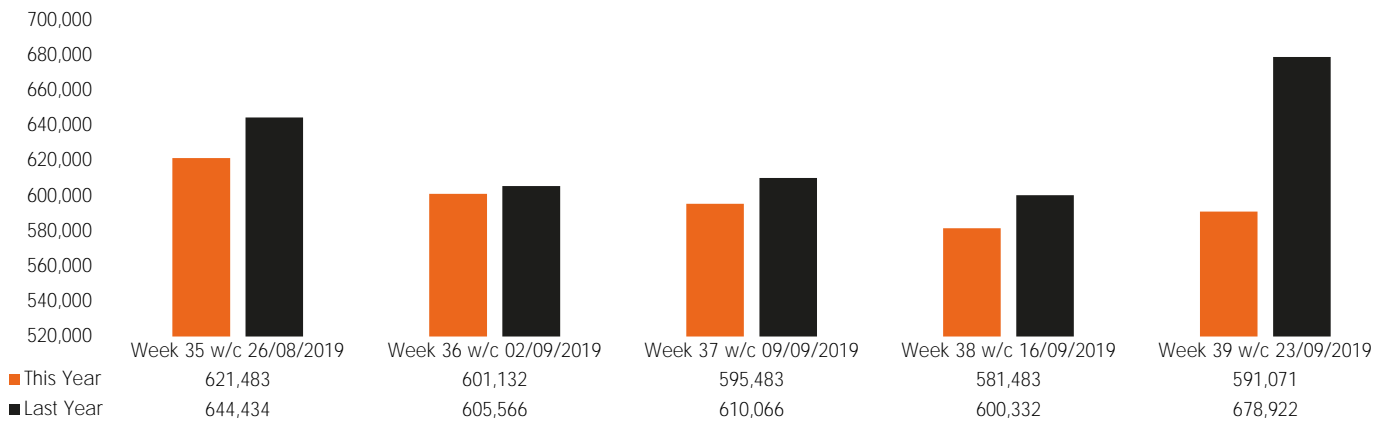


Springboard Benchmarks - YoY

	Shopping Centre Index	High Street Index
Cambridge	-5.1%	-4.7%
East	-2.9%	-3.8%
UK	-3.1%	-2.7%

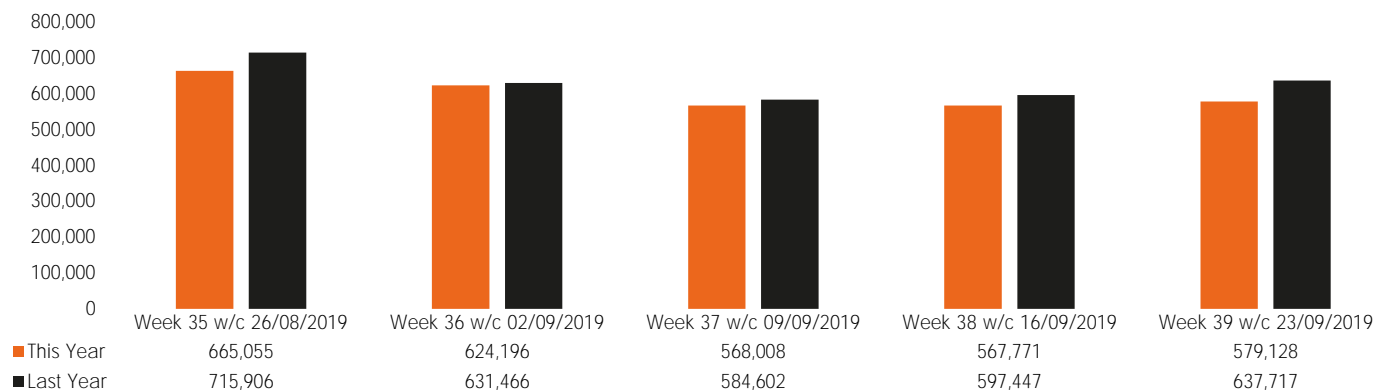
Cambridge City Centre Footfall



The Weekly Average Total for September 2019 was 598130
 The Weekly Average Total for September 2018 was 627864
 The Weekly Average Total for September 2019 was -4.74% 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 September 2019 was 600832
 The Weekly Average Total for September 2018 was 633428
 The Weekly Average Total for September 2019 was -5.15% compared to the previous year

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

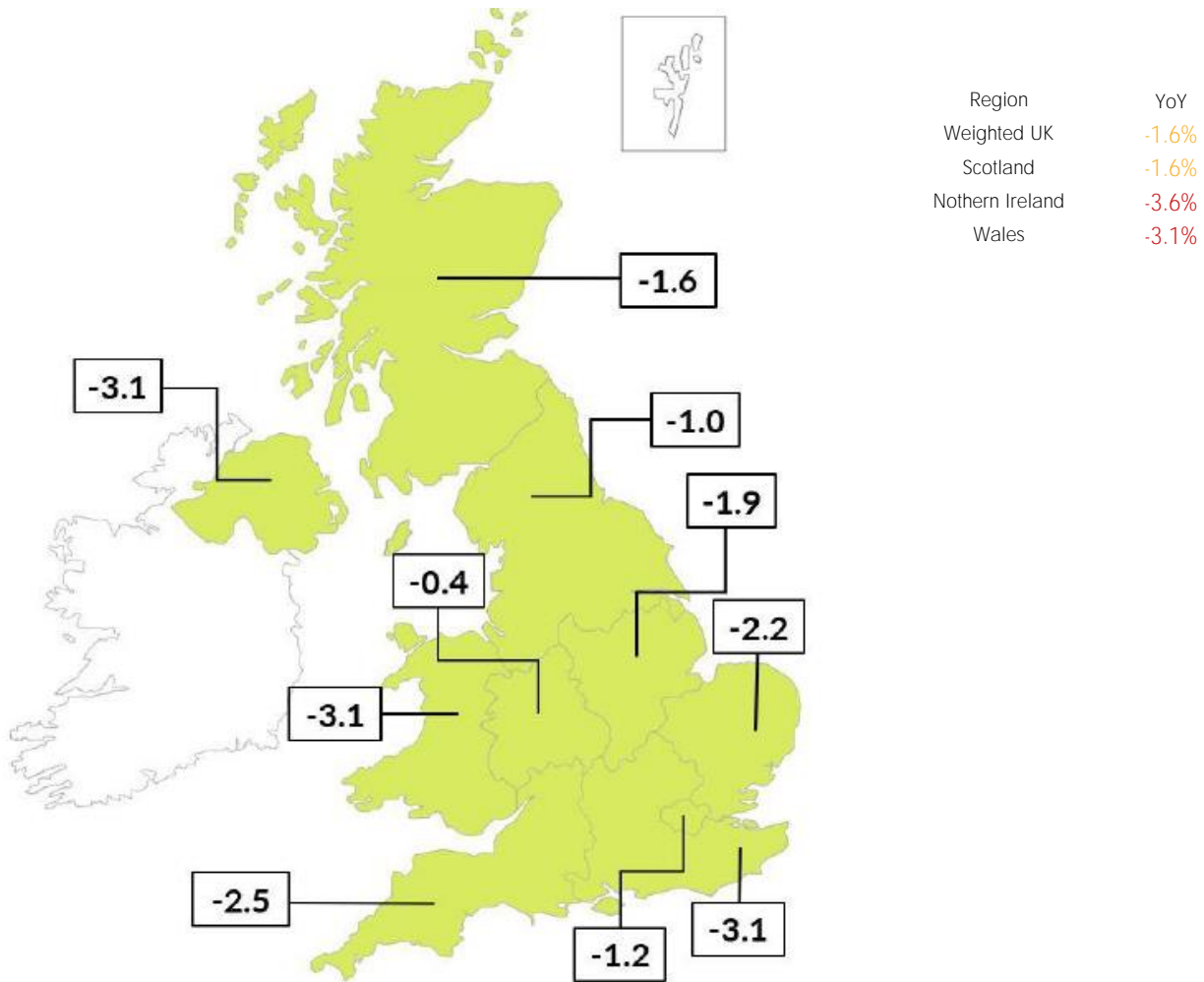
	Total Retail Footfall	High Street	Retail Park	Shopping Centre
September 2019	-1.7%	-1.8%	0.1%	-3.2%
July - September	-1.6%	-2.1%	0.7%	-2.9%

Although the 1.7% year on year Footfall decline was steeper in September than in August (1.3%), it is in line with both the 3-month and 12-month averages of 1.6% and 1.7% respectively. However, it is still not good news for stores as the UK overall has not seen Footfall growth since November 2017, excluding the distorting effects of the timing of Easter. In September, this was further compounded by none of the regions bucking the trend, as all were in decline. The West Midlands saw the shallowest rate, with a decline of 0.4%, whereas three regions all saw the steepest decline of 3.1%, namely the South East, Northern Ireland and Wales.

On the High Street, while remaining in decline, the rate of 1.8% was an improvement over August and outperformed the 3-month average decline of 2.1%. September also marks the fourth consecutive month of shallowing rates of decline, from May's recent low. When looking across the regions - in accordance with the UK overall - High Streets in the West Midlands were the best performing, recording growth of 0.9%. The South East was the worst performing of all regions, with a decline of 4.3%.

Once again it was Retail Parks to be the only destination to record Footfall growth, although at a broadly flat rate of 0.1%. This was the fourth consecutive month of growth for Retail Parks but was below the 3-month average growth of 0.7%. The North & Yorkshire was the best performing of all regions for the third consecutive month, with growth of 2.8%. Northern Ireland recorded the steepest rate of decline in September, with 2.3%.

While Shopping Centres have hardly had an easy time of it, September's decline of 3.2% is worse than August and below the 3-month average of 2.9%. This was the 30th consecutive month of declining Footfall for the destination. None of the UK's regions recorded any growth and with Scotland recording the shallowest decline, its rate of 2.3% highlights the plight for Shopping Centres. The South West saw the steepest decline of all UK regions, with 4.1%.



Helen Dickinson OBE, BRC Chief Executive, said:

"Retailers are facing a sustained drop in footfall, with numbers of visitors down over 10% in the last seven years alone. With Brexit looming, many consumers are holding off from all but essential purchases, and it is no surprise that the 1.7% drop in footfall has also contributed to a similar fall in sales. High streets and shopping centres were hit hardest with retail parks faring slightly better as they continue to entice shoppers with their varied consumer offering."

"The ongoing transformation of the retail industry is putting increasing pressure on retailers, which is now compounded by the spectre of a no deal Brexit on 31st October. If the Government wants to support consumers and retailers they should make sure they take no deal off the table, while also addressing the public policy costs such as business rates, that prevent shops from investing in their retail offering."

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

High Street footfall across Cambridge was 4.7% down in September 2019 compared to September 2018. This was in line with the 3.8% drop in the East and the 2.7% drop nationally. The national commentary refers to adverse weather conditions at the end of September, a week of exceptionally heavy rain, as one of the contributory factors for decline in footfall.

Shopping Centre footfall in Cambridge was also down in September 2019 compared to 2018 with a 5.1% drop in Cambridge. This compares again a UK average of a 3.1% drop.

Park & Ride usage in September was 10.1% up compared to September 2018, with over 26,000 extra passenger journeys recorded. Guided Busway usage dropped slightly, with September 2019 being 1.1% down compared to September 2018.

Multi-Storey car park usage was overall down 7.8% in September 2019 compared to 2018 with all 5 multi-storey car parks seeing a reduction in usage. Surface car park usage was also down during September 2019 when compared to 2018.

The Visitor Information Centre (VIC) saw a small drop in visitors: 1.8% down in September 2019, compared to September 2018. However, they still welcomed over 19,500 visitors into the VIC during September ensuring they were equipped to make the most of their time in Cambridge.

Data from Cambridge BID indicates that fewer incidents of commercial waste were reported in September. The Ambassador team also conducted more business visits this September when compared to 2018 but slightly fewer visitor welcomes for the same period.

Diane Wehrle, Insights Director at Springboard, said:

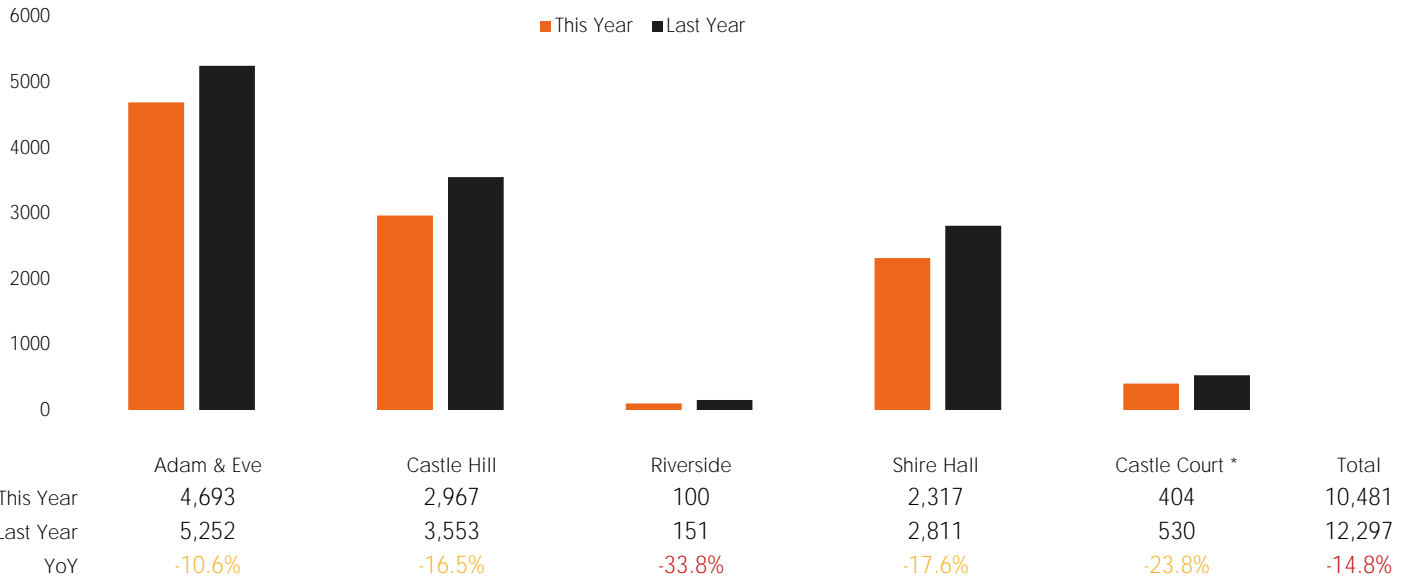
"Whilst the drop in footfall of -1.7% in September was greater than in August, the vast majority of this decline emanated from the last week of the month when footfall was hit by exceptionally heavy rain. To provide some context, the decline in footfall of -6.1% in that last week of the month was the worst of any week since March/April 2018 when the UK was hit by the Beast from the East. The relatively strong footfall performance in the preceding four weeks, which averaged at -0.7%, had been looking reasonably positive and had the last week's rain not hit the month's performance, it is likely that footfall for the month would have dropped by less than -1%."

"Stores maintained their Capture Rate in September, demonstrating that in-store customer numbers tracked wider market trends. In fact, it was only in the fashion category where store customer numbers dropped by proportionally more than footfall in destinations."

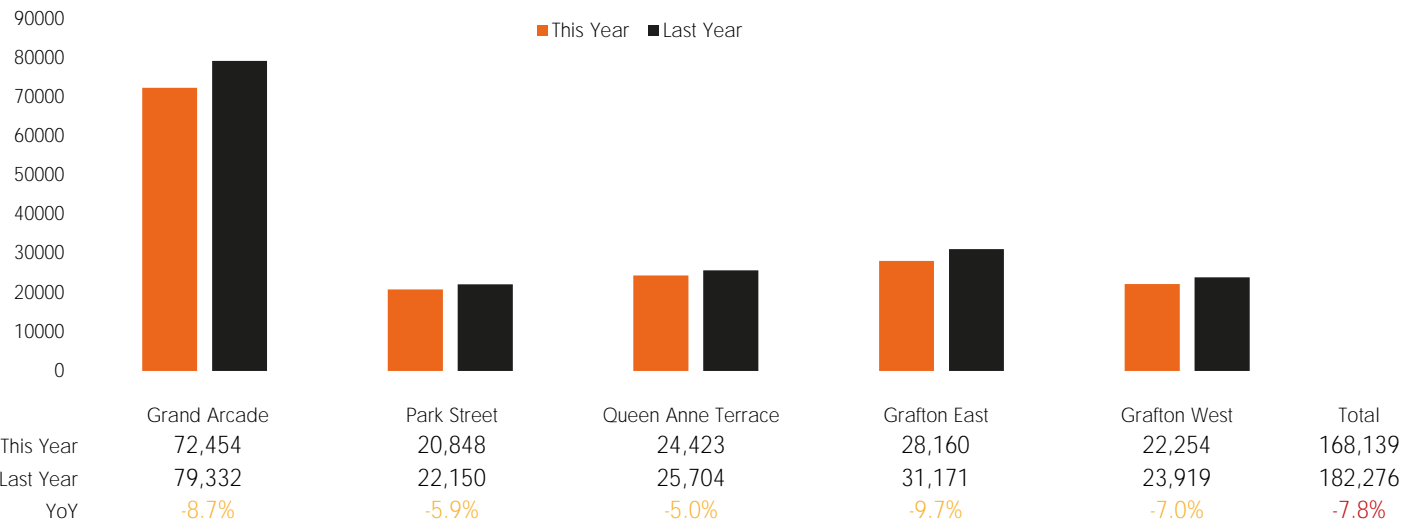
"Given the monumental changes that have occurred in our retail trading landscape over the past decade, it is unsurprising that the long-term footfall trend is a downward one. However, with 80% of spend remaining in store there is still much for bricks and mortar stores to play for in Q4 of 2019, which of course includes the all-important festive trading period."



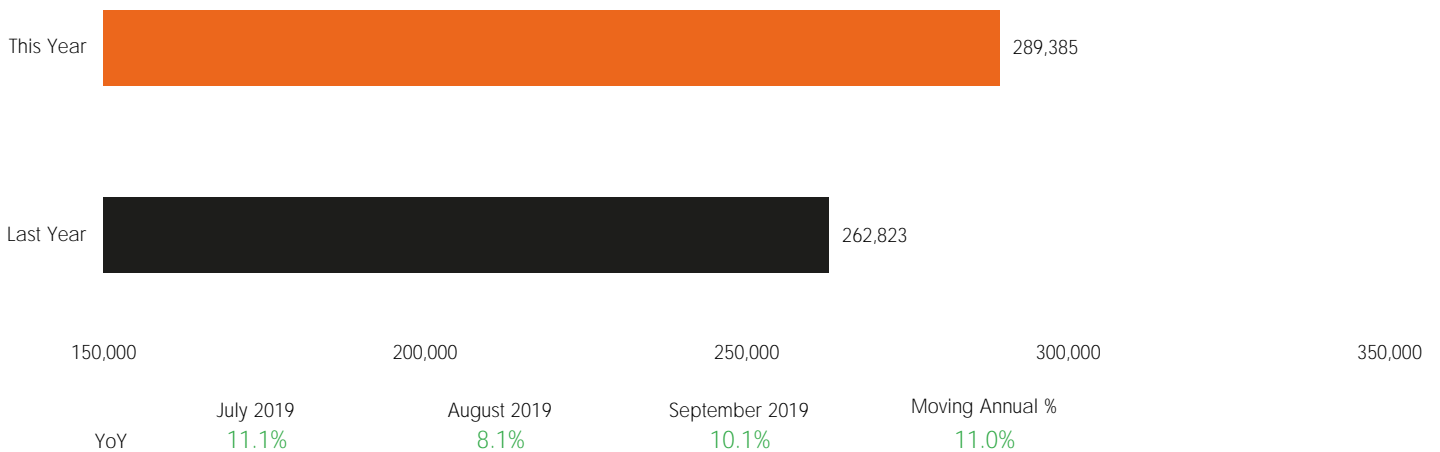
Surface Car Park Usage



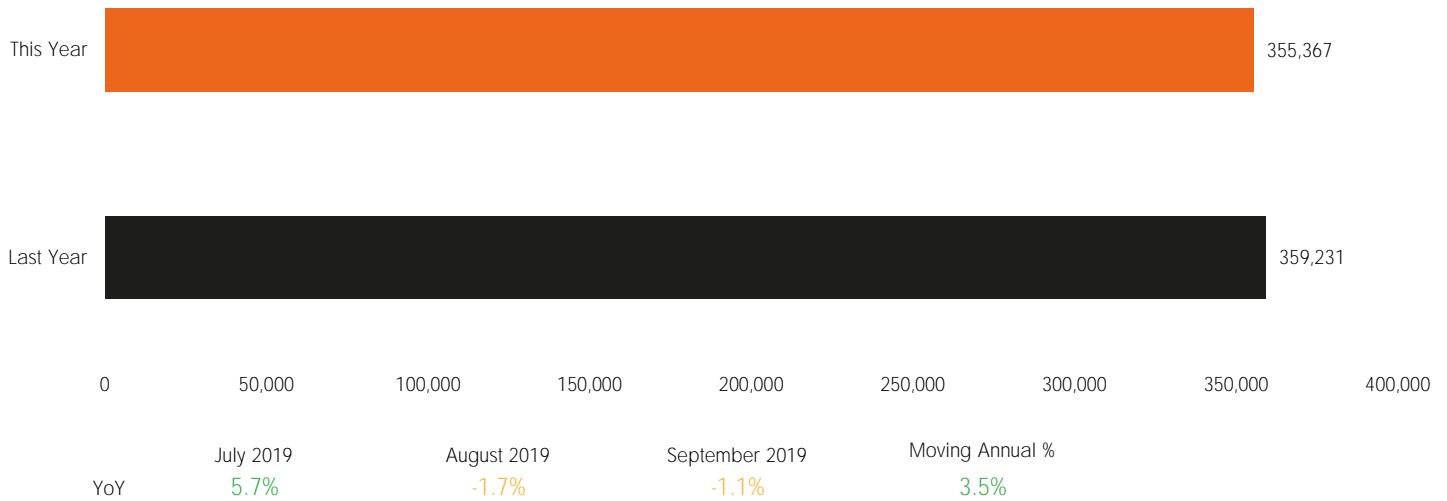
Multi Storey Car Park Usage



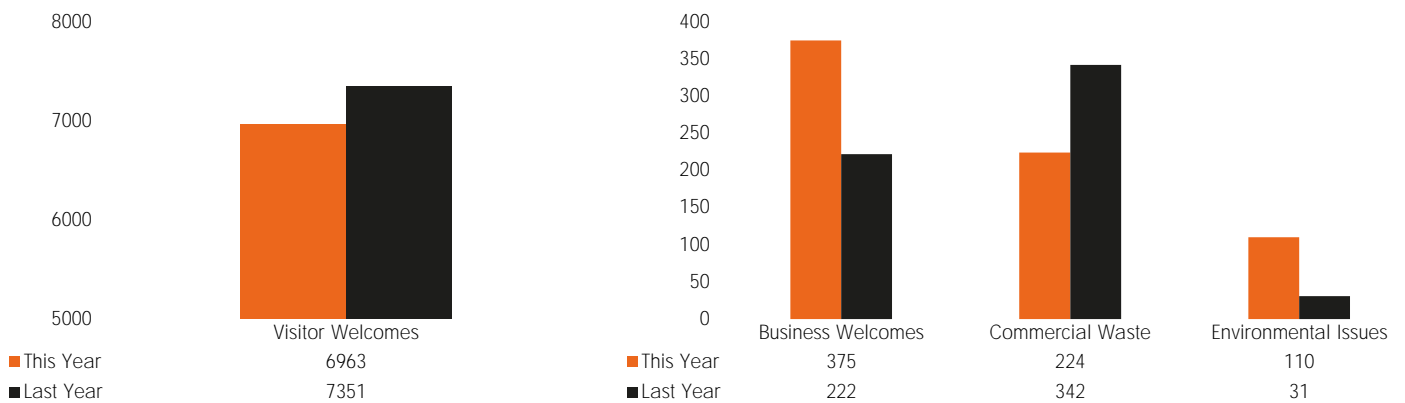
Park & Ride Usage



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