November 2021. 31 Oct 2021 - 27 Nov 2021

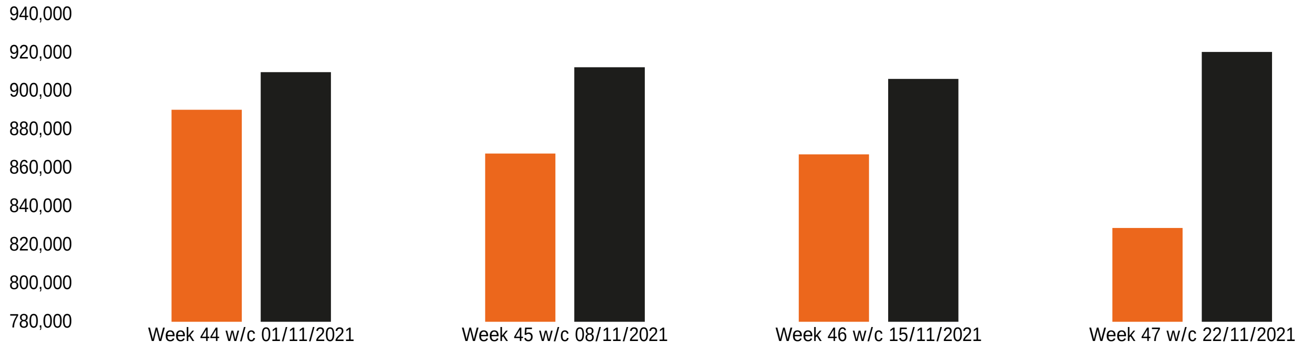
Monthly Performance Report for: Cambridge

Please Note: This report contains all available data. Some of the data usually available has been impacted by Covid-19 and therefore unable to be included

Springboard Benchmarks - vs 2019

	Shopping Centre Index	High Street Index
Cambridge	-28.3%	-5.4%
East	-21.7%	-15.7%
UK	-22.0%	-15.8%

Cambridge City Centre Footfall



	Week 44 w/c 01/11/2021	Week 45 w/c 08/11/2021	Week 46 w/c 15/11/2021	Week 47 w/c 22/11/2021
This Year	890,293	867,528	867,088	828,758
2 Years Ago	909,857	912,509	906,452	920,426

The Weekly Average Total for November 2021 was 863417

The Weekly Average Total for November 2019 was 912311

The Weekly Average Total for November 2021 was -5.36% compared to 2019

Cambridge Shopping Centre Footfall

	Week 44 w/c 01/11/2021	Week 45 w/c 08/11/2021	Week 46 w/c 15/11/2021	Week 47 w/c 22/11/2021
This Year	467,298	458,915	477,180	573,608
2 Years Ago	635,869	652,634	674,043	793,589

The Weekly Average Total for November 2021 was 494250

The Weekly Average Total for November 2019 was 689034

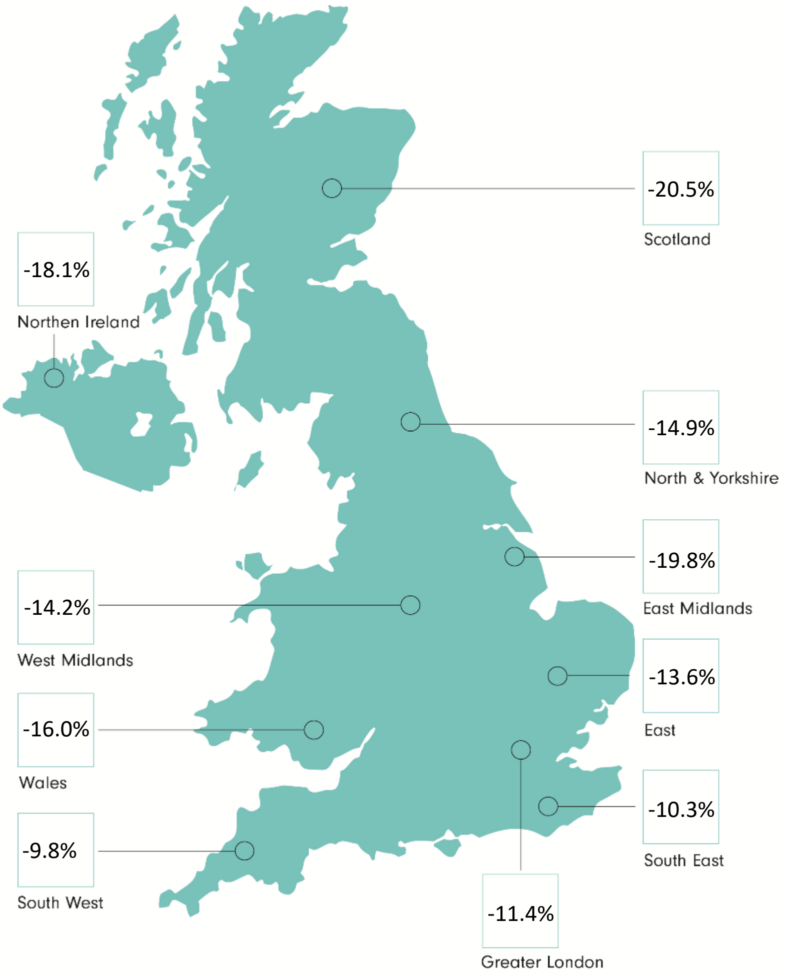
The Weekly Average Total for November 2021 was -28.27% compared to the 2019

Note:

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

UK Trends

	Total Retail Footfall	High Street	Retail Park	Shopping Centre
November 2021	-14.5%	-15.8%	-3.6%	-22.0%
September - November	-15.1%	-17.0%	-3.8%	-21.9%



Region	3 Month Average
Weighted UK	-15.1%
Scotland	-20.5%
Nothern Ireland	-19.4%
Wales	-15.8%

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Diane Wehrle, Insights Director at Springboard, said:

"Footfall in UK retail destinations worsened slightly in November to -14.5% from 2019, from -13.4% in October, however, this is still a much improved result from July when footfall was -24.2% below the 2019 level.

Footfall decreased across all three destination types from October, but the largest downward slide occurred in shopping centres which moved from -20% below 2019 in October to -22% in November. In high streets the downward slide was just -0.8% (from -15% in October to -15.8% in November) and -0.5% in retail parks (from -3.1% in October to -3.6% in November).

Despite the monthly result worsening there was some progress in the first three weeks, with footfall moving from -14.8% in the second week to -12.4% in the third week. However, it was the relatively poor uplift in footfall in the last week of the month - Black Friday week - that impacted the month as a whole; footfall shifted downward from -12.4% in the third week to -17% in week four. Black Friday was weaker than anticipated in all three destination types, although it was in high streets - where footfall over Black Friday declined from the previous week for the first time since the shopping event came to the UK - in which footfall dropped the most (from -11.9% in week three to -19.3% in week four).

It is clear that a key cause of the ongoing gap from the 2019 footfall level is that we haven't yet seen the anticipated office return. 53% of those employed continue to work from home for at least part of the week1, and it is only when this proportion starts to increase in a meaningful way that footfall will consistently return to city centres. We must also add to this the impact of the lack of international tourism, which is now unlikely to recover quickly given the emergence of the Omicron variant.

A further aspect is a long term trend since 2009 of a decline in footfall in UK destinations of around -1.5% a year, primarily due to the migration of a proportion of retail spending online and so, even in the absence of Covid, it is likely that footfall would currently be around -3% lower than the 2019 level.

It is now a waiting game for retailers to see the full extent of the impact of the Omicron variant on bricks and mortar retail in December."

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

The November 2021 Cambridge Performance Report compares November 2021 with November 2019.

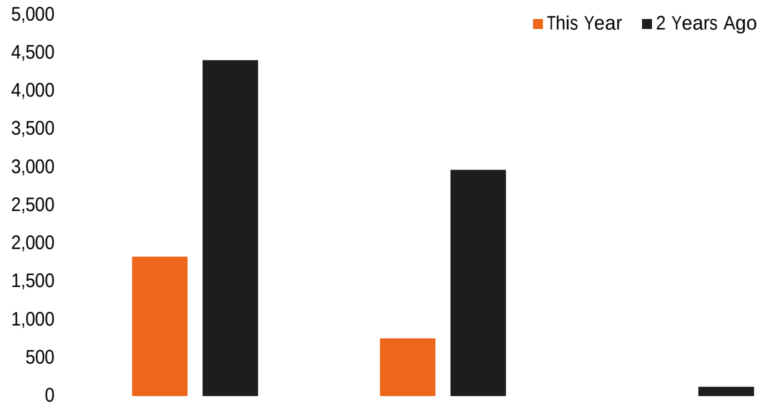
High Street footfall during November 2021 was only 5.4% DOWN against November 2019 which compares very well to the UK average of 15.8% DOWN. Shopping Centre footfall in Cambridge was 28.3% down on 2019 levels which was slightly higher than the UK average of 22% down.

The data continues to show that car parks (surface and multi-storey) are trending much closer to 2019 levels than public transport. Overall multi-storey car park usage in Cambridge in November 2021 was 12.1% down compared to 2019. Surface car parks overall, were 65.5% down in November 2021 against November 2019.

Park & Ride passenger numbers saw November 2021 40.2% down compared to November 2019 and Guided Busway passengers numbers were similar showing a 40.6% decrease compared to November 2019.

With regards to the Cambridge BID data, fewer visitor welcomes were made in November 2021 compared to November 2019 which is to be expected. The Cambridge BID Ambassadors also reported a higher number of commercial waste issues in November 2021 compared to November 2019 but fewer environmental concerns for the same comparison period.

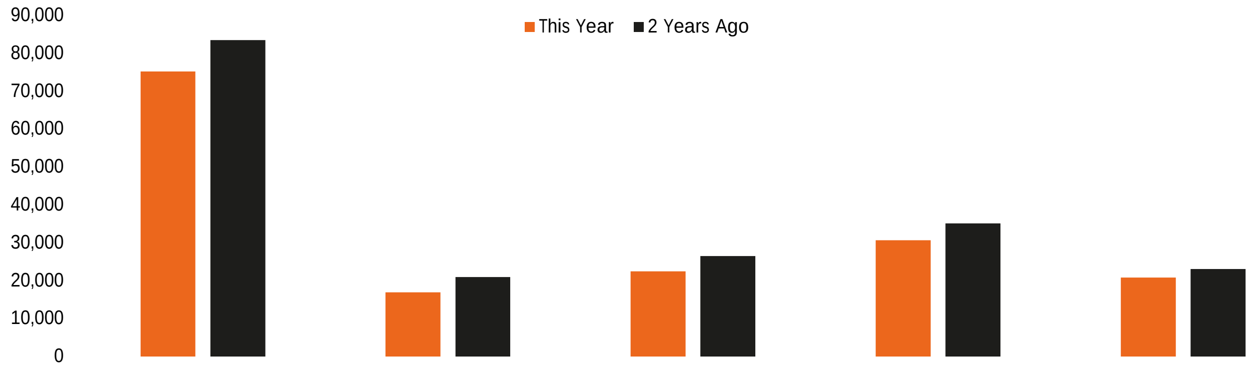
Suface Car Park Usage



	Adam & Eve	Castle Hill	Riverside	Total
This Year	1,829	759	0	2,588
2 Years Ago	4,407	2,968	123	7,498
vs 2019	-58.5%	-74.4%	-100.0%	-65.5%

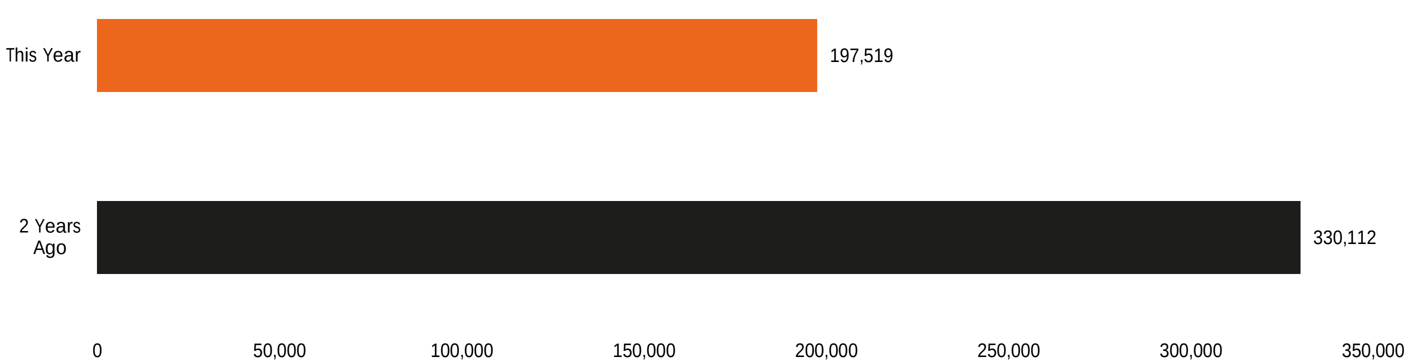
* Castle Court car park holds 299 spaces and is only available for the public to use on Saturdays and Sundays (9am - 7pm)

Multi Storey Car Park Usage



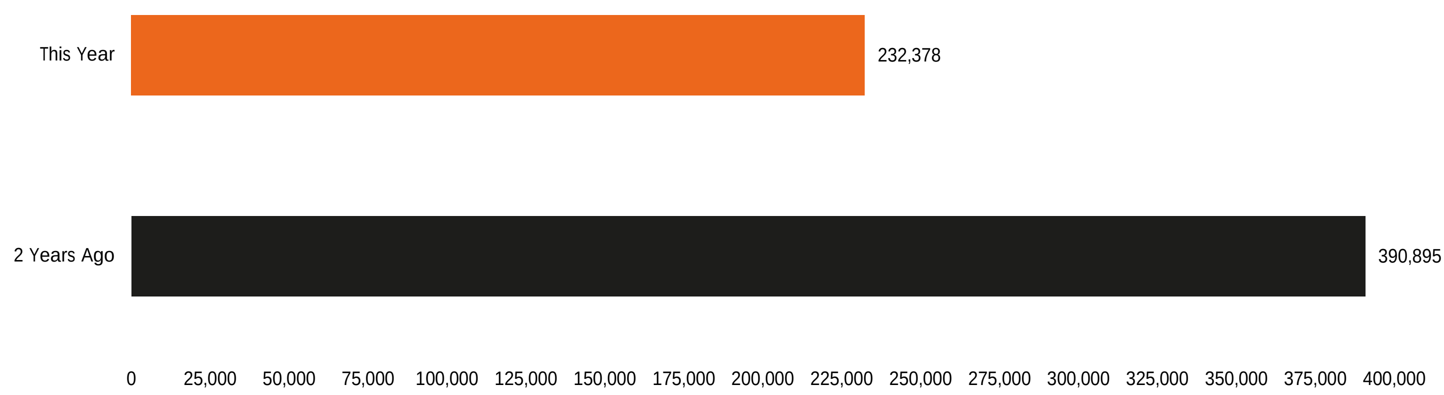
	Grand Arcade	Park Street	Queen Anne Terrace	Grafton East	Grafton West	Total
This Year	75,243	16,958	22,508	30,676	20,856	166,241
2 Years Ago	83,473	20,965	26,494	35,112	23,088	189,132
vs 2019	-9.9%	-19.1%	-15.0%	-12.6%	-9.7%	-12.1%

Park & Ride Usage



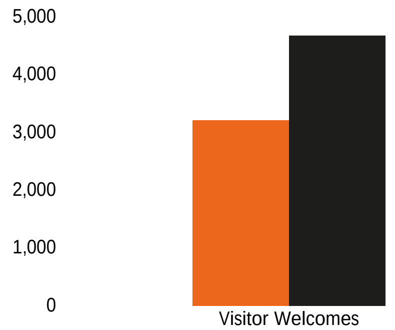
	September 2021	October 2021	November 2021	Moving Annual %
vs 2019	-43.0%	-43.1%	-40.2%	-62.7%

Guided Busway Usage

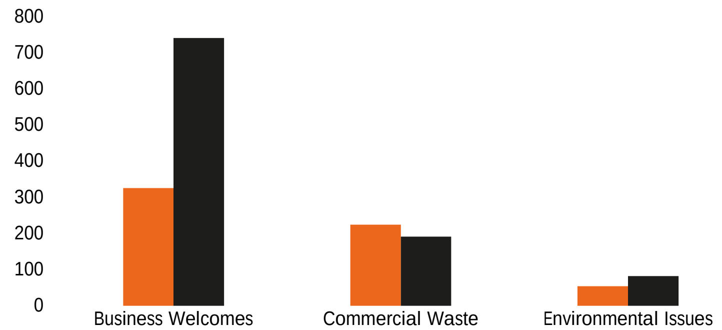


	September 2021	October 2021	November 2021	Moving Annual %
vs 2019	-42.2%	-49.6%	-40.6%	-60.8%

Cambridge BID Data



	Visitor Welcomes
This Year	3,212
2 Years Ago	4,684



	Business Welcomes	Commercial Waste	Environmental Issues
This Year	326	225	54
2 Years Ago	742	192	82

Note:

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

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