

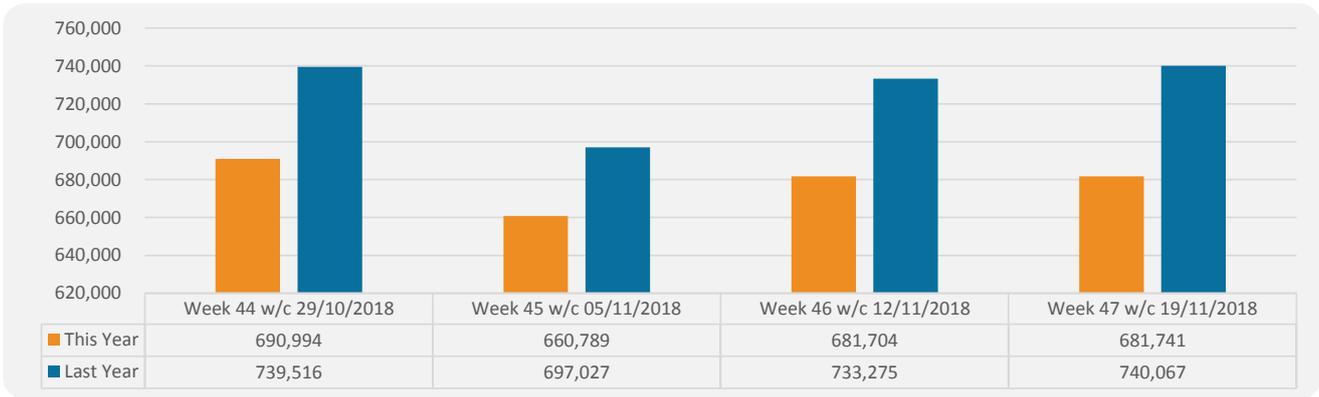
November
29/10/2018 - 25/11/2018

Region- East

Springboard Benchmarks - YoY

Shopping Centre Benchmarks		High Street Benchmarks	
Cambridge	-5.2%	Cambridge	-6.7%
East	-2.3%	East	-5.3%
UK	-3.8%	UK	-3.8%

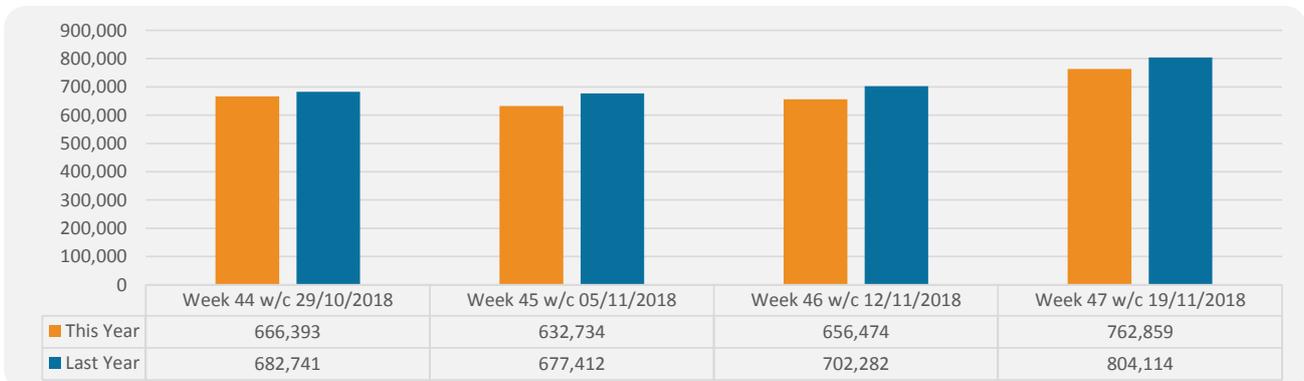
Cambridge City Centre Footfall



November 2018 Weekly Average Total	678,807	-6.7%
November 2017 Weekly Average Total	727,471	

Numbers of visitors recorded in Cambridge City Centre via footfall cameras situated in Sidney Street, Bridge Street, Kings Parade, Regent Street and Fitzroy Street.

Cambridge Shopping Centre Footfall



November 2018 Weekly Average Total	679,615	-5.2%
November 2017 Weekly Average Total	716,637	

Numbers of visitors recorded by footfall cameras in Grand Arcade, Lion Yard and The Grafton

Total Retail Footfall	High Street	Retail Park	Shopping Centre
November	-3.2%	-3.8%	-3.8%
September - November	-2.3%	-2.7%	-3.1%

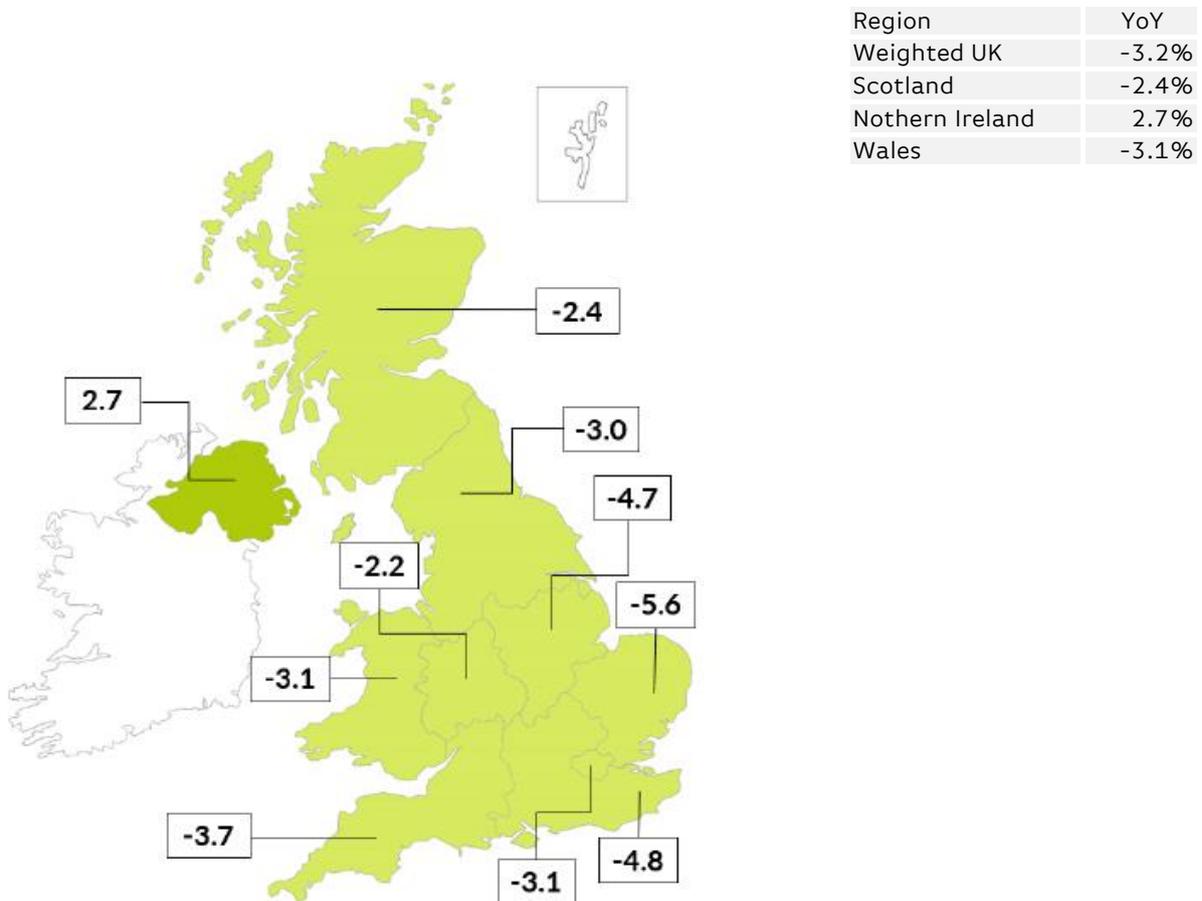
Footfall in November fell by 3.2%, a significant decline on the previous year when it grew by 0.2%. This is the twelfth month of consecutive decline. November numbers illustrate the 'Black Friday' effect of driving more shopping online during the period which is also becoming longer.

Northern Ireland sustained its growth of 2.7%, similar to the previous month, and was for the second consecutive month the only region to show growth. The East, South East and East Midlands experienced the deepest declines of 5.6%, 4.8% and 4.7%, respectively.

High Street footfall declined by 3.8%, now four months of consecutive weakening of this shopping location. This was the largest decline since April 2018 when it fell by 4.0%. Northern Ireland was the only region to see growth of 4.1%, a small increase on the previous month of 4.0%. While the East Midlands and the South East suffered the deepest declines in this location, falling by 6.5% and 6% respectively, making this the sixth month of consecutive decline for both regions.

Retail Park footfall also fell deeper into decline. At -1.4% growth in November, this is the deepest fall since April 2018 when it fell by 1.8%.

Shopping Centre footfall declined by 3.8%. This was a sharper decline relative to the October 2018 rate of -3.3% and the November 2017 rate of -1.3%. This location has recorded now 20 months of consecutive monthly declines. West Midlands was the only region to see growth in this location by 1.6%.



Helen Dickinson OBE, BRC Chief Executive, said:

"Footfall continued to decline as consumers stayed away from the high street in November. With one-in-every-three-pounds of non-food purchases made online last month, Black Friday accelerated the movement from in store to online in the lead up to Christmas. The Black Friday discounting period also began earlier for a large number of retailers negatively impacting footfall across a longer period over the month."

"It has been a difficult year for many retailers and the outlook remains challenging as Brexit uncertainty grows. Retailers will be following the upcoming parliamentary vote closely and hoping Parliament can secure a transition period to allow businesses time to adapt to life outside the EU. Without this transition, consumers face higher prices and less choice on their shopping trips."

Commenting on the Cambridge Monthly Performance Report, Cambridge BID added:

"High Street footfall in Cambridge during November 2018 was 6.7% down when compared to November 2017. The eastern region showed a similar trend, with footfall down 5.3%, and the UK as a whole was also down 3.8%. The national commentary highlights the challenges that continue to face retailers both from increasing online sales associated with Black Friday deals and also the challenges that current political uncertainty is having on consumer spending confidence. Shopping Centre footfall in November 2018 was also down compared to the year before, by 5.2% in Cambridge, 3.8% across the UK and 2.3% in the eastern region."

"Park & Ride Usage in November 2018 was 7.2% up compared to November 2017 and Guided Busway usage was also up xx% compared to November 2017. Both of these figures are positive, showing more journeys are being made by these modes into Cambridge. Car parking figures however show that multi-storey car park usage is down 5.3% with the greatest reduction seen in Queen Anne Terrace. Surface car park usage showed growth in usage for Shire Hall, Castle Court and Castle Hill with a reduction in Riverside and Adam & Eve. Overall though, surface car park usage was only 0.4% down in November 2018 when compared to November 2017."

"The number of visitors going into the Visitor Information Centre (VIC) was up 3.3% with just less than 10,000 people going into the VIC in November 2018."

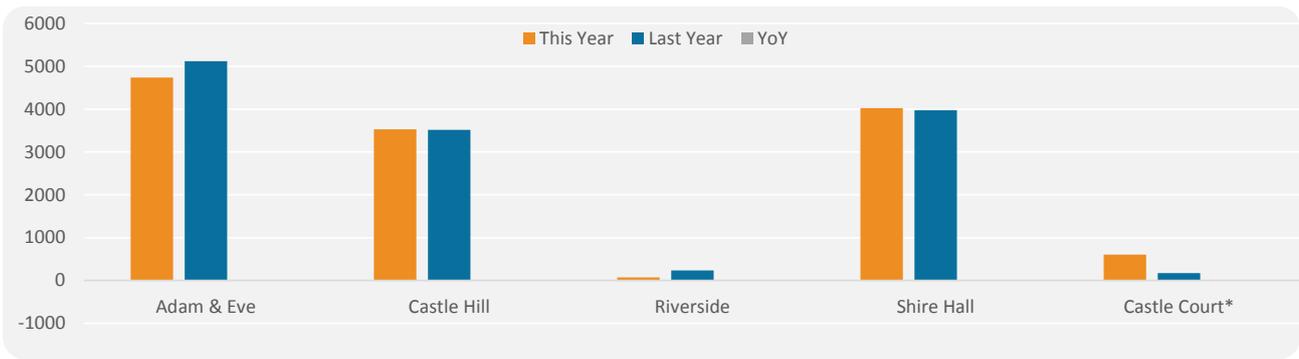
Diane Wehrle, Insights Director at Springboard, said:

"The -3.2% drop in footfall in November is indisputable evidence that Black Friday delivers no tangible benefit to bricks and mortar stores. Whilst online shopping was inevitably more prevalent than in other months, the vast majority of spending still remained in store and this is what Black Friday impacts adversely. Since 2013, when Black Friday became established as a key trading day, footfall has decreased in every year bar one and the only increase in 2017 was just +0.2%. This year, amidst all of the other challenges facing retail, the drop in footfall of -3.2% in November was the largest of any November since Springboard started publishing footfall data in 2009; and in the week of Black Friday itself footfall declined by -5.5%, more than in any week of the month. And the fact that like for like spend was down by -0.5% in November, alongside the lowest rate of growth in non-food online sales, are further indicators that the gleam of Black Friday is diminishing."

"As we head into the zenith of the retail trading calendar, both retailers and consumers alike are in the midst of the greatest degree of uncertainty in recent times. However, the fact that the parliamentary vote is not taking place until the middle of December might deliver a slight glimmer of hope for some large ticket item retailers, as consumers may purchase now rather than later in an attempt to outrun inflationary pressures that are expected should the Brexit deal not be ratified."



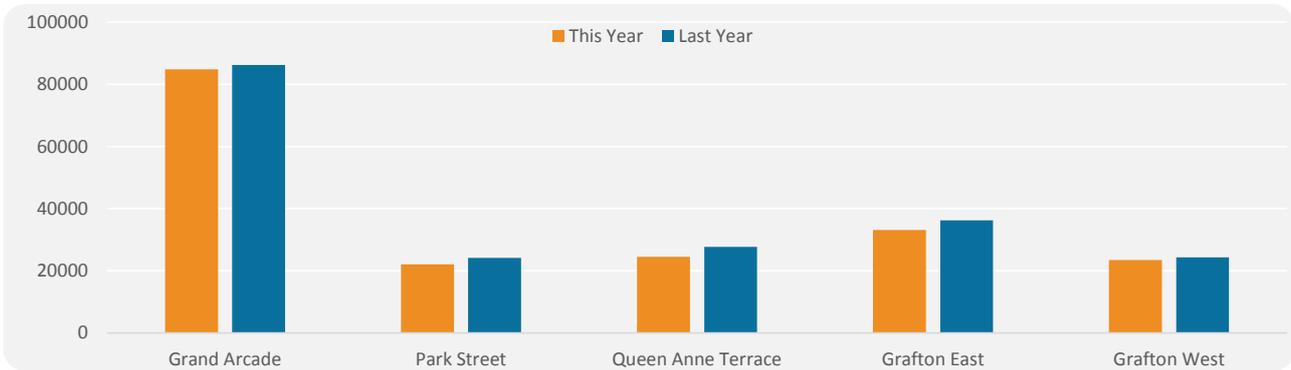
Surface Car Park Usage



	Adam & Eve	Castle Hill	Riverside	Shire Hall	Castle Court *	Total
This Year	4,737	3,529	73	4,020	601	12,960
Last Year	5,117	3,518	233	3,975	172	13,015
YoY	-7.4%	0.3%	-68.7%	1.1%	249.4%	-0.4%

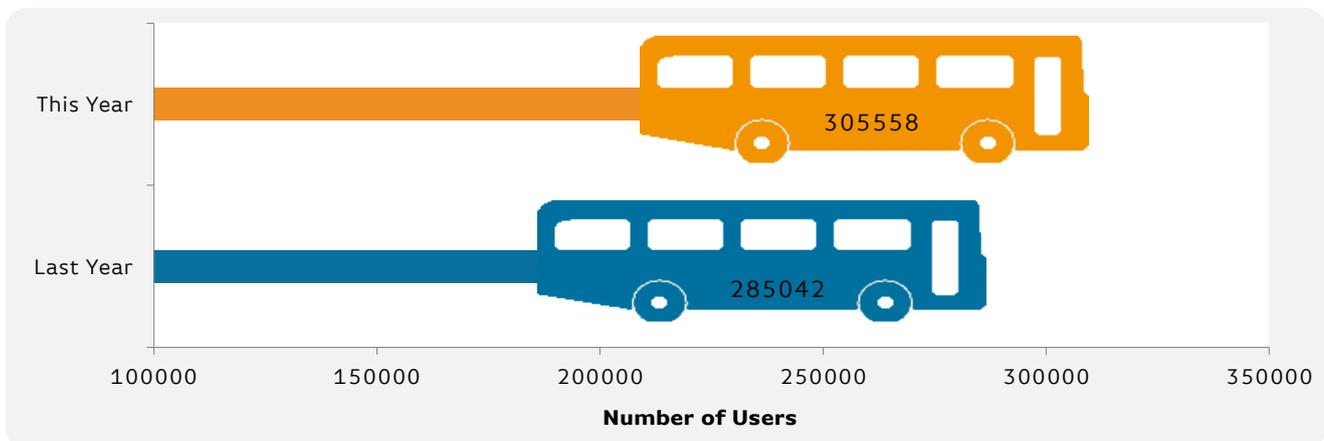
* Castle Court car park holds 299 spaces and is only available for the public to use on Saturdays and Sundays (9am - 7pm)

Multi Storey Car Park Usage



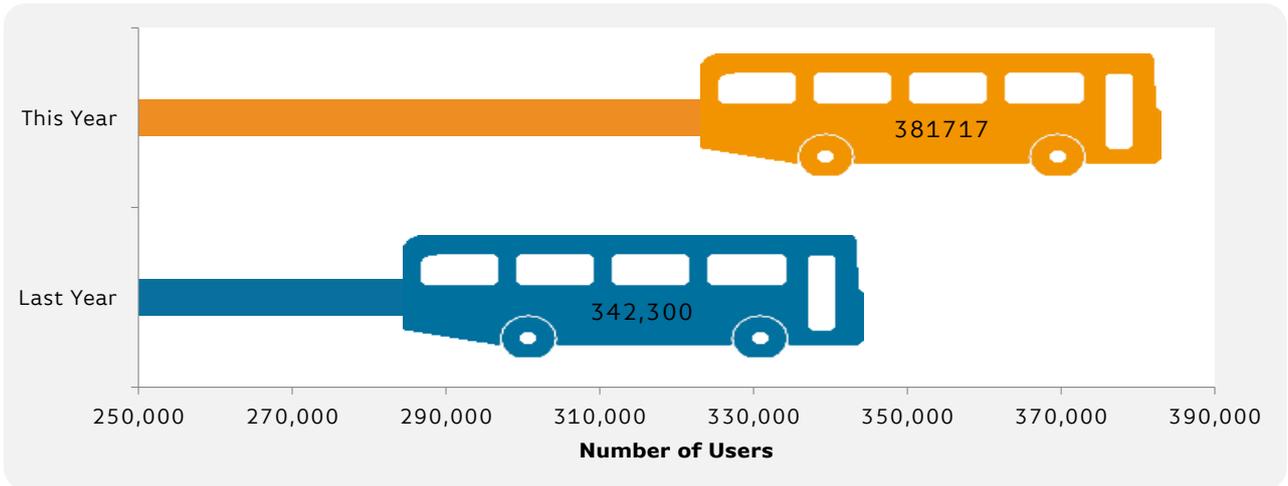
	Grand Arcade	Park Street	Queen Anne Terrace	Grafton East	Grafton West	Total
This Year	84,814	22,104	24,530	33,125	23,441	188,014
Last Year	86,234	24,124	27,702	36,263	24,296	198,619
YoY	-1.6%	-8.4%	-11.5%	-8.7%	-3.5%	-5.3%

Park & Ride Usage



% change on September 2017	% change on October 2017	% change on November 2017	Moving Annual %
5.8%	9.4%	7.2%	5.6%

Guided Busway Usage



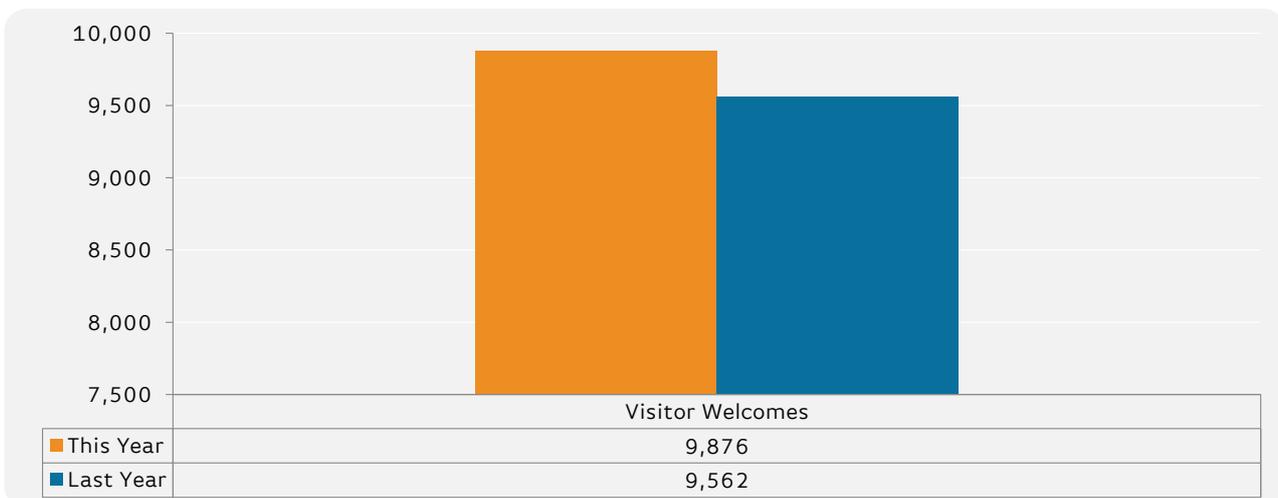
% change on September 2017	% change on October 2017	% change on November 2017	Moving Annual %
0.6%	-2.5%	11.5%	6.3%

Cambridge BID Data



*Cambridge BID have recently started using a new data capture system so we are expecting some variation in the figures

Visitor Information Centre



MA – 'Moving Annual' is the annual % change in sales/visitors for the last 52 weeks, compared to the same period last year
 YoY – 'Year on Year' is the % change in sales/visitors from the same period in the previous year
 WoW - 'Week on Week' is the % change in sales/visitors from the previous week