-Covid levels. An 8pp weekly rise sees UK mobility hit 107% of pre-Covid levels

Chart annotations:

- Non-essential retail opens
- PM announces some easing of restrictions
- **82%** of pre-Covid movement
- **3 Tier System Introduced**
- Socialising indoors allowed
- Socialising outdoors allowed
- PM announces plan of easing
- Shops re-open
- **107%** of pre-Covid movement
- **32%** of pre-Covid movement
- Leisure & Services opens
- **England Lockdown 2.0**
- Schools reopen
- **50%** of pre-Covid movement
- **Full lockdown from 23rd March**

Y-axis: Activity vs Pre-Covid Levels (100%) — 0 to 110

Phases: Reduction | Lockdown 1 | Easing | Restricting | L2 | Tiers | Lockdown 3 | Easing

X-axis: WE 2020/03/15 ... WE 2021/05/23

Body text:

- It has been on the cards for a few weeks but finally, 63 weeks after Boris Johnson announced the first lockdown in March of last year, **UK mobility is back above pre-Covid levels.** The week ending 30th May saw mobility rise by 8 percentage points (pp) taking national mobility to 107% of pre-Covid levels.

- Whilst strictly it isn't accurate to compare a hot May Bank Holiday weekend (this week's data didn't include the Bank Holiday Monday) with a week in mid-March, breaking through the 100% barrier is a huge milestone and shows that the UK is well on the way to recovery.

- If we compare mobility to the late May Bank Holiday of last year, when the country was just coming out of the first lockdown, we are a huge 56pp better off, or putting it another way, **we are twice as mobile as we were this time last year.**

- In truth, it is not a huge surprise that we broke the 100% barrier this week. The week ending 30th May was the second week of being able to socialise indoors and hospitality being fully open and it also included a very warm Bank Holiday. These factors have contributed to an 8pp increase, the biggest weekly jump since shops reopened in April 2021.
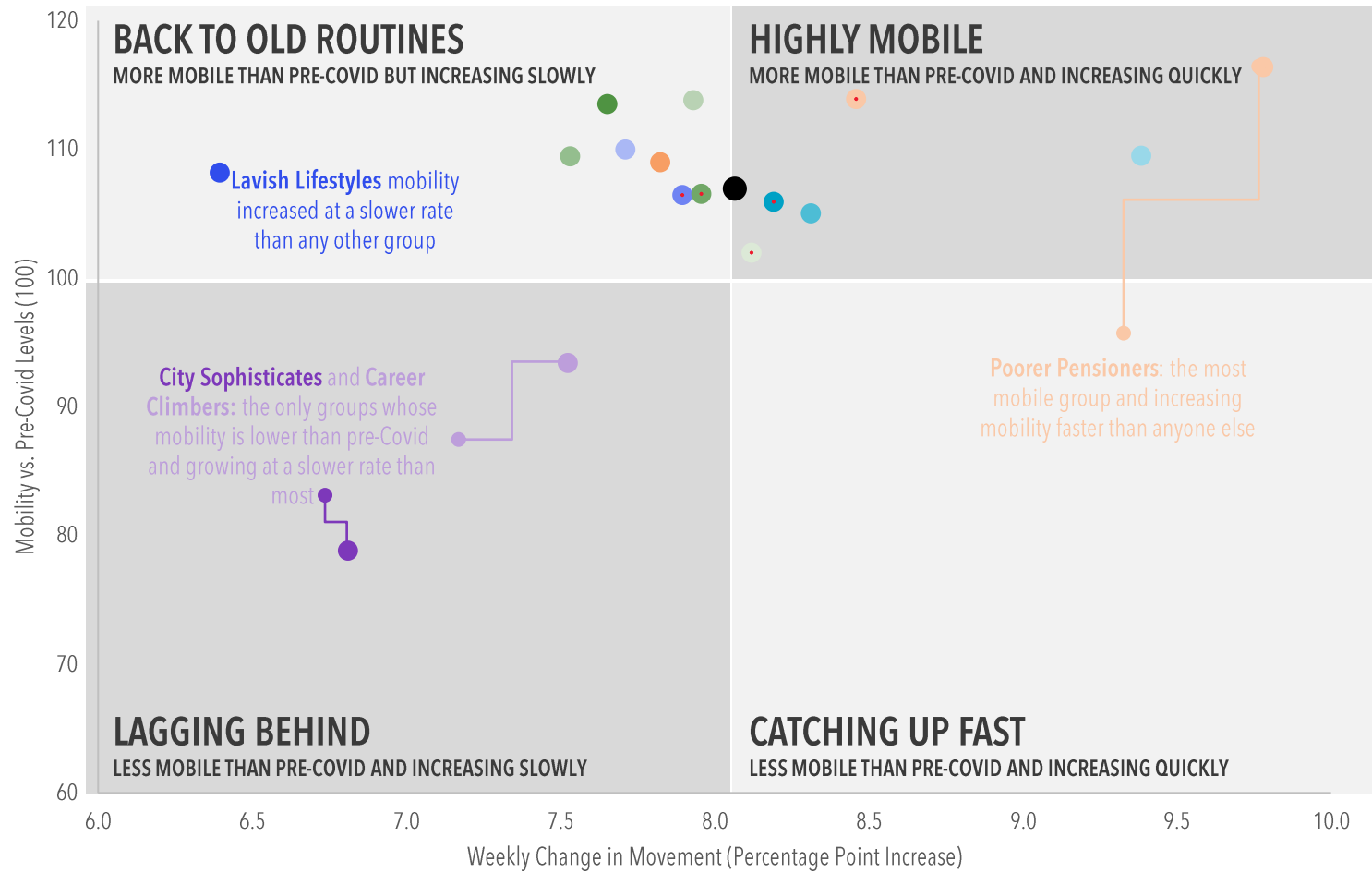
REGIONAL VARIATIONS

Every region bar London is now more mobile than they were before the pandemic
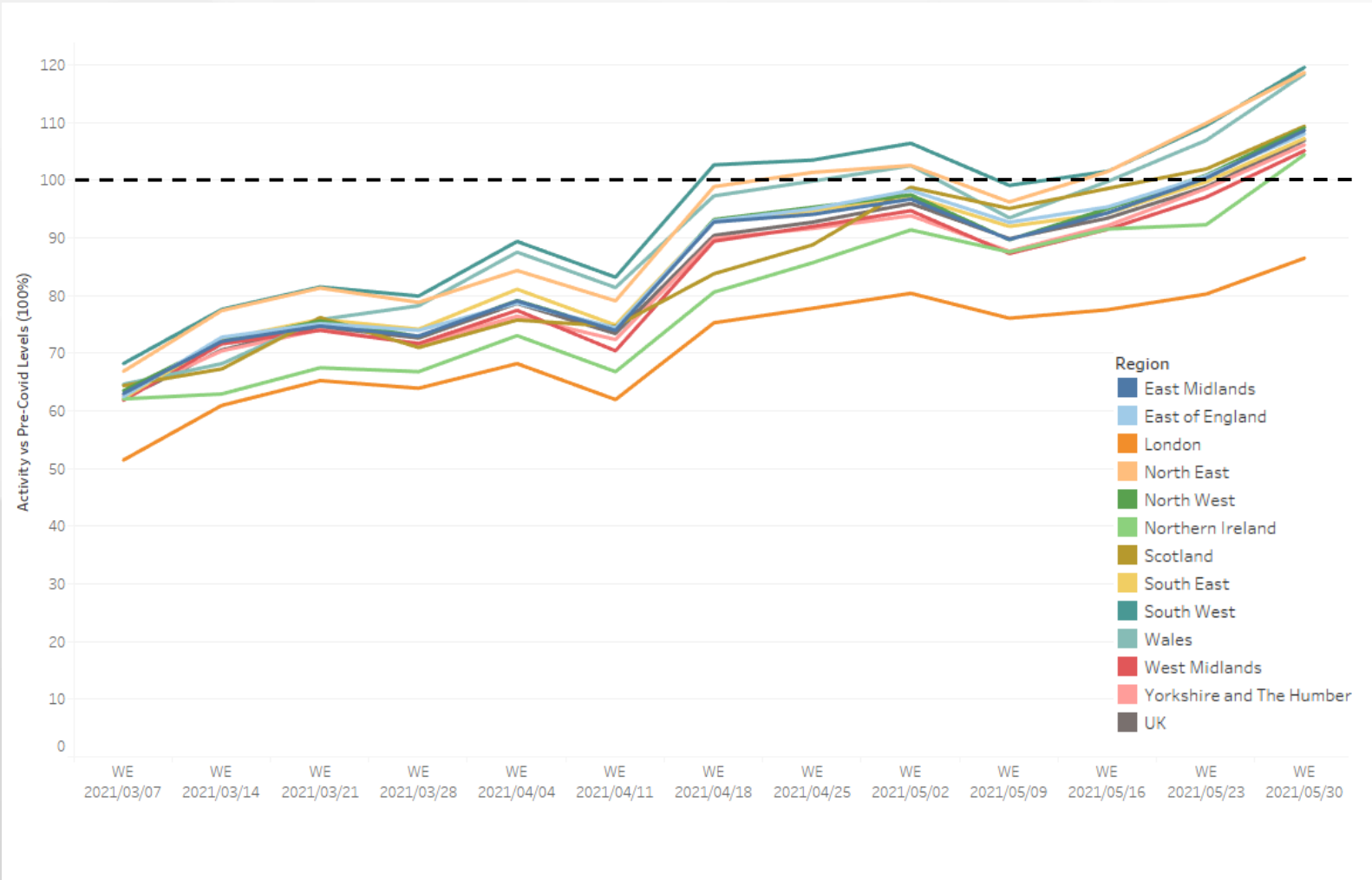
- It is unsurprising **that every nation and region of the UK has seen a strong increase in mobility this week**. Every region, apart from London, is now more mobile than it was before the pandemic.

- The **capital is lagging behind at 87% mobility**, 17pp behind the next least mobile region, Northern Ireland. London's relative lack of movement is largely twofold: firstly, due to the demographic and age profile of the city, it has a lower vaccine take up than other regions and from recent weekly reports we know there is a strong correlation between vaccination levels and mobility. Secondly, people in London have almost everything that they need on their doorsteps. Compared to some more rural regions, people living in London do not need to leave their local communities to buy their groceries, go shopping or go out for a drink or meal. Londoners have had travel restrictions imposed on them and realised that they don't really need to leave their local area.

HOW HAS MOBILITY VARIED BY ACORN?

Every Acorn group has increase mobility this week but vaccination levels are still the key factor in dictating pace of change


BACK TO OLD ROUTINES
MORE MOBILE THAN PRE-COVID BUT INCREASING SLOWLY

Lavish Lifestyles mobility increased at a slower rate than any other group

City Sophisticates and **Career Climbers:** the only groups whose mobility is lower than pre-Covid and growing at a slower rate than most

LAGGING BEHIND
LESS MOBILE THAN PRE-COVID AND INCREASING SLOWLY

HIGHLY MOBILE
MORE MOBILE THAN PRE-COVID AND INCREASING QUICKLY

Poorer Pensioners: the most mobile group and increasing mobility faster than anyone else

CATCHING UP FAST
LESS MOBILE THAN PRE-COVID AND INCREASING QUICKLY

Mobility vs. Pre-Covid Levels (100)

Weekly Change in Movement (Percentage Point Increase)

Acorn Group
- A - Lavish Lifestyles
- B - Executive Wealth
- C - Mature Money
- D - City Sophisticates
- E - Career Climbers
- F - Countryside Communities
- G - Successful Suburbs
- H - Steady Neighbourhoods
- I - Comfortable Seniors
- J - Starting Out
- L - Modest Means
- M - Striving Families
- N - Poorer Pensioners
- O - Young Hardship
- P - Struggling Estates
- Q - Difficult Circumstances
- UK

- **Every Acorn group has increased mobility by at least 6pp** this week and there are just two Acorn groups that are still below their pre-Covid levels – City Sophisticates and Career Climbers.

- The adjacent chart compares overall mobility vs. pre-Covid levels (the vertical axis) with week-on-week increase in mobility (the horizontal axis).

  - The highly mobile groups in the top right are either fully vaccinated and have the confidence to move about, or are key workers and have no choice.

  - The back to old routines in the top left tend to live in rural and suburban areas. They need to travel to go about their lives and therefore had to go back to those behaviours quickly. Now they are there, their increase in movement is slowing.

  - The lagging behind in the bottom left are essentially the Londoners discussed on the previous page. It is also no coincide that the three least mobile groups are the three youngest groups and the three least likely to be vaccinated.

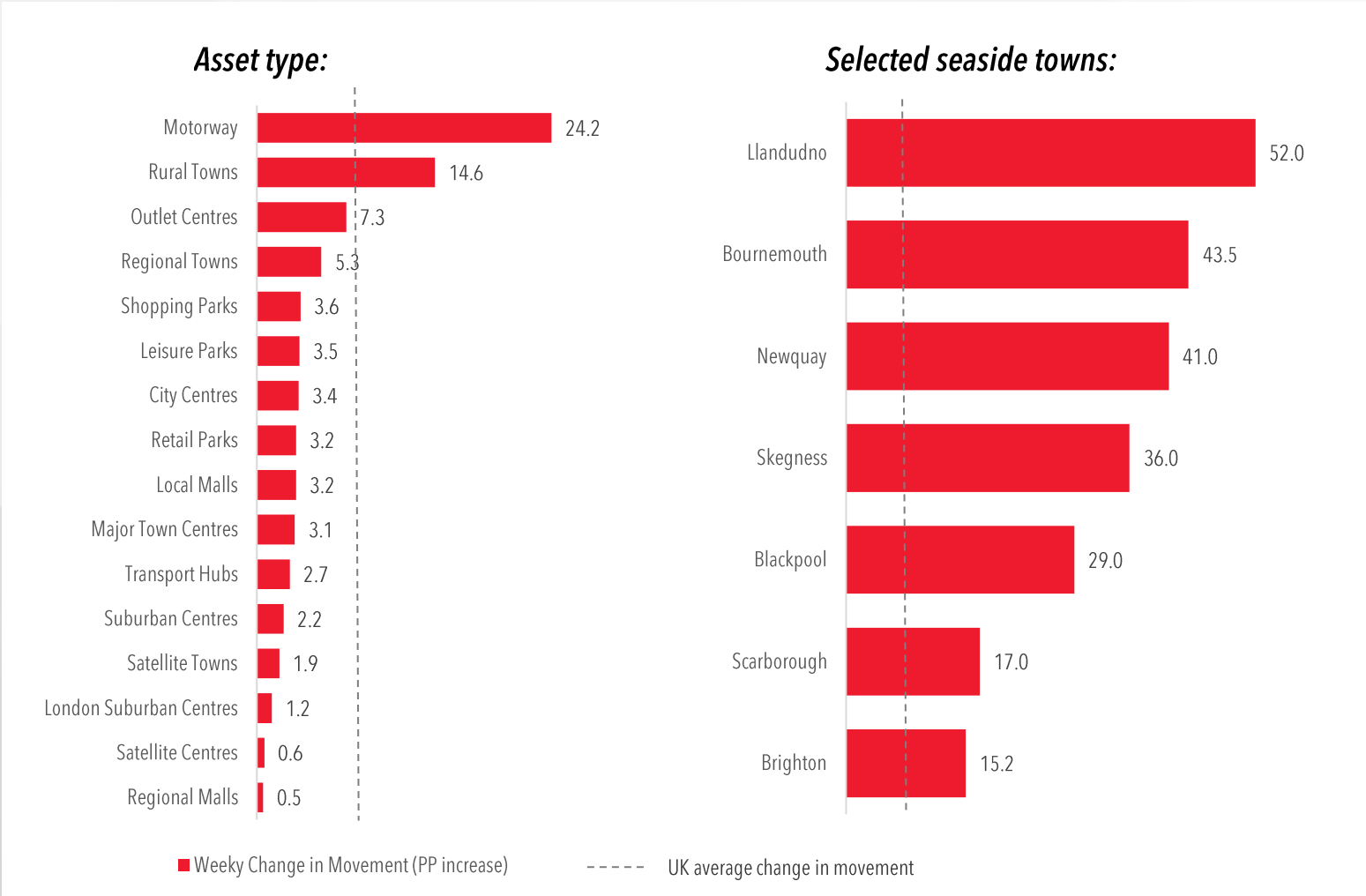CACI | DO AMAZING THINGS WITH DATA

WHERE ARE WE VISITING?

The increase in mobility is being driven by movement outside of our retail destinations and town and city centres
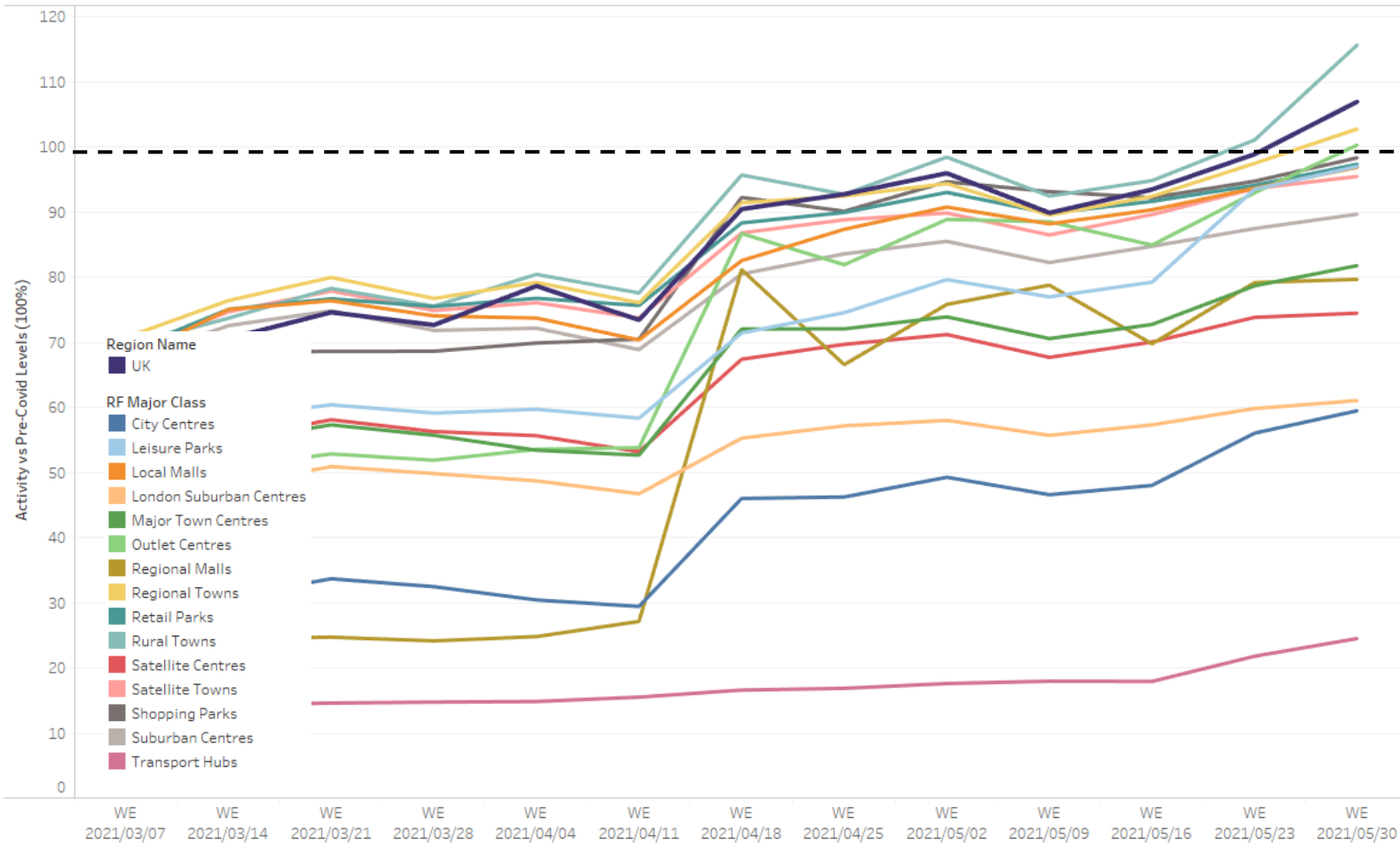
- **Only rural towns increased their mobility at a higher rate than UK average** (up from 101% to 115% of pre-Covid levels). This shows that the increase in mobility is being driven by trips not to our retail destinations, towns or cities, but to each others homes or to public spaces and summer tourist hotspots. This is no surprise considering the data this week included 2/3 of a very warm Bank Holiday weekend. **People are making the most of being able to see family and friends again**, socialising in gardens or enjoying the long weekend and getting away.

- This doesn't paint an immediately positive picture for retail destinations and this can be seen in the mobility at regional malls. They saw an initial bounce back as people raced to shop when things reopened but that has now stabilised and mobility is static at 80%. It has fluctuated between 67% and 80% over past 6 weeks. What will it take to get visitation to regional malls and managed retail destinations back to pre-Covid levels?

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WE DO LIKE TO BE BESIDE THE SEASIDE

The biggest winners this week were seaside resorts with some seeing 50 percentage point growth

Asset type:

Asset Type	Weekly Change in Movement (PP increase)
Motorway	24.2
Rural Towns	14.6
Outlet Centres	7.3
Regional Towns	5.3
Shopping Parks	3.6
Leisure Parks	3.5
City Centres	3.4
Retail Parks	3.2
Local Malls	3.2
Major Town Centres	3.1
Transport Hubs	2.7
Suburban Centres	2.2
Satellite Towns	1.9
London Suburban Centres	1.2
Satellite Centres	0.6
Regional Malls	0.5

Selected seaside towns:

Town	Value
Llandudno	52.0
Bournemouth	43.5
Newquay	41.0
Skegness	36.0
Blackpool	29.0
Scarborough	17.0
Brighton	15.2

■ Weeky Change in Movement (PP increase)   - - - - - UK average change in movement

- It is no surprise that mobility significantly increased over a Bank Holiday weekend. Even in pre-Covid "normal" times we would expect to see a big spike in mobility, particularly with the weather we had. Including motorway service stations in the asset type list shows just how much people were moving around the country but not interacting with our retail destinations – **movement in motorway service stations was up 24pp** vs. last week and I am sure anyone that braved the roads last week can vouch for the fact that they were extremely busy.

- Whilst on average towns and cities fell behind the national mobility increase, that wasn't the case for all – seaside towns hugely bucked that trend. **Almost every single seaside location across the country saw a big jump in mobility** – Llandudno in Wales saw a 52pp weekly increase, Bournemouth +44pp, Blackpool +29pp, the list goes on.

- The fact that we are getting out and interacting with the nations tourist locations will undoubtedly give the economy a much needed boost. With foreign travel looking increasingly uncertain, is the UK in for a summer holiday staycation boom?

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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 March 2020.

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

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- 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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