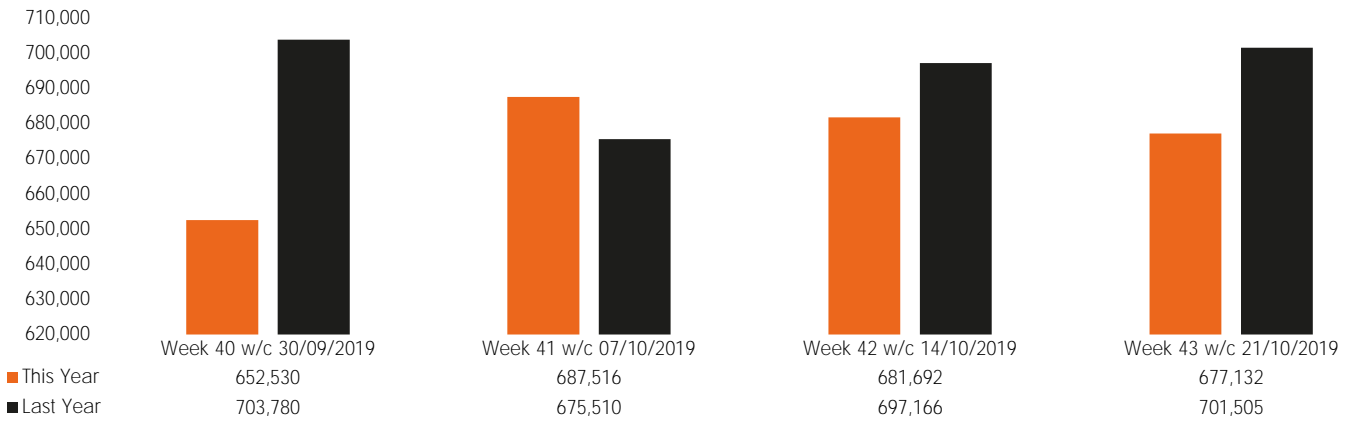


Springboard Benchmarks - YoY

|           | Shopping Centre Index | High Street Index |
|-----------|-----------------------|-------------------|
| Cambridge | -0.6%                 | -2.8%             |
| East      | -2.7%                 | -4.3%             |
| UK        | -2.4%                 | -4.9%             |

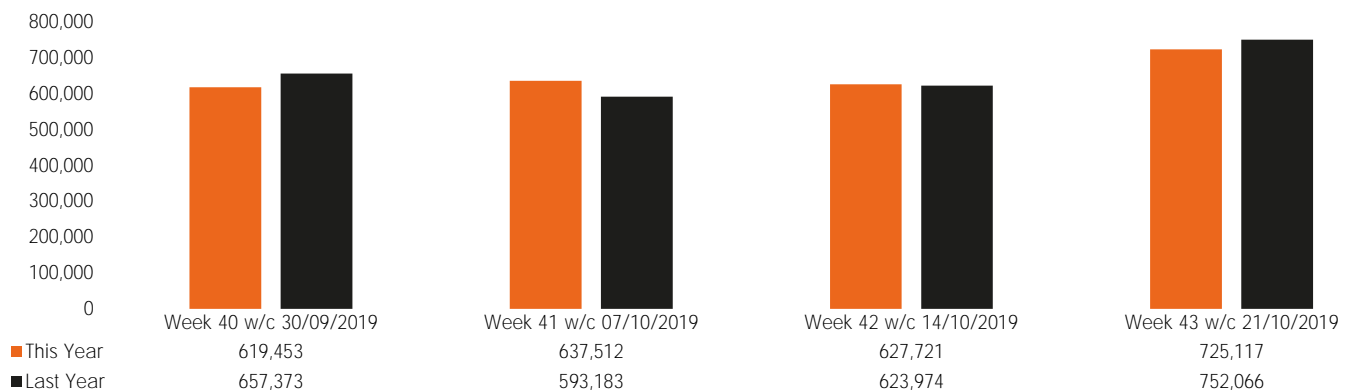
Cambridge City Centre Footfall



The Weekly Average Total for October 2019 was 674718  
 The Weekly Average Total for October 2018 was 694490  
 The Weekly Average Total for October 2019 was -2.85% compared to the previous year

Note:  
 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



The Weekly Average Total for October 2019 was 652451  
 The Weekly Average Total for October 2018 was 656649  
 The Weekly Average Total for October 2019 was -0.64% compared to the previous year

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

|                  | Total Retail Footfall | High Street | Retail Park | Shopping Centre |
|------------------|-----------------------|-------------|-------------|-----------------|
| October 2019     | -3.2%                 | -4.9%       | -0.5%       | -2.4%           |
| August - October | -2.0%                 | -2.8%       | 0.2%        | -2.6%           |

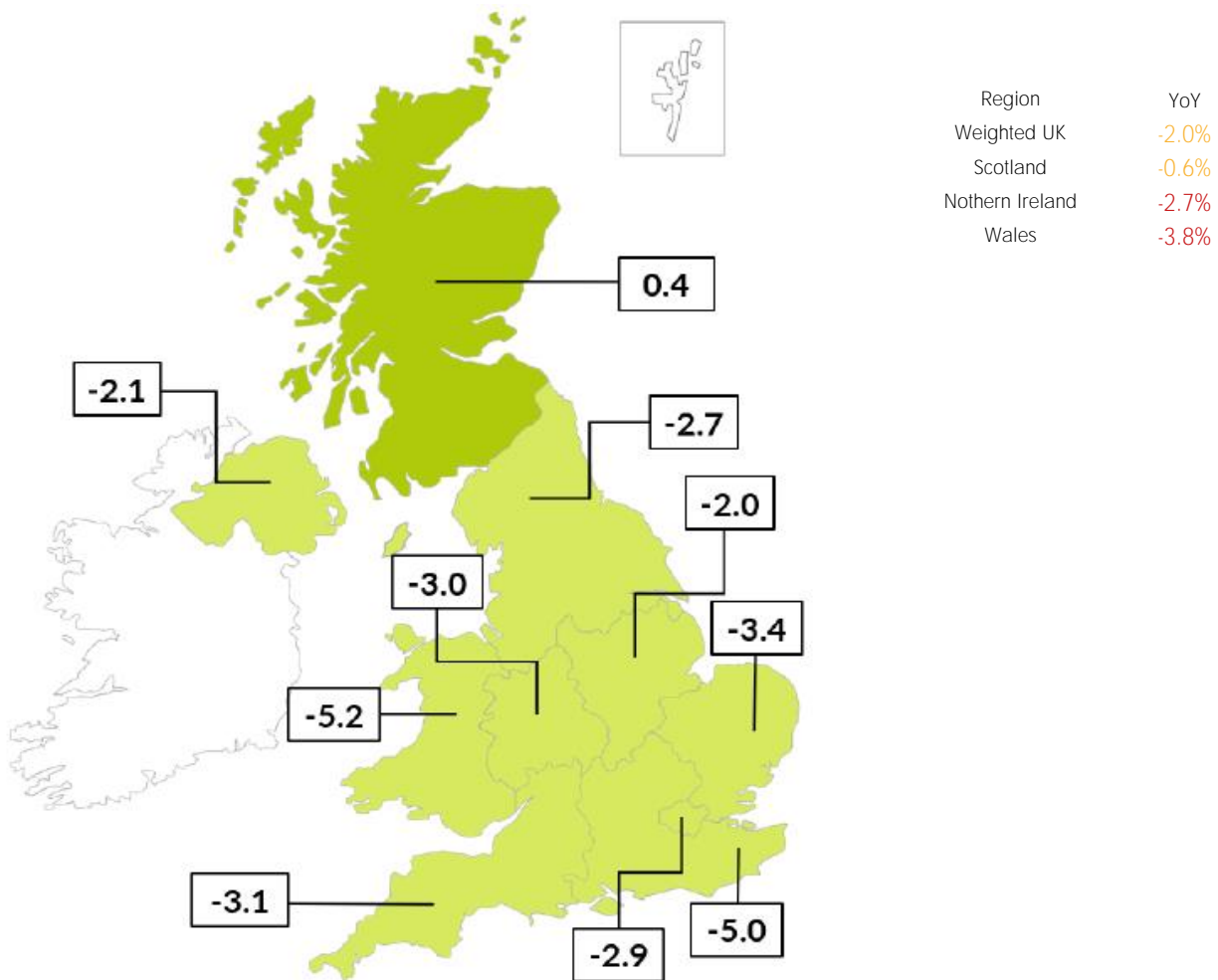
UK Footfall took a step in the wrong direction in October, with a year on year decline of 3.2%. This was below both the 3month and 12-month average declines of 2.8% and 2.6% respectively. A significant factor in this accelerated decline was the arrival of more autumnal weather, especially towards the end of the month as the rain set in. There was one ray of sunshine in October though, as Scotland managed to buck the declining trend with growth of 0.4%. For the third consecutive month, Wales saw the steepest rate of decline, falling by 5.2% year on year.

High Streets bore the brunt of the fall in shopper numbers, with a significant steepening decline to 4.9% in October, from 1.8% in September. The month also fell some way below the recent trend, as in the three months to October the average decline was 2.8%. Across the regions, Scotland followed the overall trend as it was recorded the only growth (1.8%) for the month. The South East saw the steepest decline, falling by 7.0%.

Following four months of growth, Retail Parks fell back into decline, at 0.5% year on year. This dragged the 3-month average growth down to 0.2%. The North & Yorkshire continued its impressive run, now stretching to four consecutive months with the highest growth of all regions, with 2.5% year on year - the only region in growth in October. In accordance with the High Street, Wales also saw the steepest decline for Retail Parks, falling by 3.7%.

Shopping Centres saw a softening in their rate of decline from September's 3.2% to 2.4% in October, which is now above the 3month average decline of 2.6%. As with High Streets, Scotland was the only region to see any growth, although this was by a meagre 0.2% year on year. Northern Ireland and the South East saw the steepest rates of decline for the month, both falling by 3.9%.

Vacancy Rates decreased from July's 10.3% to 10.0% in October. This improvement was largely driven by London's proportion of empty spaces falling by almost a third over this period. The largest increase in vacancies came from the South West, rising from 8.6% in July, to 9.8% in October.



Helen Dickinson OBE, BRC Chief Executive, said:

**"High streets were hit hardest in October, with the wet and wintery weather putting off many consumers from venturing out to the shops. Weak consumer demand and Brexit uncertainty have both impacted sales in recent months, and this could be further affected by the imminent election campaigning. Nonetheless, retailers will be hoping for footfall to pick up as they enter the all-important Golden Quarter. There is some cause for optimism, with the vacancy rate decreasing slightly, buoyed by strong results in London which saw vacancies fall by almost a third."**

**"The election offers an opportunity for a future Government to outline how it would support an industry that pays over £17 billion in tax every year and employs over three million people. With retail accounting for 5% of the economy yet paying 10% of all business taxes and 25% of business rates, it is clear there is room for improvement. The next Government should follow the Treasury Select Committee's advice and scrap downwards transition, which takes money from retailers and uses it to subsidise other industries."**

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

High Street footfall in October 2019 was 2.8% down on October 2018. In comparison to the Eastern region and the UK, which were 4.3% and 4.9% down respectively for high street footfall, Cambridge fared well. The national commentary talks about low consumer confidence, political uncertainty and pre-Brexit fears as all contributing to the current national trend of declining footfall. Cambridge was also ahead of the national trend for shopping centre footfall, we only saw a decline of 0.6% in October 2019 against October 2018 compared to the UK overall which saw a 2.4% decline in shopping centre footfall. With Black Friday and the pre-Christmas trading period ahead of us, plus a general election in December, the end of 2019 is going to be interesting.

During October 2019, when compared to October 2018, both Park & Ride and Cambridgeshire Guided Busway saw growth. Park & Ride was up 16.5% and CGB 13.9%, an increase of over 100,000 passenger journeys across both modes during October 2019 when compared to October 2018. Multi-storey car park usage in comparison was down 2.4% in October 2019 compared to October 2018 with just over 4,500 fewer vehicles entering the 5 multi-storey car parks. Grafton East car park was the only multi-storey car to see an increase in vehicle numbers during October 2019 compared to October 2018, with all the other car parks showing a reduction.

The Cambridge BID Ambassador Team welcomed over 700 extra visitors to Cambridge in October 2019 compared to October 2018. They also carried out a significant number of business visits, reported similar environmental issues to the correct parties so they can be dealt with and recorded far fewer incidents of commercial waste than in October 2018.

The Visitor Information Centre on Peas Hill saw slightly fewer visitors in October 2019 compared to October 2018 and it is likely that challenging weather in October impacted upon the number of visitors.

Diane Wehrle, Insights Director at Springboard, said:

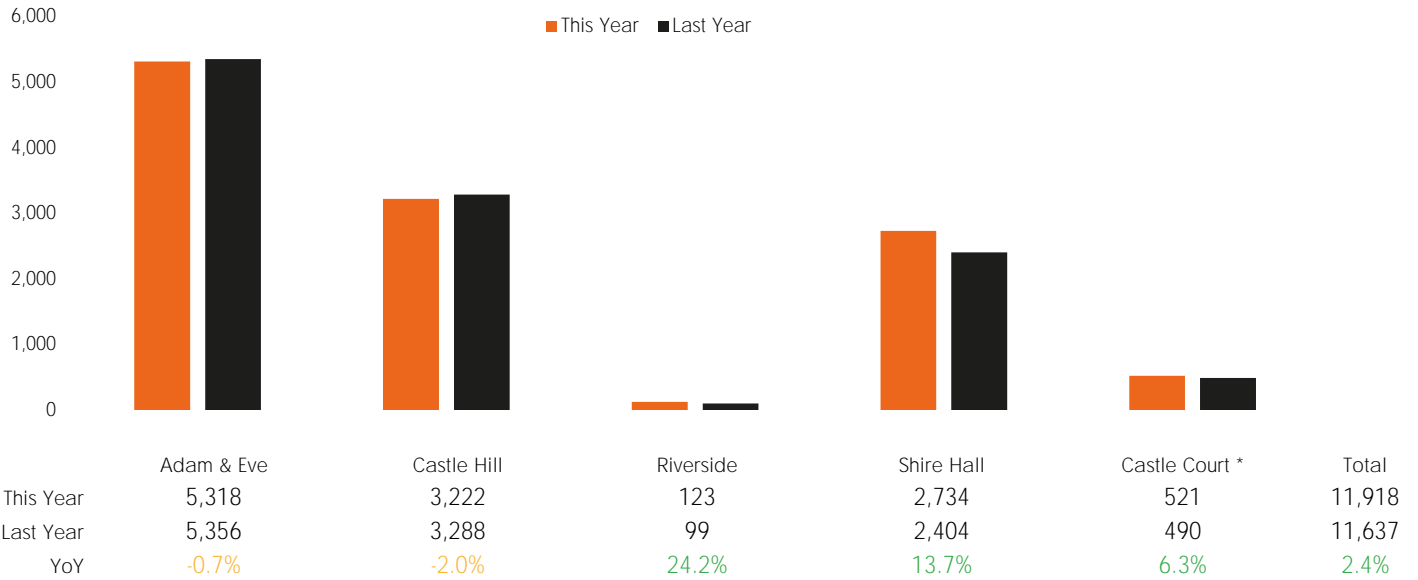
**"The drop in footfall of -3.2% was the worst result for October in seven years. Whilst it can't be regarded as a purely pre Brexit breakdown as the weather also played a part, the prevailing political uncertainty must be having a considerable impact on activity given the low level of consumer confidence."**

**"When confidence is low it doesn't take much to deter shoppers and the torrential rain in the last week of the month hit footfall particularly hard, resulting in a drop over those seven days of -6.2%. All three destination types - high streets, shopping centres and retail parks - were impacted by a much greater drop in the last week of the month than in the previous three. But by far the worst result came from high streets where footfall declined by -7.4%, which is not unexpected given their exposure to the elements. Indeed, the significant impact on high streets was felt across the board geographically, with footfall declining in all but one area and in four areas (Greater London, the South East, North & Yorkshire and Wales) the drop was in excess of -5%."**

**"A sliver of good news is that the UK vacancy rate actually improved slightly in October from July (10% from 10.3%) which reflects the improvement in the three month average from -2.8% in July to -2% in October. However, we must be mindful about reading too much into this as it is a trend that has been present in previous years as the number of pop up shops and temporary lets increase in the run up to Halloween and Christmas. The strong vacancy result in London versus other parts of the UK is not unusual and has often been the case, as it is London - with its far higher footfall volumes - that is so often the incubator for new retail concepts and fledgling bricks and mortar businesses."**

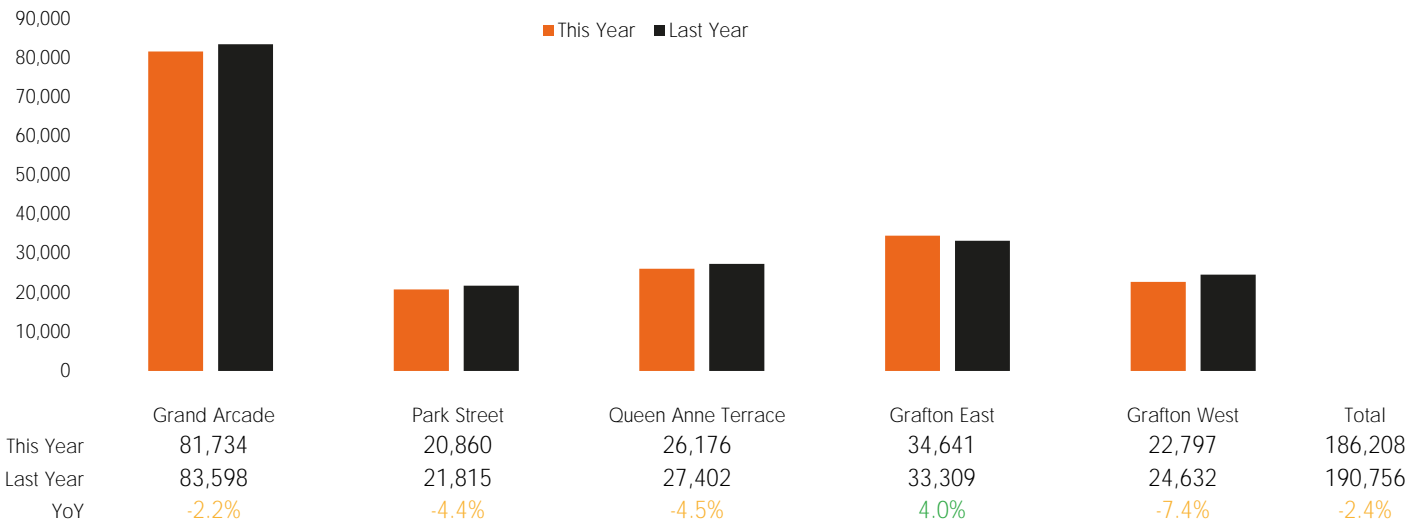


## Surface Car Park Usage

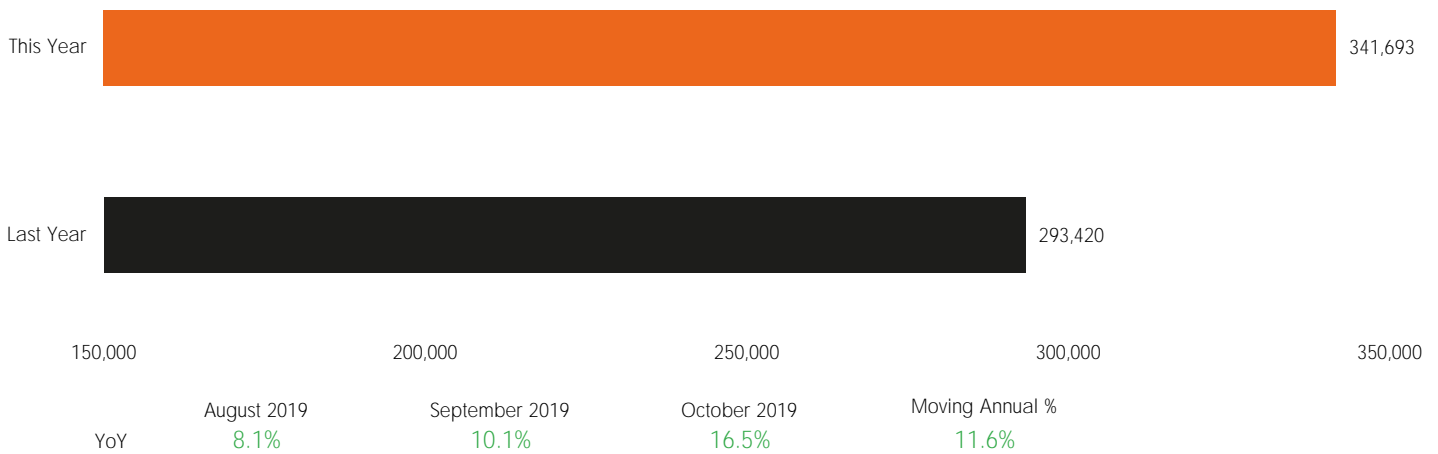


\* Castle Court car park holds 299 spaces and is only available for the public to use on Saturdays and Sundays (9am - 7pm)

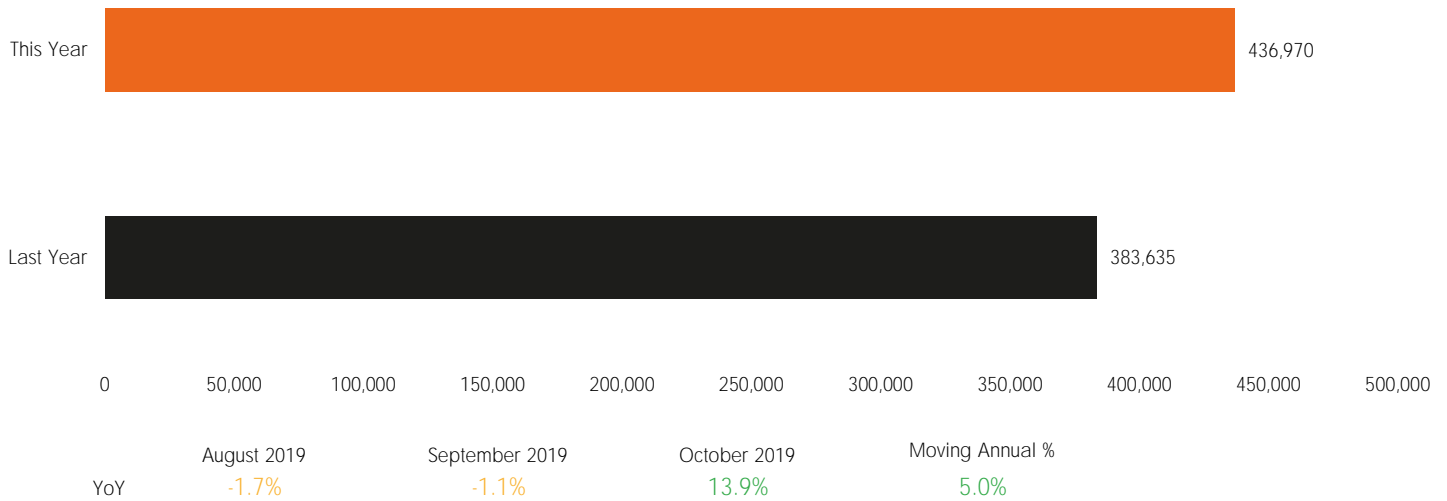
## Multi Storey Car Park Usage



## Park & Ride Usage



## Guided Busway Usage



## Cambridge BID Data



Note:  
 \*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