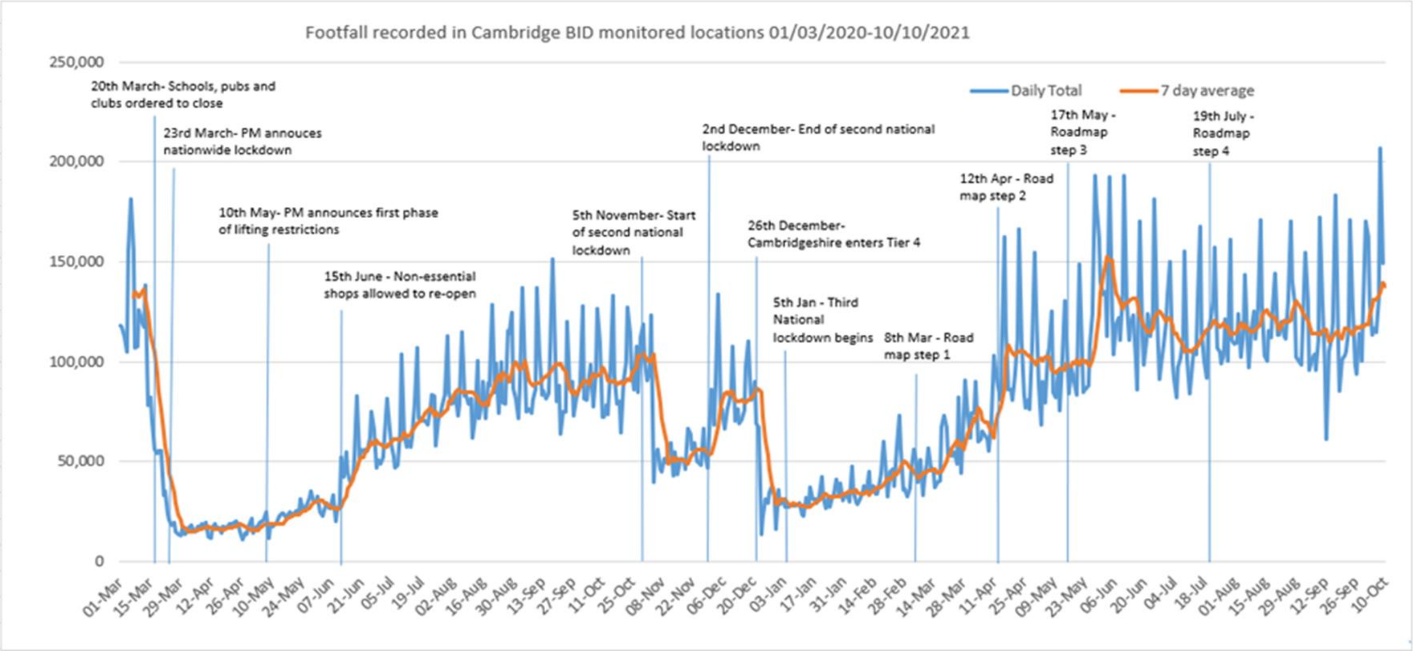
Consumer Behaviour – Footfall

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

Overview:

- **Comparing average daily footfall in September 2021 overall to August 2021 overall shows a -6% decrease.**
- **Overall retail footfall was down by -15% when comparing September 2021 to September 2019, but volumes were 20% above September 2020.**



Cambridge BID footfall data:

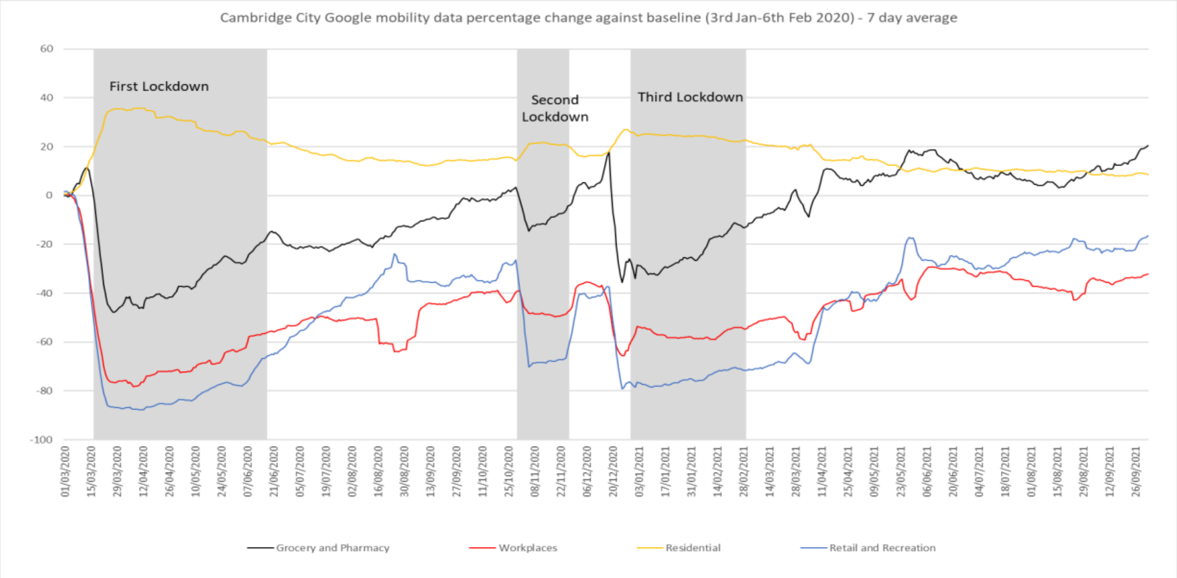
- Comparing average daily footfall in September 2021 overall to August 2021 overall shows a -6% decrease.
- The chart above highlights footfall decreasing into September following higher volumes over the summer holidays, before stabilising and increasing in early October.
- Overall retail footfall across all Cambridge City locations saw a increase of +11% in the latest week (04/10/2021-10/09/2021) when comparing overall counts to the week before (27/09/2021-03/10/2021).
- Overall retail footfall was down by -15% when comparing September 2021 to September 2019*, but volumes were 20% above September 2020.

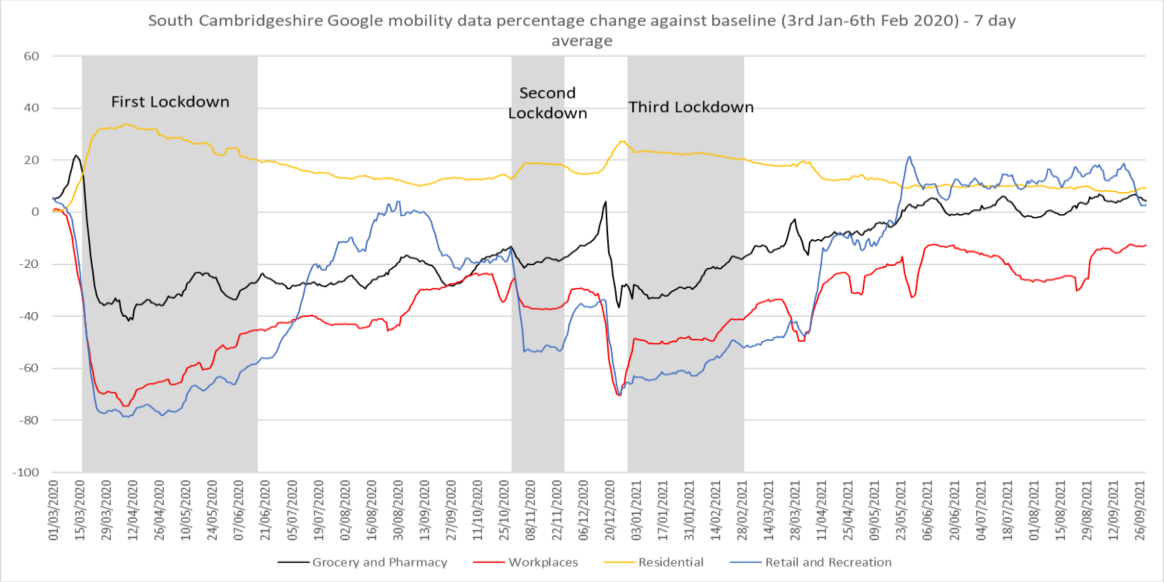
**For this comparison, all sensors except for Kings Parade and One Station Square are used. The King's Parade sensor was recalibrated in 2021 and therefore counts are no longer comparable. The One Station Square sensor was fitted in December 2019.*

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 (29th September 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 increased by 6% in September 2021 compared to August 2021 and are now 12% above the baseline.
- Workplace visits increased by 4% in September 2021 compared to August 2021 and are now -35% below the baseline.
- Residential visits decreased by -1% % in September 2021 compared to August 2021 and are 9% above the baseline.
- Retail and Recreation visits decreased by -1% in September 2021 compared to August 2021 are -22% lower than the baseline.

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

- Grocery visits increased by 5% in September 2021 compared to August 2021 and are now 5% above the baseline.
- Workplace visits increased by 11% in September 2021 compared to August 2021 and are now -15% below the baseline.
- Residential visits decreased by -1% in September 2021 compared to August 2021 and are 8% above the baseline.
- Retail and recreation visits increased by 1% % in September 2021 compared to August 2021 and are now 14% above the baseline.

Google LLC *"Google COVID-19 Community Mobility Reports"*. https://www.google.com/covid19/mobility/ Accessed: 04/10/2021

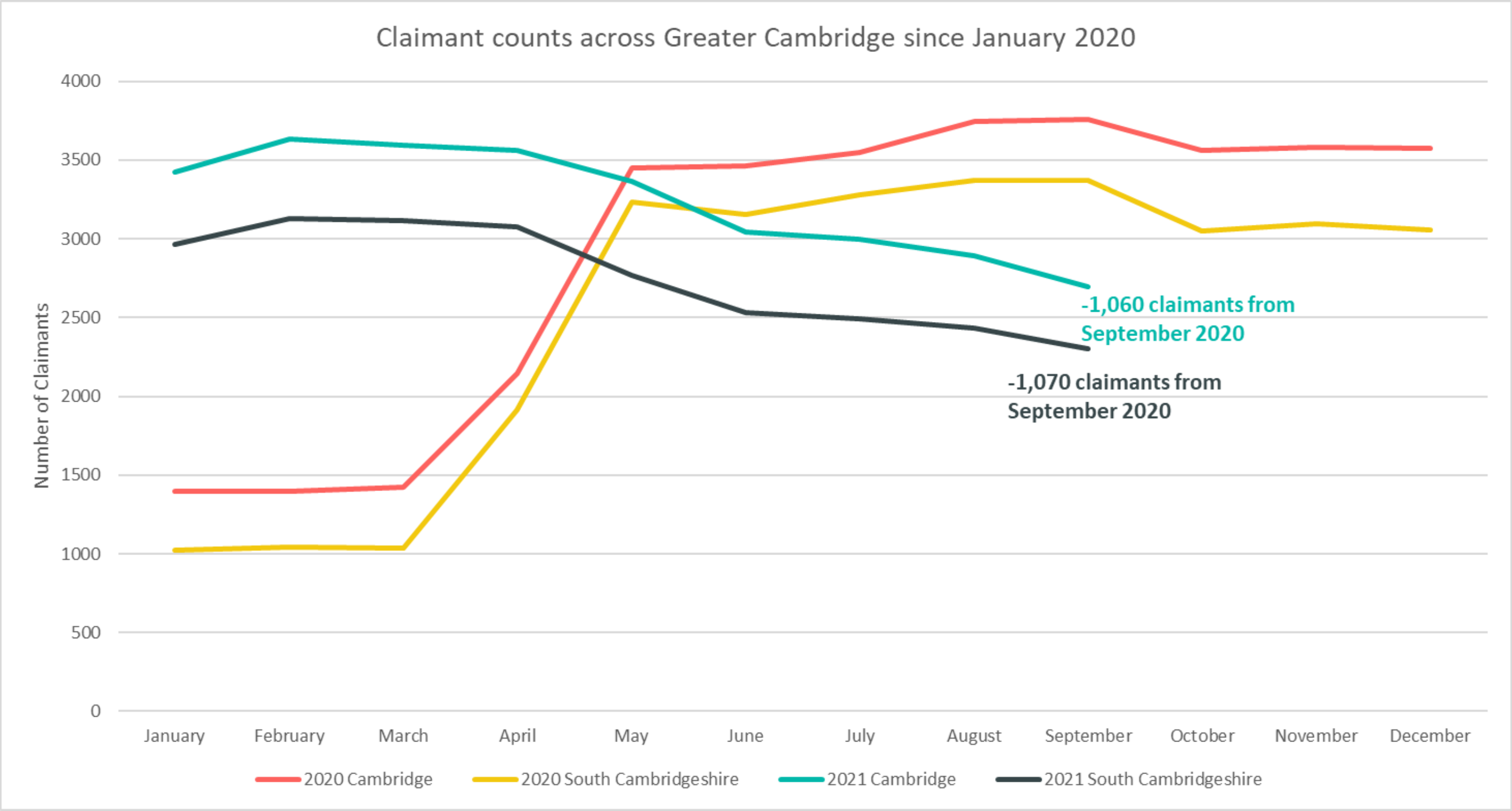
**Residential visits above baseline levels is partly influenced by people working from home.*

Labour Market – Claimant Count

Overview:

- **September 2021 data showed further decreases in claimant counts, there was a -6% decrease from August 2021 across Greater Cambridge, with a -7% decrease in Cambridge, -5% in South Cambridgeshire, compared with -5% across England overall.**

Claimant Count data across Greater Cambridge, as at 9th September 2021



- **4,995 claimants*** across the GCP area; **2.7% of people aged 16-64**, compared to 5.1% across England. This compares to **2,460 claimants (1.3% of people aged 16-64)** across the GCP area in March 2020, a +103% increase.

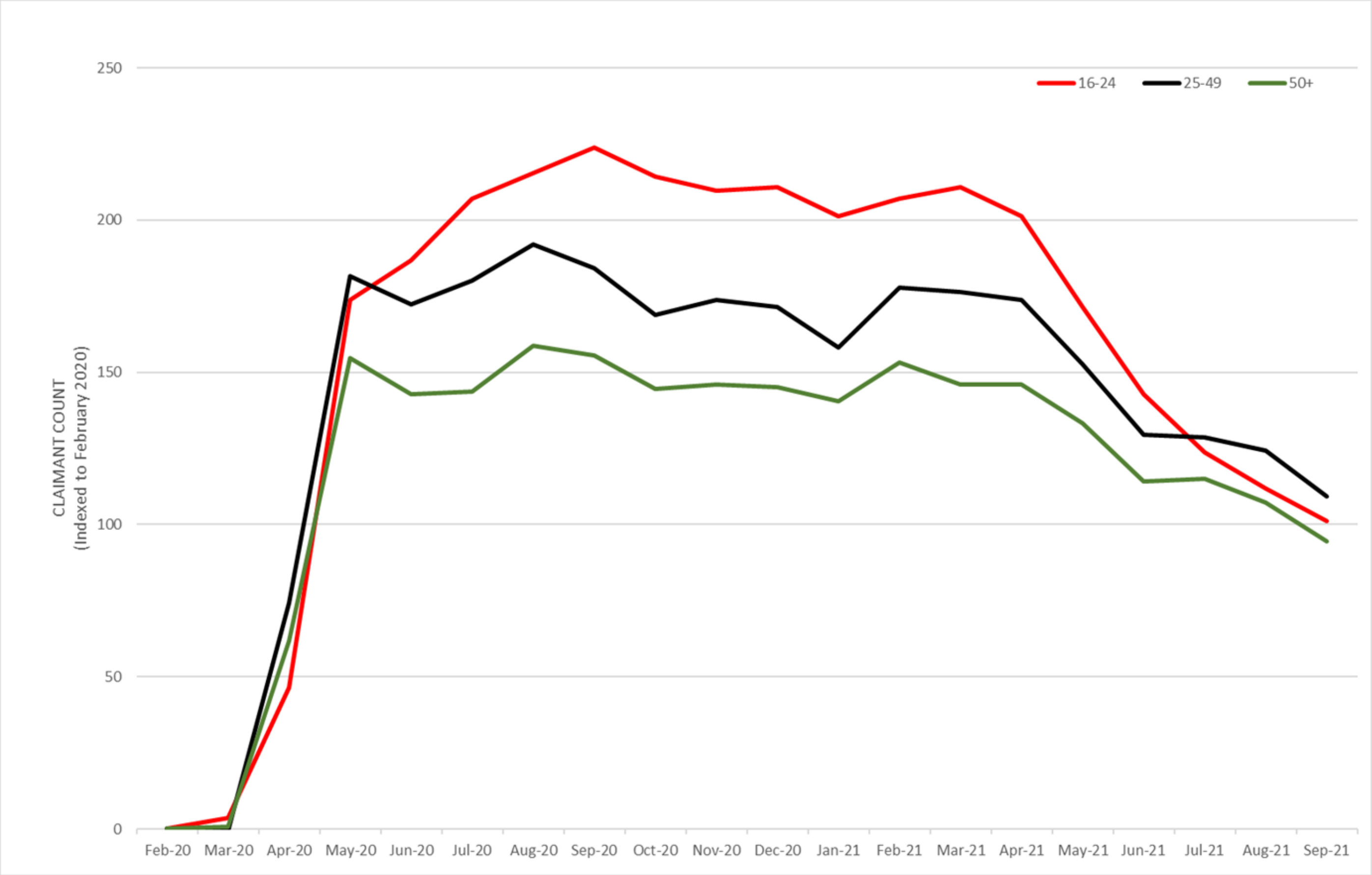
**this figure includes all residents over the age of 16 (not just working age)*

Labour Market – Claimant Count by Age

Overview:

- **In September 2021, there was a -5% decrease in claimants aged 16-24 from August 2021, with a -7% decrease in claimants aged 25-49 and a -6% decrease in claimants aged 50+. This has further narrowed the gap in claimant counts by age group which was observed between March 2020-April 2021.**

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



September 2021 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+	3.1% (2,695)	↓	2.4% (2,300)	↓	5.1%
16-17	0.4% (10)	↑	0.3% (10)	↑	0.2%
18-24	1.7% (440)	↓	4.1% (390)	↓	6.5%
25-49	4.0% (1,575)	↓	2.6% (1,345)	↑	5.7%
50+	1.9% (670)	↓	0.9% (555)	↔	2.0%

*figures may not add up due to rounding

Labour Market – Claimant Count by Location

Overview:

- Whilst the overall GCP rate sees around 2.7% of people aged 16-64 claiming, **Kings Hedges has a higher rate of 7.3% of the 16-64 population claiming.**

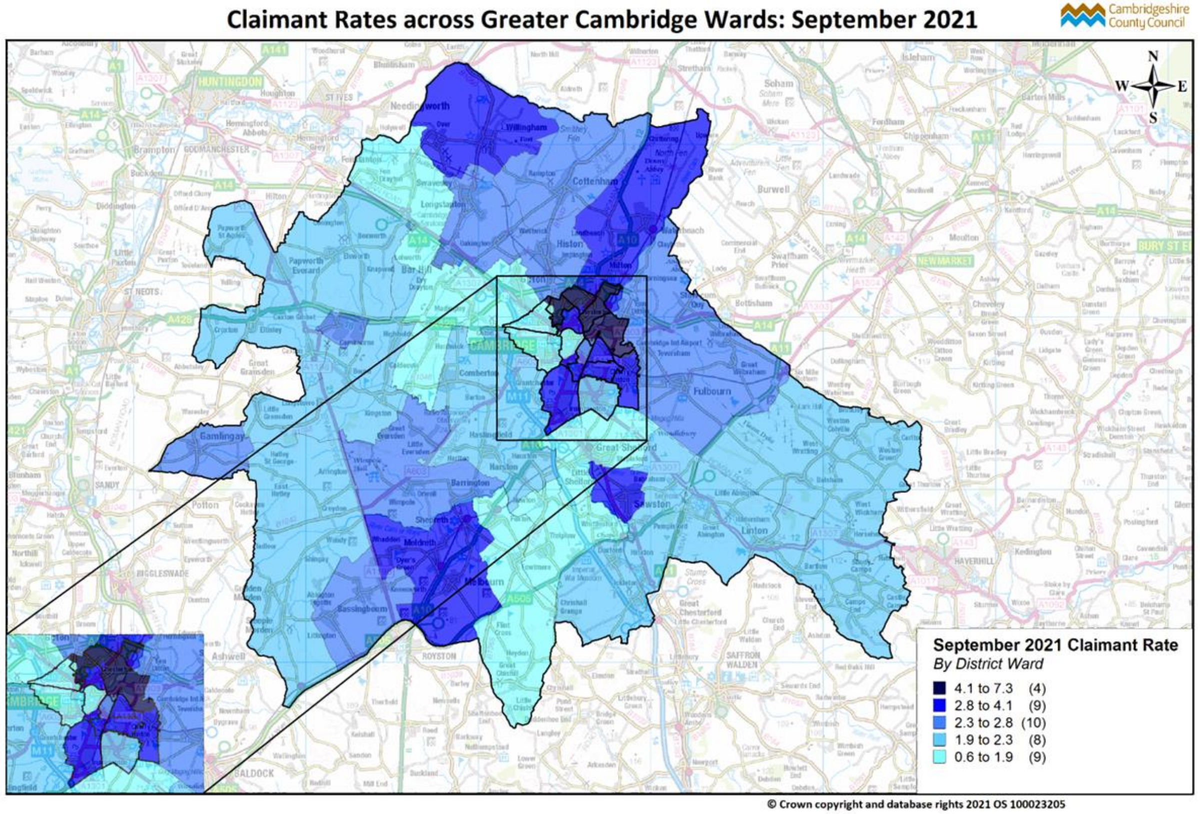
- With the exception of Melbourn (3.1%) and Milton & Waterbeach (3.0%) the **top 10 wards with the highest claimant rates in September 2021 are all in Cambridge City,** with **Kings Hedges having the highest claimant rate (7.3%)** across Greater Cambridge.

- **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%), 2.3% higher than in September 2021.

- **The lowest claimant rates across Greater Cambridge are in the Castle and Newnham (both 0.6%) and Market wards (1.2%).**

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

Ward	Claimant Rate – September 2021	Claimant Rate – September 2019
Kings Hedges	7.3	3.2
Abbey	5.5	2.2
Arbury	5.2	2.8
East Chesterton	5.0	2.3
Cherry Hinton	3.9	1.6



The top 5 wards with the highest claimant rate remain the same as they did in August 2021.

Labour Market – Claimant Count by Location

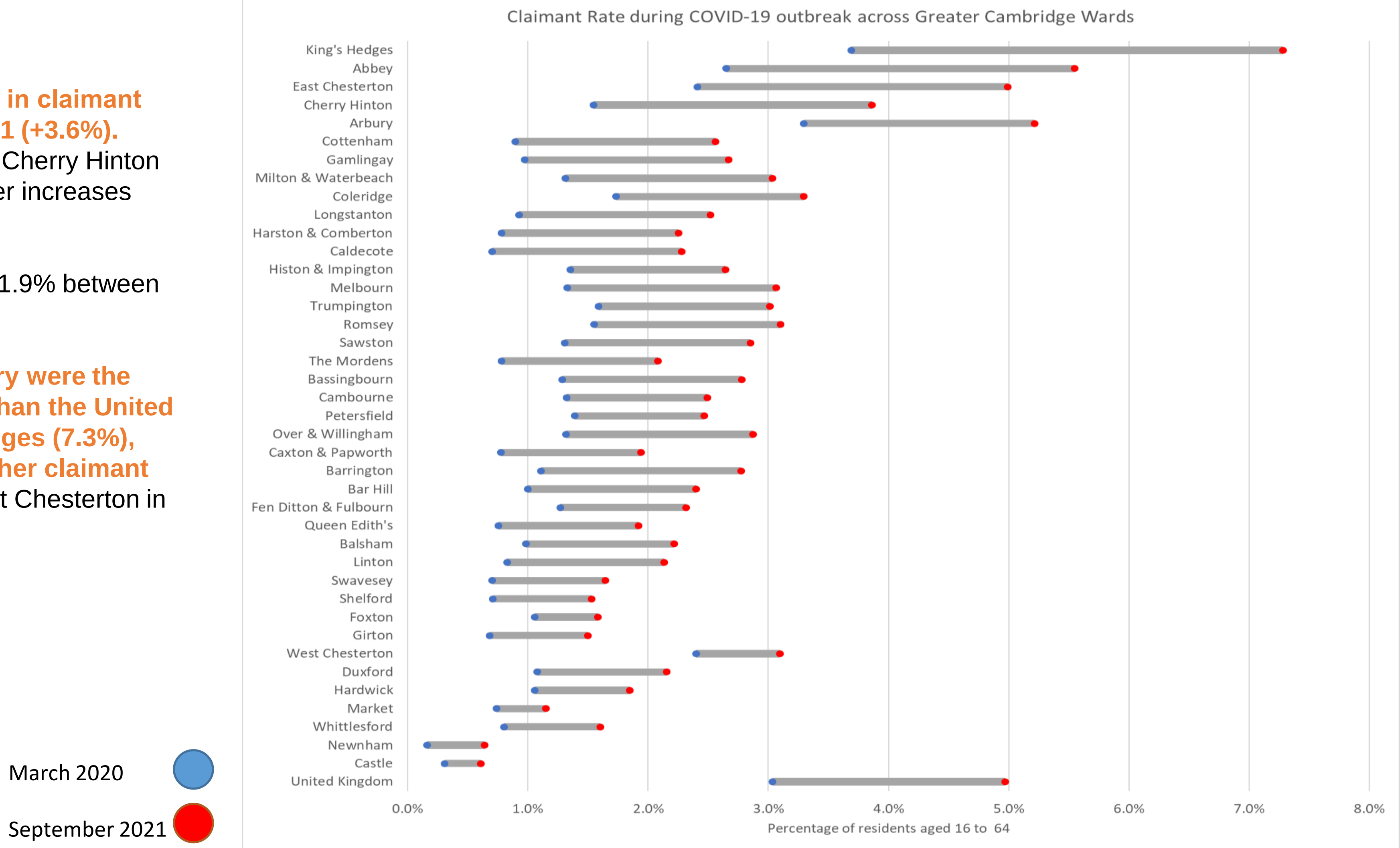
Overview:

- Whilst United Kingdom saw an increase of +1.9% in claimant rate between March 2020 and September 2021, King's Hedges saw an increase of +3.6%.

- **King's Hedges had the largest increase in claimant rate from March 2020 to September 2021 (+3.6%).** Abbey (+2.9%), East Chesterton (+2.6%), Cherry Hinton (2.4%) and Arbury (+1.9%) also have larger increases relative to the majority of wards.

- The United Kingdom saw an increase of +1.9% between March 2020 and September 2021.

- **In March 2020, Kings Hedges and Arbury were the only wards with higher claimant rates than the United Kingdom**. **In September 2021, King Hedges (7.3%), Abbey (5.5%), Arbury (5.2%) all had higher claimant rates than the United Kingdom** with East Chesterton in line with the United Kingdom (5.0%)



Note: While the Job Retention Scheme came to an end on the 30th of September, data covering claims up until the end of the scheme will not be available until November 2021.

Labour Market – Job Retention Scheme

Overview:

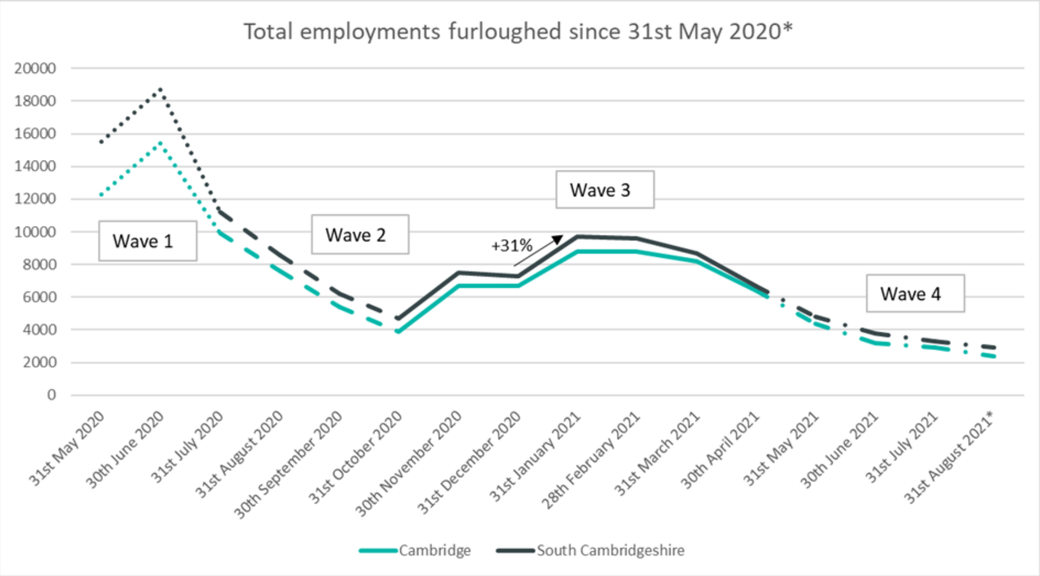
In the fourth wave of the governments coronavirus job retention scheme, **at August 31st 2021**:

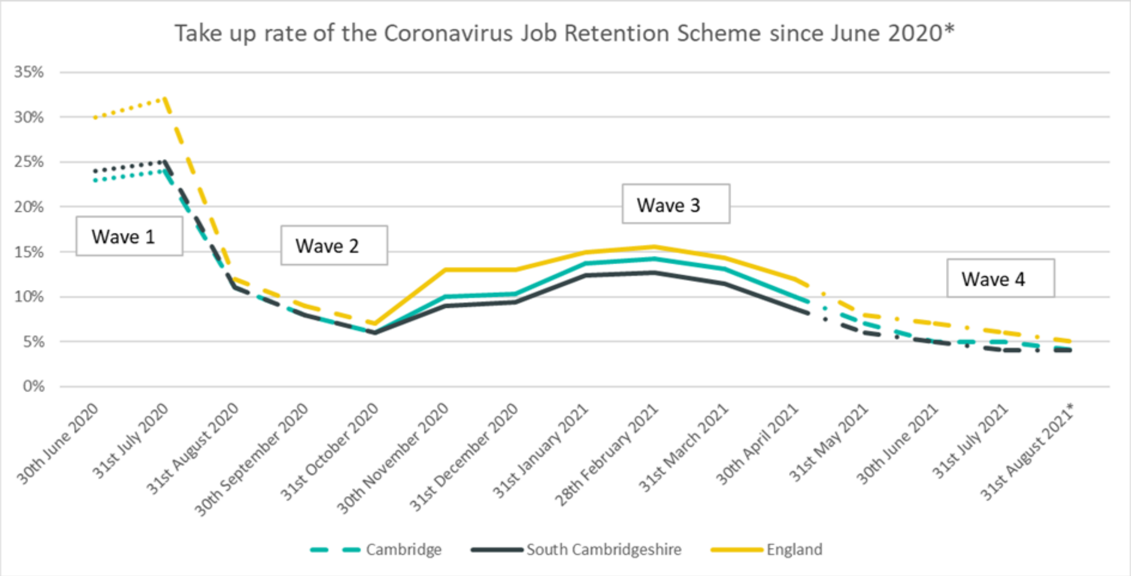
- **5,300 employments furloughed across the GCP area, representing a take-up rate of 4%, based on eligible employments.**
- **Employments furloughed across the GCP area decreased by 900 (-15%) from the 31st July to 31st August 2021. This is comparable to a -15% decrease across England overall.**
- 2,400 employments furloughed in Cambridge and 2,900 in South Cambridgeshire, accounting for 2.8% and 3.0% of employees aged 16-64 respectively, these are slightly higher than Cambridgeshire overall (2.7%) but lower than nationally (3.2%).
- **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.



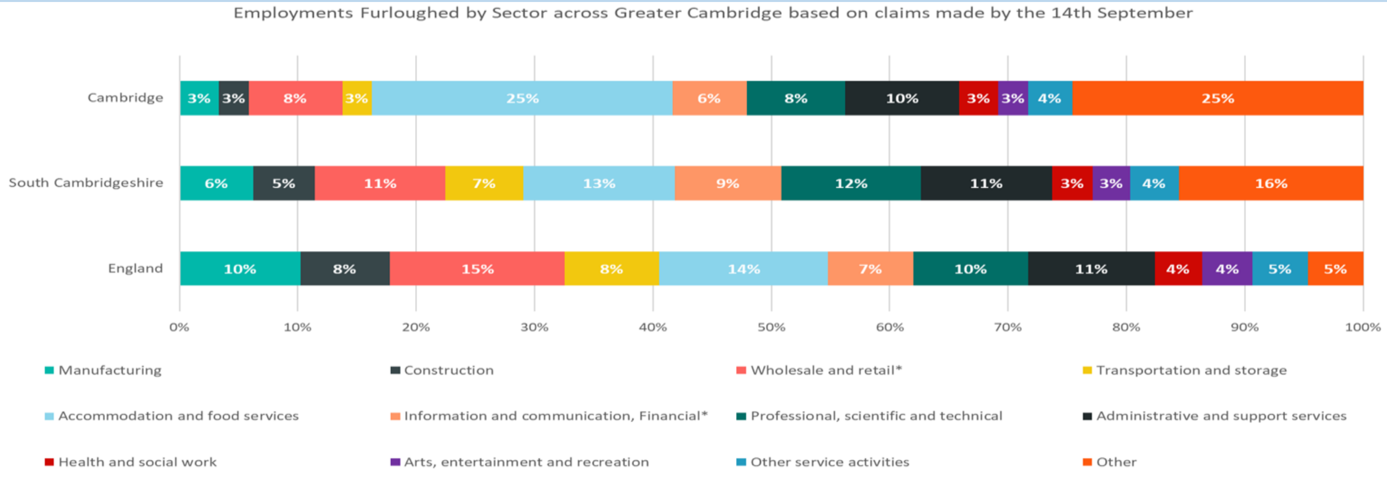


Note: While the Job Retention Scheme came to an end on the 30th of September, data covering claims up until the end of the scheme will not be available until November 2021.

Labour Market – Furloughed by Sector

Overview:

- Across the Greater Cambridge area overall, **the sector with highest proportion of employments furloughed (20%) is the Other* sector, which includes the Education sector.**
- **This sector accounts for a higher proportion of employments furloughed locally than it does nationally** (20% across the Greater Cambridge area overall compared with 5% nationally), **this is most notable in Cambridge (25%).**



Employment Sector	% Change in Employments furloughed August to September 2021
Manufacturing	-21%
Accomodation and food services	-20%
Arts, entertainment and recreation	-17%
Other*	-15%
Health and social work	-14%
Construction	-13%
Wholesale and retail*	-12%
Other service activities	-9%
Professional and scientific and technical	-8%
Transportation and Storage	-7%
Information and Communication, Financial*	-5%
Administrive and support services	-4%

- **Across the Greater Cambridge area overall, the sector with highest proportion of employments furloughed (20%) is the Other* sector. This is because it now includes the Education sector.** This compares to 5% of employments furloughed nationally. Cambridge has a higher proportion of employments furloughed in this sector (25%) than South Cambridgeshire (16%). This sector saw a -15% decrease in employments furloughed from August to September 2021.

- **The Accommodation and Food Services sector had the second highest proportion of employments furloughed** (19% across the Greater Cambridge area overall compared with 14% nationally). This is most notable in Cambridge (25%).

- **The Manufacturing sector saw the largest decrease in employments furloughed (-21%) from August to September 2021.**

- The Professional, Scientific and Technical sector accounted for 10% of employments furloughed across the GCP area, 12% in South Cambridgeshire and 8% in Cambridge. This sector saw a -8% decrease in employments furloughed from August to September 2021.

Labour Market – Self Employment Income Support Scheme

Note: While claims for the fifth SEISS grant closed on the 30th September, data covering claims up until the end of the scheme will not be available until November 2021.

Overview:

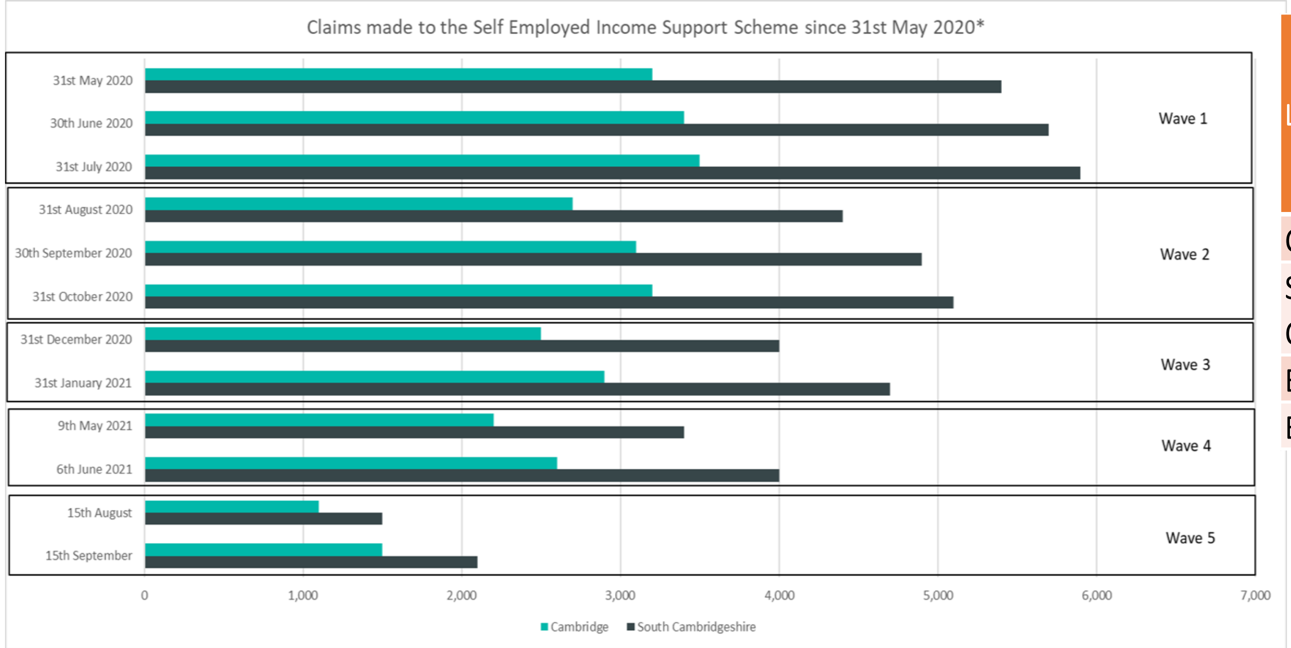
- **Greater Cambridge has had lower take up rates of the SEISS in all five waves compared to regionally and nationally, except for in the fifth wave where Cambridge City had a slightly higher take up rate (32%) compared to regionally (31%).**
- **£128.4 million worth of claims have been made to the SEISS across Greater Cambridge since the start of the pandemic.**
- **The fifth wave of the scheme so far has seen 3,600 claims made across the GCP area to the 15th September 2021, worth £8.9m.**

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 made across the GCP area to the 6th June 2021, worth £20.1m.



Location	Wave 1 SEISS Take-Up Rate	Wave 2 SEISS Take-Up Rate	Wave 3 SEISS Take-Up Rate	Wave 4 SEISS Take-Up Rate	Wave 5 SEISS Take-Up Rate
Cambridge	70%	65%	58%	53%	32%
South Cambridgeshire	72%	63%	58%	49%	26%
East of England	76%	68%	64%	56%	31%
England	77%	69%	65%	58%	33%

**Based on the number of eligible individuals*

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

Labour Market – Vacancies

Data provided through EMSI by the Cambridgeshire and Peterborough Combined Authority.

Overview:

- **In September 2021, there were 30,245 unique job postings across Greater Cambridge. This is the highest number of vacancies recorded for September since 2016.***
- **From August 2021 to September 2021, postings increased by +4% across Greater Cambridge. Nationally, job postings also increased by +4% in this period.**
- **When compared to a pre-Covid-19 period*, job postings were up by 4% in September 2021, nationally they were 19% higher.**

- **In the last three months (July-September 2021) job postings were up by 28% when compared to July-September 2020.** When compared to the same period in 2019, there was no difference in unique job postings across GCP as a whole. However, South Cambridge saw a +130% increase when compared to the same period in 2019 and Cambridge City saw a -9% decrease when compared to the same period in 2019.
- **Job vacancies increased by 5% from the previous quarter (April-June 2021) across the GCP area.**

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

District	July-September 2020	July-September 2021	% Difference
Cambridge	60,886	76,248	25%
South Cambridgeshire	8,513	12,568	48%
Greater Cambridge	69,399	88,816	28%

Monthly unique job postings across Greater Cambridge