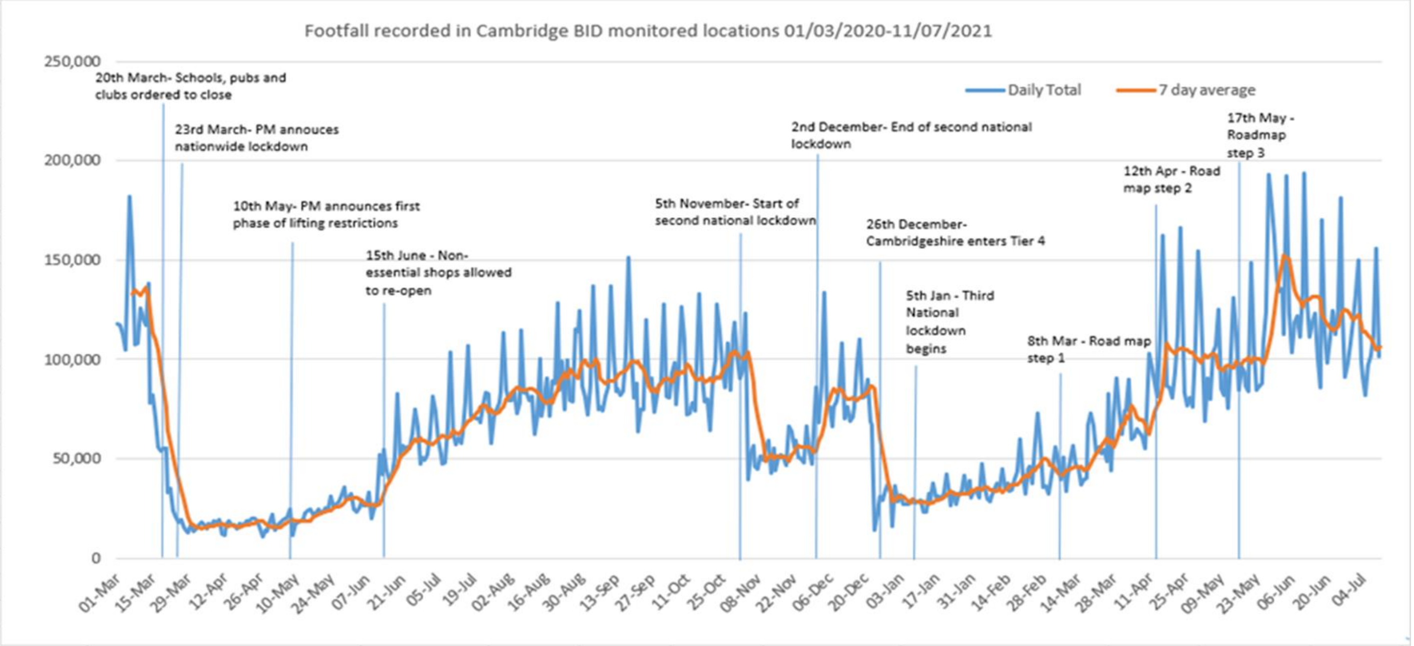
Consumer Behaviour – Footfall

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

Overview:

- Comparing average daily footfall in June 2021 overall to May 2021 overall shows a 15% increase.
- Overall retail footfall was down by -12% when comparing June 2021 overall to a pre-Covid-19 period*.



Cambridge BID footfall data:

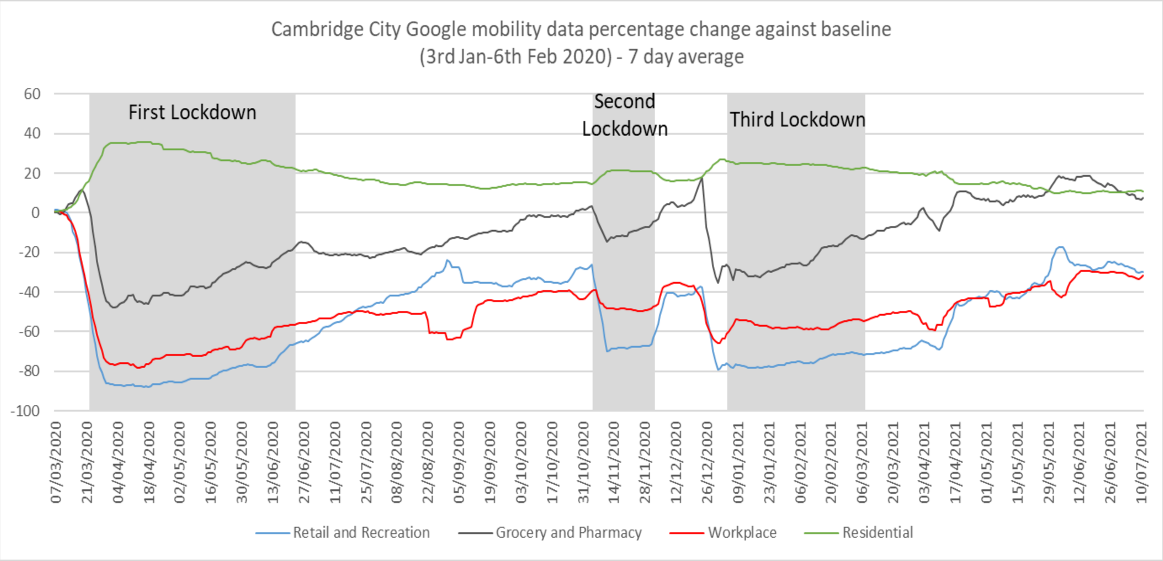
- Comparing average daily footfall in June 2021 overall to May 2021 overall shows a 15% increase.
- The chart above highlights a decrease trend in the second half of June, after large increases were seen at the beginning of the month. Overall retail footfall across all Cambridge City locations saw a decrease of -7% in the latest week (05/07/2021-11/07/2021) when comparing overall counts to the week before (28/06/2021-04/07/2021).
- Overall retail footfall was down by -12% when comparing June 2021 overall to a pre-Covid-19 period*

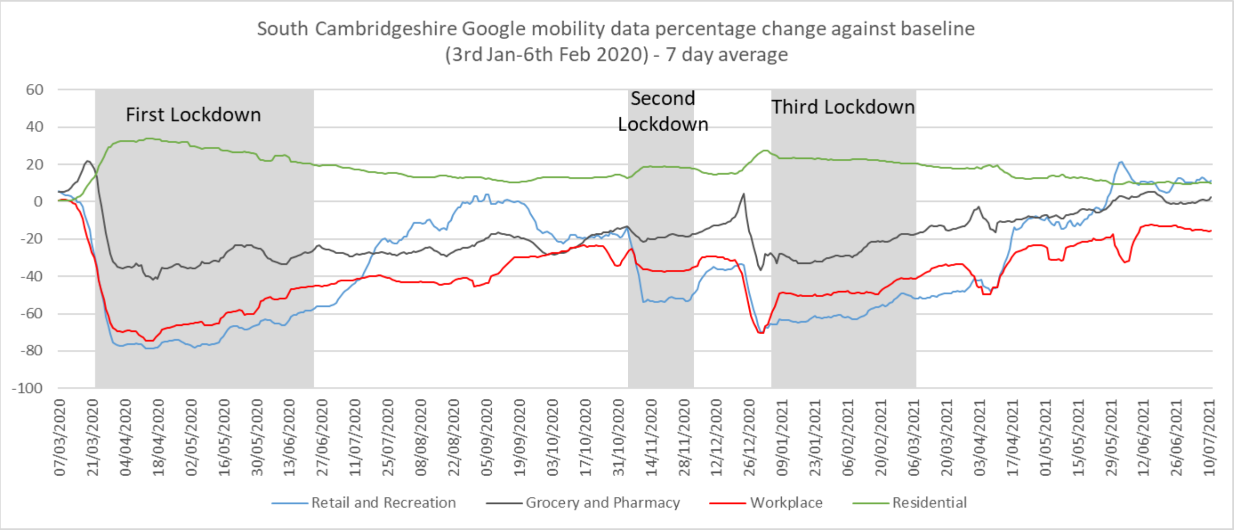
**The pre-Covid-19 comparison period is February 2020. For this comparison, all sensors except Kings Parade are used as this was recalibrated during 2021 making the figures incomparable to 2020.*

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 (11th July 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 -2% in the 7 days to 11th July and are now
- 7% above the baseline.
- Workplace visits did not change in the last 7 days compared to the 7 days prior and are now -32% below the baseline.
- Residential visits did not change in the last 7 days and are 11% above the baseline.
- Retail and Recreation visits decreased by -3% in the 7 days to the 7 days prior and are now -30% lower than the baseline.

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

- Grocery visits increased by 3% in the 7 days to 11th July compared to the 7 days prior and are now 2% above the baseline.
- Workplace visits decreased by -1% in the last 7 days and are now -16% below the baseline.
- Residential visits did not change in the last 7 days compared to the 7 days prior and are 10% above the baseline.
- Retail and recreation visits increased by 1% in the last 7 days compared to the 7 days prior and are now 11% above the baseline.

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

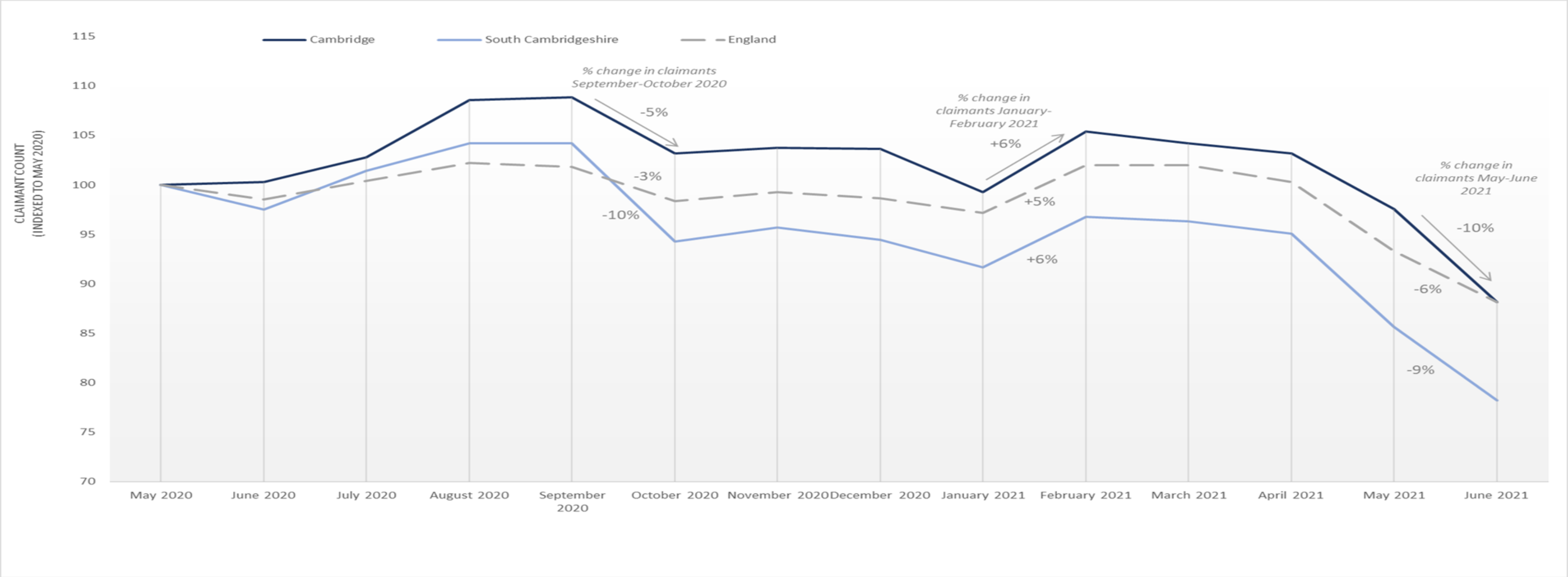
Google LLC "*Google COVID-19 Community Mobility Reports*". https://www.google.com/covid19/mobility/ Accessed: 15/07/2021

Labour Market – Claimant Count

Overview:

- **June 2021 data showed a decrease from May 2021 in claimant counts across Greater Cambridge, with larger decreases of -9.7% in Cambridge, -8.7% in South Cambridgeshire, compared with -5.6% across England overall. This is the largest decrease in claimant counts across the area overall since the start of the pandemic.**

Claimant Count data across Greater Cambridge, as at 10th June 2021



- **5,570 claimants*** across the GCP area; **3.1% of people aged 16-64**, compared to 5.7% across England. This is 2.1% higher than in June 2019, when 1% of people aged 16-64 were claiming across the GCP area.

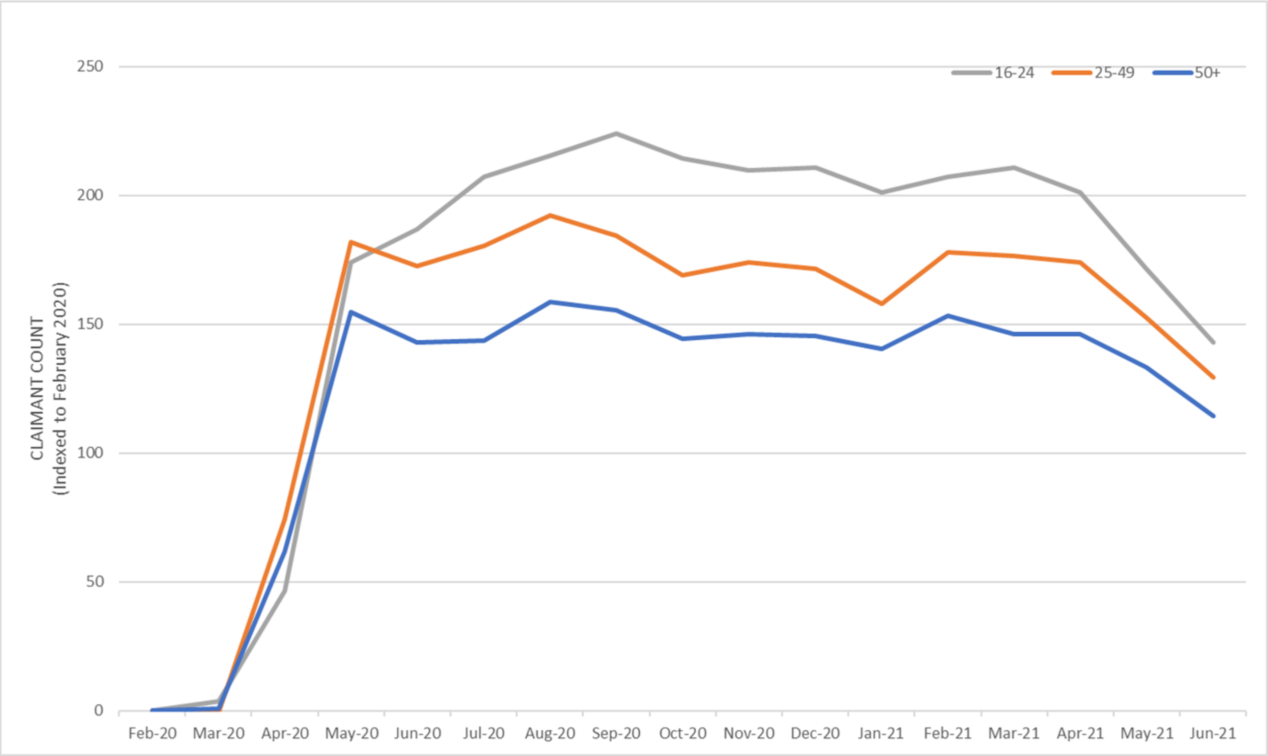
**this figure includes all residents over the age of 16 (not just working age)*

Labour Market – Claimant Count by Age

Overview:

- Over the period May 2021 to June 2021 there was a -19% decrease in claimants aged 16-24, this compares to -16% among claimants aged 25-49 and -13% among claimants aged 50+. **This has narrowed the gap in claimant counts by age group which was observed between March 2020-April 2021.**
- In total, 5,570 people or 3.1% of people aged 16-64 in Greater Cambridge are currently claiming (June 2021). **In South Cambridgeshire, a higher proportion (5.1%) of 18-24 year olds are currently claiming**, **compared to the working age population (2.6%). This is still below the national percentage for 18-24 year olds (7.7%).**

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



June 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% (3,040)	↓	2.6% (2,530)	↓	5.7%
16-17	0.2% (5)	↔	0.1% (5)	↔	0.3%
18-24	2.1% (525)	↓	5.1% (485)	↓	7.7%
25-49	4.5% (1,810)	↓	2.7% (1,390)	↓	6.2%
50+	2.0% (700)	↓	1.0% (650)	↓	2.3%

*figures may not add up due to rounding

Labour Market – Claimant Count by Location

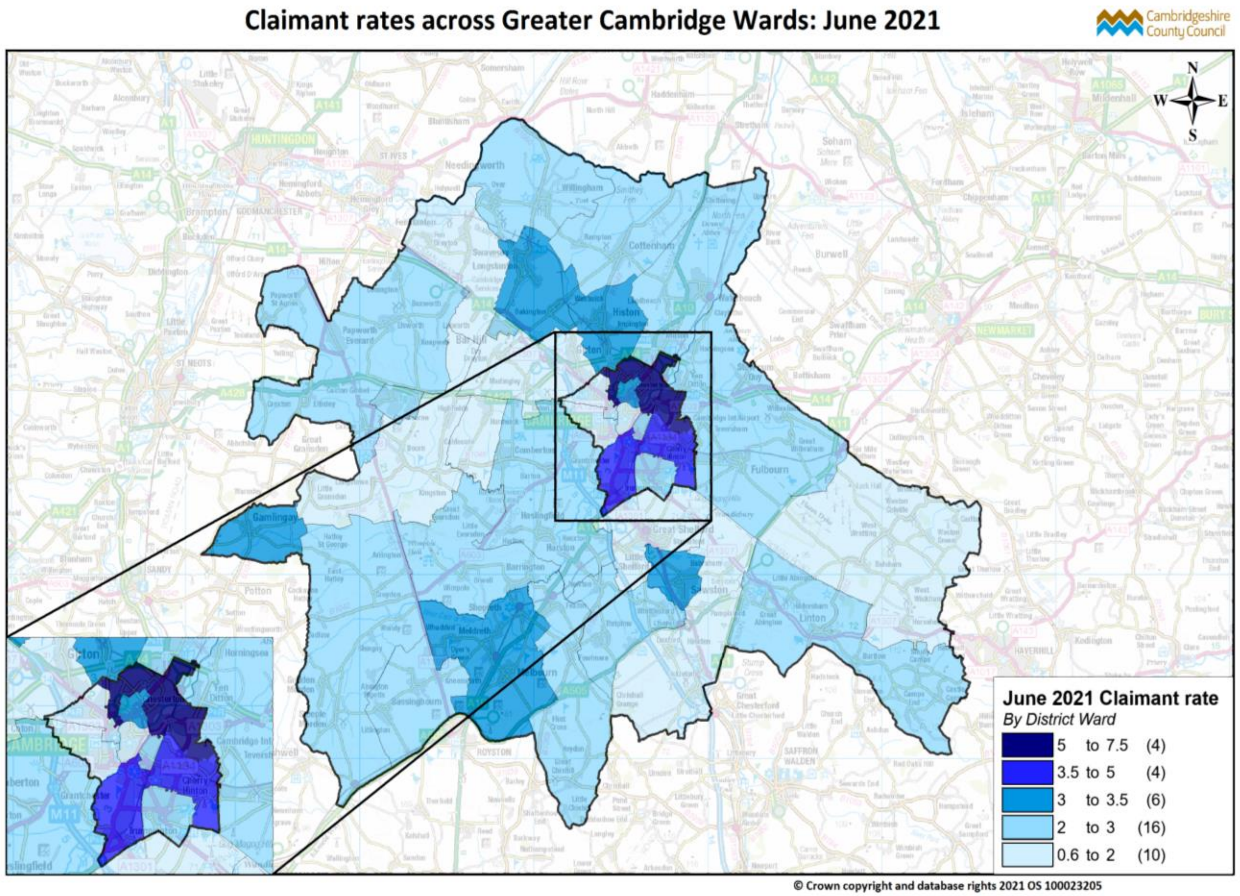
Overview:

- Whilst the overall GCP rate sees around 3.1% 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 June 2021 are all in Cambridge City (except for Melbourne which is 10th highest)**, 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 June 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%** (June 2021).



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

Ward	Claimant Rate – June 2021	Claimant Rate – June 2019
Kings Hedges	7.5	3.0
Abbey	6.0	2.1
Arbury	5.9	2.4
East Chesterton	5.8	2.3
Cherry Hinton	4.0	1.3

The top 5 wards with the highest claimant rate remain the same as they did in May 2021, with all wards showing slight decreases.

Labour Market – Job Retention Scheme

Overview:

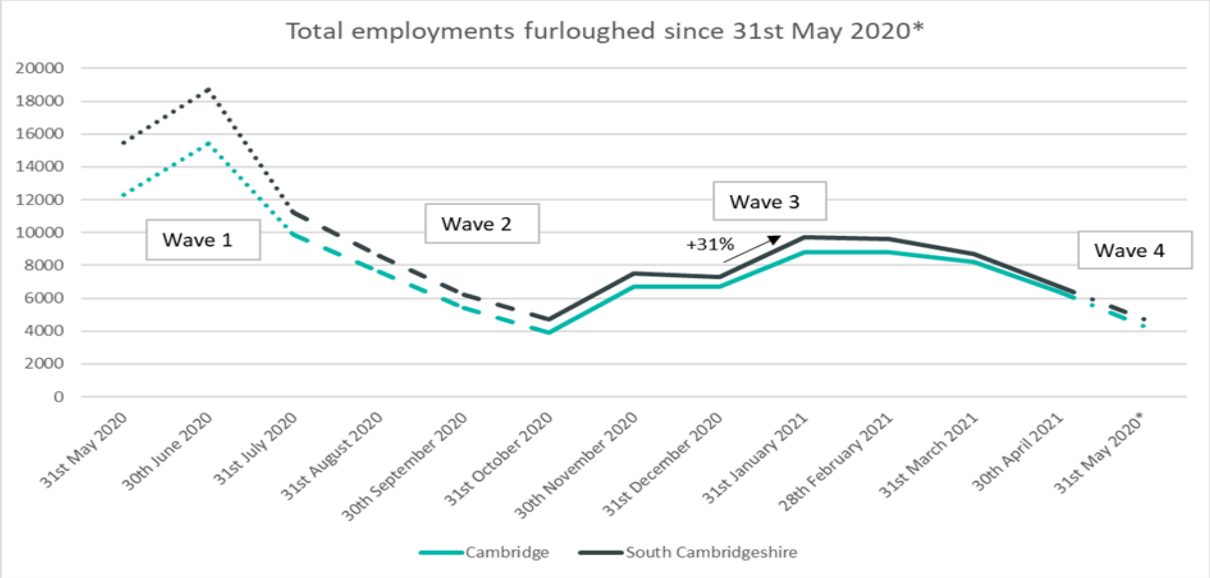
In the fourth wave of the governments coronavirus job retention scheme, **at May 31st 2021**:

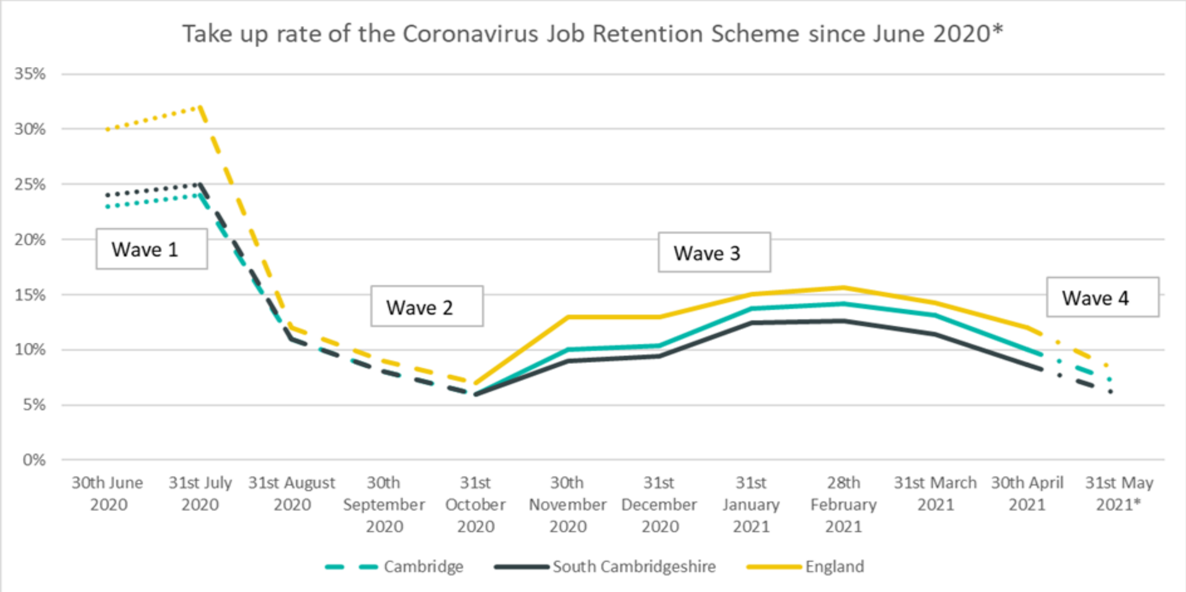
- **9,000 employments furloughed across the GCP area, representing a take-up rate of 7%, based on eligible employments.**
- **Employments furloughed across the GCP area decreased by 4,100 (-30%) from the 30th April to 31st May 2021. This is in line with the decrease across England overall.**
- 4,300 employments furloughed in Cambridge and 4,700 in South Cambridgeshire, both accounting 7% of employees aged 16-64, this is in line with Cambridgeshire overall (7%) but lower than nationally (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.

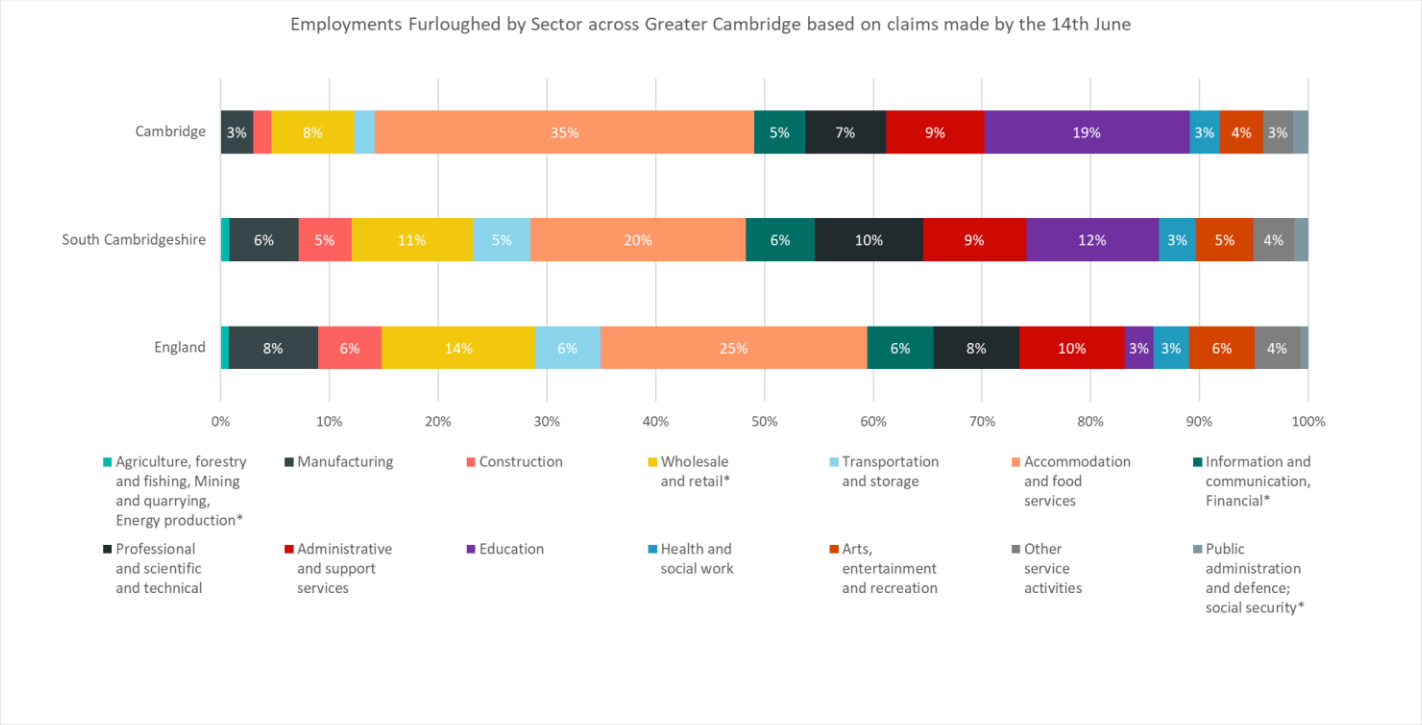




Labour Market – Furloughed by Sector

Overview:

- Across the Greater Cambridge area overall, **the sector with highest proportion of employments furloughed (27%) is the Accommodation and Food services sector.**
- **The Education sector accounts for a higher proportion of employments furloughed locally than it does nationally** (16% across the Greater Cambridge area overall compared with 3% nationally), **this is most notable in Cambridge (19%).**



- **Across the Greater Cambridge area overall, the sector with highest proportion of employments furloughed (27%) is the Accommodation and Food services sector.** This compares to 25% of employments furloughed nationally. **Cambridge has a higher proportion of employments furloughed in this sector (35%) than South Cambridgeshire (20%).**
- **The Education sector accounts for a higher proportion of employments furloughed locally than it does nationally**. Across the Greater Cambridge area overall, 16% of employments furloughed were in this sector. This compares to 3% nationally, a 13% difference. **Cambridge has a higher proportion of employments furloughed in this sector (19%) than South Cambridgeshire (12%).**
- The Professional, Scientific and Technical sector accounted for 9% of employments furloughed across the GCP area, 10% in South Cambridgeshire and 7% in Cambridge. Nationally it accounted for 8%.

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

Labour Market – Self Employment Income Support Scheme

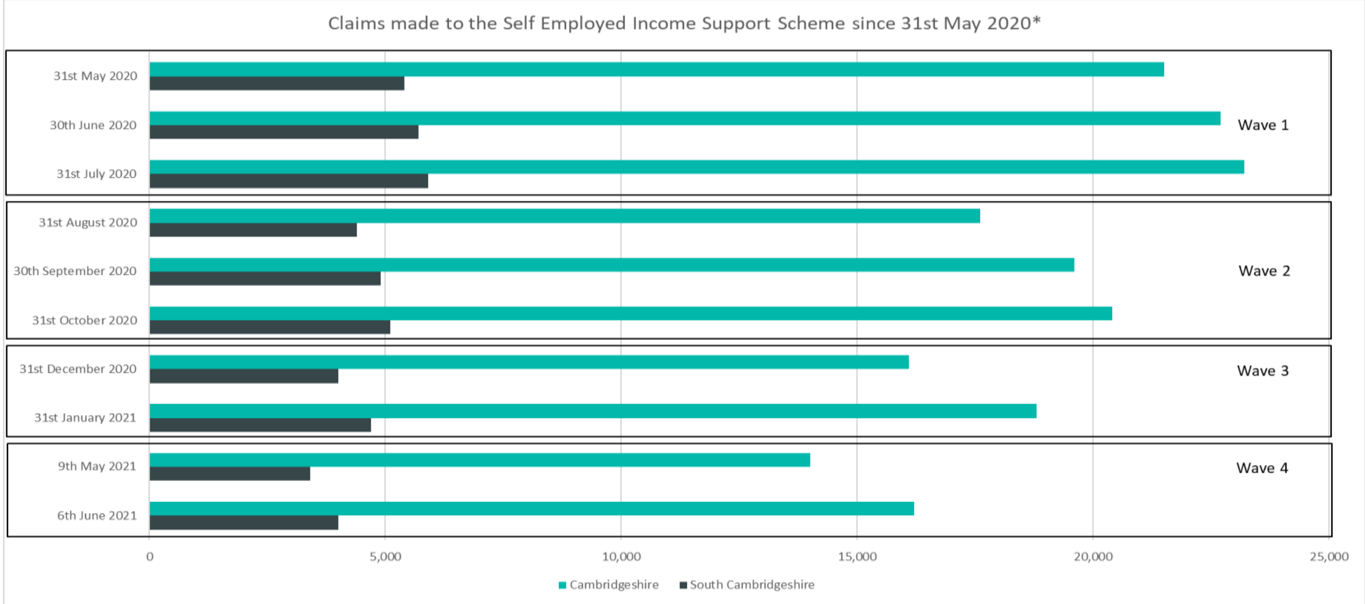
Overview:

- **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.



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.*

In the fourth wave of the scheme, 6,600 claims were made across the GCP area to the 6th June 2021, worth £20.1m. **This takes the support for self employment in the area to over £100 million since the beginning of the pandemic.**

Greater Cambridge has had lower take up rates of the SEISS in all four waves compared to regionally and nationally.

Labour Market – Vacancies

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

Overview:

- In June 2021, **there were 6,627 postings across Greater Cambridge.**
- **From May 2021 to June 2021, postings decreased by -1% across Greater Cambridge. Nationally, job postings increased by 4% in this period.**
- **When compared to a pre-Covid-19 period*, job postings were up by 8% in June 2021.**
- **Job postings were up by 93%** in the last three months compared to the same period last year. When compared to the same period in 2019, job postings were up by 11% in 2021.

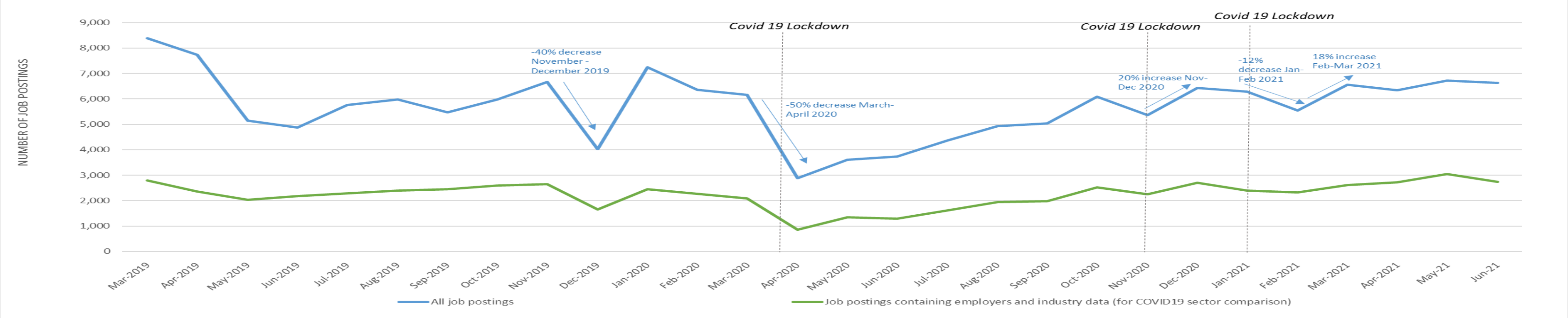
- Looking at the last three months (April-June 2021) job postings were up by 93% when compared to April-June 2020. **However, in April 2020 vacancies were at their lowest due to the first national lockdown. When compared to the same period in 2019, job postings were up by 11% in 2021.**
- When comparing vacancies in the **latest month to a pre-Covid-19 period*, postings were up by 8%. Nationally, they were 43% higher.**

Job postings from April to June 2021 compared to the same period the year before

District	April-June 2020	April-June 2021	% Difference
Cambridge	9,704	18,595	92%
South Cambridgeshire	521	1,101	111%
Greater Cambridge	10,225	19,696	93%

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

Monthly job postings across Greater Cambridge



Labour Market – Vacancies by Sector

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

Overview:

- **In June 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: June 2021	Greater Cambridge % Difference June 2021-Pre-Covid-19	National % Difference June 2021-Pre-Covid-19
HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	614	▲ 17.3	▲ 42.6
EDUCATION	551	▲ 24.6	▲ 47.9
PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	441	▲ 23.4	▲ 59.9
MANUFACTURING	265	▬ -2.5	▲ 43.9
WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	155	▬ -4.5	▲ 31.0
ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	80	▬ 4.1	▲ 29.4
INFORMATION AND COMMUNICATION	126	▲ 25.1	▲ 66.6
ACCOMMODATION AND FOOD SERVICE ACTIVITIES	98	▬ -2.6	▲ 21.2
OTHER SERVICE ACTIVITIES	65	▼ -22.2	▲ 71.2
PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	103	▲ 69.8	▲ 41.5
FINANCIAL AND INSURANCE ACTIVITIES	60	▲ 32.6	▲ 39.4
CONSTRUCTION	70	▲ 54.4	▲ 52.0
TRANSPORTATION AND STORAGE	17	▼ -22.1	▲ 36.1
REAL ESTATE ACTIVITIES	39	▲ 52.9	▲ 47.9
ARTS, ENTERTAINMENT AND RECREATION	27	▲ 44.0	▲ 29.1
OTHER SECTORS*	24	▲ 56.5	▲ 44.6

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 June 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 below pre-Covid-19.

June 2021 saw a slight decrease in vacancies by -1% from May 2021, **however, vacancies in June 2021 were 8% higher than pre-Covid-19*.** The following sectors have notably less vacancies than the pre-Covid-19* baseline:

- **Other Service activities**
- **Transportation and Storage**

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 8% when compared to pre-Covid-19 in June 2021, **vacancies across the Accommodation and Food Services sector were still down by -3%. 27% 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.*