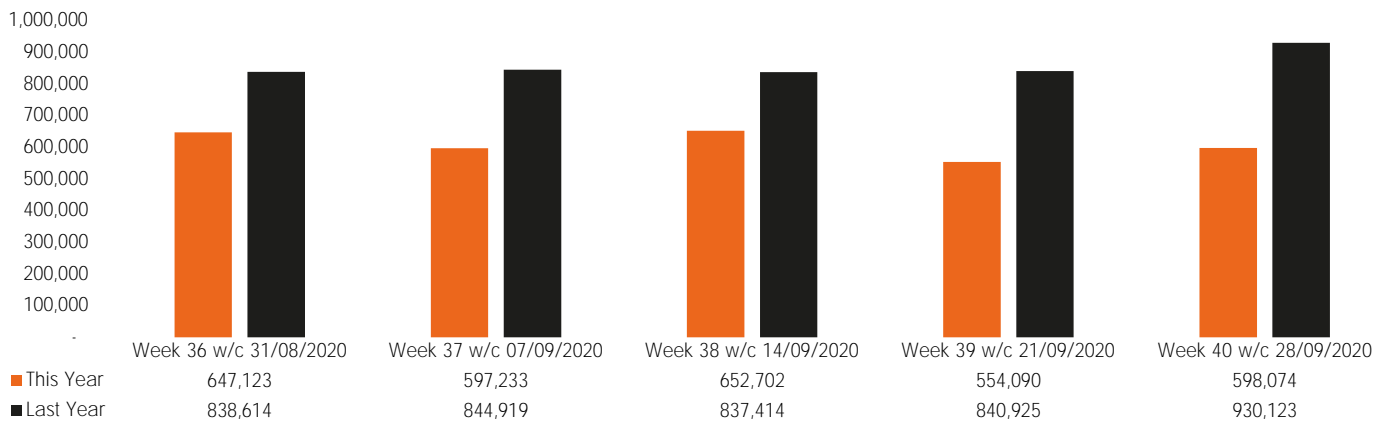


Please Note: This report contains all available data. Some of the data usually available has been impacted by Covid-19 and therefore unable to be included

Springboard Benchmarks - YoY

	Shopping Centre Index	High Street Index
Cambridge	-36.3%	-29.0%
East	-31.9%	-24.3%
UK	-31.5%	-34.6%

Cambridge City Centre Footfall

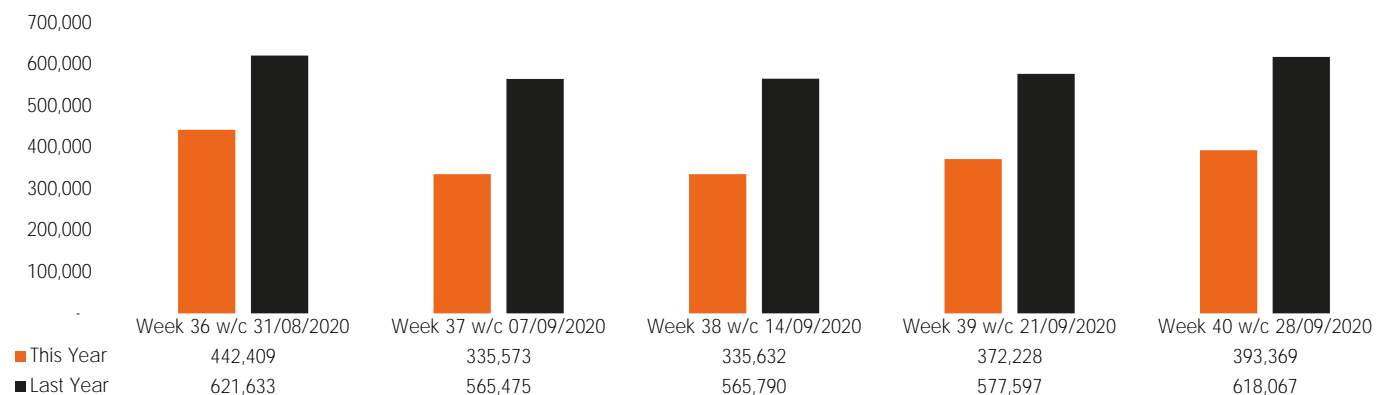


The Weekly Average Total for September 2020 was 609844

The Weekly Average Total for September 2019 was 858399

The Weekly Average Total for September 2020 was -28.96% compared to the previous year

Cambridge Shopping Centre Footfall



The Weekly Average Total for September 2020 was 375842

The Weekly Average Total for September 2019 was 589712

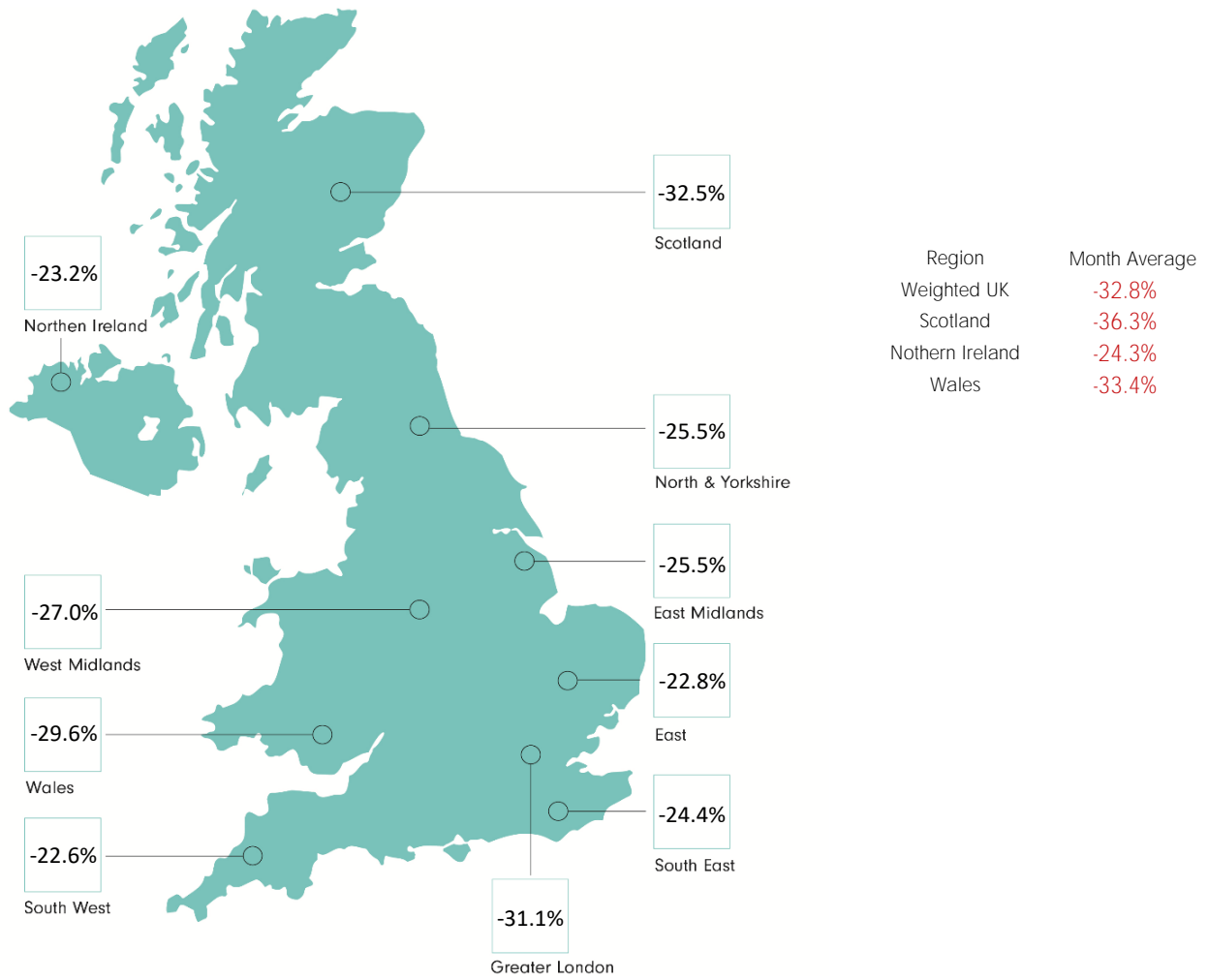
The Weekly Average Total for September 2020 was -36.27% compared to the previous year

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
September 2020	-28.2%	-34.6%	-10.8%	-31.5%
July - September	-32.8%	-40.1%	-13.9%	-35.8%



Diane Wehrle, Insights Director at Springboard, said:

Footfall continued to strengthen in September, although the improvement slowed, with footfall dropping by 28.2% compared with -30.8% in August, which had previously improved from -39.4% in July. This was partly a consequence of the start of the school term, which led to footfall shifting downward from -25% in the first week of the month to -28.7% by the third week. However, this was then exacerbated by the introduction of greater restrictions on movement from the third week onwards, which meant that by the last week of September the decline in footfall reached -31.4%.

The greatest impact has been felt by high streets, which is unsurprising given the concentration of hospitality here: in the second half of the month following the compulsory 10pm closure of hospitality outlets high street footfall moved downward from -34.3% to -39.4% compared with a much more marginal decline in shopping centres (-32.6% to -33.7%) and an improvement in retail parks (-12.5% to -11.8%). In fact, retail parks have consistently outperformed high streets and shopping centres, and in September footfall during day time trading hours in retail parks was just 7.3% lower than in 2019.

Inevitably the greatest impact on consumer activity of the increased government restrictions is during the evening - indeed this is exactly the desired policy outcome - with the decline in high street footfall post 8pm of -44.7% and -42.1% between 5pm and 8pm compared with -30.7% between 9am and 5pm. This suggests that for many hospitality operators who are missing their second sitting and therefore losing a significant proportion of turnover, a way forward could be to bring forward dining times and encourage customers to eat earlier.

The earlier hospitality closure is a further challenge for large city centres in recovering lost footfall. Our data was the first to identify a far greater reduction in activity in large cities than in smaller high streets early on in the lockdown period as shoppers stayed local, and this is a trend that has been ongoing, with Central London being by far the hardest hit. In September, footfall in regional cities declined by -35.8% (from -35% in August) and by -56.4% in Central London, versus just -24.2% in Outer London and -23.5% in market towns across the UK. This is the first conclusive evidence of the importance to local economies of the working population, and suggests that there could be a fundamental long term change in bricks and mortar retailing if working from home becomes an embedded long term trend.

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

High Street Footfall in September was just ahead of the UK average. Cambridge High Street Footfall in September 2020 was 29% down on September 2019 compared with a UK decrease of 34.6%. Shopping Centre footfall in Cambridge however was 36.3% down compared to September 2019 with the UK average at 31.5% down.

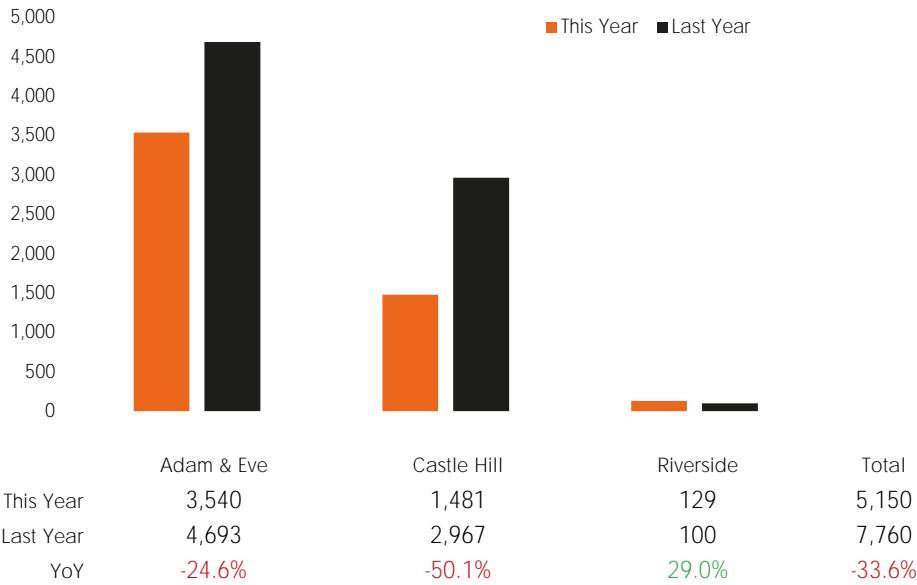
Cambridge continued in September to offer parking at all multi-storey car parks for £1 per hour which has had a positive impact on usage. Multi storey car park usage was 12% down in September 2020 compared to 2019. Grafton West and Grafton East fared best as they were only 1.6% and 5.1% down respectively in September 2020 compared to September 2019.

Park & Ride and Guided Bus usage continue to be affected by Government messaging regarding working from home where possible and limiting your travel. However more people returned to Park & Ride in September than had done in July and August. Park & Ride usage was down 64% in September 2020 compared to September 2019 as a result and Guided Busway usage was similarly impacted with a 66.5% reduction in passengers in September 2020 compared to September 2019.

Understandably with numerous international travel restrictions, UK restrictions in some areas and a smaller team of Ambassadors on street the number of visitor welcomes in September 2020 was down compared to September 2019. The Cambridge BID Ambassadors continue to play a significant business support role and have continued business visits, ensuring COVID floor stickers and other materials are distributed for example. They also continue to report incidents of commercial waste or environmental issues to the respective local authority to ensure that Cambridge is looking at its best for residents and visitors alike.

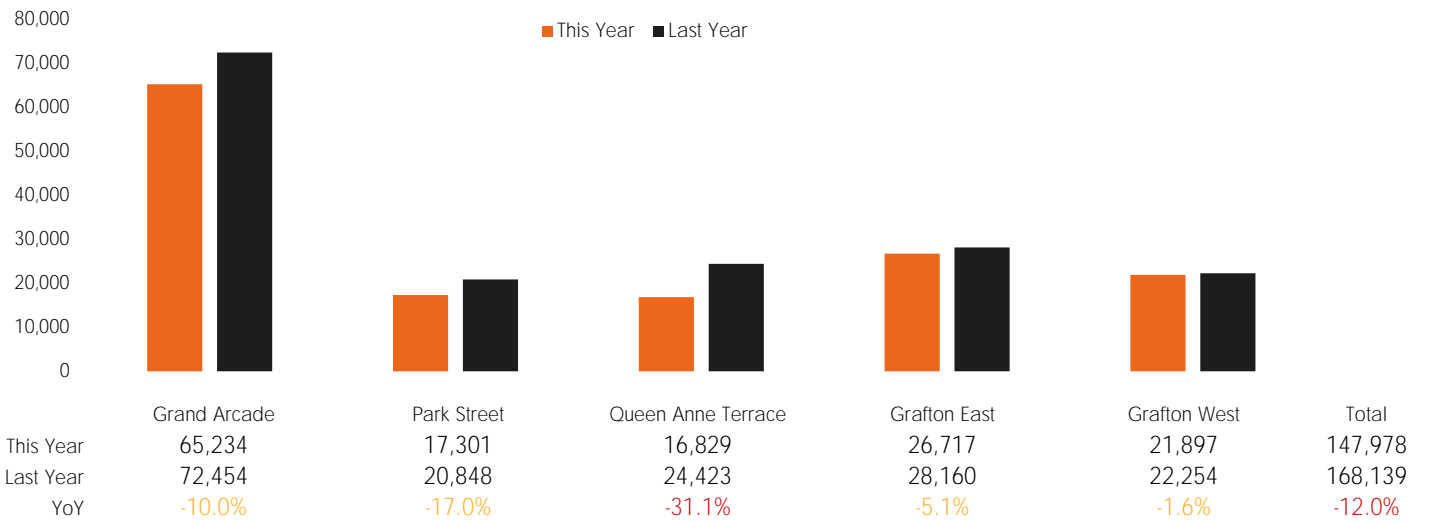


Surface Car Park Usage

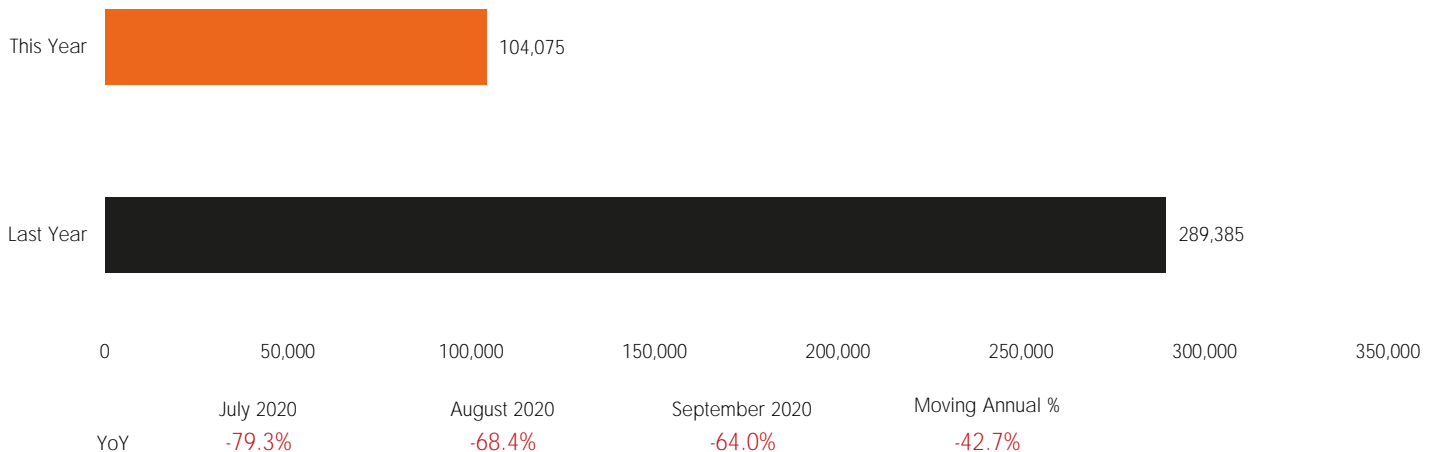


* Castle Court car park holds 299 spaces and is only available for the public to use on Saturdays and Sundays (9am - 7pm)

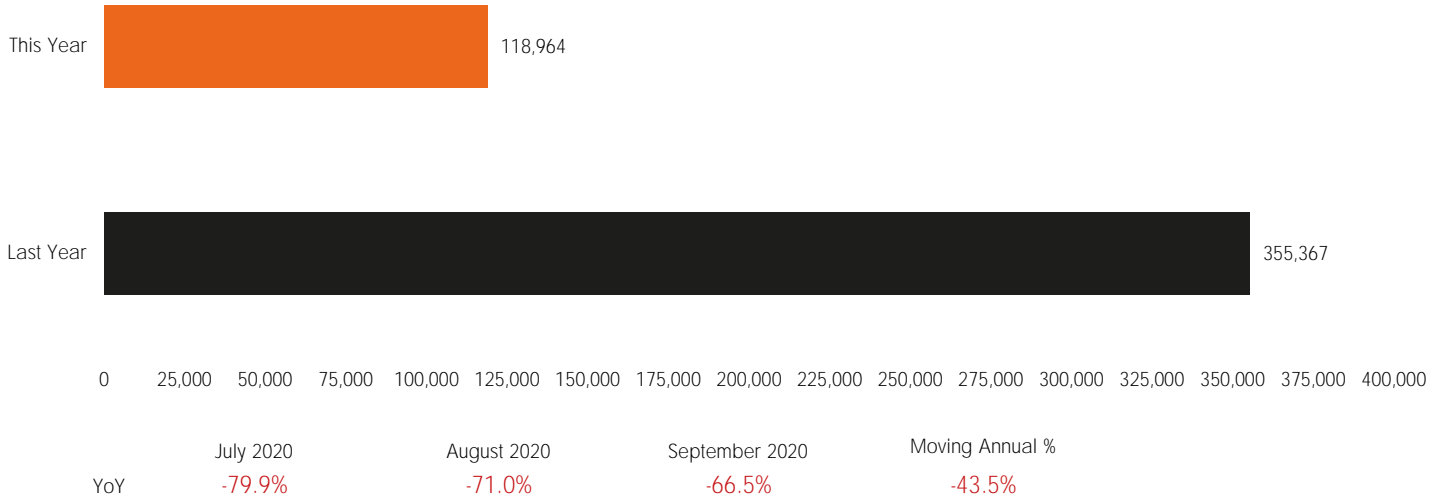
Multi Storey Car Park Usage



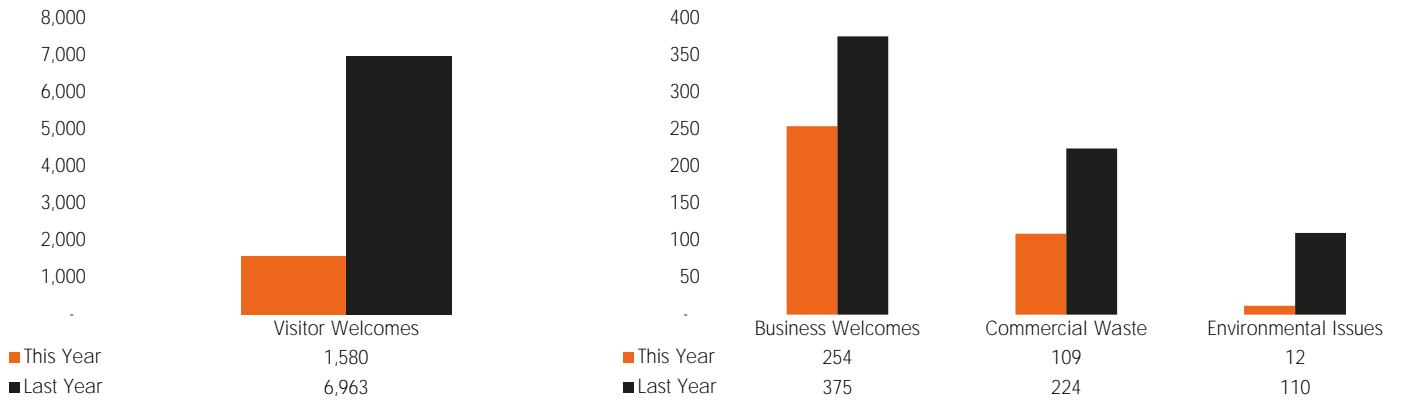
Park & Ride Usage



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

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