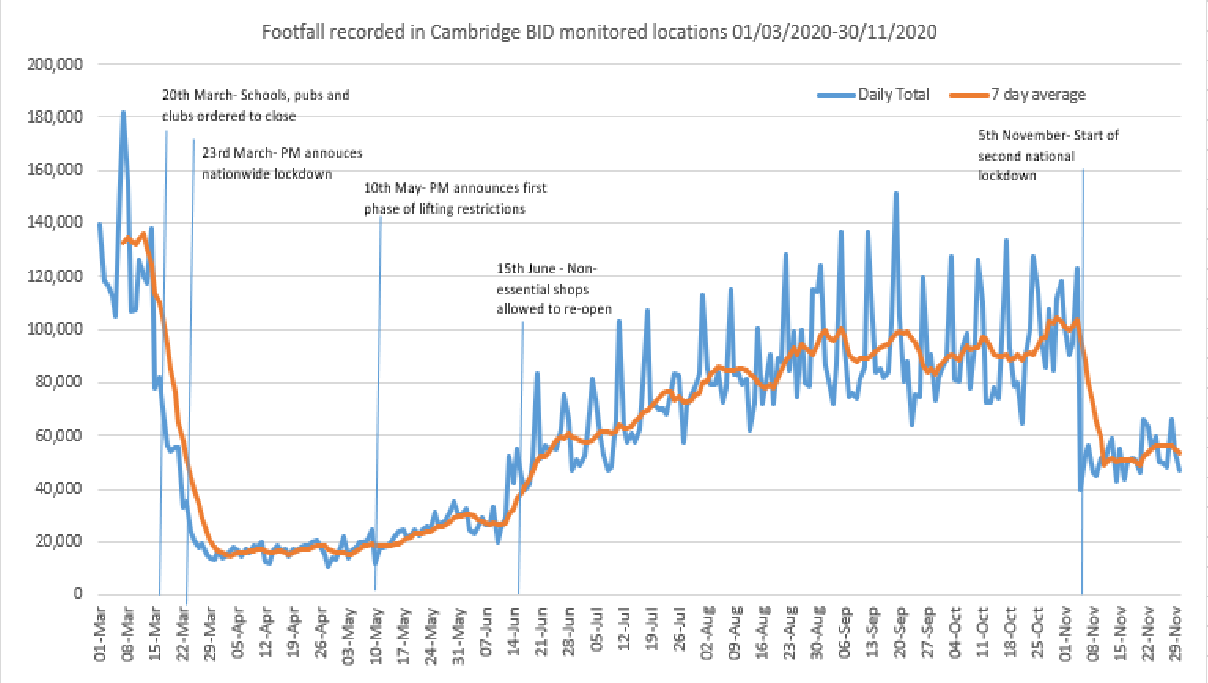
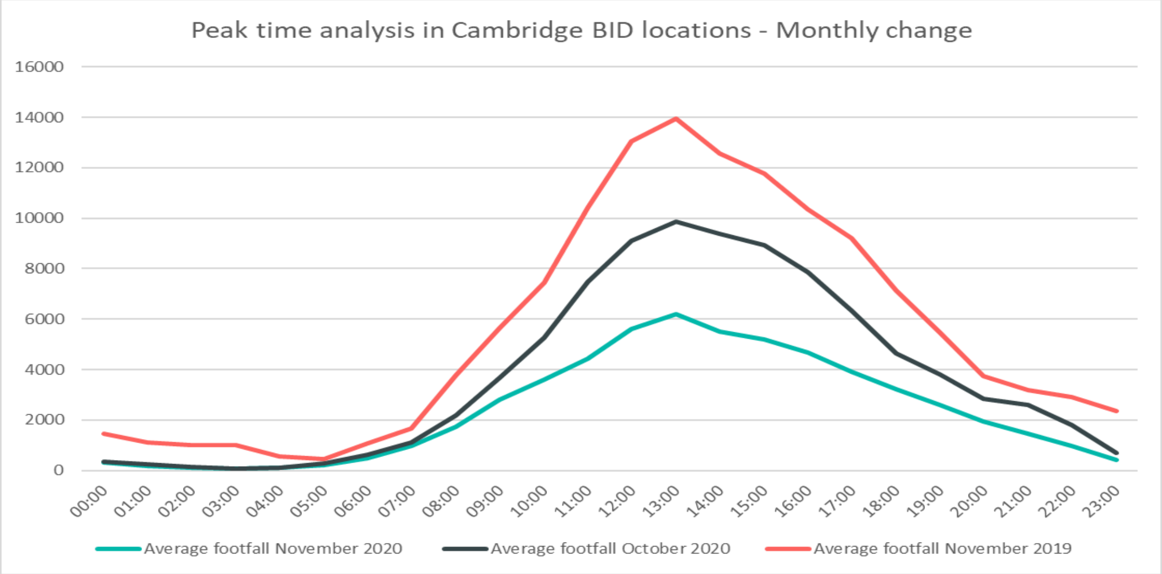
Consumer Behaviour – Footfall

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

Overview:

- Cambridge BID data for the city centre indicates that retail footfall saw rapid decreases from 5th November onwards due to the national lockdown, it remained relatively flat after this showing little week on week change.
- Footfall was down by -58% in November 2020 when compared to November 2019, this was most pronounced between 11AM and 5PM.





Cambridge BID footfall data:

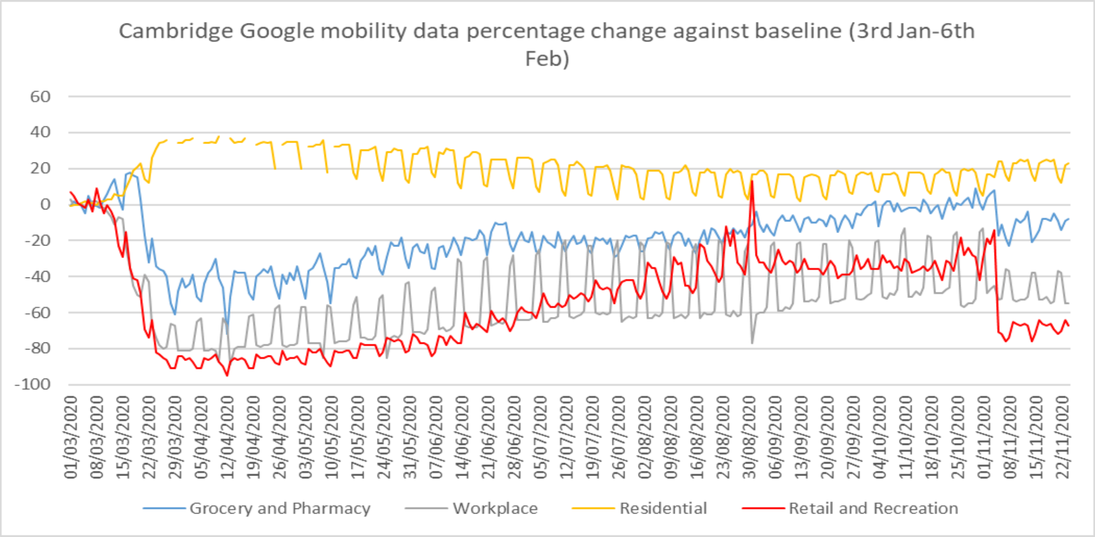
- Retail footfall down -38% in November compared to October – saw a rapid decrease on the 5th November, highlighting the impact of the national lockdown.
- Retail footfall down around -58% year-on-year throughout November.

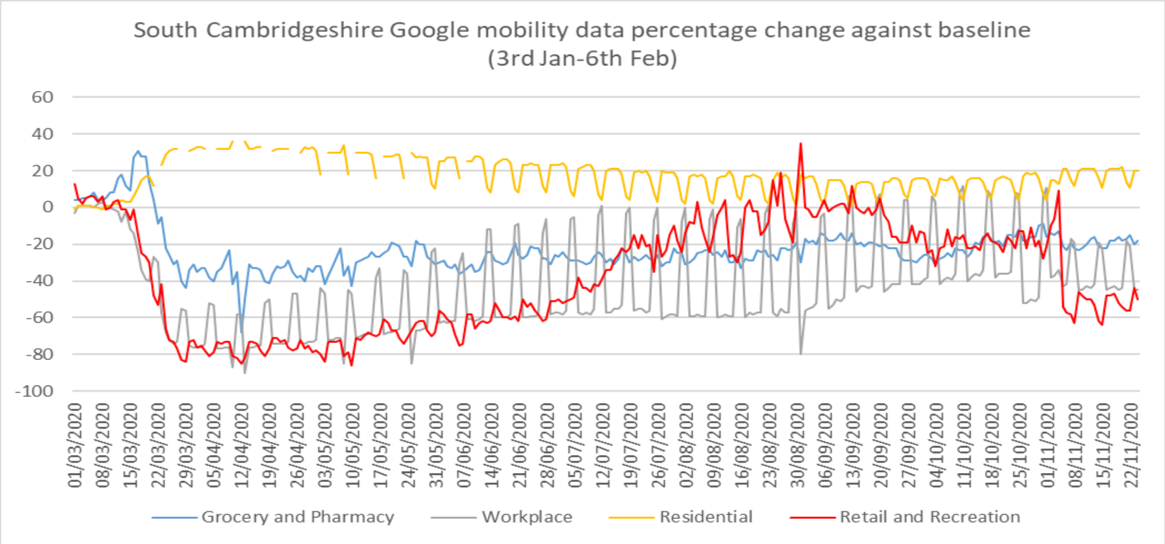
- The -38% decrease in retail footfall from October to November was evident throughout the day, this was most pronounced between 11AM-5PM.
- Despite reduced footfall a slight lunchtime peak is still evident. This is less prominent than it was in October and even less so when compared to the same time last year. Footfall has been more evenly distributed throughout the day in November, compared to October 2020 and to November 2019.

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 (24th November) compared to the median of the corresponding day in the baseline period (3rd Jan-6th Feb)





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

- Grocery visits were 3% closer to the baseline in the 7 days to 24th November compared to the 7 days prior and are now 9% below the baseline.
- Workplace visits were 1% further from the baseline in the last 7 days compared to the 7 days prior and are now 49% below the baseline.
- Residential visits were 1% closer to the baseline in the last 7 days and are now 21% above the baseline.
- Retail and recreation visits remained the same in the 7 days to 24th November compared to the 7 days prior and are now 68% lower than the baseline.

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

- Grocery visits were 2% closer to the baseline in the 7 days to 24th November compared to the 7 days prior and are now 17% below the baseline
- Workplace visits remained the same in the last 7 days and are now 37% below the baseline.
- Residential visits remained the same in the last 7 days compared to the 7 days prior and are now 18% above the baseline.
- Retail and recreation visits were 2% closer to the baseline in the last 7 days compared to the 7 days prior and are now 51% lower than the baseline.

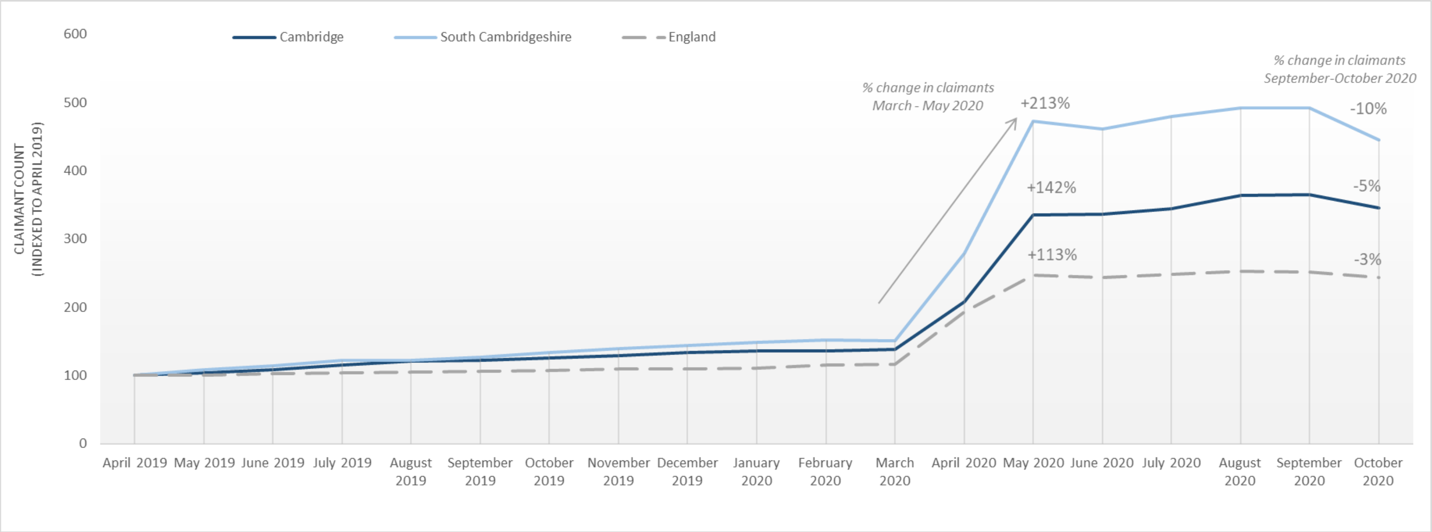
Google LLC *"Google COVID-19 Community Mobility Reports"*. https://www.google.com/covid19/mobility/ Accessed: 30/11/2020

Labour Market – Claimant Count

Overview:

- **October 2020 data has shown the most significant decreases in claimant count since March 2020**, with a 10% decrease in South Cambridgeshire and a 5% decrease in Cambridge.
- In total, **6,610 people or 3% of people aged 16+ in Greater Cambridge are currently claiming**. In South Cambridgeshire, a much higher proportion (6.4%) of 18-24 year olds are currently claiming, compared the whole population 16+ (3.2%)

Claimant Count data across Greater Cambridge, to 31st October 2020



- **6,610 claimants*** across the GCP area; **3.3% of people aged 16+**, compared to 6.3% across England;
- **There was a 10% decrease in claimants in South Cambridgeshire from September-October, the largest decrease across the county in the last month.**
- **However, South Cambridgeshire also saw the biggest increases in claimant count from** March-September 2020. Despite this, it still has the lowest proportion of residents aged 16-64 claiming (3.2%) compared to the rest of the county.

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

October 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% (3,560)	↓	3.2% (3,050)	↓	6.3%
16-17	0.6% (15)	↔	0.1% (5)	↔	0.3%
18-24	2.7% (700)	↓	6.4% (605)	↓	9.2%
25-49	5.2% (2,105)	↓	3.2% (1,645)	↓	6.9%
50+	2.1% (740)	↓	1.3% (800)	↓	2.5%

*figures may not add up due to rounding

	October 2020	Compared to March 2020 (number/%)	Proportion of residents 16-64 claiming (October 2020)
Cambridge City	3,560	+2,135 (+150%)	4%
South Cambridgeshire	3,050	+2,015 (+195%)	3%
Cambridgeshire	16,290	+9,785(+150%)	4%

Labour Market – Claimant Count by Age and Location

Overview:

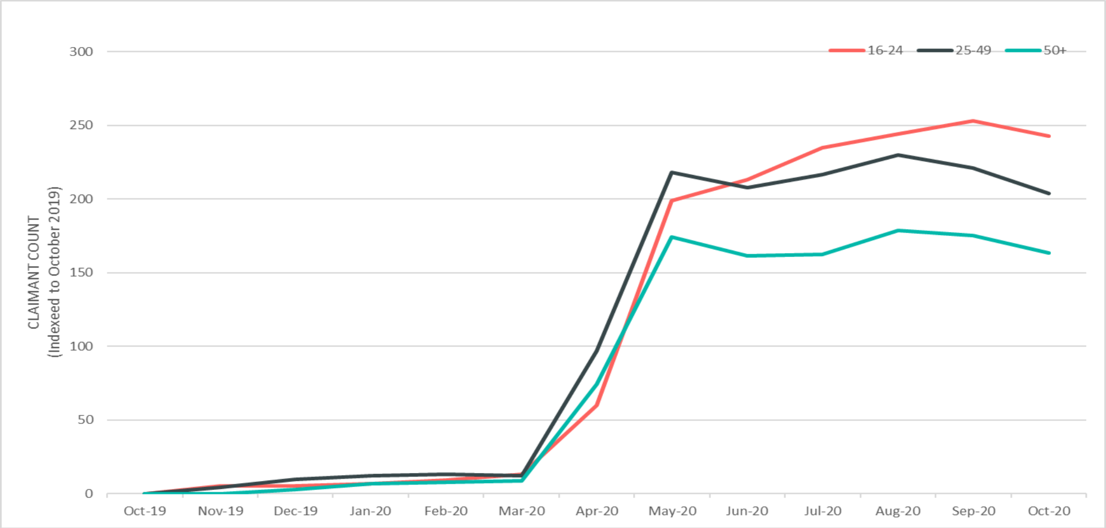
- Over the period May to October 2020 there has been **a noticeable widening in claimant counts by age groups**, with 16-24 year olds increasing at a faster rate than other age groups.
- Whilst the overall GCP rate see around 3% of people claiming, **Kings Hedges has a much higher rate of 9% of the 16-64 population claiming**.

- The **wards with the highest claimant rates in October 2020 are all in Cambridge City**, with **Kings Hedges having the highest claimant rate (8.8%)** across Greater Cambridge.

- Looking at the **changes in claimant rate from October 2019** indicates that the following wards have seen the highest levels of change: **Newnham (800%), Caldecote (420%), The Mordens (+371%), and Foxton (343%). Note low bases.**

- **The areas with the highest levels of claimants have seen relatively low levels of change** (all less than +213%) in comparison to the wards listed above – this highlights the higher base for claimants in these areas.

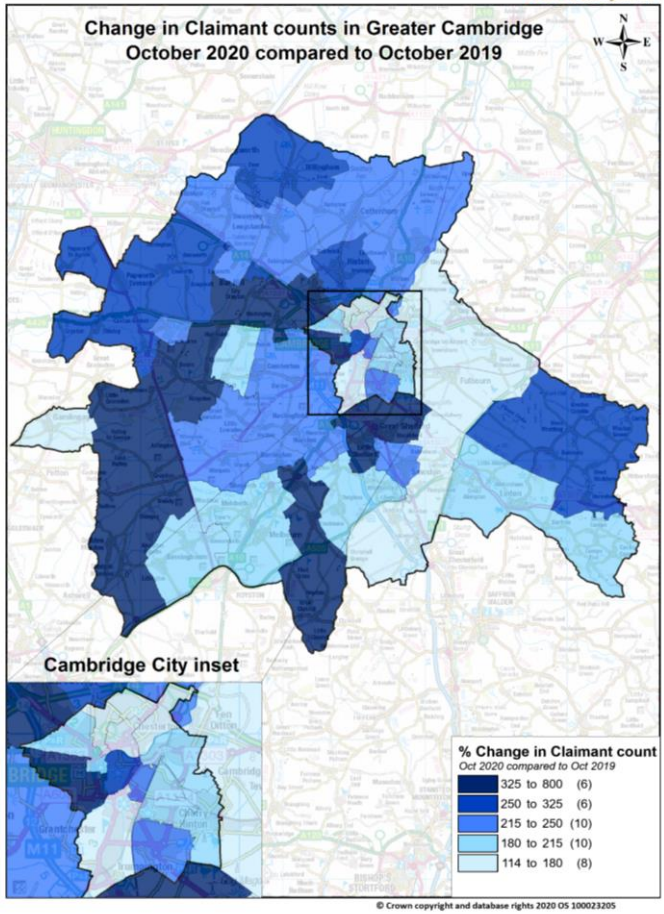
October Claimant Counts by Age Group (Indexed to 2019)



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

Ward	Claimant Rate - October
Kings Hedges	8.8
Abbey	6.4
Arbury	6.3
East Chesterton	6.2
Cherry Hinton	5.0

The wards with the highest claimant rate remain in the same order as they did in September 2020, however all areas have shown a decrease in claimant rates.



Labour Market – Job Retention Scheme

Overview:

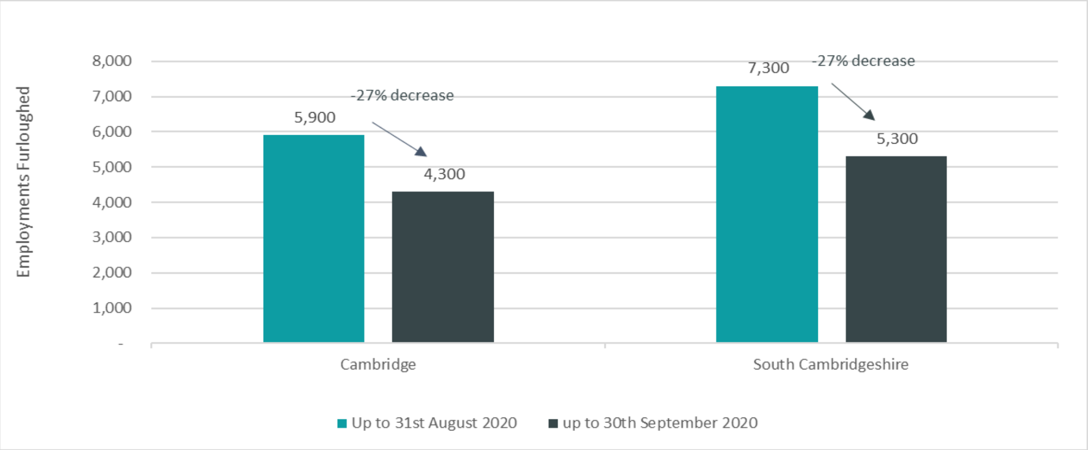
- 9,600 employments furloughed as **at September 30th 2020, representing 7% of employees**.
- **Number of employments furloughed substantially less in wave 2** and this has decreased from the end of August to the end of September by 27% across Greater Cambridge.

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

Since the beginning of July 2020, the second wave of the governments coronavirus job retention scheme opened. In the second wave, employers have had the flexibility to bring furloughed employees back to work part time. Additionally, employers have the flexibility to decide the hours and shift patterns of their employees – with the government continuing to pay 80% of salaries for the hours they do not work.

On 5 November 2020, an extension to the scheme was announced and it is anticipated that the CJRS will now remain open until 31 March 2021. However, this will be analysed separately as a third wave as employers do not need to have used the CJRS previously indicating slight differences in the eligibility criteria.

Number of employments furloughed under the Government's Job Retention Scheme (JRS) in Greater Cambridge, second wave up until 30th September



- In Greater Cambridge, there were **9,600 employments furloughed as at September 30th 2020*, representing 7% of employees aged 16-64,** this decreased by 27% from the end of August, when there were 13,200 employments furloughed, accounting for 10% of employees aged 16-64.
- **There have been substantially less employments furloughed in wave 2 compared to wave 1,** where 36,600 employments (28% of employees) were furloughed by the end of June 2020.

**Further changes from the start of August, September and October gradually reduced the total level of support available for each furloughed employee up to the end of October.*

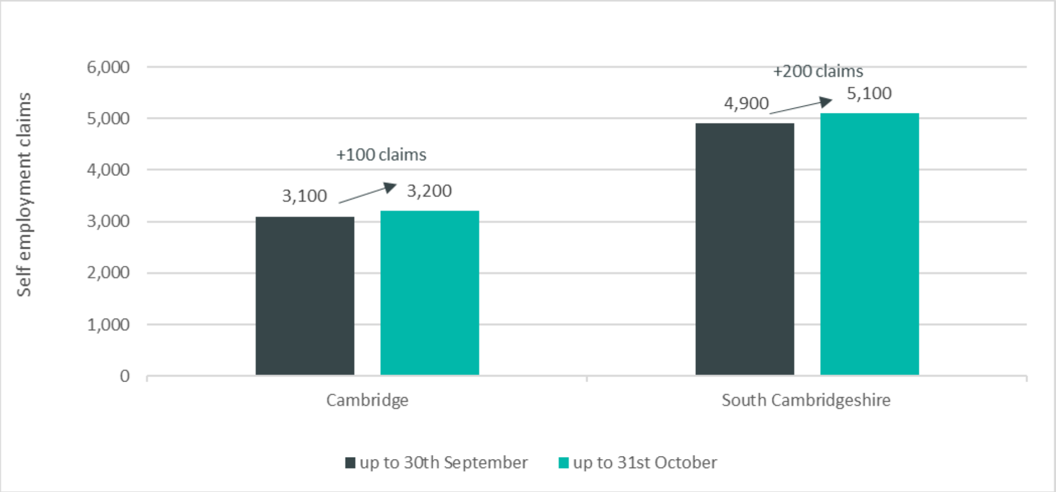
Labour Market – Self Employment Income Support Scheme

Overview:

- **8,300 claims have been made to the Self Employment Income Support Scheme (SEISS) to the end of October, worth £22.9m** in the second grant wave.
- **Take-up of the SEISS has been lower in wave 2** compared to wave 1, and take up remains lower in Greater Cambridge than regional and national rates.

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.

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



Location	Wave 1 SEISS Take-Up Rate (based on # eligible individuals)	Wave 2 SEISS Take-Up Rate (based on # eligible individuals)
Cambridge	70%	65%
South Cambridgeshire	72%	63%
East of England	76%	68%
UK	77%	69%

- The Wave 2 SEISS take-up rate across Greater Cambridge increased from 62% at the end of September to 64% by the end of October, in line with regional and national monthly increases.
- This is still lower than the regional take up rate of 68% and the national at 69%.

SEISS up until 31st October (second grant wave)

- **8,300 claims** to the SEISS across Greater Cambridge to 31st October 2020* – worth **£22.9m** (claims in wave 1 were worth £29.6m over 9,400 claims).
- Cambridge has seen **lowest number of claims** (3,200), and **lowest value of claims** (£8.4m) across the county. **South Cambridgeshire saw more claims** (5,100), to a higher value (£14.5m).
- Average claim value in Cambridge (£2,600) is lower than South Cambridgeshire (£2,800).

**Applications for the second wave of the SEISS closed on the 19th October*

Labour Market – Unemployment

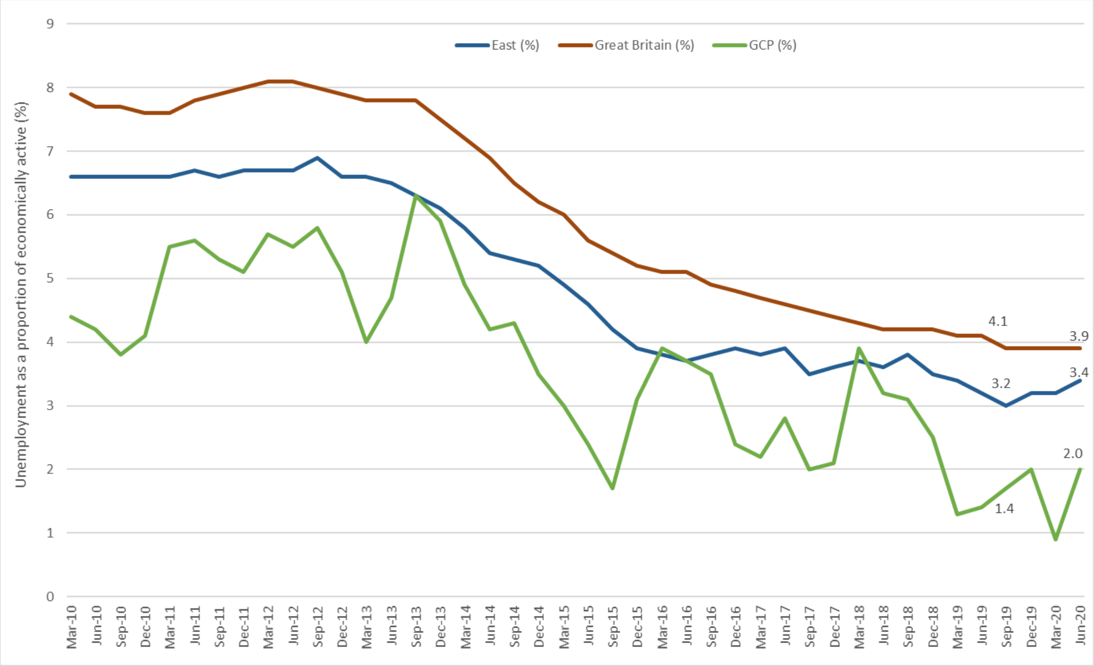
Unemployment measures people without a job who have been actively seeking work within the last four weeks and are available to start work within the next two weeks. The unemployment rate is not the proportion of the total population who are unemployed. The proportions are of the economically active population (those in work plus those seeking and available to work) who are unemployed.

Overview:

- Estimates show 4,200 people across the Greater Cambridge area were unemployed April-June 2020.
- Cambridge City has seen the largest increase in unemployment both in terms of numbers (+900 people) and rates (+28%) across the County.

The data presents the situation up to June 2020, and although this covers the period after the implementation of the coronavirus (COVID-19) social distancing measures furlough and other employment support measures were still in place during this reference period.

- Historically, unemployment rates have been falling over the past decade and in the past few years Greater Cambridge unemployment rate has been falling away from the regional and national average.
- **Estimates for April to June 2020 show 4,200 people across the Greater Cambridge area were unemployed, 700 more than a year earlier and an increase of 600 compared to the first quarter of 2020.**
- In Quarter 2 of 2020, Greater Cambridge saw a 1.1 percentage point increase from Q1 of 2020, and a 0.6 percentage point increase from Q2 2019 - **both greater increases compared to regional and national average equivalents**.
- **Cambridge City has seen the largest increase in unemployment both in terms of numbers (+900 people) and rates (+28%) across the County since Q2 in 2019.** The greatest of this increase was seen between Q1 and Q2 of 2020.
- **South Cambridgeshire had the second highest increases across the County in unemployment after Cambridge, with a 12% increase since this time last year**. This increase occurred between Q1 and Q2 of 2020.



District Unemployment (modelled)

	Quarter 2 2020	Compared to Quarter 1 2020 (number/%)	Compared to Quarter 2 2019 (number/%)	Proportion of residents unemployed (Quarter 2 2020)
Cambridge City	2,300	+400 (+21%)	+500 (+28%)	3%
South Cambridgeshire	1,900	+200 (+12%)	+200 (+12%)	2%

Note: all district level data numbers are model-based estimates of unemployment. This is a new modelling methodology to produce modelled estimates of unemployment levels and rates for local authority districts and unitary authorities (LAD/UAs).

Labour Market – Vacancies

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

Overview:

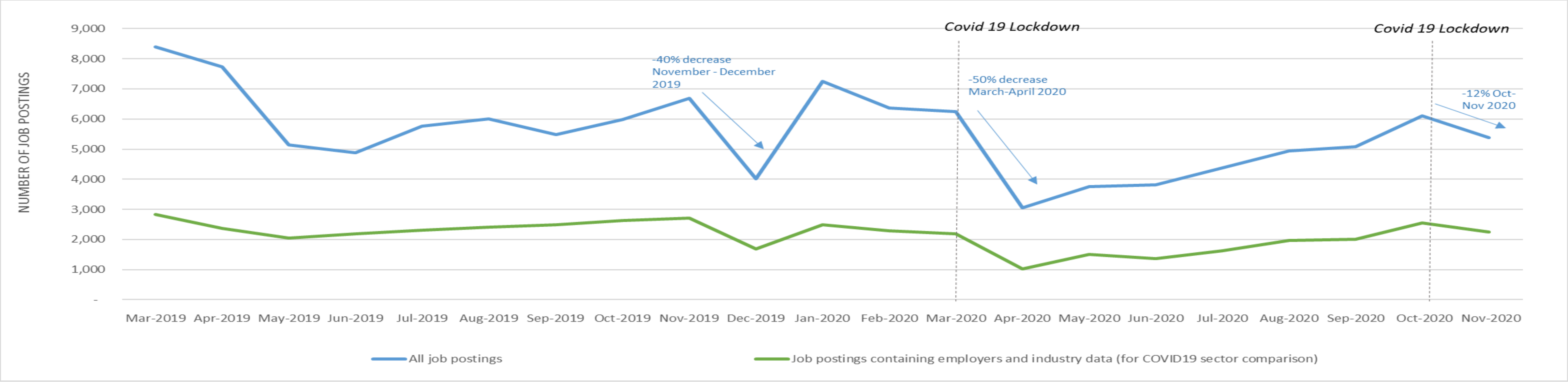
- In November 2020, **total postings were -20% lower than November 2019**.
- **Job postings were down by -9%** in the last three months compared to the same period last year.

- There were **5,374 postings across Greater Cambridge in November 2020, down by -12% from October. This is in line with a national decrease of -12%.**
- **In November 2020, total postings were -20% lower than November 2019.**
- Looking at the last three months (September-November) **job postings were down by -8.8.% when compared to September to November in 2019.**

Job postings from September to November in 2020 compared to 2019

District	Sep-Nov 2019	Sep-Nov 2020	% Difference
Cambridge	17,146	15,633	-8.8
South Cambridgeshire	1,004	927	-7.7
Greater Cambridge	18,150	16,560	-8.8

Monthly job postings across Greater Cambridge



Labour Market – Vacancies by Sector

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

Overview:

- Decreased vacancies in November 2020 has resulted in most employment sectors having less vacancies than the same time last year, except for **Human Health & Social work activities and Public Administration & Defence which have more vacancies in the Greater Cambridge area**.
- **All sectors except for "Financial & Insurance Activities" have increased vacancies in the Greater Cambridge area since April 2020** – Accommodation and Food Service activities has seen the biggest increase (+443%) (note low base).

Employment Sector	Vacancies in Greater Cambridge: November 2020	Greater Cambridge % Difference April-November 2020	National % Difference April-November 2020
HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	711	74.7	25.9
EDUCATION	518	217.8	127.6
PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	261	96.2	112.6
MANUFACTURING	237	115.5	126.2
WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	100	122.2	200.0
ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	77	234.8	163.4
INFORMATION AND COMMUNICATION	71	65.1	72.7
ACCOMMODATION AND FOOD SERVICE ACTIVITIES	38	442.9	219.1
OTHER SERVICE ACTIVITIES	25	13.6	65.4
PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	96	405.3	172.6
FINANCIAL AND INSURANCE ACTIVITIES	27	-3.6	99.6
CONSTRUCTION	35	400.0	258.2
TRANSPORTATION AND STORAGE	19	216.7	306.3
REAL ESTATE ACTIVITIES	19	137.5	113.3
ARTS, ENTERTAINMENT AND RECREATION	10	233.3	172.4
OTHER SECTORS*	11	266.7	151.4

**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; AND AGRICULTURE, FORESTRY AND FISHING*

November 2020 saw a decrease **in vacancies by -12%** from October 2020, the following sectors are the only areas which have more vacancies than the same time last year[1]:

- **Human Health & Social work Activities**
- **Public Administration & Defence**

All other employment sectors have seen decreases in vacancies since the same time last year, both locally and nationally. In Greater Cambridge, recovery in the two sectors noted above is stronger than it has been nationally for this comparison period.

Nationally, all employment sectors have an increased number of vacancies when compared to April 2020, indicating a strong overall recovery. However, in Greater Cambridge, "Financial and Insurance Activities", **is yet to recover in line with national rates, with the current number of vacancies in Greater Cambridge similar to April 2020.**

Overall however, **the majority of sectors indicate a recovery** in vacancies when **compared to April 2020**

[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 November 2020, how this compares to April 2020, November 2019 and a national comparison.

Employment Sector	Vacancies in Greater Cambridge: November 2020	Greater Cambridge % Difference November 2019-2020	Greater Cambridge % Difference April-November 2020	National % Difference November 2019-2020	National % Difference April-November 2020
HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	711	41.4	74.7	19.8	25.9
EDUCATION	518	-15.5	217.8	-20.4	127.6
PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	261	-31.1	96.2	-23.4	112.6
MANUFACTURING	237	-26.2	115.5	-29.0	126.2
WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	100	-45.4	122.2	-22.7	200.0
ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	77	-15.4	234.8	-23.0	163.4
INFORMATION AND COMMUNICATION	71	-41.8	65.1	-28.7	72.7
ACCOMMODATION AND FOOD SERVICE ACTIVITIES	38	-59.1	442.9	-72.3	219.1
OTHER SERVICE ACTIVITIES	25	-80.9	13.6	-34.4	65.4
PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	96	29.7	405.3	-17.3	172.6
FINANCIAL AND INSURANCE ACTIVITIES	27	-37.2	-3.6	-23.1	99.6
CONSTRUCTION	35	-14.6	400.0	-19.3	258.2
TRANSPORTATION AND STORAGE	19	-17.4	216.7	-19.1	306.3
REAL ESTATE ACTIVITIES	19	-34.5	137.5	-19.3	113.3
ARTS, ENTERTAINMENT AND RECREATION	10	-66.7	233.3	-62.2	172.4
OTHER SECTORS*	11	-63.3	266.7	-36.6	151.4

**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; AND AGRICULTURE, FORESTRY AND FISHING*