

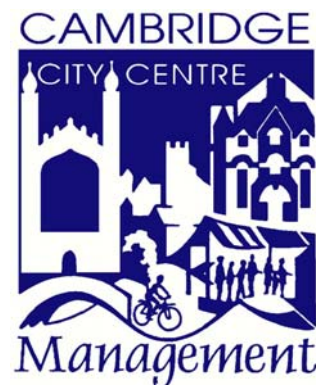
# CITY CENTRE MANAGEMENT – KEY PERFORMANCE INDICATOR REPORT



# INTRODUCTION

## In this issue...

- ◆ PAGE 2: VACANT RETAIL OUTLETS
- ◆ PAGE 3: CAMBRIDGE FOOTFALL
- ◆ PAGE 4: PARKING TRENDS
- ◆ PAGE 5: TOURISM
- ◆ PAGE 6: PARK & RIDE
- ◆ PAGE 7: CRIME



## Welcome...

... to the first edition of our Key Performance Indicator report for 2009. Against the backdrop of a very challenging trading environment it is encouraging that Cambridge continues to perform well against the picture nationally.

As you may already be aware from the 1st April 2009 the current City Centre Management Partnership, which has been in existence since 1995, will be re-launched as an independent public/private sector partnership operating under the name of "Love Cambridge." The key objective of the proposed change is to strengthen the existing model and to provide a structure, which will enable all stakeholders to have a say in how the city centre evolves.

Without doubt the early part of 2009 will be tough on the high St. and the launch of the new "Love Cambridge" City Centre Partnership will play a critical role in bringing the city centre together to address the emerging challenges for the city.

The core function of "Love Cambridge" will be to develop a vision and action plan for the city centre through working in partnership with a diverse range of key city centre organisations to ensure the city's ongoing accessibility, vitality, vibrancy, safety and sustainability.

As mentioned in the July edition of this report, in 2009 we will be looking to review the performance management information we currently collect and the most effective way of sharing this with you. Any feedback you would like to give us in terms of additional information that you would like to receive please email me on the email address below

**With Kind Regards**

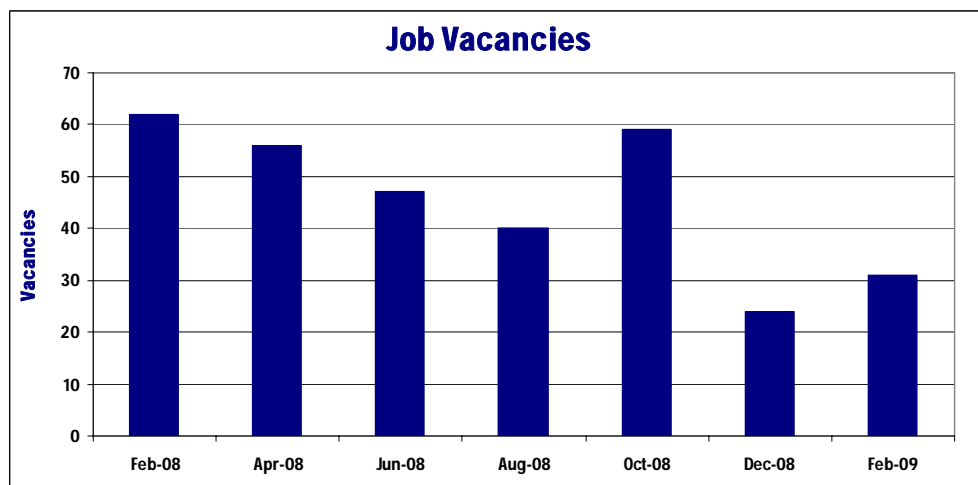
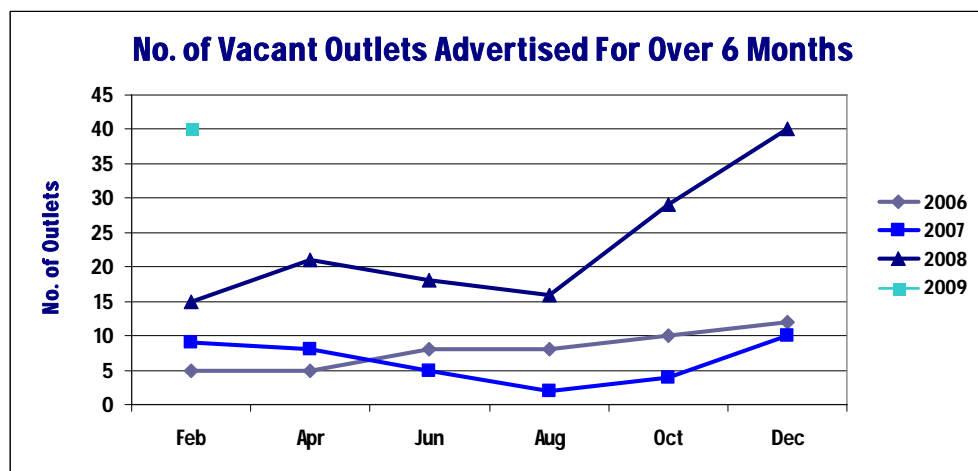
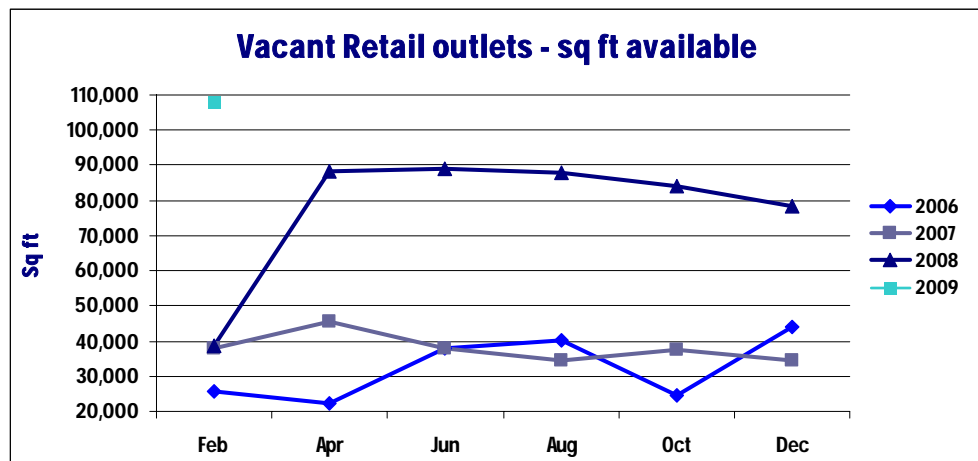
**Emma Thornton - City Centre Manager**

T: 01223 457446

E: [emma.thornton@cambridge.gov.uk](mailto:emma.thornton@cambridge.gov.uk)



# VACANT RETAIL OUTLETS



The data gathered details the number of vacant retail outlets in Cambridge city centre<sup>1</sup>. The method used consists of a web-based search and a walk through the city centre; it is conducted bi-monthly. The charts below are an approximation of the health of the retail sector in the city.

Figures collected from the survey show a substantial jump in retail vacancies over the past two months. This is partly due to the departure of companies who temporary leased many retail outlets over the Christmas period.

Fitzroy St and Burleigh St are showing the highest volume of vacant floorspace, whilst the Grafton Centre is showing a high number of retail unit vacancies, although many of these are empty to facilitate their project: *Renew*, which is due to commence later in the year. However, the opening of a large-scale Primark store in the old John Lewis building on Burleigh St and the refurbishment of the Grafton Centre is expected to enhance the area and generate more interest from retailers and shoppers alike.

Regents St is also showing a higher than average number of vacancies.

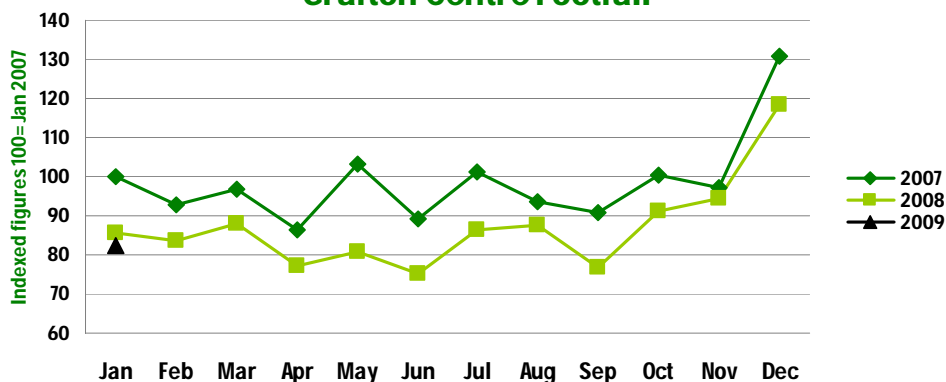
Some vacancies have arisen through the failure of businesses to survive in the current economic climate, which have been reflected across the country. A number of well-known companies have recently gone into, or filed for administration, including Zavvi, Ringtons, Rosebys, Olan Mills, The Pier, Envy and Adams. However Colliers CRE<sup>2</sup> notes that discount and value retailers are performing well, with Primark seeing sales rise by 18% in December. The report also notes that from a national perspective – fashion retailers are the biggest generator of vacant retail units, other noteworthy closures are attributed to pubs, cafes and restaurants. The average size of vacant retail units (from Colliers CRE sample cities) has also fallen by 14% since October 2006, suggesting that the smaller shops are more difficult to let.

<sup>1</sup> Including the Grafton Centre, Fitzroy St, Burleigh St & Mill Rd  
<sup>2</sup> National Retail Barometer – Retail Voids! Winter 2009, Colliers CRE

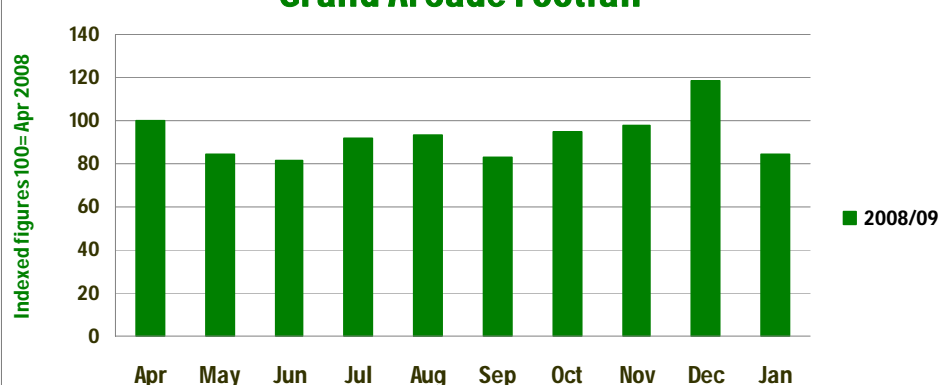


# CAMBRIDGE FOOTFALL

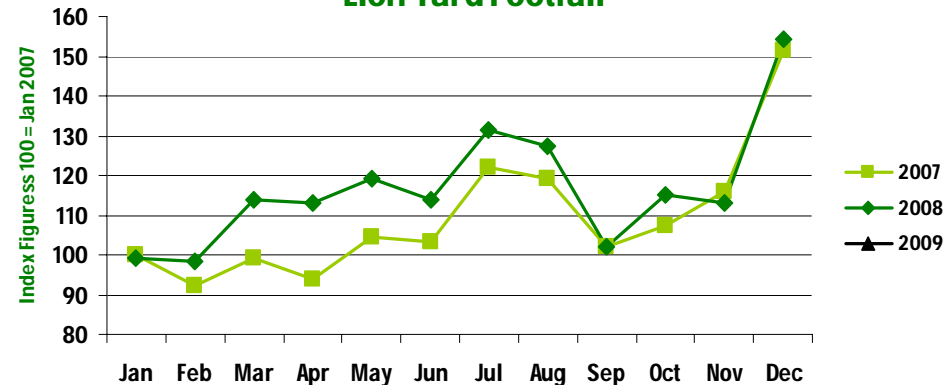
## Grafton Centre Footfall



## Grand Arcade Footfall



## Lion Yard Footfall



The charts show footfall trends in the Lion Yard, Grafton and Grand Arcade shopping centres. It should be noted that the figures in the charts are indexed, which means they are not actual footfall figures but a monthly comparison to a base-starting figure. Both the Grafton Centre and Lion Yard shopping centre's starting figure is 100 as of January 2005 and the chart shows the percentage difference in footfall from January 2005. The Grand Arcade's starting figure is April 2008.

ATCM<sup>3</sup> Springboard's National Footfall Index recorded an annual decline in footfall of 8% in town centres in January, this was the largest annual decrease for January since their Index began in 2005, it was also twice the level of decline in footfall recorded in January 2008.

According to ATCM regional cities seem to be fairing better than towns and cities generally. Regional cities saw a decrease in footfall of 3.6% when comparing January 2009 with January 2008, whilst the UK national average dropped by 8%. The Grafton Centre reflects this trend, showing a 3.9% drop

in footfall, unfortunately Lion Yard's figures for January are currently not available due to technical difficulties and no such comparisons can be made with the Grand Arcade, as it did not open until March 2008.

From November 2008 to December 2008 national footfall figures indicate an 11.2% increase for all towns and cities and a 13.3% for regional cities. All three Cambridge shopping centres saw an above average performance over this timescale, with the Grafton Centre footfall increasing by 26%, Lion Yard by 37% and the Grand Arcade by 21%.

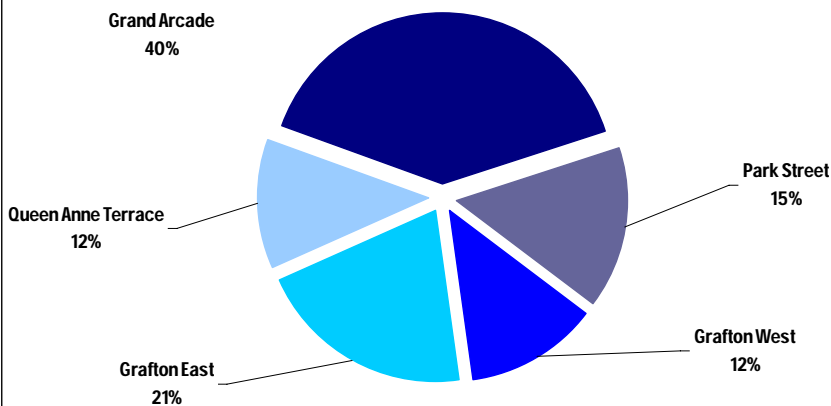
Month on month comparison shows that nationally, footfall decreased by 32% from December 2008 to January 2009 for all towns and cities and by 36.2% for the regional cities category. The Grafton Centre and the Grand Arcade are doing better than average showing only a 30% drop from the Grafton Centre and a 29% drop from the Grand Arcade.

<sup>3</sup> Association of Town Centre Management - <http://www.atcm.org/>



# PARKING TRENDS

## Car Park Usage 30/3/08 to 31/01/09



Total multi-storey car park usage from April 2008 to the end of January 2009 in comparison with the same period in 2007 is up by 5.3% (over 99,000 cars).

The Grand Arcade continues to take the largest proportion of customers (40%), with Queen Anne Terrace and the Grafton West Car Park seeing 12% of customers each.

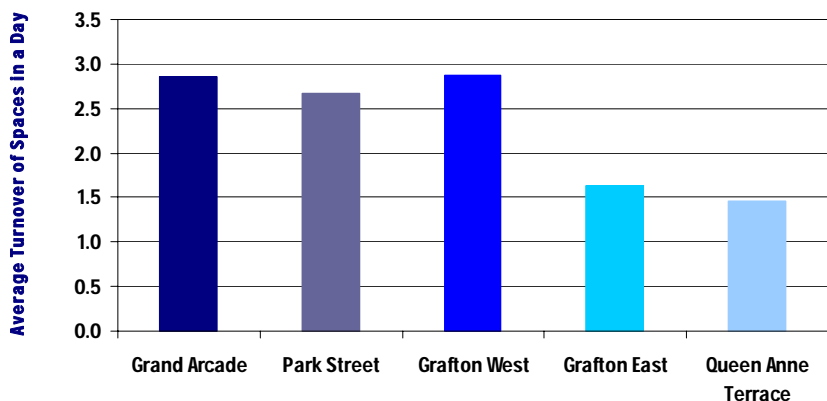
Turnover in all five car parks have remained similar to figures from the February issue of this report (Issue 10). As stated in the previous issue, although the Grafton West car park is only taking 12% of customers, it is in fact seeing a turnover equivalent to that of the Grand Arcade.

The Grand Arcade car park remains very popular with customers, some of which are customers who have parked in other city center car parks whilst the Grand Arcade was being refurbished. This is still reflected in the final chart, which shows the displacement effects of car park usage. This popularity has led to a decrease in usage in some other city center car parks - most notably Grafton East.

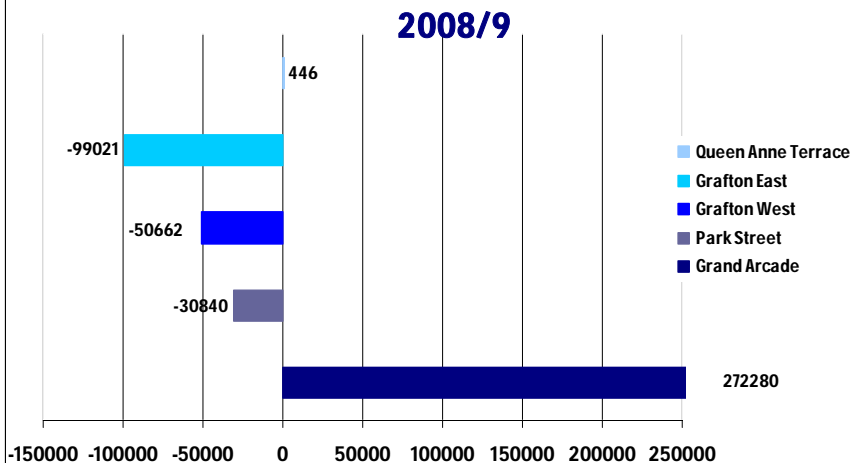
Queen Anne Terrace seems to show a slight increase in usage, and therefore is only mildly affected by the reopening of the Grand Arcade car park.

Currently it is difficult to relate the changes in city centre footfall to that of car park usage, as car park usage currently seems unaffected by the economic climate.

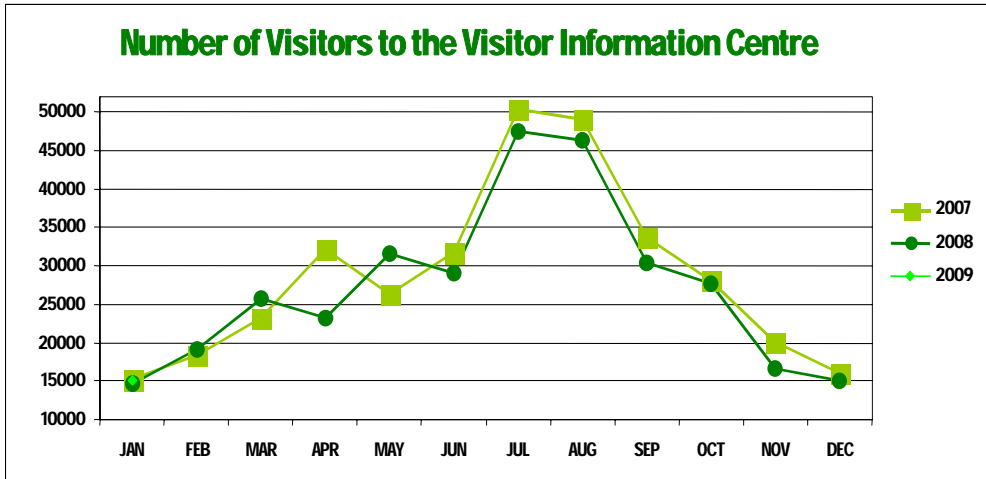
## Average Turnover of Spaces in a Day - 30/3/08 to 31/01/09



## Displacement Effects Showing Change in Usage from Apr to Jan (inclusive) 2007/8 to 2008/9

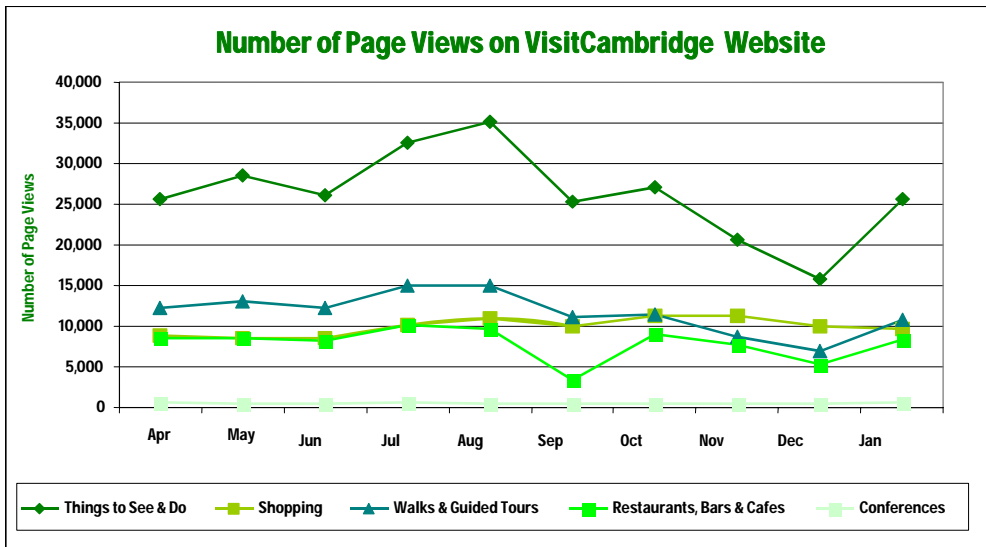


# TOURISM



Following a 2% increase in the number of tourists visiting the Cambridge Visitor Information Centre (Tourist Office) in 2007, total figures for 2008 have now dropped by 5%. Differences in trends for these years between March and May are most likely due to what dates Easter fell on and hence when Easter holidays/breaks were taken. In 2007 Easter

was on the 8<sup>th</sup> April and in 2008 on the 23<sup>rd</sup> March.



The United Kingdom Tourism Survey for October 2008<sup>4</sup> is a national consumer survey measuring the volume and value of tourism trips taken by residents of the United Kingdom.

Figures from the survey suggest a similar trend among visitor figures across the UK as indicated in the chart above detailing the

number of visitors to the Visitor Information Centre.

“Domestic tourism declined in October, however domestic trips were slightly more resilient than international trips as the real onset of the credit crunch continued”.

## United Kingdom Tourism Survey – October 2008 Update

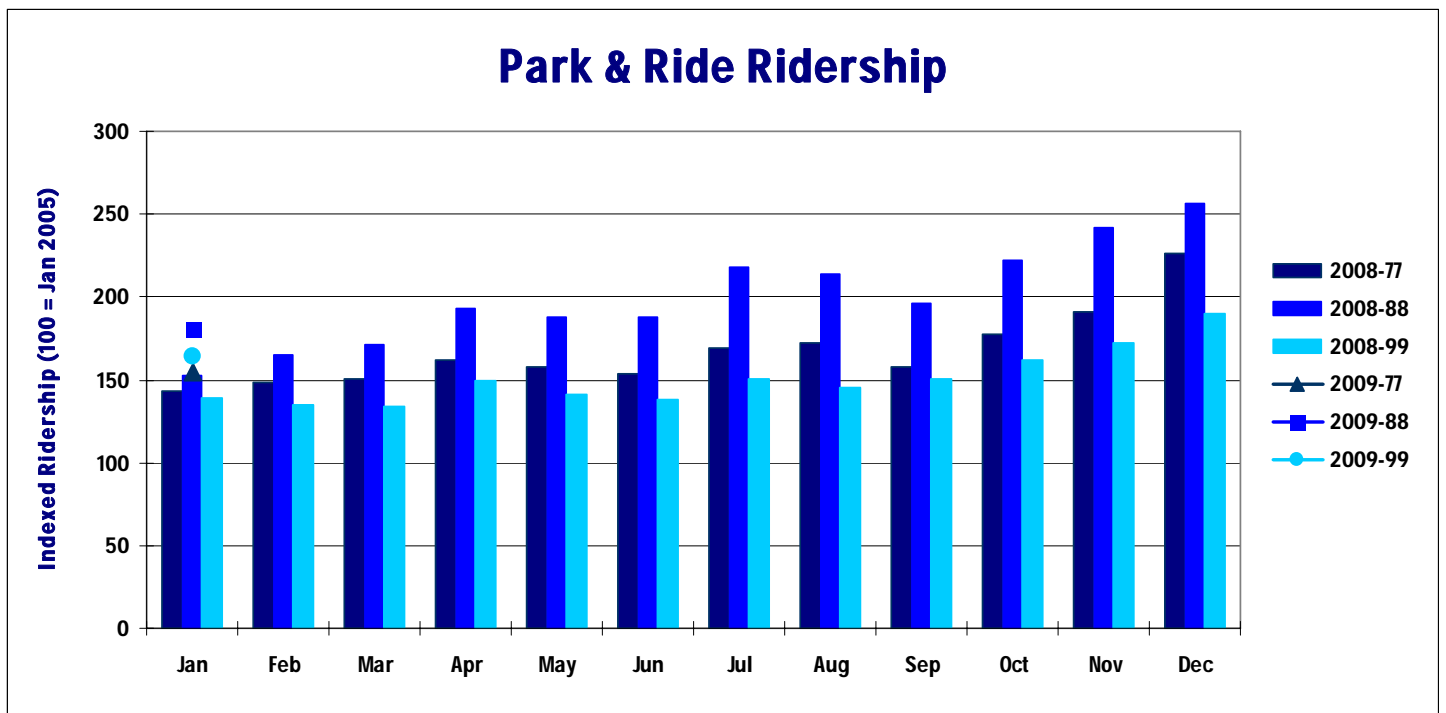
The UK Tourism Survey for October 2008 also points out that the number of overnight trips made in the UK by UK residents in October 2008 decreased by 5% from the same month in 2007, which is equivalent to 0.5m fewer trips. Bed nights, length of stay and the value of overnight trips also fell. Domestic overnight trips were worth £1.71bn during the month compared with £1.74bn in October 2007. Average spend per night and per trip however, increased by 11% and 4% respectively (note this does not take into account inflation which was around +4% at the time)

UK residents made 5.9m trips abroad in October 2008, representing a year-on-year decrease of 10%. Spend on overseas trips fell by -7% compared to the year before at £2.9bn during the month.

Many people believe that the current economic crisis will increase domestic tourism due to the decrease in people’s disposable income and that the number of international tourists visiting the UK will decrease. This is yet to be substantiated, but may be something to look out for in the future.

The second chart shows the number of page views to specific pages of the VisitCambridge website. These trends may be able to illustrate what visitors to Cambridge are looking to do at different points in the year whilst in the area.

# PARK & RIDE



It must be noted that the figures in the charts are indexed, which means that they are not actual ridership figures, they are a measure of the performance of each service against themselves. Each service's starting figure is 100 as of January 2005 and each of the following months show their percentage difference from January 2005.

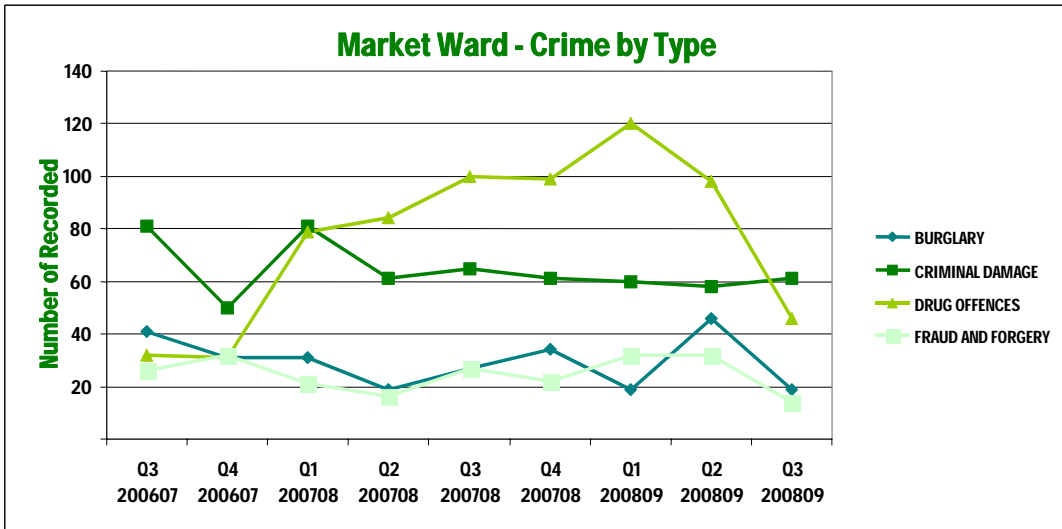
Total ridership figures for 2008 improved on 2007 figures by 28%, over 964,000 passengers. Growth in usage for each of the three Park & Ride services was considerable. Service 77 saw an increase of 34% on previous years figures, Service 88 - 41% and Service 99 by 15%. All services saw a rise in passenger numbers by over 200,000.

January 2009 Park & Ride figures have increased in comparison to January 2009. Service 77 has increased by 7%, Service 88 & Service 99 have increased by 18%.

Percentage Breakdown of Weekly Ridership from 1st Jan 08 - 131st Dec 09			
Day	Service 77	Service 88	Service 99
Monday	13.5%	13.1%	15.7%
Tuesday	14.8%	14.3%	16.8%
Wednesday	15.5%	15.0%	17.6%
Thursday	14.4%	14.3%	16.4%
Friday	15.0%	15.0%	16.3%
Saturday	18.7%	20.5%	15.4%
Sunday	8.1%	7.6%	1.8%
<b>Monday to Friday</b>	<b>73.1%</b>	<b>71.8%</b>	<b>82.8%</b>

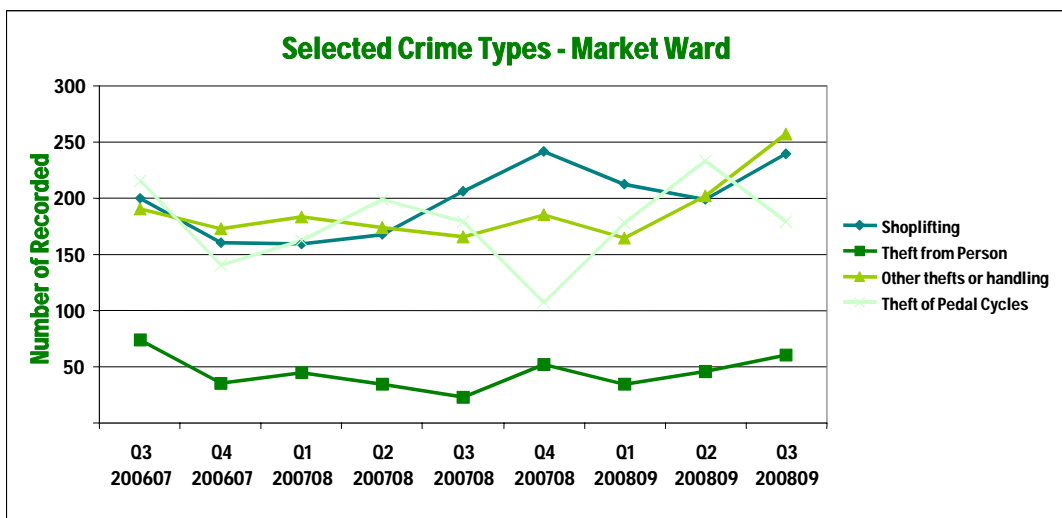


# CRIME

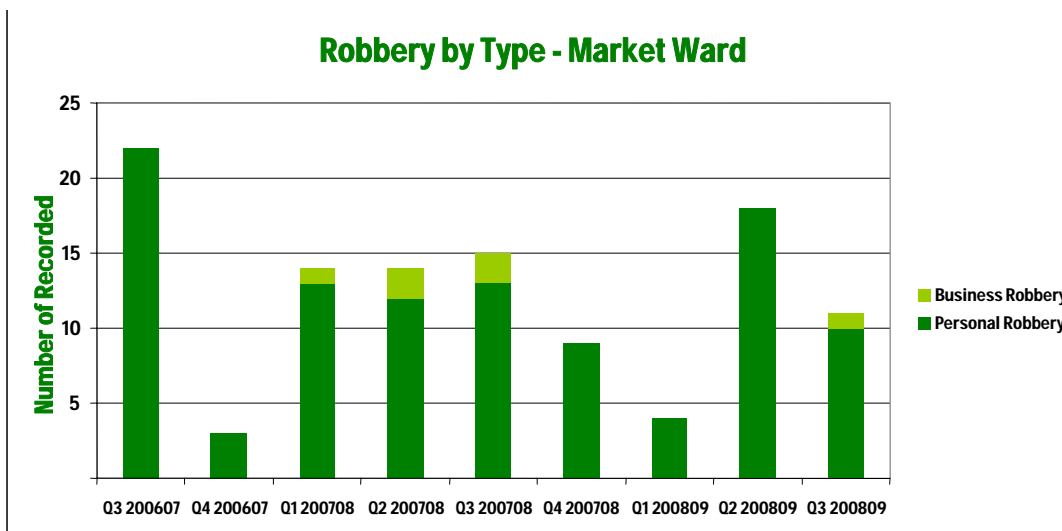


Over the past year (from October to December 2008 in comparison with October to December 2007) burglary, criminal damage, drug offences and fraud and forgery have all decreased in the Market ward.

Burglary has dropped by 30%; in contrast, recorded burglaries for the whole of the city have actually increased by 31%.



Drug offences and fraud and forgery have declined dramatically in the past year. Drug offences have decreased by 54% and fraud and forgery 48%. Across the city as a whole, these crime types have also dropped but not as significantly. Drug offences by 25% and fraud and forgery by 20%.



In comparison recorded shoplifting offences, theft from a person and other thefts and handling have not fared so well. Shoplifting has risen by 17% and other thefts and handling by 54.8%. Theft from a person has increased by 160% from 23 to 60. Again, this reflects the Cambridge City trends. Shoplifting has risen by 18% and

theft from a person has increased by 138%. The recent increase in detected shoplifting offences is due to the successful action taken by CAMBAC and the Police to target shoplifters over the Christmas period.



**WITH THANKS TO:**

- Cambridge City Council - Parking Services**
- Cambridgeshire County Council**
- Stagecoach Cambridgeshire**
- The Grafton Centre**
- The Grand Arcade**
- Lion Yard Shopping Centre**
- Visit Cambridge**

**FOR PROVIDING DATA AND INFORMATION FOR THIS REPORT**