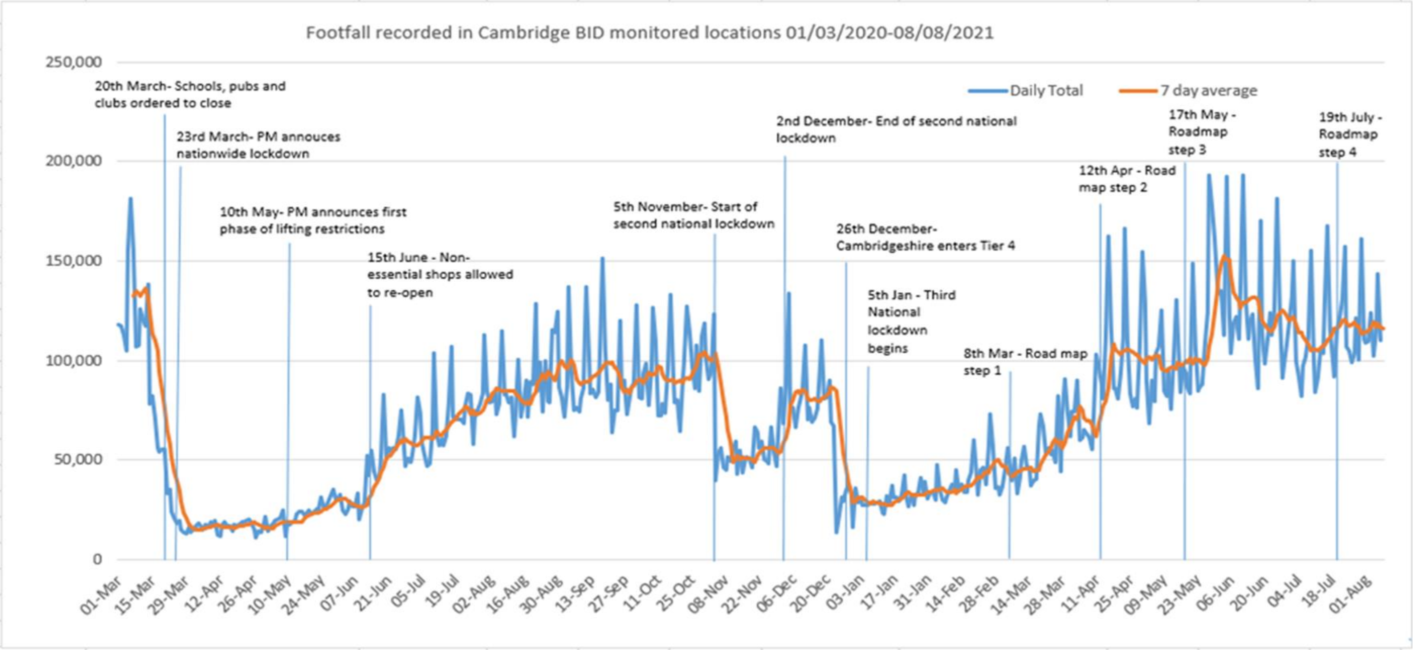
Consumer Behaviour – Footfall

With a focus on footfall, understanding emerging indications of consumer behaviour, including of spending and confidence.

Overview:

- Comparing average daily footfall in July 2021 overall to June 2021 overall shows a -5% decrease.
- Overall retail footfall was down by -20% when comparing July 2021 overall to a pre-Covid-19 period*.



Cambridge BID footfall data:

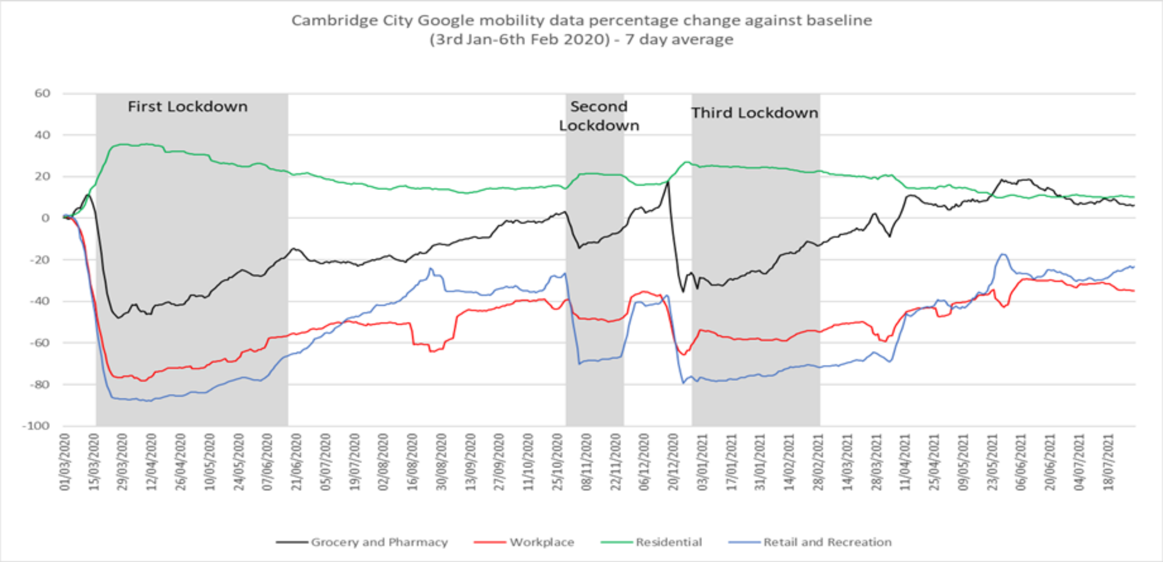
- Comparing average daily footfall in July 2021 overall to June 2021 overall shows a -5% decrease.
- The chart above highlights an increase trend in the first half of July before levelling off in the second half. Overall retail footfall across all Cambridge City locations saw an increase of +2% in the latest week (02/08/2021-08/08/2021) when comparing overall counts to the week before (26/07/2021-01/08/2021).
- Overall retail footfall was down by -20% when comparing July 2021 overall to a pre-Covid-19 period*

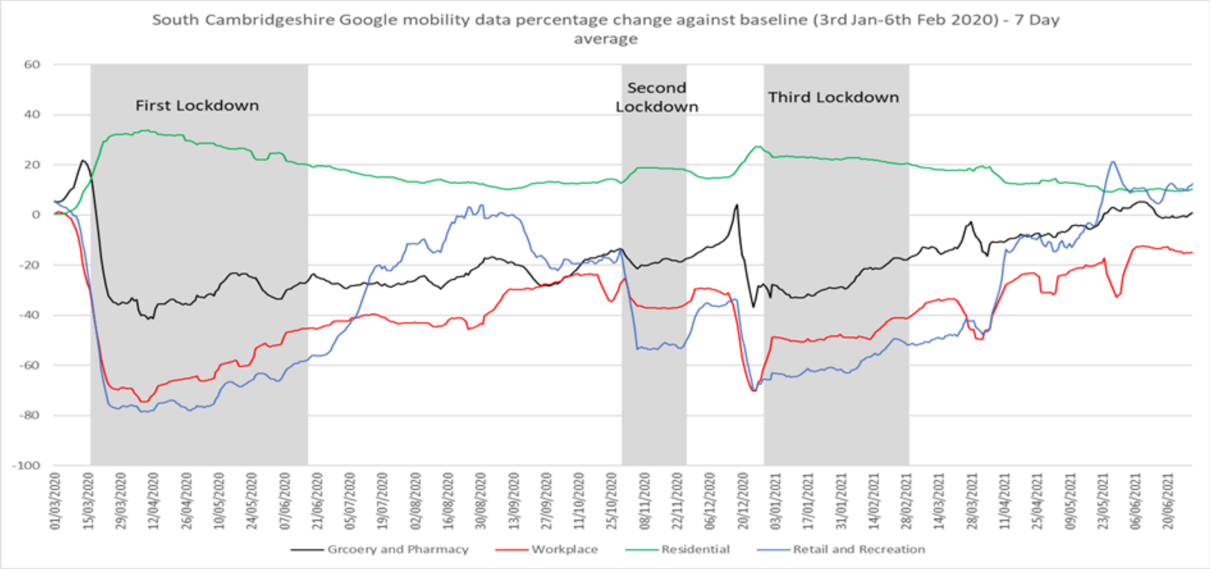
**The pre-Covid-19 comparison period is February 2020. For this comparison, all sensors except Kings Parade are used as this was recalibrated during 2021 making the figures incomparable to 2020.*

Consumer Behaviour – Google Mobility Data

Overview:

- Data gathered from Google account holders location history. The comparison of social mobility change is based on the most recent several weeks up to the report date (6th August 2021) compared to the median of the corresponding day in the baseline period (3rd Jan-6th Feb 2020).





Cambridge Mobility data (based on Jan/Feb 2020 baseline):

- Grocery visits decreased by -1% in last the 7 days to 6th August and are now 6% above the baseline.
- Workplace visits decreased by -1% in last 7 days compared to the 7 days prior and are now -35% below the baseline.
- Residential visits decreased by -1% in the last 7 days compared to the 7 days prior and are now 10% above the baseline.
- Retail and Recreation visits increased by +2% in the last 7 days compared to the 7 days prior are now -23% lower than the baseline.

South Cambridgeshire Mobility data (based on Jan/Feb 2020 baseline):

- Grocery visits decreased by -2% in the 7 days to 6th August compared to the 7 days prior and are now -2% below the baseline.
- Workplace visits decreased by -2% in the last 7 days compared to the 7 days prior and are now -26% below the baseline.
- Residential visits decreased by -1% in the last 7 days compared to the 7 days prior and are now 10% above the baseline.
- Retail and recreation visits increased by 3% in the last 7 days compared to the 7 days prior and are now 12% above the baseline.

**Residential visits above baseline levels is partly influenced by people working from home.*

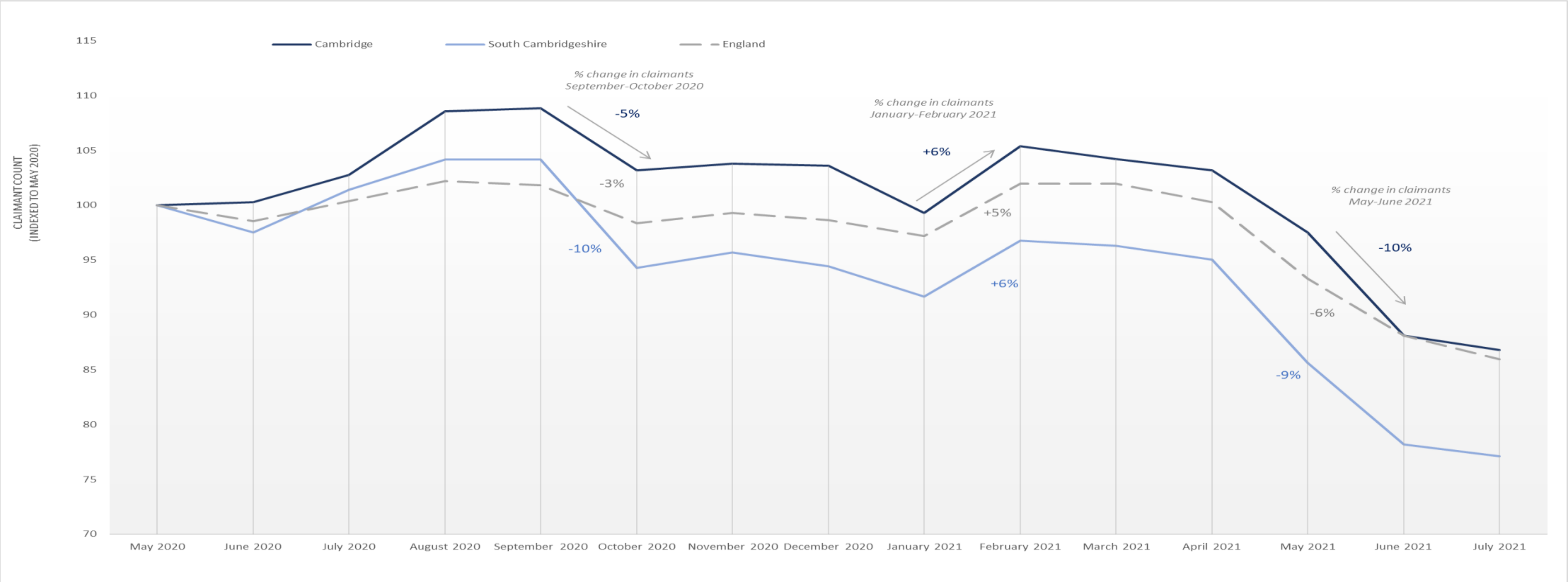
Google LLC *"Google COVID-19 Community Mobility Reports"*. https://www.google.com/covid19/mobility/ Accessed: 11/08/2021

Labour Market – Claimant Count

Overview:

- **July 2021 data showed further decreases in claimant counts, there was a slight (-1.4%) decrease from June 2021 across Greater Cambridge, with a -1.5% decrease in Cambridge, -1.4% in South Cambridgeshire, compared with -2.5% across England overall.**

Claimant Count data across Greater Cambridge, as at 8th July 2021



- **5,490 claimants*** across the GCP area; **3.0% of people aged 16-64**, compared to 5.5% across England. This is 1.9% higher than in July 2019, when 1.1% of people aged 16-64 were claiming across the GCP area.
- **2,995 claimants in Cambridge City (3.5%) and 2,495 claimants in South Cambridgeshire**, **South Cambridgeshire still has the lowest proportion of residents aged 16-64 claiming (2.6%)** compared to the rest of the county.

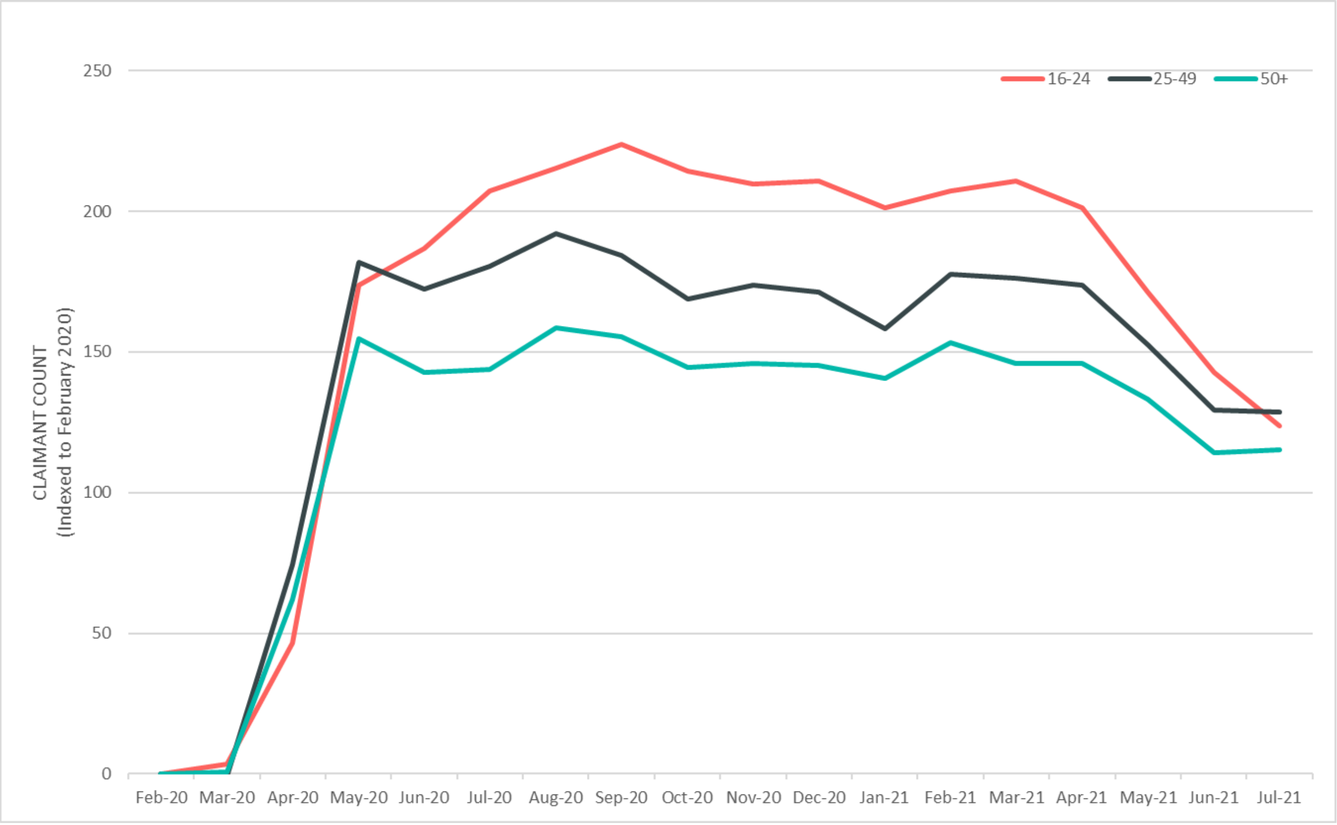
**this figure includes all residents over the age of 16 (not just working age)*

Labour Market – Claimant Count by Age

Overview:

- **In July 2021, there was an -8% decrease in claimants aged 16-24 from June 2021, with little change among other age groups. This has further narrowed the gap in claimant counts by age group which was observed between March 2020-April 2021.**
- **July 2021 has seen the largest decrease among claimants aged 18-24, particularly in South Cambridgeshire, where the proportion aged 18-24 has decreased from 5.1% in June 2021 to 4.6% in July 2021**. This is still higher than the working age population (2.6%), but lower than the national percentage for 18-24 year olds (7.2%).

July 2021 Claimant Counts by Age Group (Indexed to February 2020)



July Claimant Rate, by selected age groups

(Note: percentages are presented as a proportion of all (or subset of the) working age population 16-64, where applicable; numbers in brackets include all residents 16+ (i.e. include those over the age of 64)

	Cambridge		South Cambs		ENG
Age	**Claimant Rate (arrow indicates monthly change)**				
16+	3.5% (2,995)	↓	2.6% (2,495)	↓	5.5%
16-17	0.2% (5)	↔	0.1% (5)	↔	0.2%
18-24	2.0% (505)	↓	4.6% (435)	↓	7.2%
25-49	4.4% (1,775)	↓	2.8% (1,415)	↑	6.1%
50+	2.1% (715)	↑	1.0% (640)	↓	2.2%

*figures may not add up due to rounding

Labour Market – Claimant Count by Location

Overview:

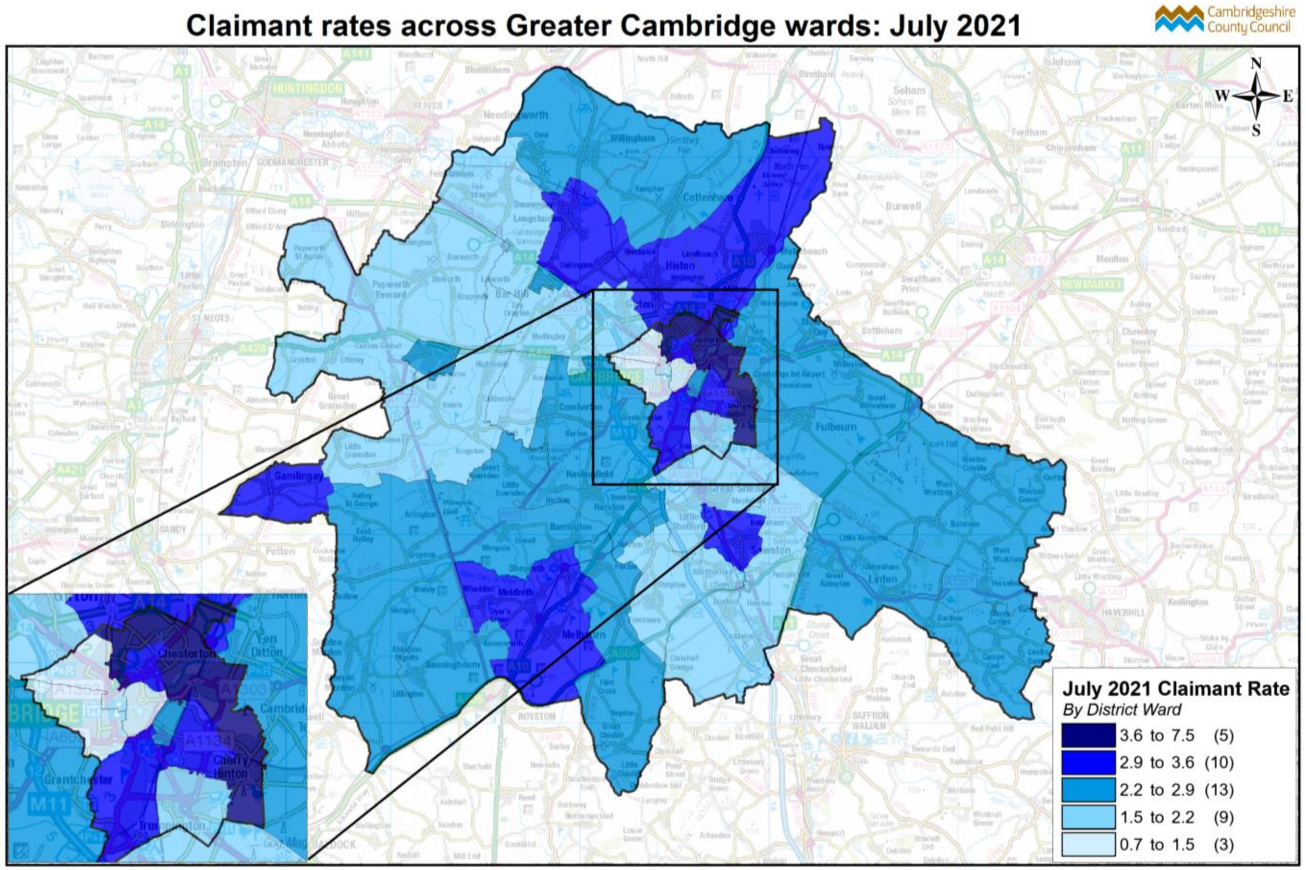
- Whilst the overall GCP rate sees around 3.0% of people aged 16-64 claiming, **Kings Hedges has a higher rate of 7.5% of the 16-64 population claiming.**

- The **top 10 wards with the highest claimant rates in July 2021 are all in Cambridge City,** with **Kings Hedges having the highest claimant rate (7.5%)** across Greater Cambridge.
- **All areas have seen decreases in claimant counts since the beginning of the year**, in February 2021, the claimant rate in Kings Hedges was (9.6%), 2.1% higher than in July 2021.
- **The lowest claimant rates across Greater Cambridge are in the Newnham, Castle and Market wards**, all of which have a **claimant rate of around 1%** (July 2021).

Wards with highest claimant rate in Greater Cambridge (as a proportion of 16-64 population)

Ward	Claimant Rate – July 2021	Claimant Rate – July 2019
Kings Hedges	7.5	3.1
Abbey	6.0	2.2
East Chesterton	5.9	2.4
Arbury	5.8	2.6
Cherry Hinton	4.1	1.5

Claimant rates across Greater Cambridge wards: July 2021



The top 5 wards with the highest claimant rate remain the same as they did in June 2021, Arbury and East Chesterton have swapped places, with East Chesterton and Cherry Hinton showing slight increases

Labour Market – Self Employment Income Support Scheme

This slide has not been updated since the previous pack as data for the fifth grant of the SEISS is yet to be released, when more data is available, this slide will be updated.

Overview:
- **Greater Cambridge has had lower take up rates of the SEISS in all four waves compared to regionally and nationally.**
- **£113 million worth of claims have been made to the SEISS since the start of the pandemic.**

The first wave of the Self Employment Income Support Scheme (SEISS) saw 9,400 claims made across Greater Cambridge (worth £29.6m) up to 31st July 2020.

The second wave of the scheme saw 8,300 claims made across Greater Cambridge (worth £22.9m) to 31st October 2020.

The third wave of the scheme saw 7,600 claims made across Greater Cambridge (worth £23.3m) to the 31st January 2021.

The fourth wave of the scheme saw , 6,600 claims were made across the GCP area to the 6th June 2021, worth £20.1m.

Location	Wave 1 SEISS Take-Up Rate (based on # eligible individuals)	Wave 2 SEISS Take-Up Rate (based on # eligible individuals)	Wave 3 SEISS Take-Up Rate (based on # eligible individuals)	Wave 4 SEISS Take-Up Rate (based on # eligible individuals)
Cambridge	70%	65%	58%	53%
South Cambridgeshire	72%	63%	58%	49%
East of England	76%	68%	64%	56%
England	77%	69%	65%	58%

** The number and values of claims are not directly comparable across waves as there are differences in eligibility criteria and claim values.*

Labour Market – Job Retention Scheme

Overview:

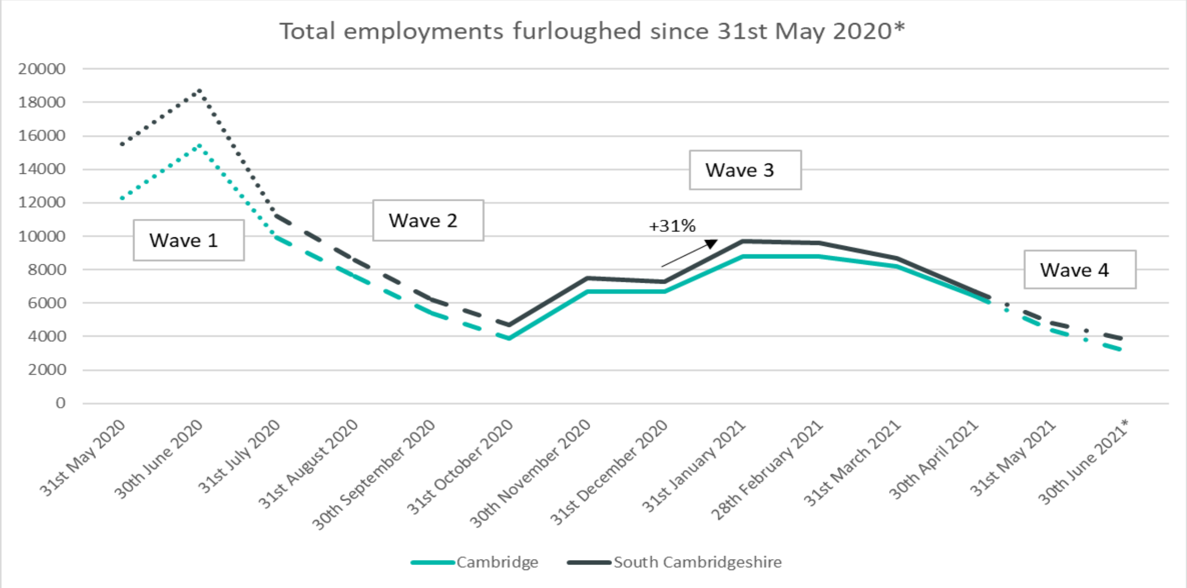
In the fourth wave of the governments coronavirus job retention scheme, **at June 30th 2021**:

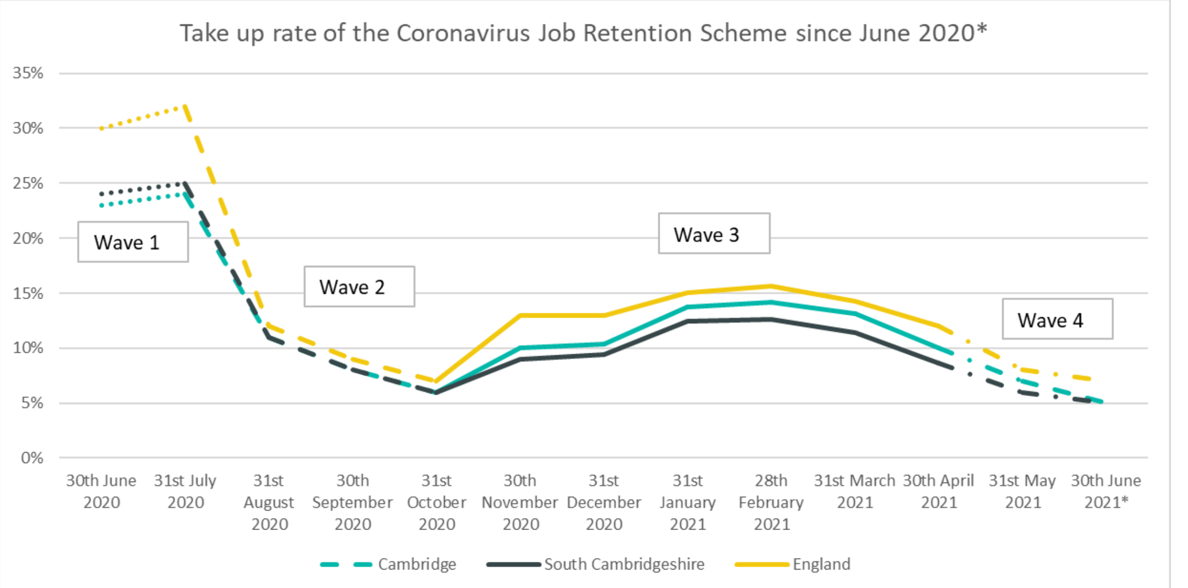
- **6,900 employments furloughed across the GCP area, representing a take-up rate of 5%, based on eligible employments.**
- **Employments furloughed across the GCP area decreased by 2,300 (-25%) from the 31st May to 30th June 2021. This is greater than the decrease across England overall (-22%).**
- 3,100 employments furloughed in Cambridge and 3,800 in South Cambridgeshire, accounting for 5.0% and 5.6% of employees aged 16-64 respectively, this is in line with Cambridgeshire overall (5.3%) but lower than nationally (6.9%).
- **Greater Cambridge has had a lower take up rate of the CJRS across all four waves compared to regionally and nationally.**

The first wave of the governments coronavirus job retention scheme saw 36,600 employments across Greater Cambridge furloughed to the end of June 2020.

The second wave of the scheme saw noticeably less employments furloughed compared to the first wave. There were 8,600 employments furloughed to the end of October.

The third wave of the scheme saw 13,100 employments across Greater Cambridge furloughed to the end of April, an increase compared to the second wave.

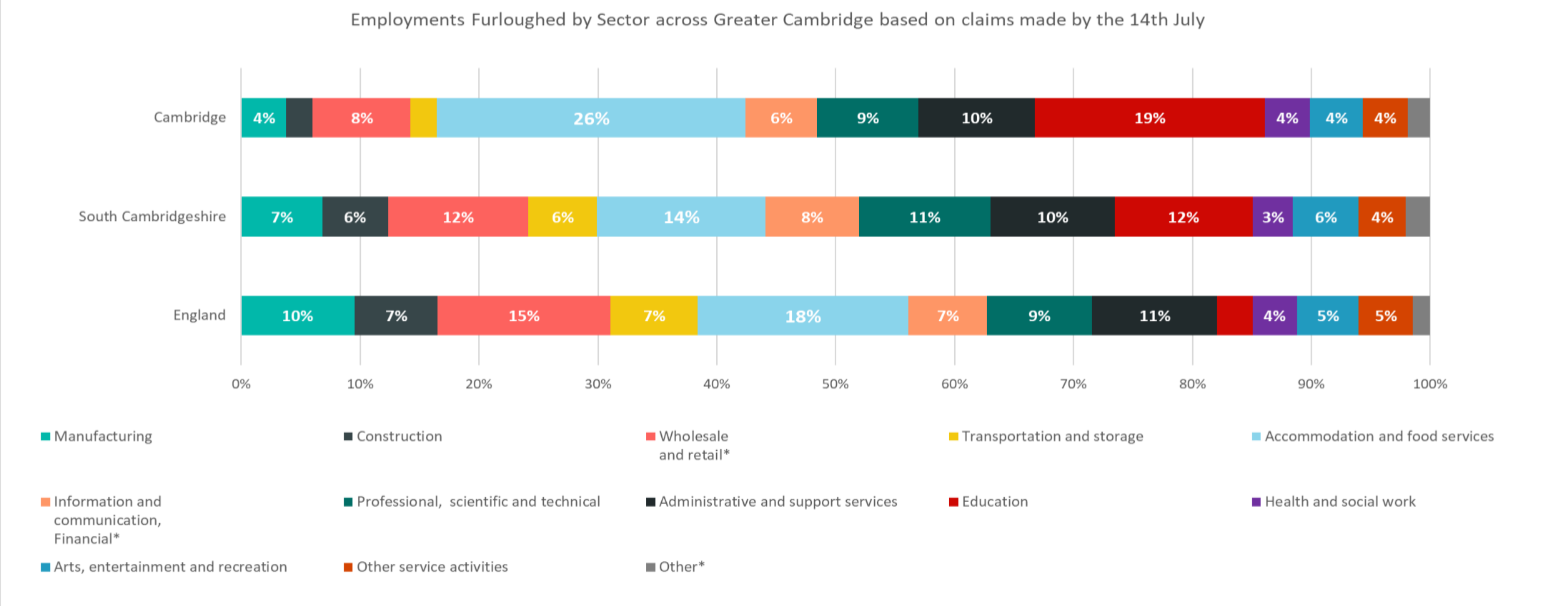




Labour Market – Furloughed by Sector

Overview:

- Across the Greater Cambridge area overall, **the sector with highest proportion of employments furloughed (20%) is the Accommodation and Food services sector. This compares to 18% of employments furloughed nationally. This sector saw the largest decrease in employments furloughed from May to June 2021.**
- **The Education sector accounts for a higher proportion of employments furloughed locally than it does nationally** (15% across the Greater Cambridge area overall compared with 3% nationally), **this is most notable in Cambridge (19%).**



Employment Sector	% Change in Employments furloughed May to June 2021
Accomodation and food services	-46%
Other*	-43%
Education	-24%
Wholesale and retail*	-17%
Arts, entertainment and recreation	-17%
Administrative and support services	-15%
Other service activities	-13%
Professional and scientific and technical	-13%
Transportation and Storage	-12%
Manufacturing	-12%
Health and social work	-11%
Information and Communication, Financial*	-8%
Construction	-7%

- **Cambridge has a higher proportion of employments furloughed in Accommodation and Food services (26%) than South Cambridgeshire (14%). However, this sector saw the greatest decrease across the GCP area (-46%) in employments furloughed from May to June 2021,** with a slightly larger decrease across Cambridge (-47%) than South Cambridgeshire (-44%).
- The Other* sector saw a -43% decrease in employments furloughed in the last month, the second highest, however this sector accounts for a small number of employments therefore this percentage is against a low baseline.
- **The Education sector saw the third greatest decrease (-24%) in employments furloughed across Greater Cambridge from May to June 2021.**

**The sectors in the chart and table above have been abbreviated for clarity, the full list of sector names can be seen in the notes below.*

Labour Market – Vacancies

Data provided through Burning Glass by the Cambridgeshire and Peterborough Combined Authority.

Overview:

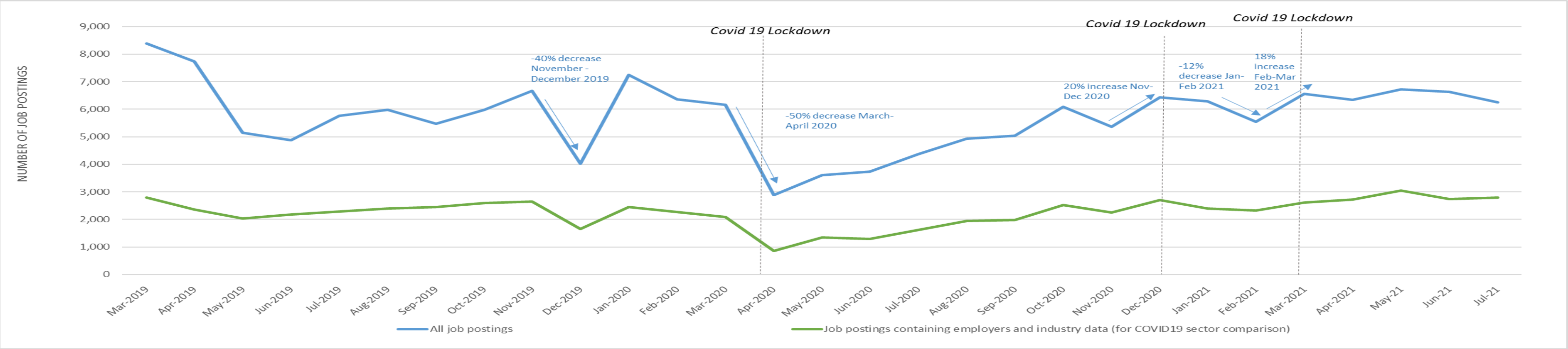
- **In July 2021, there were 6,620 postings across Greater Cambridge.**
- **From June 2021 to July 2021, postings decreased by -6% across Greater Cambridge. Nationally, job postings also decreased by -6% in this period.**
- **When compared to a pre-Covid-19 period*, job postings were up by 2% in July 2021, nationally they were 34% higher.**

- **Looking at the last three months (May-July 2021) job postings were up by 67% when compared to May-July 2020.** However, in May 2020 vacancies were low due to coming out of the first national lockdown. When compared to the same period in 2019, job postings were up by 24% in 2021.
- **Job vacancies increased by 6% from the previous quarter (February-April 2021) across the GCP area. Nationally, from May to July 2021, there were a record high number of job vacancies, having grown by 44% compared with the previous quarter[1].**

Job postings from May to July 2021 compared to the same period the year before

District	May-July 2020	May-July 2021	% Difference
Cambridge	11,081	18,393	66%
South Cambridgeshire	629	1,216	93%
Greater Cambridge	11,710	19,609	67%

Monthly job postings across Greater Cambridge



**The pre-Covid-19 comparison period is based on a twelve month average from March 2019-February 2020.*

Labour Market – Vacancies by Sector

Data provided through Burning Glass by the Cambridgeshire and Peterborough Combined Authority.

Overview:

- **In July 2021, the Accommodation and Food Service activities sector had seen the largest increases since April 2020, both locally and nationally. This is likely influenced by the easing of restrictions and the re-opening of hospitality.**

Employment Sector	Vacancies in Greater Cambridge: July 2021	Greater Cambridge % Difference July 2021-Pre-Covid-19	National % Difference July 2021-Pre-Covid-19
HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	715	▲ 36.6	▲ 55.5
EDUCATION	469	▲ 6.1	▲ 25.4
PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	344	▬ -3.8	▲ 30.4
MANUFACTURING	506	▲ 86.1	▲ 29.9
WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	151	▼ -7.0	▲ 17.9
ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	83	▲ 8.0	▲ 20.4
INFORMATION AND COMMUNICATION	94	▼ -6.7	▲ 34.3
ACCOMMODATION AND FOOD SERVICE ACTIVITIES	98	▬ -2.6	▲ 25.3
OTHER SERVICE ACTIVITIES	33	▼ -60.5	▲ 19.7
PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	106	▲ 74.7	▲ 30.5
FINANCIAL AND INSURANCE ACTIVITIES	53	▲ 17.1	▲ 20.8
CONSTRUCTION	51	▲ 12.5	▲ 25.9
TRANSPORTATION AND STORAGE	19	▼ -13.0	▲ 20.3
REAL ESTATE ACTIVITIES	29	▲ 13.7	▲ 21.8
ARTS, ENTERTAINMENT AND RECREATION	16	▼ -14.7	▲ 15.9
OTHER SECTORS*	24	▲ 56.5	▲ 27.4

OTHER SECTORS INCLUDES: MINING AND QUARRYING; WATER SUPPLY; SEWERAGE; WASTE MANAGEMENT AND REMEDIATION ACTIVITIES; ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY; ACTIVITIES OF EXTRATERRITORIAL ORGANISATIONS AND BODIES; ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS; UNDIFFERENTIATED GOODS-AND SERVICES-PRODUCING ACTIVITIES OF HOUSEHOLDS FOR OWN USE; AND AGRICULTURE, FORESTRY AND FISHING

In July 2021, the Accommodation and Food Service activities sector had seen the largest increases since April 2020, both locally and nationally. This is likely influenced by the easing of restrictions and the re-opening of hospitality. However, some of these are against very low bases at the GCP geography and vacancies in this sector are still slightly below pre-Covid-19.

July 2021 saw a decrease in vacancies by -6% from June 2021, **however, vacancies in July 2021 were 2% higher than pre-Covid-19*.** The following sectors have notably less vacancies than the pre-Covid-19* baseline:

- **Wholesale and Retail Trade**
- **Information and Communication**
- **Other Service activities**
- **Transportation and Storage**
- **Arts, Entertainment and Recreation**

Locally, all other employment sectors are showing similar or higher numbers of vacancies compared to the pre-Covid-19 baseline.

Nationally, all employment sectors were showing increases compared to the pre-Covid-19 baseline*.

While overall vacancies were up by 2% when compared to pre-Covid-19 in July 2021, **vacancies across the Accommodation and Food Services sector were still down by -3%. 20% of employments furloughed across the GCP area are in this sector, and this may be contributing to a reduced number of vacancies.**

**The pre-Covid-19 comparison period is based on a twelve month average from March 2019-February 2020.*