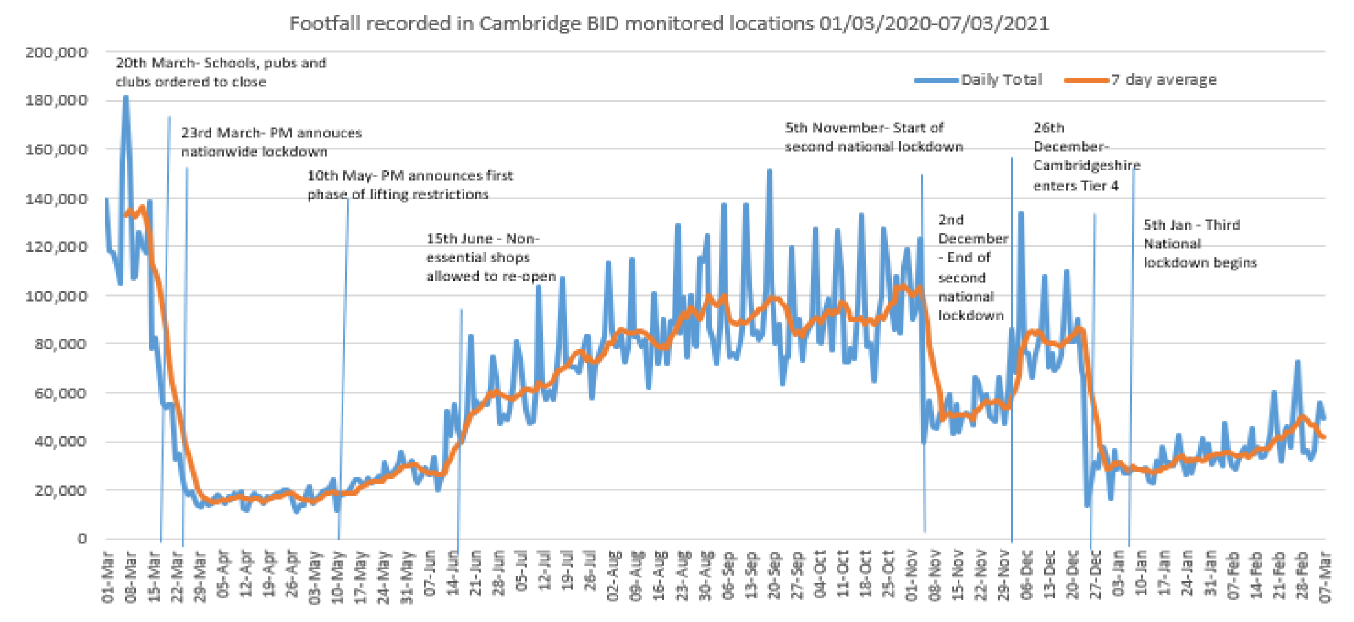
Consumer Behaviour – Footfall

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

Overview:

- Comparing average daily footfall in February 2021 against January 2021 shows a 32% increase in overall footfall, this highlights the impact of warmer weather conditions in February which saw footfall gradually increase each week, despite a national lockdown still being in place.
- Footfall was down by -69% in the latest week when compared to the same week in March 2020.



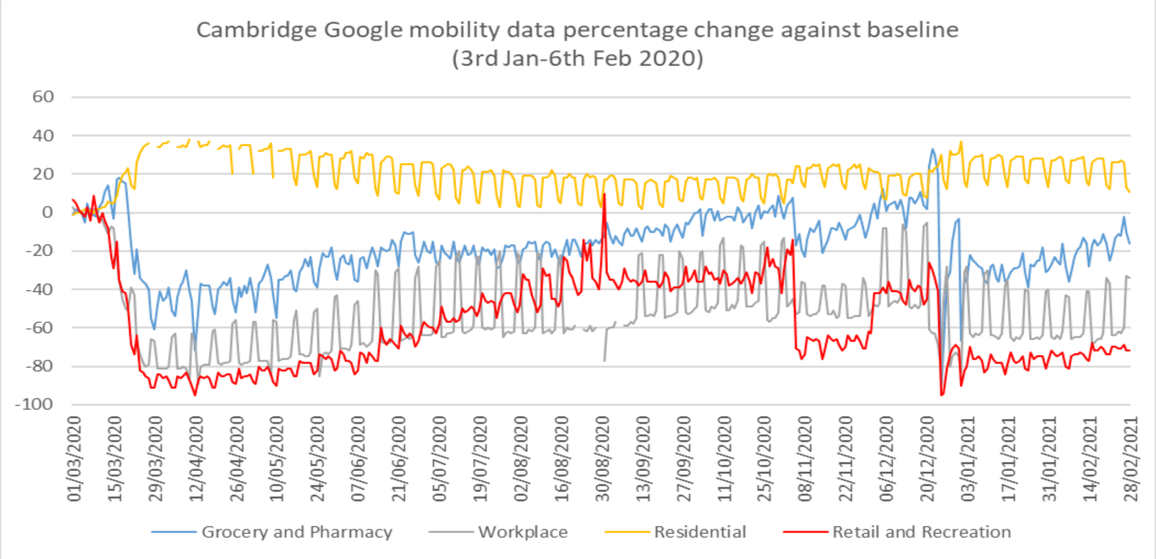
Cambridge BID footfall data:

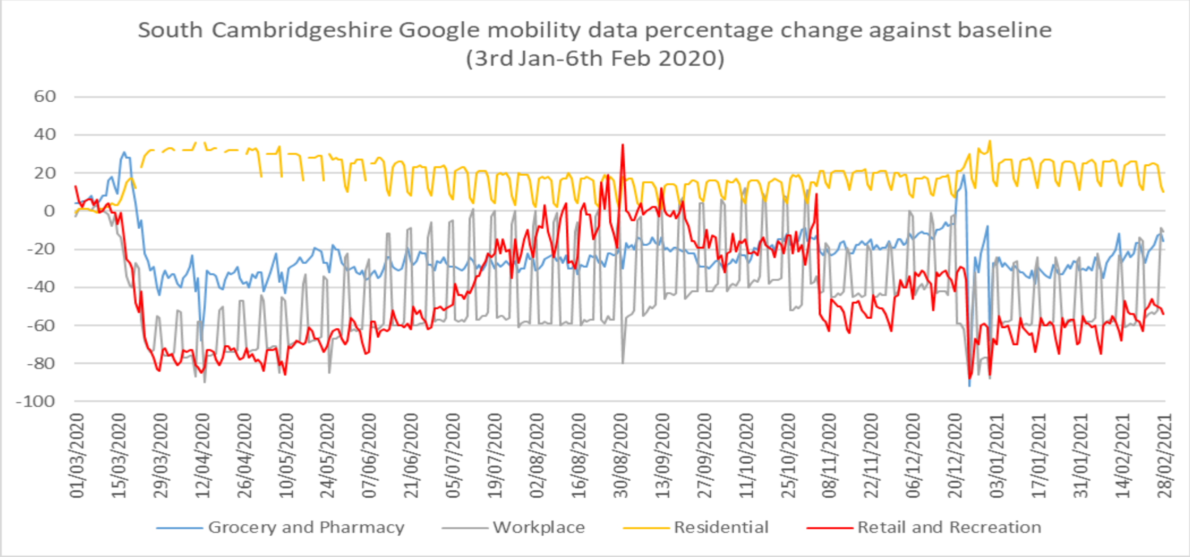
- Comparing average daily footfall in February 2021 against January 2021 shows a 32% increase in overall footfall, this highlights the impact of warmer weather conditions in February which saw footfall gradually increase each week, despite a national lockdown still being in place.
- However the latest week of data (01/03/21-07/03/21) has shown a -16% decrease in overall retail footfall when comparing overall counts to the week before (22/02/21-28/02/21). Retail footfall is down by -60% when compared to the last week of October, just before we entered the November lockdown and down by -69% when compared to the same time last year.
- Time of day analysis highlights the 32% increase in footfall from January to February 2021 took place throughout the day, with the largest increases evident between 11AM-4PM.

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 (28th February) compared to the median of the corresponding day in the baseline period (3rd Jan-6th Feb 2020)





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

- Grocery visits increased by 4% in the 7 days to 28th February and are -12% below the baseline.
- Workplace visits increased by 3% in the last 7 days compared to the 7 days prior and are now -54% below the baseline.
- Residential visits decreased by -1% in the last 7 days and are 22% above the baseline.
- Retail and Recreation visits increased by 1% in the 7 days to 28th February compared to the 7 days prior and are now -71% lower than the baseline.

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

- Grocery visits increased by 3% in the 7 days to 28th February compared to the 7 days prior and are now -18% below the baseline.
- Workplace visits increased by 6% in the last 7 days and are now -41% below the baseline.
- Residential visits decreased by -1% in the last 7 days compared to the 7 days prior and are 21% above the baseline.
- Retail and Recreation visits increased by 5% in the last 7 days compared to the 7 days prior and are now -50% lower than the baseline.

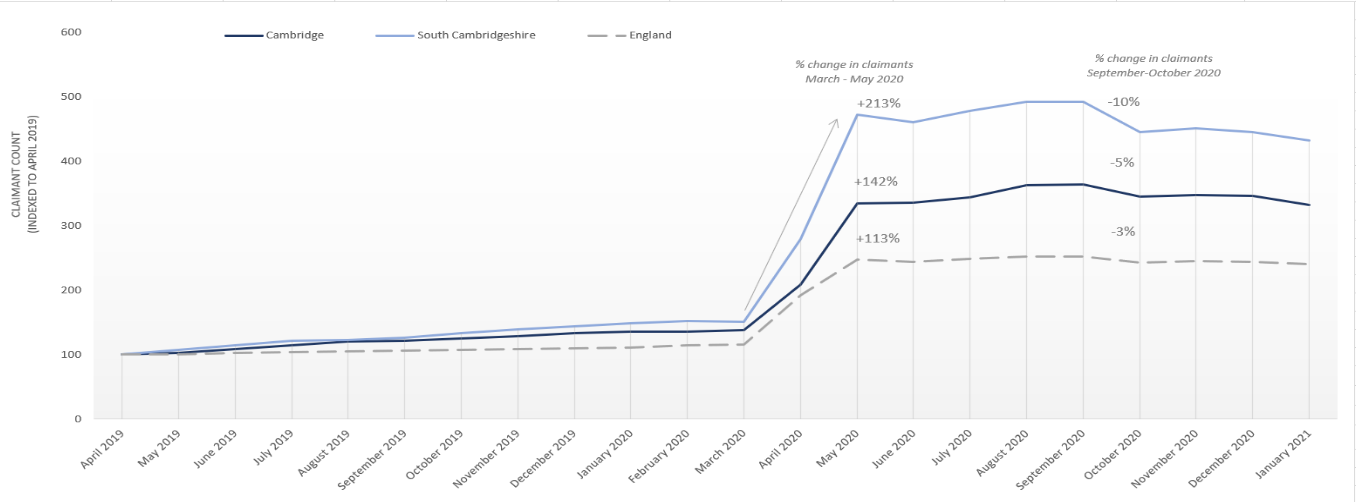
Google LLC *"Google COVID-19 Community Mobility Reports"*. https://www.google.com/covid19/mobility/ Accessed: 05/03/2021

Labour Market – Claimant Count

Overview:

- **January 2021 data showed slight decreases from December 2020 in claimant counts across Greater Cambridge, with a -4.2% decrease in South Cambridgeshire and -2.9% in Cambridge, compared with -1.5% across England overall.**
- In total, **6,390 people or 4% of people aged 16-64 in Greater Cambridge are currently claiming (January 2021)**. In South Cambridgeshire, a higher proportion (6.2%) of 18-24 year olds are currently claiming, compared to the working age population (3.1%)

Claimant Count data across Greater Cambridge, as at 14th January 2021



- **6,390 claimants*** across the GCP area; **3.5% of people aged 16-64**, compared to 6.3% across England;
- **January 2021 data showed slight decreases from December 2020** in claimant counts across Greater Cambridge, with **a -4.2% decrease in South Cambridgeshire, -2.9% in Cambridge, compared with -1.5% across England overall.**
- **South Cambridgeshire has seen the biggest increases in claimants across the period March 2020 – January 2021**. Despite this, it still has the lowest proportion of residents aged 16-64 claiming (3.1%) compared to the rest of the county.
- Whilst we have started to see overall decreases in claimant count, **this has not been seen in the 16-17 or 50+ age brackets,** although these groups still have the lowest proportions of residents claiming.

January 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+	3.9% (3,425)	↓	3.1% (2,965)	↓	6.3%
16-17	0.6% (15)	↔	0.1% (5)	↔	0.3%
18-24	2.6% (670)	↓	6.2% (580)	↓	8.8%
25-49	4.9% (1,985)	↓	3.2% (1,615)	↓	6.8%
50+	2.2% (755)	↔	1.2% (760)	↔	2.5%

*figures may not add up due to rounding

	January 2021	Compared to March 2020 (number/%)	Proportion of residents 16-64 claiming (January 2021)
Cambridge City	3,425	+2,000 (+140%)	4%
South Cambridgeshire	2,965	+1,930 (+186%)	3%
Cambridgeshire	15,615	+9,110 (+140%)	4%

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

Labour Market – Claimant Count by Age and Location

Overview:

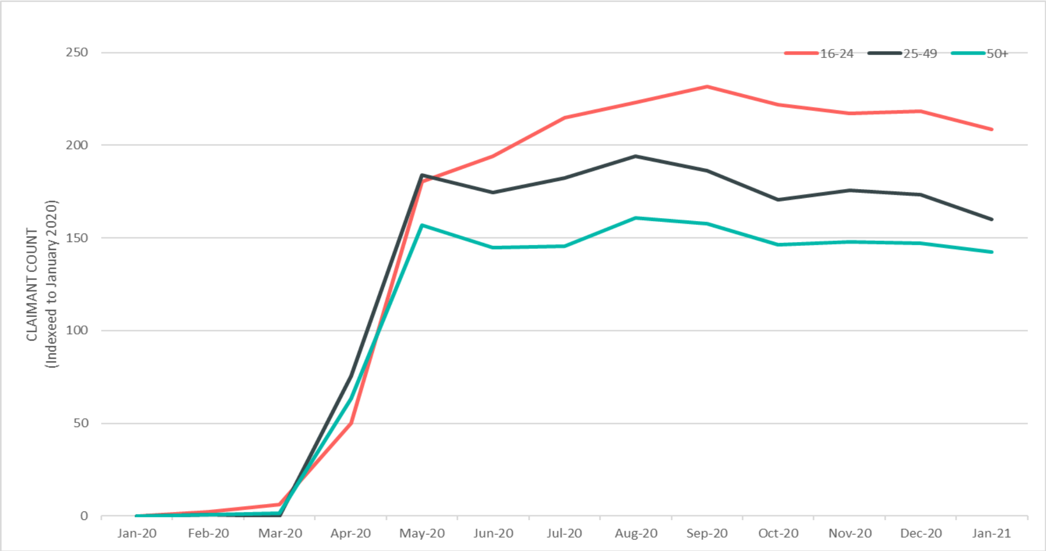
- Over the period May 2020 to January 2021 there has been **a noticeable widening in claimant counts by age groups**, with 16-24 year olds increasing at a faster rate than other age groups.
- Whilst the overall GCP rate sees around 4% of people aged 16-64 claiming, **Kings Hedges has a higher rate of 9% of the 16-64 population claiming**.

- The **top 10 wards with the highest claimant rates in January 2021 are all in Cambridge City (except for Sawston, which is the 7th highest)**, with **Kings Hedges having the highest claimant rate (8.9%)** across Greater Cambridge.

- Looking at the **changes in claimant rate since January 2020 indicates there has been a 164% increase in claimant rate across Greater Cambridge**. The following wards have seen the highest levels of change: **The Mordens (+600%), Hardwick and Newnham (both +350%). Note low bases – In January 2020 all above wards had a claimant count of 10.**

- **The areas with the highest levels of claimants have seen relatively low levels of change** (all less than +181%) in comparison to the wards listed above – this highlights the higher base for claimants in these areas.

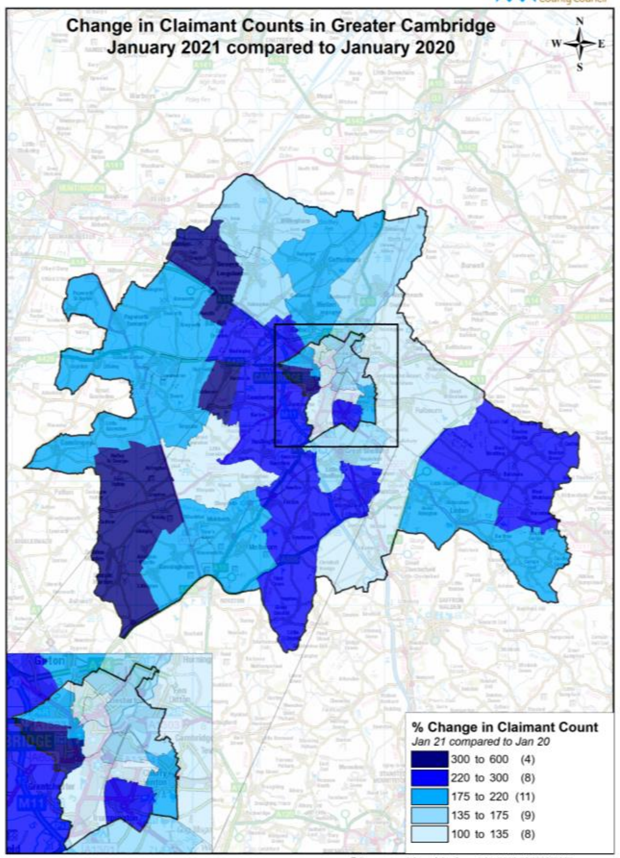
January 2021 Claimant Counts by Age Group (Indexed to January 2020)



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

Ward	Claimant Rate - January
Kings Hedges	8.9
Arbury	6.7
Abbey	6.5
East Chesterton	6.1
Cherry Hinton	4.8

The top 5 wards with the highest claimant rate remain the same as they did in December 2020, and all areas have shown slight decreases.



Labour Market – Job Retention Scheme

Overview:

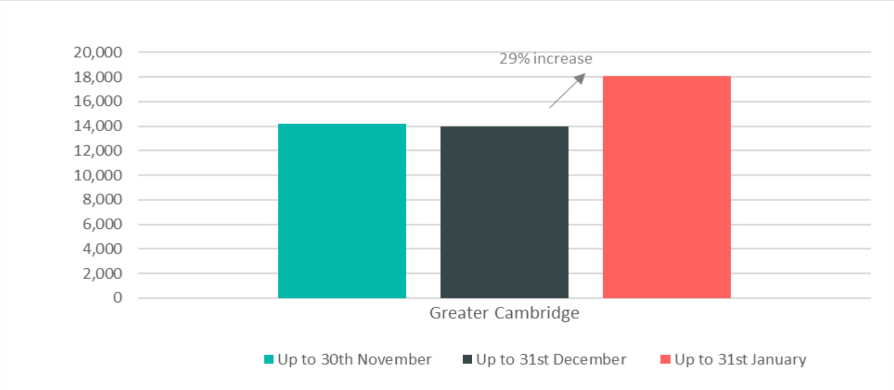
- 18,100 employments furloughed as **at January 31st 2021, representing a take-up rate of 13%, based on eligible employments.**
- 8,600 employments furloughed in Cambridge and 9,500 in South Cambridgeshire, both accounting for 14% of employees aged 16-64, this is in line with Cambridgeshire overall (14%) but lower than nationally (17%).
- **Greater Cambridge has had a lower take up rate of the CJRS across all three waves compared to regionally 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.

On 5 November 2020, the government announced an extension to the CJRS to support individuals and businesses who are impacted by disruption caused by COVID-19. The CJRS will remain open until 30 April 2021. This is analysed as a third wave as employers do not need to have used the CJRS previously indicating slight differences in the eligibility criteria to the previous two schemes. This update presents the second update from the third wave of CJRS. However, the data for January is not yet fully complete as while claims relating to January should have been filed by 15 February 2021, employers could file claims later with the agreement of HMRC if they had a reasonable excuse. Claims for January can also be amended until 1 March 2021. Together these factors are likely to have a small effect on the statistics: it is estimated that the number of claims reported for January could increase by around 3%.

Number of employments furloughed under the Government's Job Retention Scheme (JRS) in Greater Cambridge, third wave up until 31st January 2021



- In Greater Cambridge, in the third wave, there were **18,100 employments furloughed as at January 31st 2021, this is an increase of 4,100 employments (+29%)** since the end of December 2020.
- This represents **a take-up rate of 13%,** based on eligible employments**. This is lower than the regional and national take up rate of 15%.**
- **8,600 employments furloughed in Cambridge and 9,500 in South Cambridgeshire, both accounting for 14% of employees aged 16-64, this is in line with Cambridgeshire overall (14%) but lower than nationally (17%).**

Labour Market – Self Employment Income Support Scheme

Overview:

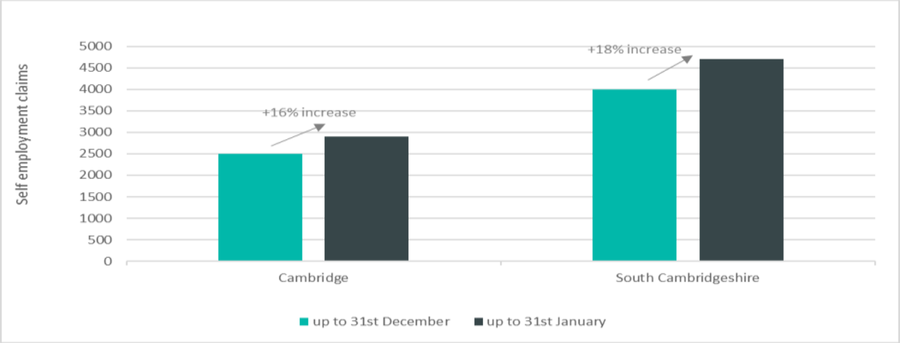
- **7,600 claims have been made to the Self Employment Income Support Scheme (SEISS) to the end of January 2021, worth £23.3m** in the third grant wave. This takes the support for self employment in the area to over £75million since the beginning of the pandemic.
- **Greater Cambridge has had lower take up rates of the SEISS in all three waves compared to regionally and nationally.**

The first wave of the governments self employment income support scheme 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 Cambridgeshire and Peterborough (worth £22.9m) to 31st October 2020.

On the 30 November 2020 applications for the third grant of SEISS opened, this closed on 29 January 2021. To make a claim for the third grant businesses must have had a new or continuing impact from coronavirus between 1 November 2020 and 29 January 2021. This is a grant worth 80% of their average monthly trading profits, paid out in a single instalment covering 3 months' worth of profits, and capped at £7,500 in total. To be eligible for SEISS 3 an individual must have been eligible for SEISS 1 and 2.

Number of claims to the Government's Self-Employment Income Support Scheme (SEISS) in Greater Cambridge, Third grant wave up to 31st January 2021*



SEISS up until 31st January 2021 (third grant wave)

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)
Cambridge	70%	65%	58%
South Cambridgeshire	72%	63%	58%
East of England	76%	68%	64%
UK	77%	69%	65%

- Greater Cambridge has had lower take up rates of the SEISS in all three waves compared to regional and national take up rates.
- At the end of January 2021, Wave 3 had a take up rate of 58% in the GCP area, compared with 64% regionally and 65% nationally.

- **There was a 17% increase in SEISS claims across Greater Cambridge** from the end of December to the end of January, this highlights **the impact of the third national lockdown** on self-employed workers across the area.
- **7,600 claims** to the SEISS across Greater Cambridge to 31st January 2021– worth **£23.3m** (claims in wave 2 were worth £22.9m over 8,300 claims).
- Cambridge has seen **one of the lowest number of claims** (2,900), and **lowest value of claims** (£8.4m) across the county. **South Cambridgeshire saw more claims** (4,700), to a higher value (£14.9m).
- Average claim value in Cambridge (£2,900) is lower than South Cambridgeshire (£3,200).

**Applications for the third wave of the SEISS closed on the 29th January 2021.*

Labour Market – Vacancies

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

Overview:

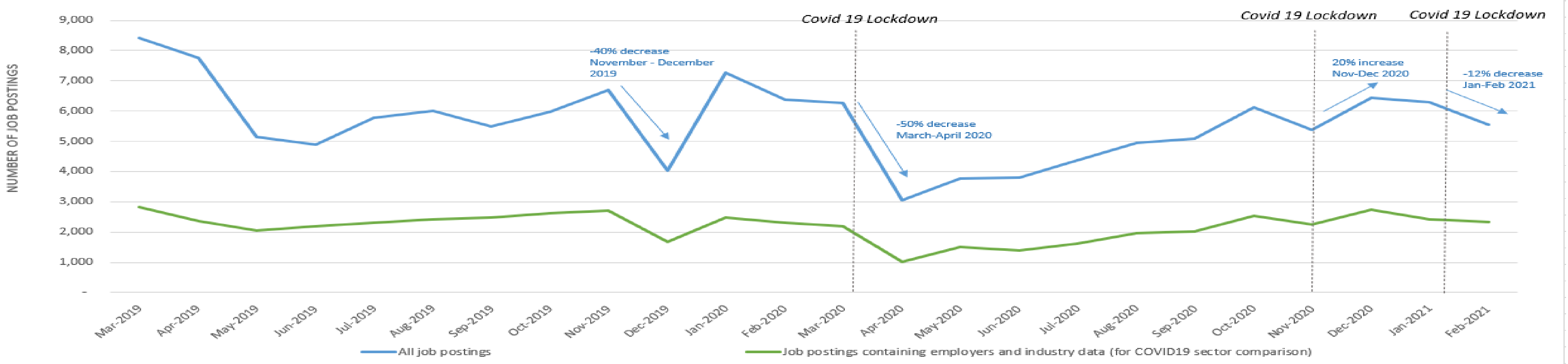
- In February 2021, **total postings were -13% lower than they were in February 2020.**
- **From January 2021 to February 2021, postings decreased by -12% across Greater Cambridge. Nationally, job postings increased by 4% in this period.**
- **Job postings were up by 3.6%** in the last three months compared to the same period last year.

- There were **5,551 postings across Greater Cambridge in February 2021, down by -12% from January. Nationally, job postings increased by 4% in the same period.**
- **In February 2021, job postings were down by -13% when compared to February 2020.**
- Looking at the last three months (December-February) **job postings were up by 3.6% when compared to December 2019-February 2020. South Cambridgeshire had 69% more postings compared to the same period last year (however this is against a low base).**

Job postings from December 2020 to February 2021 compared to the same period the year before

District	Dec 2019-Feb 2020	Dec 2020-Feb 2021	% Difference
Cambridge	16,589	16,478	-0.7
South Cambridgeshire	1,067	1,808	69.4
Greater Cambridge	17,656	18,286	3.6

Monthly job postings across Greater Cambridge



Labour Market – Vacancies by Sector

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

Overview:

- **All sectors have seen increased vacancies since April 2020, both locally and nationally. The Construction sector has seen the largest increases, locally and nationally.**

Employment Sector	Vacancies in Greater Cambridge: February 2021	Greater Cambridge % Difference April 2020-February 2021	National % Difference April 2020-February 2021
HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	551	▲ 45.5	▲ 30.7
EDUCATION	474	▲ 177.3	▲ 131.3
PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	360	▲ 181.2	▲ 176.2
MANUFACTURING	331	▲ 181.8	▲ 191.3
WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	93	▲ 213.3	▲ 176.6
ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	73	▲ 278.3	▲ 174.1
INFORMATION AND COMMUNICATION	93	▲ 144.2	▲ 167.3
ACCOMMODATION AND FOOD SERVICE ACTIVITIES	19	▲ 300.0	▲ 201.2
OTHER SERVICE ACTIVITIES	54	▲ 150.0	▲ 101.3
PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	94	▲ 310.5	▲ 280.2
FINANCIAL AND INSURANCE ACTIVITIES	54	▲ 85.7	▲ 166.0
CONSTRUCTION	47	▲ 657.1	▲ 378.5
TRANSPORTATION AND STORAGE	26	▲ 333.3	▲ 296.0
REAL ESTATE ACTIVITIES	25	▲ 250.0	▲ 227.3
ARTS, ENTERTAINMENT AND RECREATION	8	▲ 333.3	▲ 277.0
OTHER SECTORS*	29	▲ 300.0	▲ 227.5

**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; AND AGRICULTURE, FORESTRY AND FISHING*

All sectors have seen increased vacancies since April 2020, both locally and nationally. However, some of these are against very low bases at the GCP geography.

February 2021 saw a decrease **in vacancies by -12%** from January 2021, with vacancies in February 2021 -13% lower than in February 2020. The following sectors still have more vacancies than the same time last year[1]:

- **Administrative and Support Service Activities**
- **Wholesale and Retail Trade**
- **Professional, Scientific and Technical Activities**
- **Public Administration and Defence**
- **Human Health and Social Work activities**

Locally, all other employment sectors have seen decreases in vacancies since the same time last year.

Nationally, changes in vacancies since the same time last year shows similar patterns to locally, with more vacancies than the same time last year in Human Health and Social Work Activities and Public Administration and Defence. However, there are differences in other sectors such as Real estate activities and Construction, see the following slide for the full breakdown.

[1]Full vacancies analysis looking back to this time last year provided separately

Labour Market – Vacancies by Sector 2

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

Overview: The below table provides a full overview of vacancies in Greater Cambridge in February 2021, how this compares to April 2020, February 2020 and a national comparison.

Employment Sector	Vacancies in Greater Cambridge: February 2021	Greater Cambridge % Difference February 2020-2021	Greater Cambridge % Difference April 2020-February 2021	National % Difference February 2020-2021	National % Difference April 2020-February 2021
HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	551	7.8	45.5	28.7	30.7
EDUCATION	474	-18.9	177.3	-18.4	131.3
PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	360	16.1	181.2	4.8	176.2
MANUFACTURING	331	-1.0	181.8	-3.4	191.3
WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	93	23.7	213.3	-18.3	176.6
ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	73	29.9	278.3	-15.8	174.1
INFORMATION AND COMMUNICATION	93	-2.8	144.2	15.5	167.3
ACCOMMODATION AND FOOD SERVICE ACTIVITIES	19	-65.0	300.0	-70.4	201.2
OTHER SERVICE ACTIVITIES	54	-12.7	150.0	-14.5	101.3
PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	94	13.0	310.5	24.7	280.2
FINANCIAL AND INSURANCE ACTIVITIES	54	-13.3	85.7	8.7	166.0
CONSTRUCTION	47	-11.7	657.1	18.8	378.5
TRANSPORTATION AND STORAGE	26	-13.3	333.3	-4.2	296.0
REAL ESTATE ACTIVITIES	25	-20.0	250.0	23.6	227.3
ARTS, ENTERTAINMENT AND RECREATION	8	-50.0	333.3	-45.7	277.0
OTHER SECTORS*	29	-55.6	300.0	-4.0	227.5

**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; AND AGRICULTURE, FORESTRY AND FISHING*