







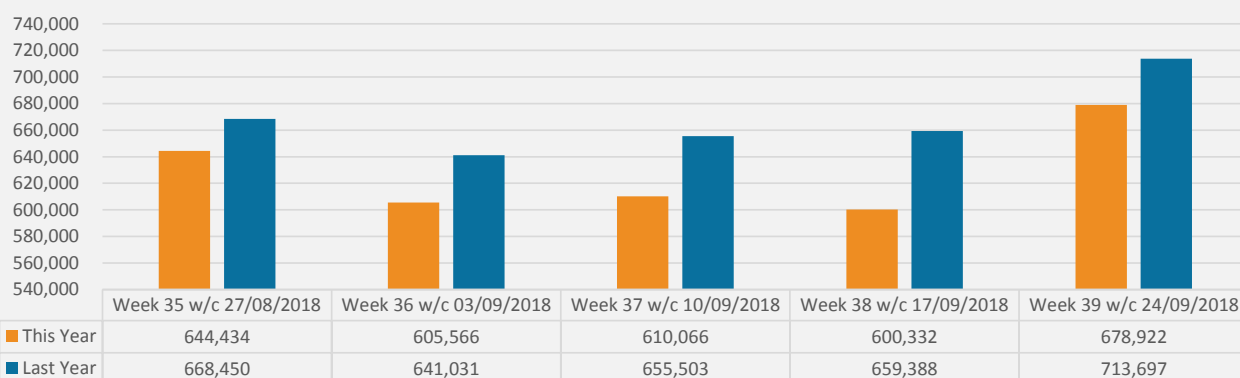
September
27/08/2018 - 30/09/2018

Region- East

Springboard Benchmarks - YoY

Shopping Centre Benchmarks			High Street Benchmarks		
Cambridge		-6.3%	Cambridge		-6.0%
East		-4.0%	East		-5.7%
UK		-2.5%	UK		-2.2%

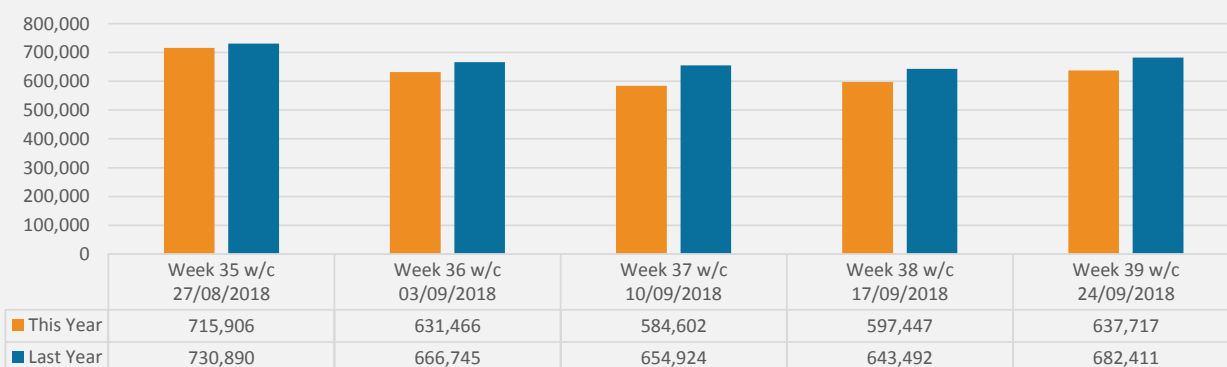
Cambridge City Centre Footfall



September 2018 Weekly Average Total	627,864	-6.0%
September 2017 Weekly Average Total	667,614	

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



September 2018 Weekly Average Total	633,428	-6.3%
September 2017 Weekly Average Total	675,692	

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

Total Retail Footfall		High Street	Retail Park	Shopping Centre
September	-1.7%	-2.2%	0.1%	-2.5%
July - September	-1.1%	-1.4%	0.0%	-2.7%

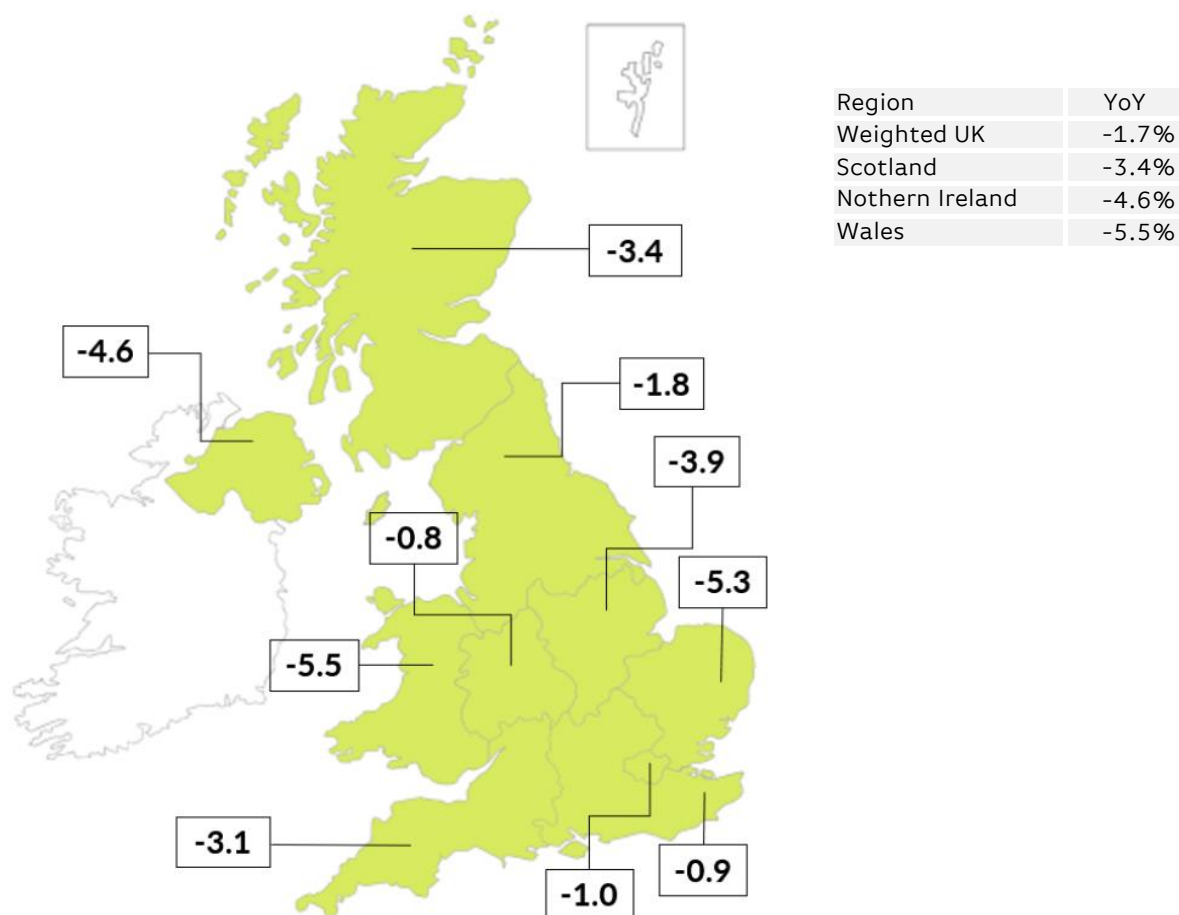
Footfall in September declined by 1.7% on the previous year, a slight acceleration on August's fall of 1.6%. Some of this is down to the unrelenting pressure on households' budgets. With sluggish wage growth and inflation ticking upwards – the BRC-Nielsen Shop Prices recorded their second month of inflation in over five-years in September -- it's no surprise consumers are cautious about their discretionary spending. Furthermore, favourable weather conditions for much of September made it challenging for stores to attract footfall, shoppers having little need to update their wardrobes for the colder season ahead.

No region saw growth in September, the East experienced a sharp decline by 5.3% from 1.7% in August. Wales footfall also fell sharply by 5.5% on the previous year.

High Street footfall decreased by 2.2%, now two months of consecutive decline. High Street footfall fell in all regions, with Wales and Northern Ireland seeing the deepest declines at 7.9% and 6.1%, respectively.

Retail Park footfall growth slowed by 0.1% in September from 0.3% in August. The East saw a negative swing from +5.1% in August to -5.6%. Northern Ireland saw an end to its four-month growth, falling by 6.1%.

Shopping Centre footfall continued to decrease, however at a decelerated rate: in September it fell by 2.5%, compared to August's fall of 2.4% and July's 3.4% fall. September is the eighteenth consecutive month of decline.



Helen Dickinson OBE, BRC Chief Executive, said:

"September saw a continuation of the trend for decreased footfall at UK shops, with overall figures down 1.7% on September 2017. Shoppers are feeling the squeeze of increasing shop price inflation and little real wage growth."

"This month's footfall figures are yet further demonstration of the increasingly difficult operating environment British retailers are facing. And yet, the country's largest private sector employer is not seeing any action from Government to help."

"The retail industry pays a disproportionate amount of tax, representing 5% of the economy and paying 10% of business tax and 25% of business rates. The system is skewed towards high taxes on people and property which is contributing to store closures and job losses, stalling the reinvention of our high streets. The Government urgently needs to reduce the business rates burdens and create a tax system fit for the 21st century that more fairly distributes taxes right across the economy."

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

"High Street Footfall during September 2018 was down 6% compared to September 2017. This is reflective of the broader picture as the East was down by 5.7% and the UK as a whole by 2.2%. Shopping Centre footfall showed a similar pattern, down in Cambridge by 6.3% in 2018, compared with September 2017."

"The national commentary talks of a more cautious consumer, the impact of recent large high street closures and the unseasonably warm weather in early September discouraging Autumn / Winter fashion purchases."

"Looking at the number of Visitors seen at the VIC in September, this was 0.7% up in 2018 compared to 2017. We are also seeing more people using Park & Ride and Guided Busway to travel into Cambridge, with Park & Ride up 5.8% and Guided Busway up 0.6% in September 2018 compared to September 2017. Surface Car Parks are being more widely used with figures showing a 13.3% growth across these car parks but that is against an 8.6% decline in usage in multi-storey car parks."

"Our Ambassador team has reported fewer commercial waste and far fewer punt tout sighting during September 2018 and reported fewer environmental issues - which is very positive for the look and feel of Cambridge whilst visitors are here. The team did an extra 2,000 visitor welcomes in September 2018 compared to 2017 ensuring that those in Cambridge are able to make the most of their time here."

Diane Wehrle, Insights Director at Springboard, said:

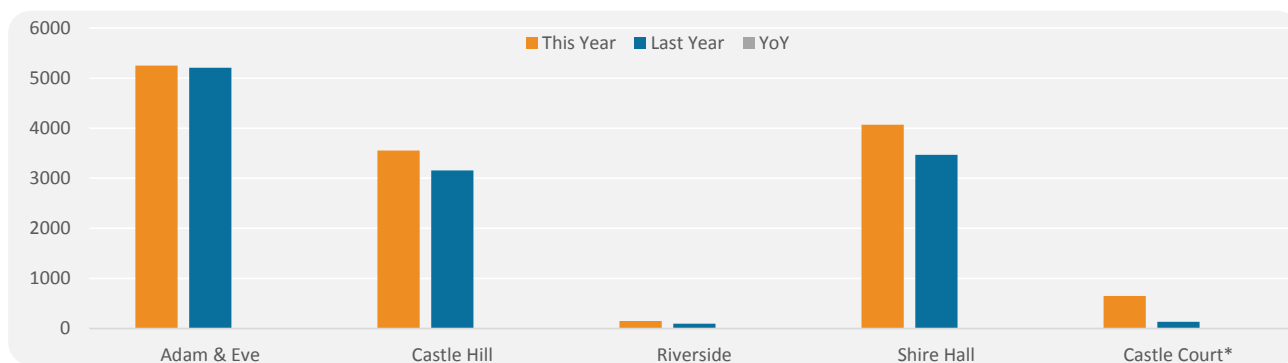
"A drop in footfall of -1.7% in September - an even slightly greater rate of footfall decline than the -1.6% decline in August - provides further evidence of the current challenges facing bricks and mortar retail."

"However, whilst it would be easy to put this down to the shift to online spending, the story is not nearly as cut and dried. With the growth in non-food online sales in September of +5.4% being the lowest since January and just half what it was in September 2017, combined with the highest level consumer credit for five years, a recent increase in inflation, a 20% drop in new car sales which is the worst since 2008, and the rise in house prices only a half what it was a year ago, all indicators point to the fact that footfall is simply reflecting the underlying constraints on consumer spend generally."

"In addition, the recent well publicised high street failures are likely to have made consumers more cautious about committing to large purchases in a number of our leading high street brands, either online or in bricks and mortar stores. With all of these pressures, and the continued mild weather minimising the impetus to renew fashion items for autumn, at least some of the impact on footfall will be a consequence of consumers focussing on paying down debt and shoring up their finances in advance of the Christmas period."



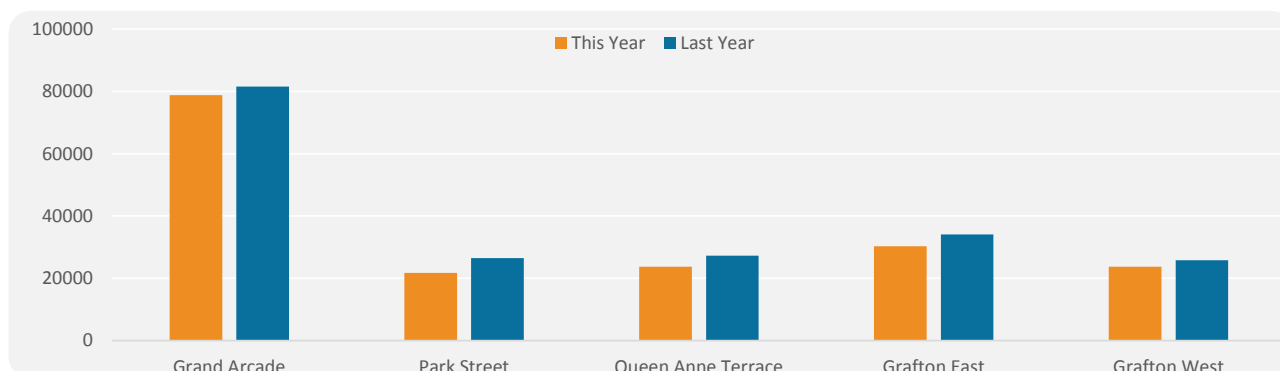
Surface Car Park Usage



	Adam & Eve	Castle Hill	Riverside	Shire Hall	Castle Court *	Total
This Year	5,252	3,553	151	4,069	648	13,673
Last Year	5,209	3,155	97	3,465	137	12,063
YoY	0.8%	12.6%	55.7%	17.4%	373.0%	13.3%

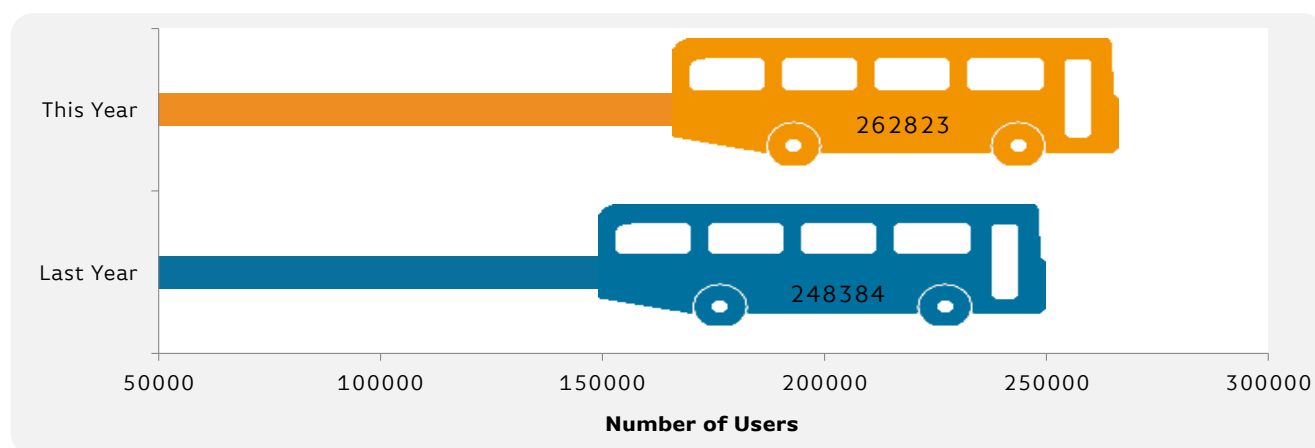
* Castle Court car park holds 299 spaces and is only available for the public to use on Saturdays and Sundays (9am - 7pm)

Multi Storey Car Park Usage



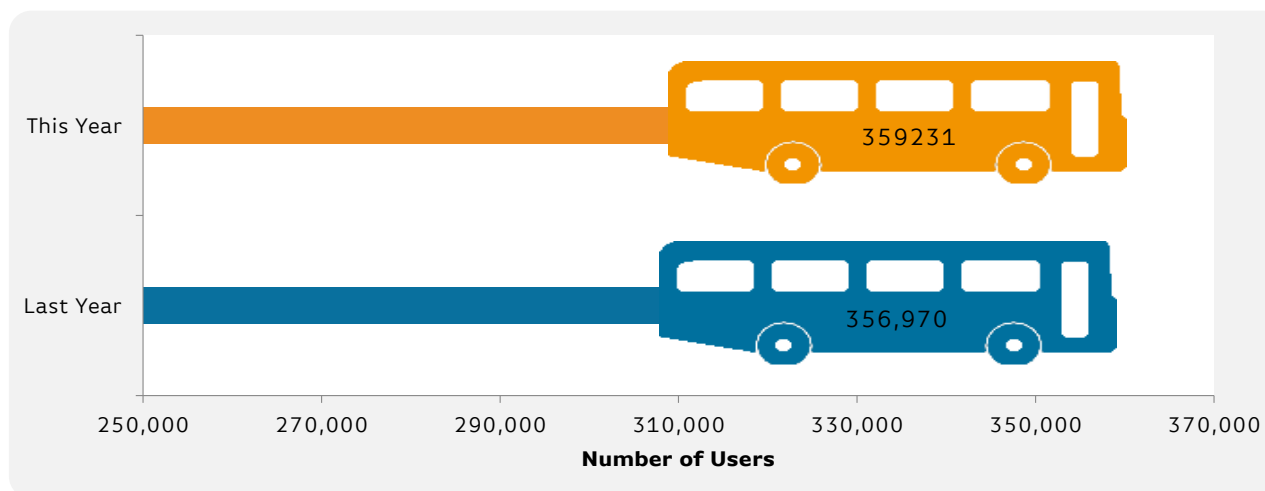
	Grand Arcade	Park Street	Queen Anne Terrace	Grafton East	Grafton West	Total
This Year	78,823	21,748	23,742	30,277	23,725	178,315
Last Year	81,544	26,467	27,217	34,040	25,753	195,021
YoY	-3.3%	-17.8%	-12.8%	-11.1%	-7.9%	-8.6%

Park & Ride Usage



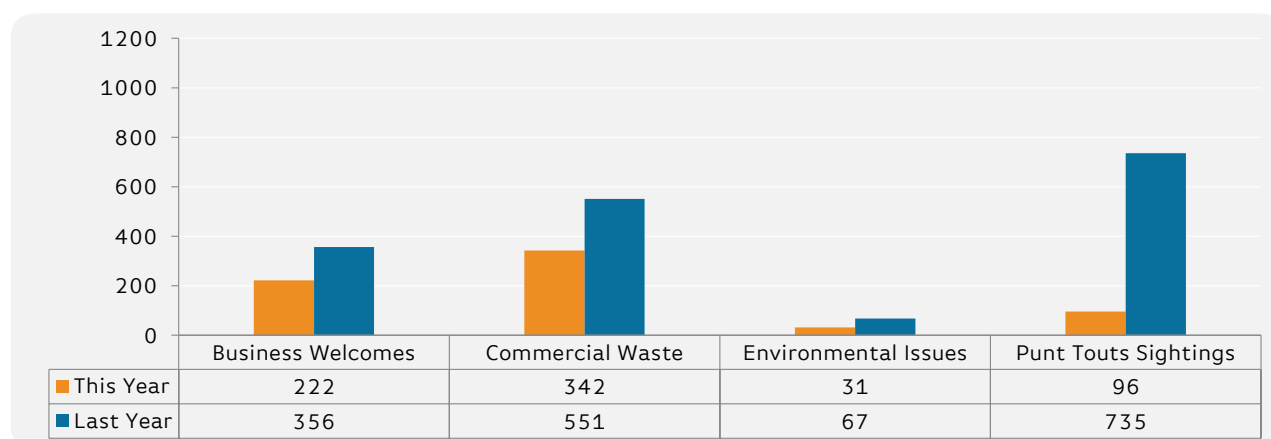
% change on July 2017	% change on August 2017	% change on September 2017	Moving Annual %
3.3%	8.9%	5.8%	4.4%

Guided Busway Usage

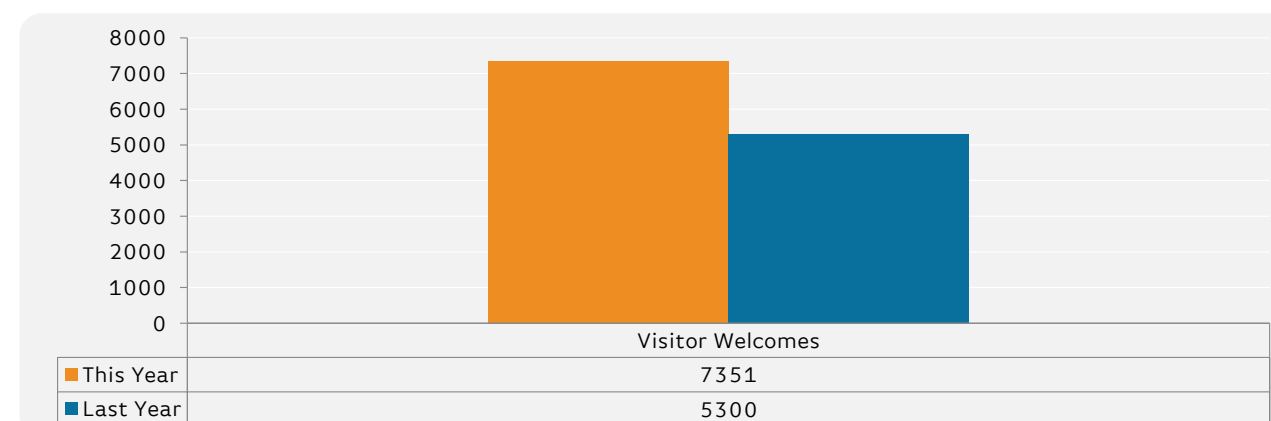


% change on July 2017	% change on August 2017	% change on September 2017	Moving Annual %
11.1%	3.7%	0.6%	7.4%

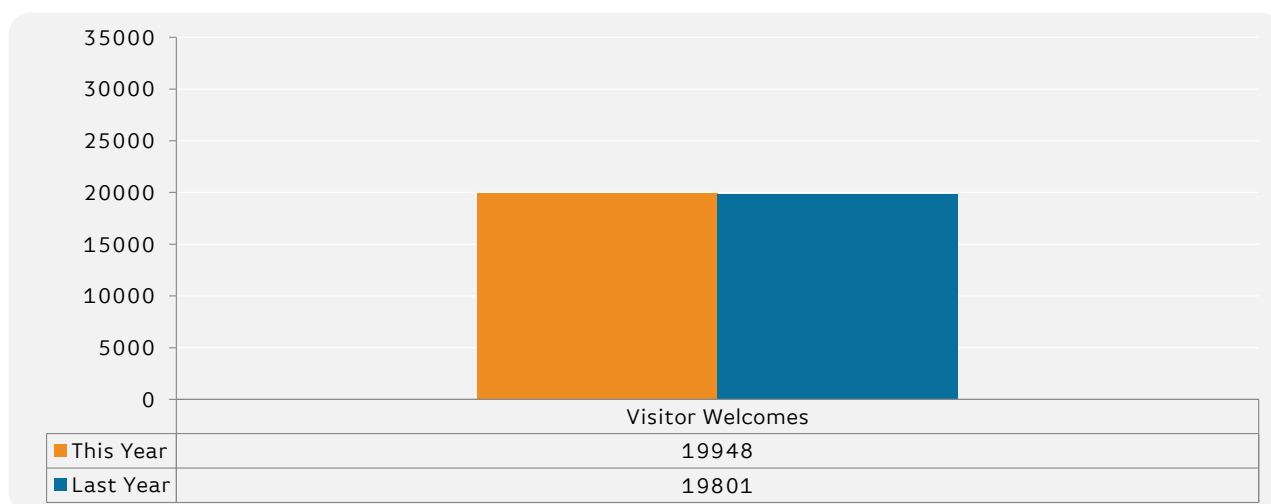
Cambridge BID Data



Ambassador Visitor Welcomes



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