# York Data Intelligence Hub

## AUGUST 2025 CITY CENTRE INSIGHTS

Est. 1841 YORK ST JOHN UNIVERSITY

| This month | Growth vs last year | UK benchmark | Year to date | Growth ytd vs last year | UK benchmark |
|---|---|---|---|---|---|
| £38.18m Sales | -4.89% Sales | -4.78% Sales | £278.66m Sales | -0.25% Sales | -2.93% Sales |
| 477.36k Customers | -3.76% Customers | -0.93% Customers | 3.36m Customers | -1.88% Customers | -3.06% Customers |
| 2.05m Transactions | -4.62% Transactions | -5.39% Transactions | 14.87m Transactions | -3.62% Transactions | -4.22% Transactions |
| £79.99 ARPC | -1.17% ARPC | -3.89% ARPC | £82.90 ARPC | 1.65% ARPC | 0.13% ARPC |
| £18.65 ATV | -0.29% ATV | 0.64% ATV | £18.73 ATV | 3.49% ATV | 1.34% ATV |

In August 2025, total Debit Card Sales in York reached **£38.8 million**, representing a -4.89% year-on-year (YOY) decline compared with the same month in 2024. This reduction mirrors the national trend, with the UK benchmark recording a similar **-4.78%** decrease.

By the end of August 2025, year-to-date (YTD) Debit Card Sales totaled **£278.7 million**, marking a modest **-0.25%** decline compared with the previous year. This performance remains notably stronger than the YTD UK benchmark, which was down **-2.93%** over the same period.

The number of monthly customers fell by **-3.76%** YOY, a significantly sharper drop than the UK benchmark decline of **-0.93%**. Meanwhile, YTD customer numbers were down by **-1.88%** compared to 2024.

The Average Revenue Per Customer (ARPC) in August 2025 was **£79.99**, representing a **-1.17%** YOY decrease, although this remains more resilient than the UK benchmark, which fell **-3.89%**.

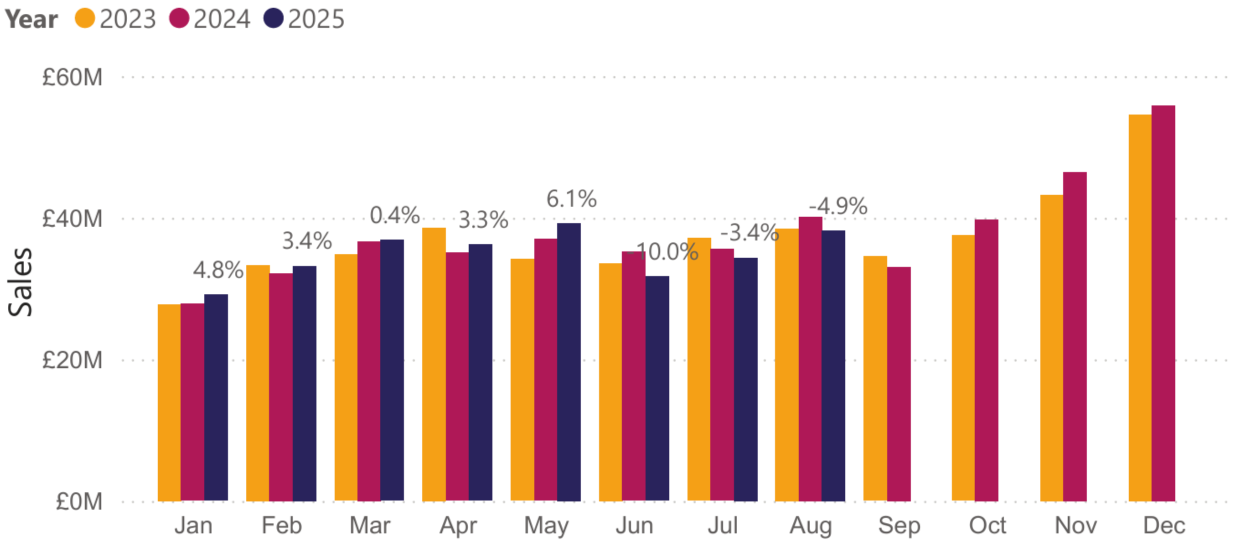
By the end of August 2025, YTD ARPC growth stood at **+1.65%**, falling considerably short of the average rate of inflation (CPI), which currently stands at **4.1%**.

Due to a technical fault with the Springboard camera located on Parliament Street, accurate footfall data for August is unavailable and has therefore been excluded from this month's report.

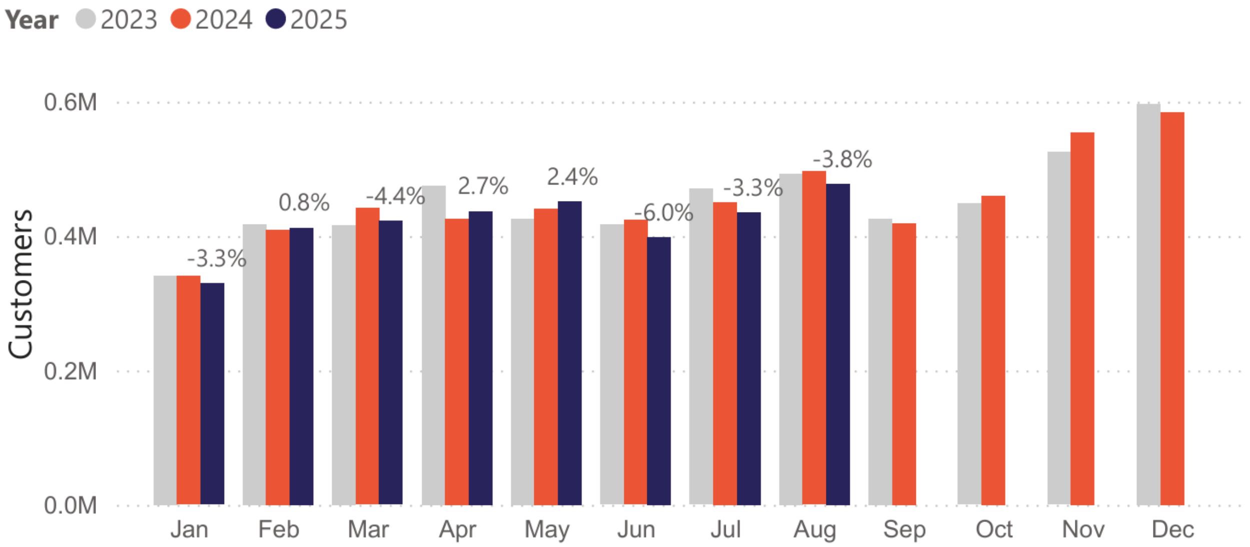
For definitions of specific terms, please refer to the Glossary, on pages 9 & 10 of this report.

# Spending Insights August 2025

## Monthly sales




## Monthly customers




The graph above illustrates monthly sales trends since 2023.

Following a strong start to the calendar year, year-to-date (YTD) sales growth stood at **+3.2%** at the end of May compared with 2024. However, weaker performance across June, August, and August has since reduced YTD growth to **-0.25%**.

During 2024, sales during the festive trading period (November & December) accounted for **22.5%** of total annual sales.

In 2025, May recorded the highest year-on-year (YOY) increase in monthly sales at **+6.1%** compared with the same month in 2024.

The graph also shows monthly customer trends since 2023, highlighting a gradual decline in annual customer numbers over this period.

Notably, January 2025 saw an increase in average revenue per customer (ARPC) of **+8.4%**, despite a YOY decrease in customer numbers of **-3.3%**.

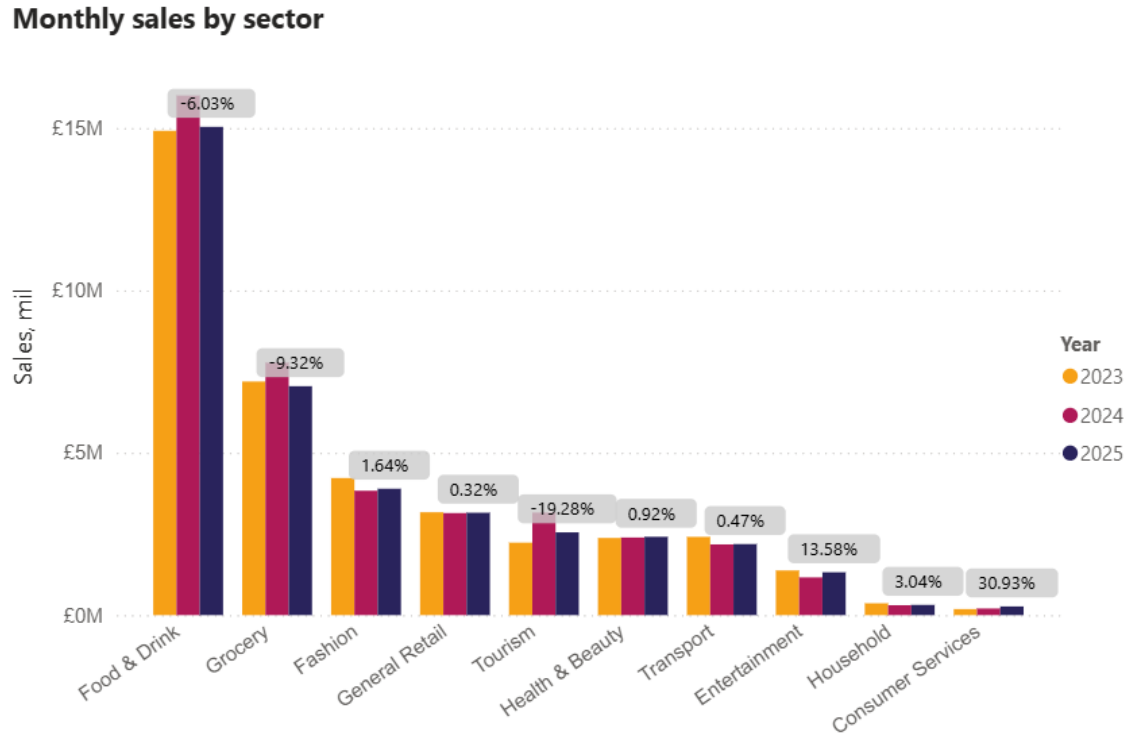
# Sector Spending August 2025

| Sector | August 25 | August 25 vs 24 | YTD August 25 | YTD Aug 25 vs 24 |
|---|---|---|---|---|
| **Food & Drink** | £15.0m | -6.00% | £104m | -2.70% |
| **Grocery** | £7.05m | -9.30% | £55.1m | -6.20% |
| **Fashion** | £3.89m | 1.60% | £29.4m | 7.90% |
| **General Retail** | £3.15m | 0.30% | £23.7m | 11.60% |
| **Tourism** | £2.55m | -19.30% | £17.5m | -2.20% |
| **Health & Beauty** | £2.41m | 0.90% | £20.0m | 5.10% |
| **Transport** | £2.19m | 0.50% | £16.5m | -2.30% |
| **Entertainment** | £1.32m | 13.60% | £7.64m | 7.10% |
| **Household** | £315k | 3.00% | £2.94m | 15.50% |
| **Consumer Services** | £268k | 30.90% | £1.72m | 3.70% |

The **Food & Drink** sector accounted for approximately **37%** of total YTD sales and **39%** of monthly sales recorded in August.

During August 2025, the **Entertainment** sector achieved the strongest year-on-year (YOY) sales growth at **+13.6%**, supported by a **+1.74%** increase in Customers. In contrast, the **Tourism** sector recorded the sharpest decline, with sales down **-19.3%**, primarily driven by a **-24.8%** reduction in ARPC.

The **Fashion** sector reported a YOY increase in sales of **+1.6%**, outperforming the UK benchmark, which declined by **-4.6%**. Conversely, the UK benchmark for **Food & Drink (-2.2%)** considerably outperformed York, which fell by **-6.0%**.

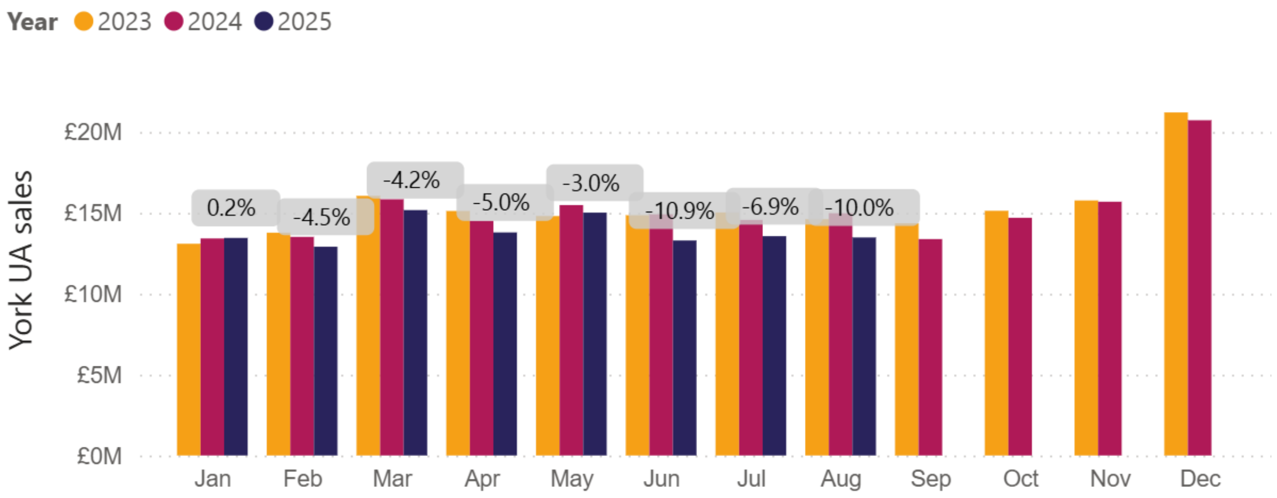



Year-to-date, the **Fashion (+7.9%)**, **General Retail (+11.6%)**, **Household (+15.5%)**, and **Entertainment (+1.1%)** sectors have recorded the strongest growth in 2025. Meanwhile, **Food & Drink (-2.7%)** and **Grocery (-6.2%)** have experienced consistent declines.

The increase in **Fashion** spending appears to have been driven by a YTD uplift in ARPC of **+12.3%**, while higher **General Retail** sales were primarily the result of a **+5.36%** increase in Customer numbers.

# Catchment Spending August 2025

## York UA monthly sales




| Customer Catchment | August 25 | August 25 vs 24 | YTD August 25 | YTD August 25 vs 24 |
|---|---|---|---|---|
| **York UA** | 35.3% | -2.0ppt | 39.7% | -2.2ppt |
| **Rest Of GB** | 31.5% | +1.0ppt | 28.3% | +2.0ppt |
| **North Yorkshire** | 12.0% | +0.1ppt | 12.6% | -0.3ppt |
| **North East** | 6.7% | +0.5ppt | 5.5% | -0.1ppt |
| **West Yorkshire** | 6.5% | +0.2ppt | 6.1% | +0.3ppt |
| **East Yorkshire** | 5.0% | -0.1ppt | 5.3% | +0.5ppt |
| **South Yorkshire** | 3.0% | +0.3ppt | 2.5% | -0.2ppt |

The graph above shows the monthly sales trends for customers residing in the York Unitary Authority (AU) area since 2023.

Following a strong start to the calendar year, year-to-date (YTD) sales growth stood at **+3.2%** at the end of May compared with 2024. However, weaker performance across June, August, and August has since reduced YTD growth to **-0.25%**.

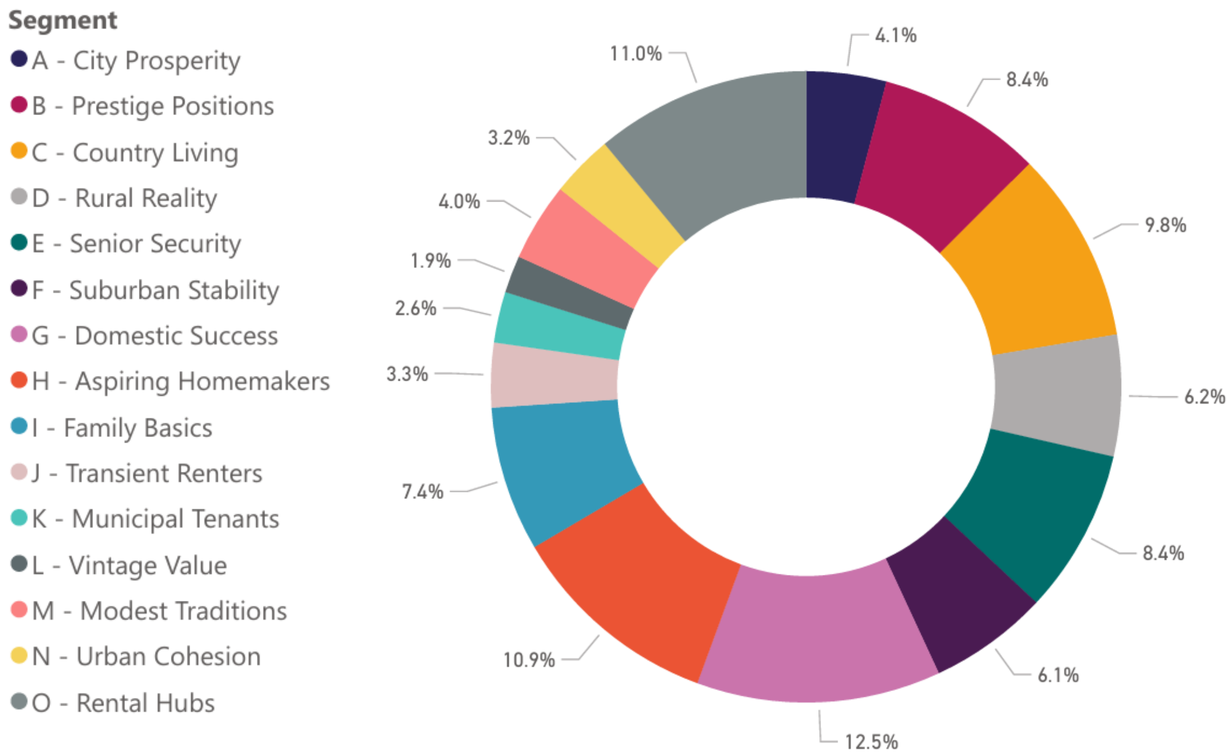
During 2024, sales in November and December—the festive trading period—accounted for **22.5%** of total annual sales. In 2025, May recorded the highest year-on-year (YOY) increase in monthly sales at **+6.1%** compared with the same month in 2024.

In July 2025, **39.3%** of total sales were made by residents of the York Unitary Authority (UA) area, a **1.7%** decrease compared to the previous year.

Year-to-date, approximately **67%** of all sales have been generated by residents from across the Yorkshire region, with North Yorkshire representing the largest individual contributor at circa **13%.**

# Spending by Segments August 2025

## Sales by segment




The pie chart illustrates the percentage share of total monthly sales in August 2025, segmented by demographic groups as defined by Experian's MOSAIC classification.

During this period, the highest levels of spending (collectively accounting for nearly half of total monthly sales) were made by the following four demographic groups:

- **G – Domestic Success (12.5%):** Thriving families balancing career progression with raising children (average age 36–45).
- **H – Aspiring Homemakers (10.9%):** Younger households establishing themselves in affordable housing (average age 26–35).
- **O – Rental Hubs (11.0%):** Educated young adults privately renting in urban neighbourhoods (average age 26–35).
- **C – Country Living (9.8%):** Affluent homeowners in rural areas enjoying the benefits of country life (average age 66+).

Together, these groups represent a wide cross-section of the population, ranging from younger renters on moderate incomes to financially secure retirees in rural locations.

For further information on each of the 15 MOSAIC segment groups, please refer to the MOSAIC UK Handbook

# Hotel Occupancy August 2025

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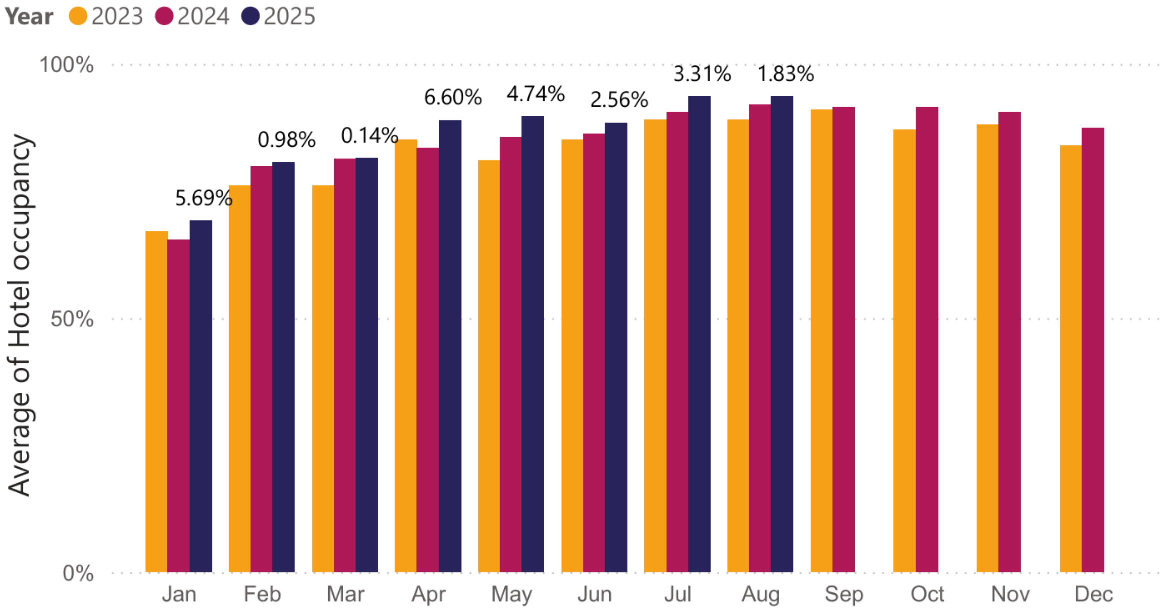
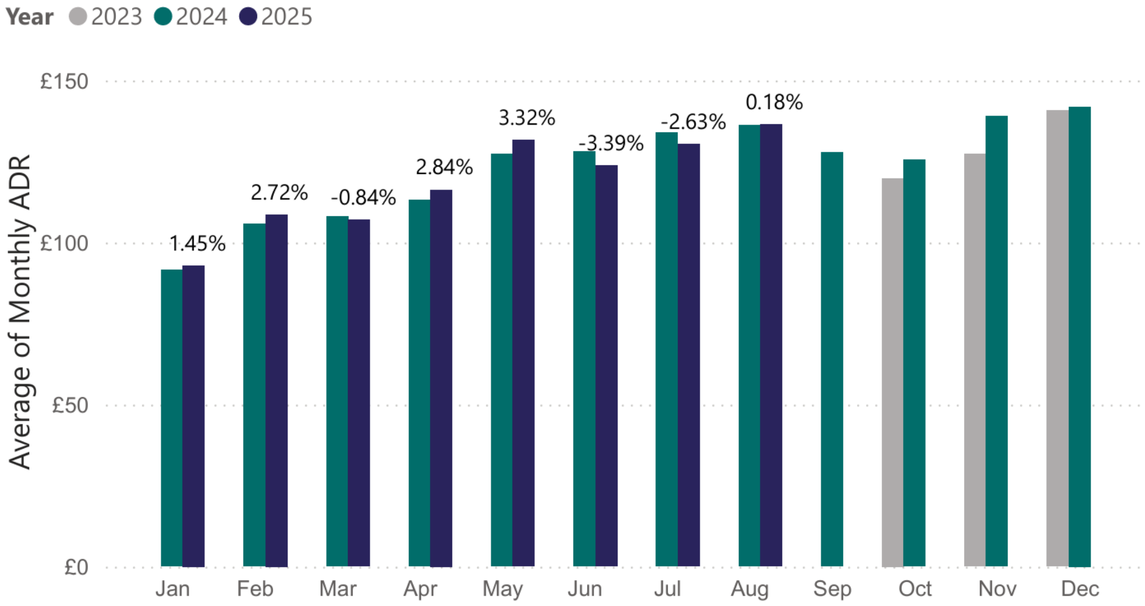
## Average hotel occupancy by month and year




## Average hotel day rate by month and year




During Quarter 1 of 2025, hotel occupancy across the city saw a **+2.1%** year-on-year increase compared to the same period in 2024.

The biggest growth in monthly occupancy levels was witnessed in January 2025, reporting a **+5.7%** year-on-year increase.

Saturdays are consistently the busiest day of the week, with an average occupancy of **89.1%** during Quarter 1. Comparatively, Sunday is consistently the quietest day of the, week with an average occupancy of **57.5%**.

The average day rate (ADR) for a room purchase during the Quarter 1 increased by **+1.1%** year-on-year.

# Vacant Commercial Property August 2025

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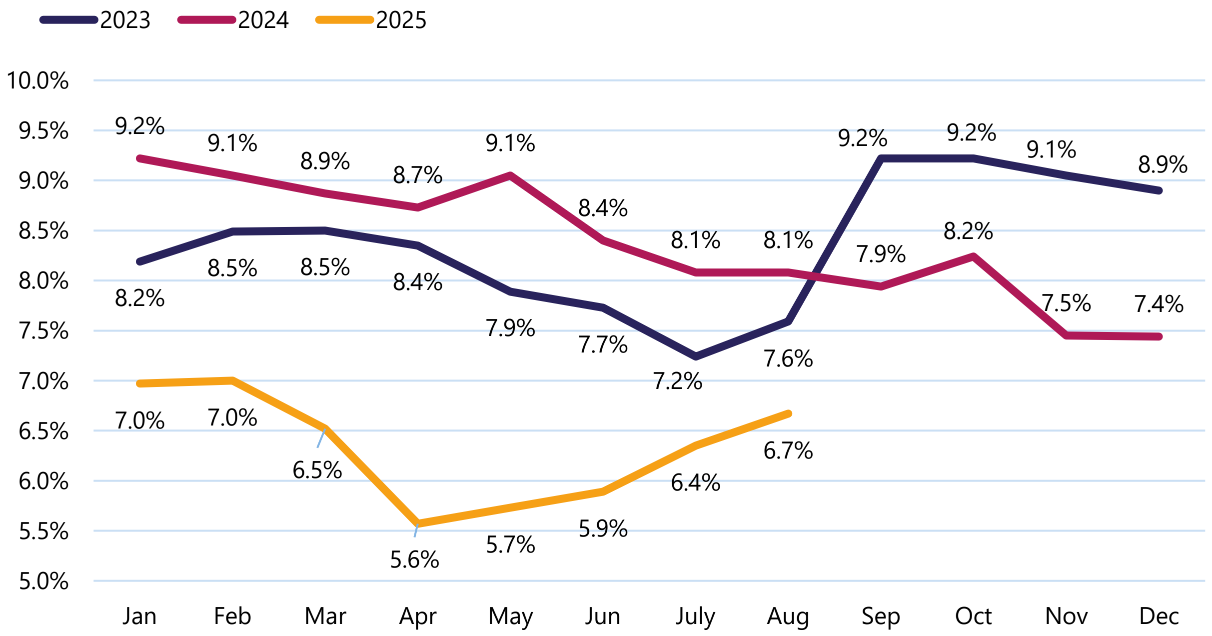
**Monthly Shop Vacancy Rate (%)**




- As of August 2025, shop vacancy data for York city centre, published through the Council's Open Data platform, shows a vacancy rate of **6.7%.**
- For context, Savills reported that the national high street vacancy rate across the UK stood at **16.9%** at the end of Q2 2025.
- Year to date, vacancy levels in York have shown a marked improvement compared with the previous two years, reaching their lowest point in April 2025 at **5.6%.**

York BID and York St John University have partnered to develop a Data Intelligence Hub for York city centre. The Hub bring together valuable metrics from a variety of trusted sources to offer insights and trends into the city's economic performance over time. The emerging economic trends will be published monthly as part of monthly/quarterly reports and made available to local businesses and strategic partners.

**Data sources included in the report:**

- In-store Debit Card Sales (Beauclair)
- Footfall Analytics (MRI – Springboard)
- Hotel Occupancy (Hospitality Association York – STR)
- Train Journeys to York (LNER)
- Shop Vacancy Rates (York Open Data – City of York Council)

**The primary objectives of the Data Intelligence Hub are to:**

- Equip local businesses with actionable intelligence to support operational and strategic decision-making
- Provide a robust evidence base to assess the impact of projects and strengthen the case for future investment
- Support public and private sector stakeholders in making informed policy and planning decisions
- Promote a consistent, data-led narrative around York's economic health to build business and investor confidence

All merchant and customer data presented in this report is strictly anonymised and aggregated, ensuring full compliance with GDPR and data protection regulations.

To find out more, please visit www.theyorkbid.com or get in touch at info@theyorkbid.com or by phone on 01904 809970.

**The York Data Intelligence Hub is proudly sponsored by York & North Yorkshire Combined Authority.**

# Glossary of Terms (1/2)

The following is an alphabetical list of terms used in the York Data Intelligence Hub Report, with definitions to aid interpretation.

**Average Revenue Per Customer (ARPC)** – Total sales divided by the number of customers.
**Average Transaction Value (ATV)** – Total sales divided by the number of transactions.
**Catchment** – A defined geographical area in which customers live. For example, York Unitary Authority (York UA)
**Customers** – The number of unique debit card account holders who have undertaken transactions.
**Footfall** – The number of people recorded as being present within a retail area.
**Growth** – The percentage change in a metric between time periods. A negative figure indicates a decrease.
**Hotel Occupancy** – The average percentage of occupied hotel rooms within a given period, based on the total number of rooms available.
**Metric** – A measurable indicator of performance.
**Quarter** – A three-month period. There are four quarters in a calendar year:

- **Q1:** 1 January – 31 March
- **Q2:** 1 April – 30 June
- **Q3:** 1 July – 30 September.
- **Q4:** 1 October – 31 December

**Retail Area** – The geographical area in which a metric is measured.
**Sales** – The total recorded value of spending.

# Glossary of Terms (2/2)

The following is an alphabetical list of terms used in the York Data Intelligence Hub Report, with definitions to aid interpretation.

**Sectors** – The business industries in which metrics are recorded.
**Food and Drink** – Alcoholic Beverages, Cafés and Coffee Shops, Confectionery, Fast Food Chains, Food Delivery Services, Non-Alcoholic Beverages, Pubs and Bars, Restaurants.
**Grocery** – Corner Shops and Newsagents, Grocery Delivery, Specialist Grocery, Supermarkets, Wholesalers.
**Fashion** – Baby and Childrenswear, Bags and Accessories, Jewellery and Watches, Lingerie, Menswear, Shoes, Sportswear, Unisex, Womenswear.
**General Retail** – Books and Stationery, Cards and Gifts, Department Stores, Digital Marketplaces, Discount Retailers, Electronics and Appliances, Pets.
**Health and Beauty** – Beauty Products, Beauty Salons and Spas, Gyms and Fitness, Health and Nutrition, Healthcare Providers, Opticians.
**Tourism** – Airlines, Holidays, Hotels.
**Transport** – Parking, Petrol, Vehicle Rentals, Transportation.
**Entertainment** – Attractions and Experiences, Gambling, Live Shows and Events, Music and Video Streaming, Sports Equipment and Clubs, Toys and Gaming, Entertainment.
**Household** – DIY and Interior Design, Furniture, Garden, Household Products.
**Consumer Services** – Adult, Delivery Services, Florists, Other Consumer Services, Photography and Printing, Software.
**Segments** – Demographic groups of customers or visitors, defined by economic, age, lifestyle, and behavioural characteristics, based on the MOSAIC classification powered by Experian.
**Shop Vacancy** – The percentage of empty commercial premises within a given period, based on the total number of units available.
**Timeframe** – The period over which a metric is measured.
**Transactions** – The number of recorded sales transactions.
**UK Benchmark** – The percentage change in metrics recorded at the national level for the United Kingdom. A negative figure indicates a decrease.
**Year-on-Year (YoY)** – A comparison of metrics from a given period with the same period in the previous year.
**Year-to-Date (YTD)** – A period starting from 1 January and ending with the selected month of the same year.