York City Centre Insights Report May 2026

Our monthly insights report provides an overview of the key economic performance indicators for the most recent month available. Data is typically made available a month in arrears.

More detailed insights are available within the York Economic Data Hub, which is an online resource designed to provide clear, accessible insights into the economic performance of York city centre over time.

Please refer to the Glossary for definitions of the terms and abbreviations used in this report, along with maps outlining the geographic coverage of each dataset.

Latest Monthly Insights - May 2026

Metric	Monthly Total	Growth vs 2025	UK Benchmark	YTD Jan-May 2026	YTD Growth vs 2025	YTD UK Benchmark
Sales	£35.1m	-8.2%	-4.5%	£161.5m	-4.7%	-4.1%
Customers	410.9k	-6.9%	-4.8%	1.9m	-5.4%	-4.1%
ARPC	£85.52	-1.4%	+0.3%	£85.15	+0.7%	-0.0%
Transactions	1.8m	-7.3%	-7.1%	8.5m	-5.1%	-5.6%
ATV	£19.55	-1.0%	+2.8%	£19.10	+0.4%	+1.5%
Footfall	2.9m	-8.8%	n/a	£13.4m	-8.2%	n/a

Headline Summary

- 📉 **Sales and customer activity weakened sharply in May**, with sales down **-8.2% YoY** and customer volumes falling **-6.9%**, both below national benchmarks and marking the steepest decline of 2026 so far.
- 🚶 **Footfall continues to trend down in 2026**, showing a decline of **-8.8% in May** and **-8.2% YTD**, closely mirroring sales and customer trends—though April briefly broke the pattern due to a spike in Average Revenue Per Customer (ARPC).
- 🛍️ **Sector performance shifted significantly**, with **Fashion (-30.4%)**, **General Retail (-10.2%)**, and **Food & Drink (-7.5%)** seeing the largest drops. Year-to-date figures show Fashion and General Retail declining at roughly **double** the national rate.
- 🏘️ **York residents remain the biggest spenders (39%)**, but their city-centre spending has been falling since early 2024, contrasting with stronger performance witnessed at out-of-town shopping centres (**-1.5% YTD**).
- 🏬 **Shop vacancy rose slightly to 5.7%**, still far below the national benchmark of **13.5%**, signalling continued resilience in York's retail occupancy despite wider market pressures.

Spending Insights

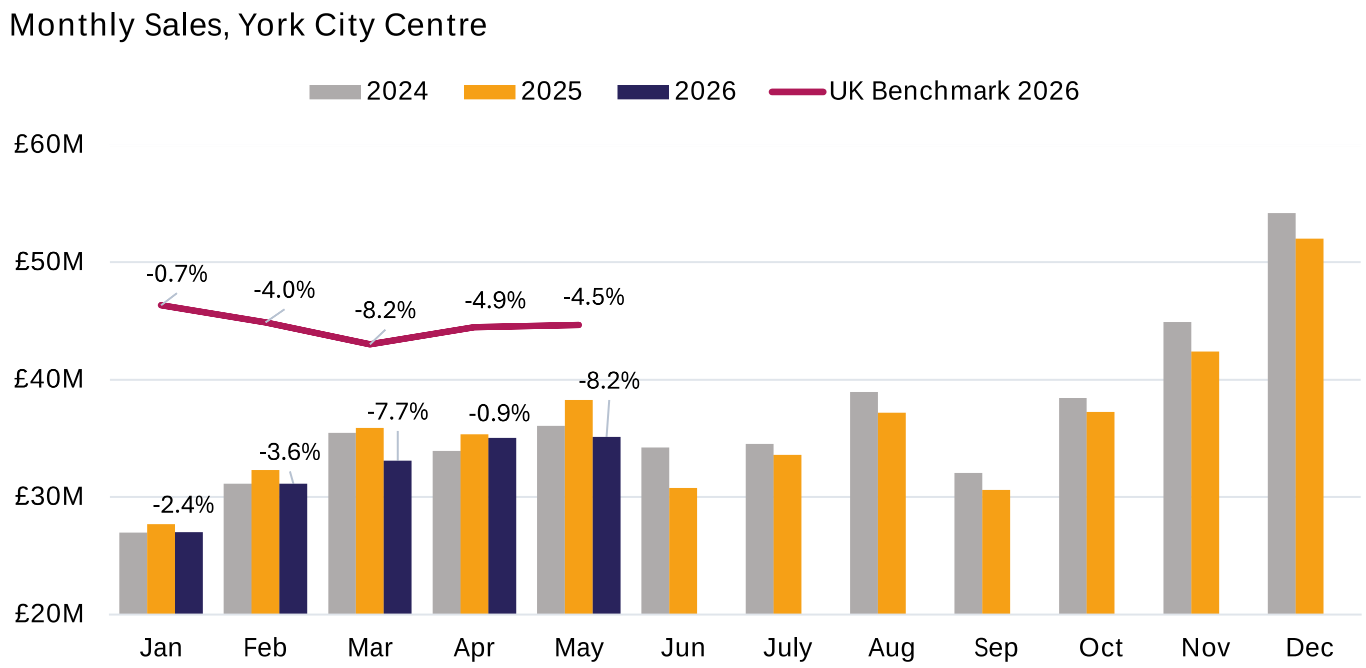


Figure 1. *Total monthly sales recorded in York city centre between 2024 and 2026. Data labels show year-on-year (YoY) growth, comparing each month in the current year with the corresponding month in the previous year.* ***(Source: Beauclair)***

Spending trends in York city centre have remained below last year's levels since the start of 2026. April saw a brief uplift, but year-on-year sales growth fell again in May to **-8.2%**, the sharpest decline recorded so far this year. York also underperformed the UK benchmark of **-4.5%**.

While the national benchmark is also trending down, York's year-to-date performance is currently **0.6** percentage points behind the UK benchmark, at **-4.1%**

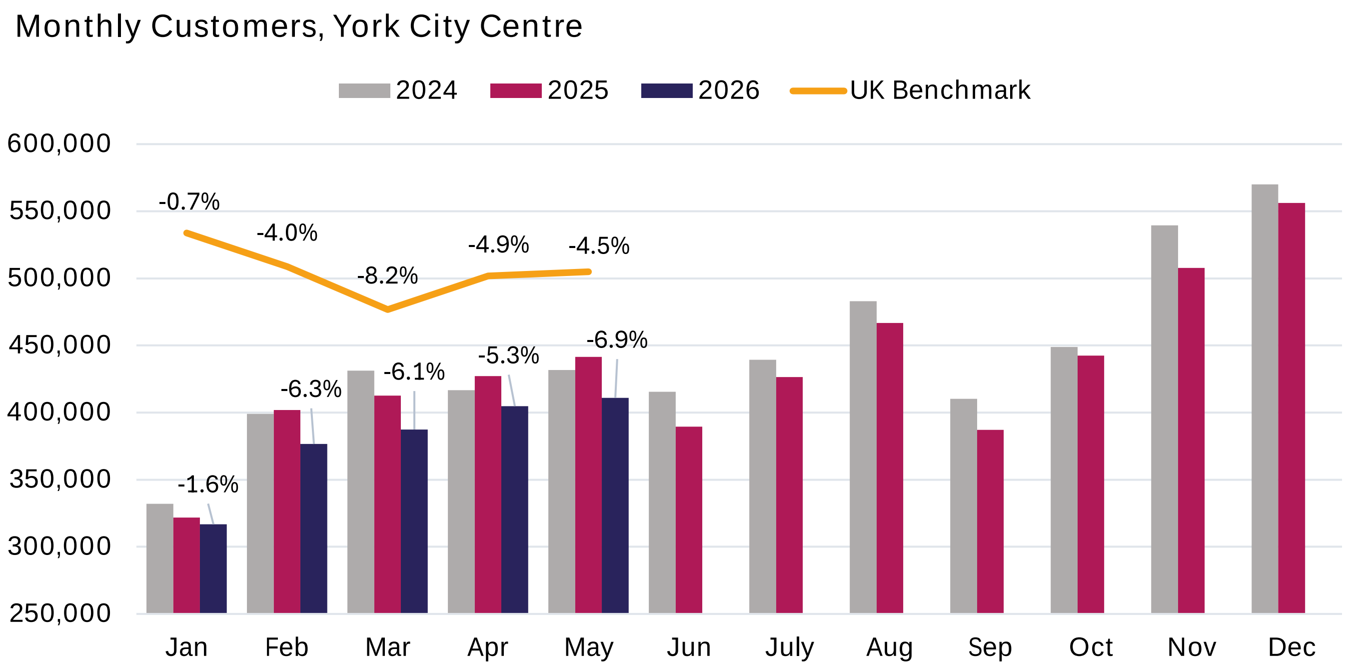


Figure 2. *Total number of account holders linked to monthly debit card transactions, recorded in York city centre between 2024–2026. Data labels show year-on-year (YoY) growth, comparing each month in the current year with the corresponding month in the previous year.* ***(Source: Beauclair)***

Monthly customer trends help explain the decline in sales performance in York. As shown in the graph below, customer volumes have steadily decreased, with monthly declines consistently ranging between **6%** and **7%**.

Year-to-date (YTD) customer growth stands at **-5.4%**, which is **1.3** percentage points below the UK benchmark. Despite some month-to-month fluctuation, Average Revenue Per Customer (ARPC) has remained broadly stable and in line with both local and national performance levels recorded last year.

Sector Spending Insights

From a sector perspective, most business categories experienced notable declines in sales growth during May, the most pronounced by far were Fashion **(-30.4%)**, General Retail **(-10.2%)** and Food & Drink **(-7.5%)**. For a more detailed breakdown of sector insights during May, visit the York Economic Data Hub.

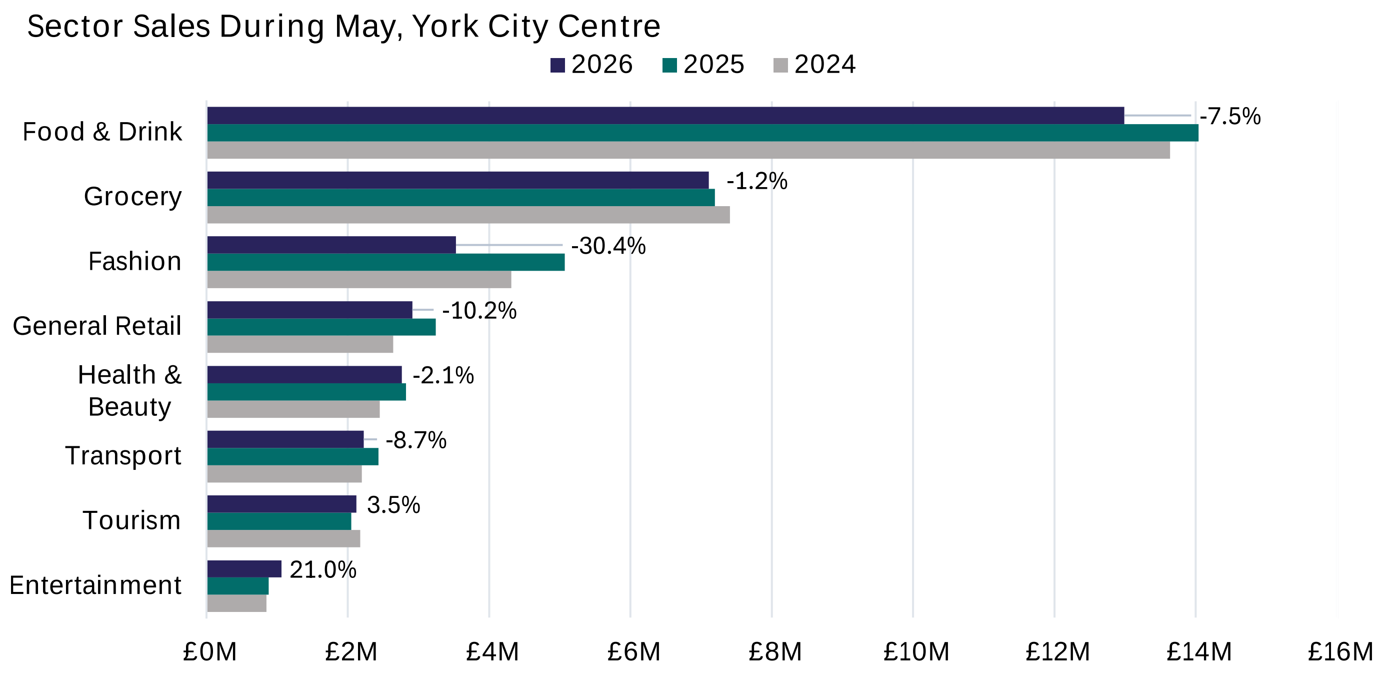
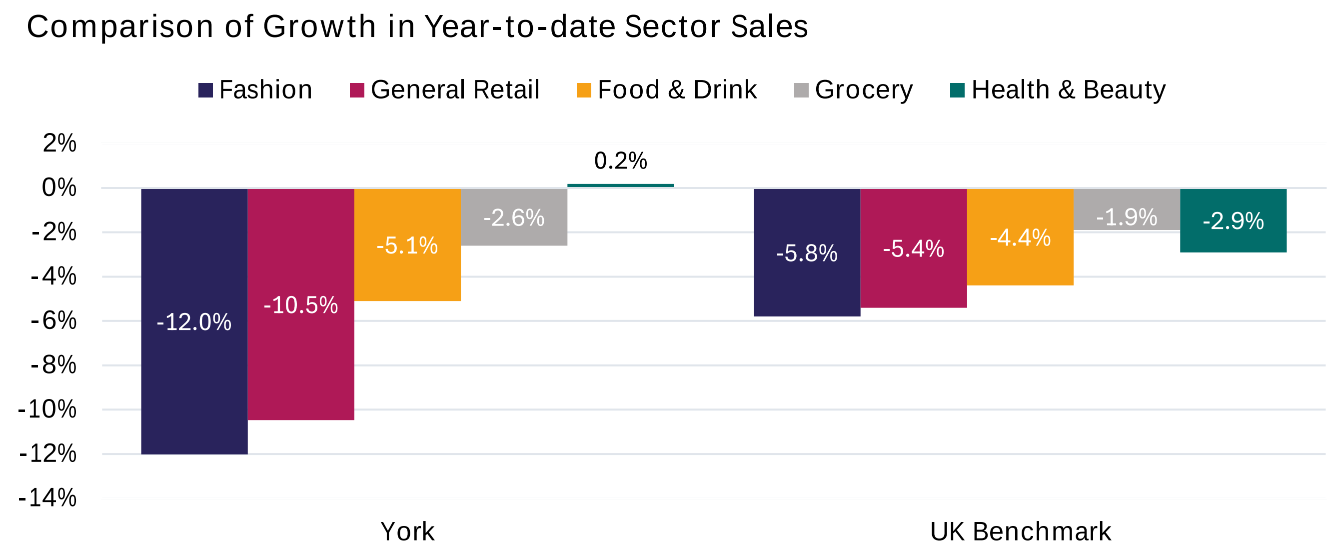


Figure 3. *Total monthly sales across sectors, recorded in York city centre, within a chosen month. Data labels show year-on-year (YoY) growth, comparing each month in the current year with the corresponding month in the previous year. Use the slicer to explore different months across the year. For sector definition, please refer to the Glossary of Terms.* ***(Source: Beauclair)***

The table below compares year-to-date (YTD) sales growth across the top-performing sectors in York against the UK benchmark. While both York and the UK have experienced a slowdown in sales growth during the year to date, the decline has been significantly more pronounced in York's Fashion and Retail sectors, where performance has fallen at twice the rate observed nationally. By comparison, the Food & Drink and Grocery sectors are tracking more closely with the national benchmark.



Visitor Insights

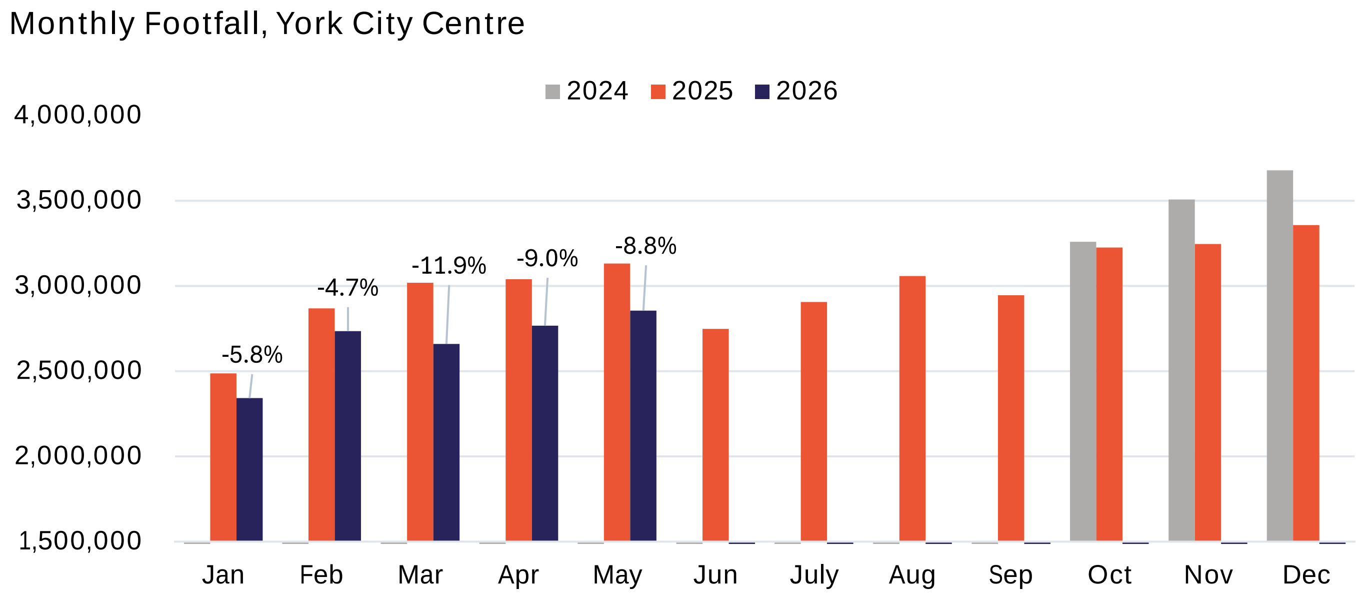


Figure 5. *Monthly totals of cumulative daily visitors to York city centre from October 2024 to present. Data labels show year-on-year (YoY) percentage change, comparing each month with the equivalent period in the previous year.* ***(Source:*** ***BT Active Intelligence)***

Overall, footfall declined by **-8.8%** in May and is down **-8.2%** year-to-date. Footfall trends broadly mirror both sales and customer performance, reinforcing the link between reduced visitor numbers and weaker trading results.

However, April was a notable exception, with footfall falling by almost **-12%** while sales recorded their strongest performance of the year to date at **-0.9%.** This shift can be partly attributed to a **4.6%** increase in Average Revenue Per Customer (ARPC) during the same period, indicating that higher customer spending helped offset the impact of lower visitor volumes.

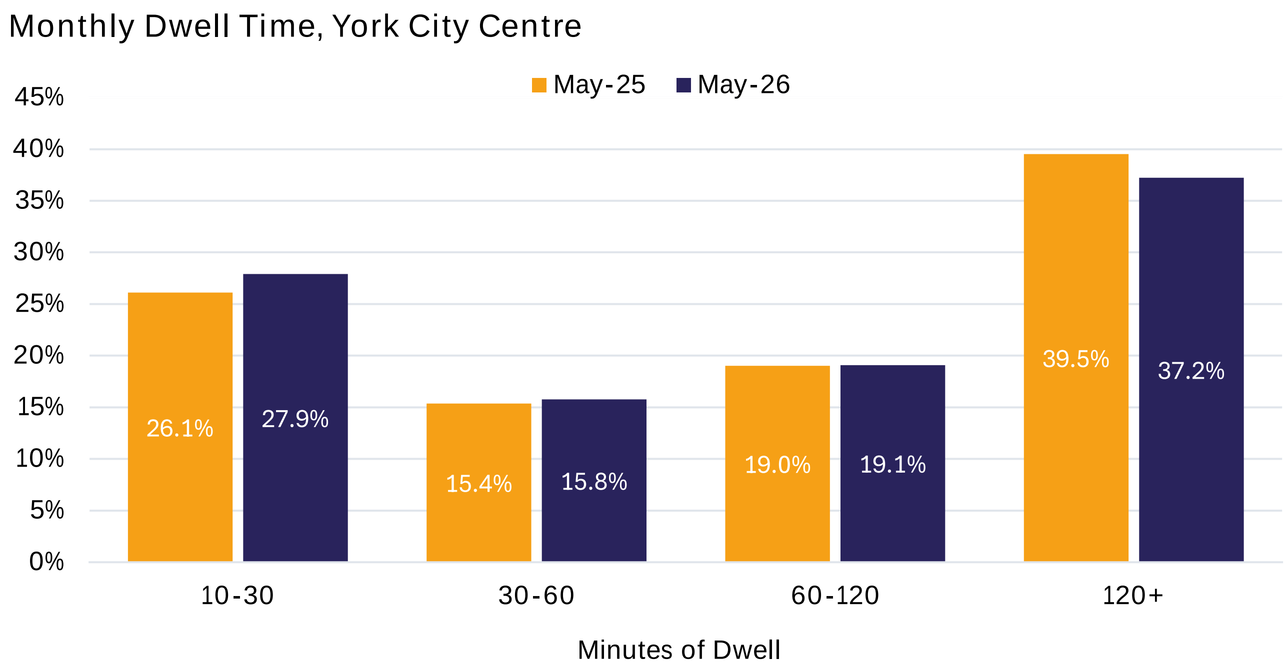


Figure 6. *Percentage distribution of monthly visitors to York city centre by dwell time (in minutes) during May 2026. Visitors present in the retail area for fewer than 10 minutes are excluded.* ***(Source:*** ***BT Active Intelligence)***

May saw a notable shift in visitor dwell patterns. The proportion of visitors staying in the city centre for **2 hours or more** fell by **2.5 percentage points**, accounting for **37.2%** of all dwell times. In contrast, the share of visitors staying for **30 minutes** or less rose by 1.8 percentage points to **27.9%,** indicating a move toward shorter visits overall.

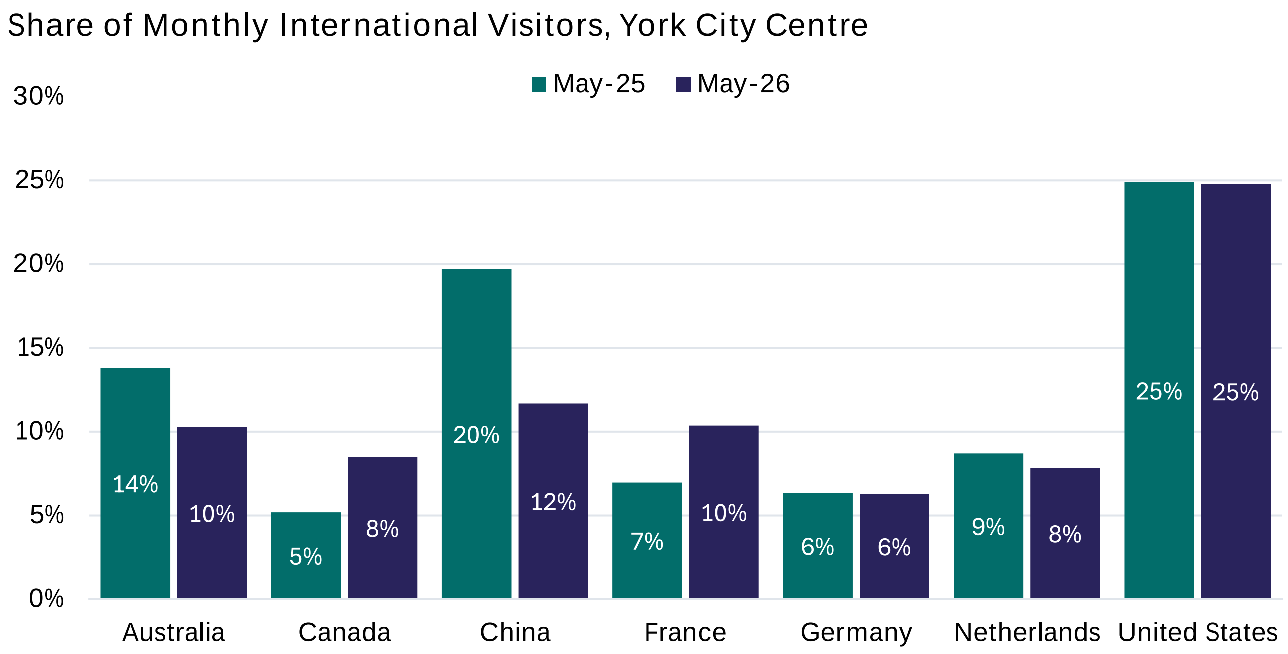


Figure 7. *Percentage distribution of monthly international visitors during May 2026 to York city centre, from the 7 top largest volumes of visitors. **(Source:** BT Active Intelligence**)***

The table above illustrates the distribution of international visitors during May 2026 across the seven largest contributing countries. The accompanying table highlights several significant year-on-year changes: **Chinese** and **Australian** visitor numbers declined sharply, while **Canadian** and **French** visitors increased over the same period. Visitors from the **USA** remain the largest international segment, representing **25%** of all overseas arrivals, with performance holding broadly steady compared with last year.

Catchment Insights

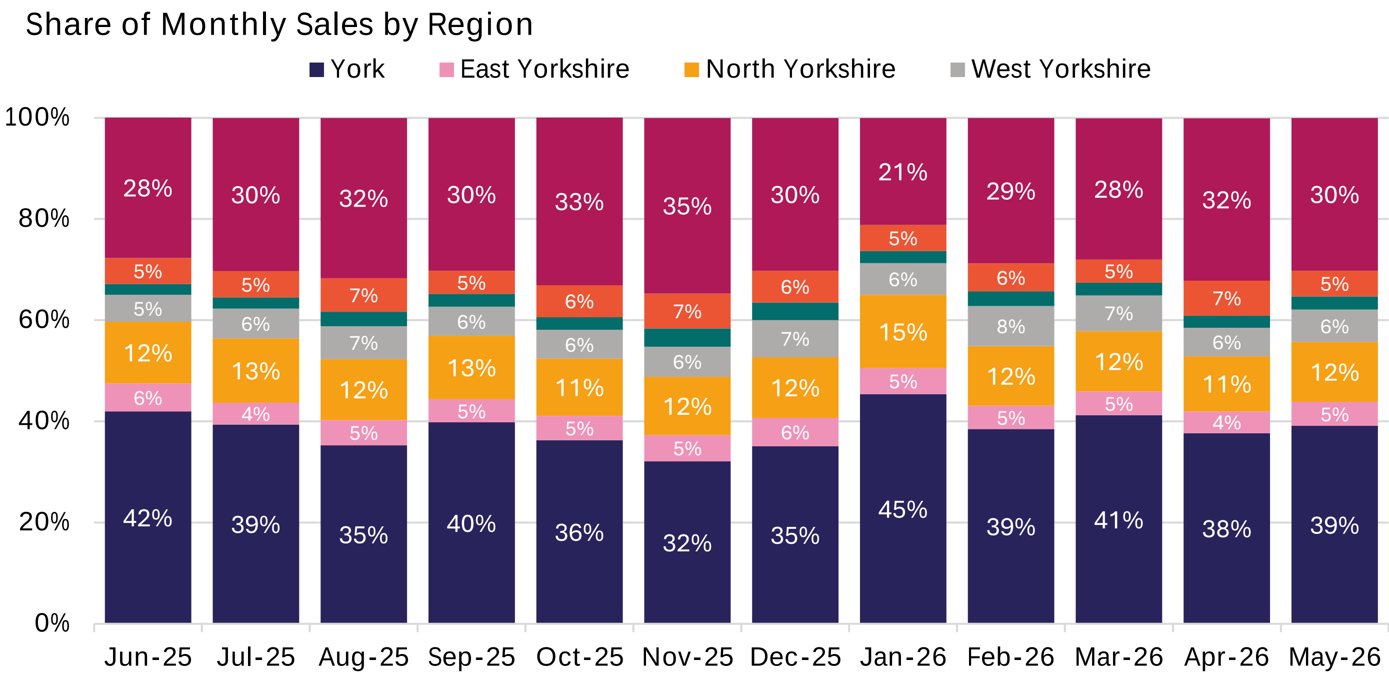


Figure 4.** Distribution of monthly sales by customers' region of residence. Data labels show the percentage share of total sales associated with customers of each region, recorded in York city centre during the last 12 months.* ***(Source: Beauclair)

York residents remained the largest contributor to city centre sales in May, accounting for **39%** of total expenditure. Visitors from outside Yorkshire and the North East generated **30%** of sales, while Yorkshire residents collectively contributed **70%** of total spending.

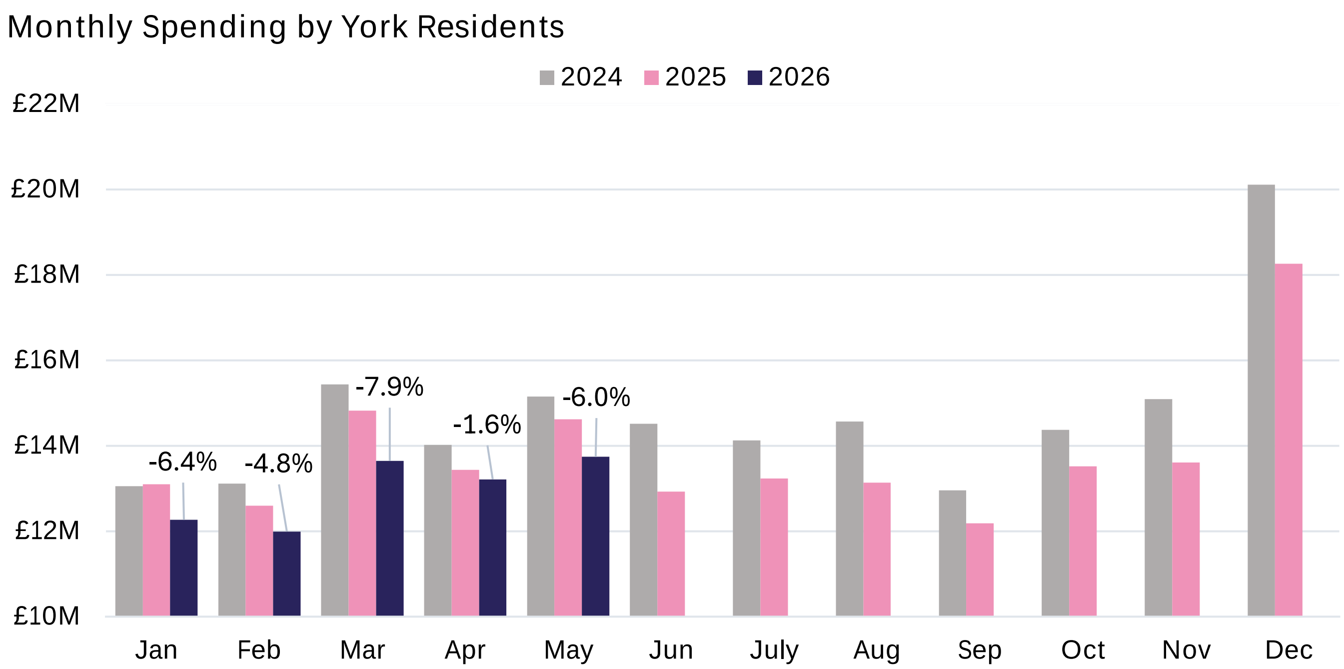


Figure 5.** Total monthly spending by customers residing within the York Local Authority Area, recorded in York city centre between 2024 and 2026. Data labels show year-on-year (YoY) growth, comparing each month in the current year with the corresponding month in the previous year.* ***(Source: Beauclair)

However, despite their continued importance to the city centre economy, spending by York residents has been in year-on-year decline since January 2024. This trend is particularly notable given the relative resilience of

York's out-of-town retail centres, where year-to-date sales are down by only **-1.5%** across Monks Cross, Clifton Moor and York Designer Outlet.

The divergence in performance suggests that local consumers may increasingly favour the convenience and accessibility offered by these destinations, presenting an ongoing challenge for the city centre retail offer.

Shop Vacancy

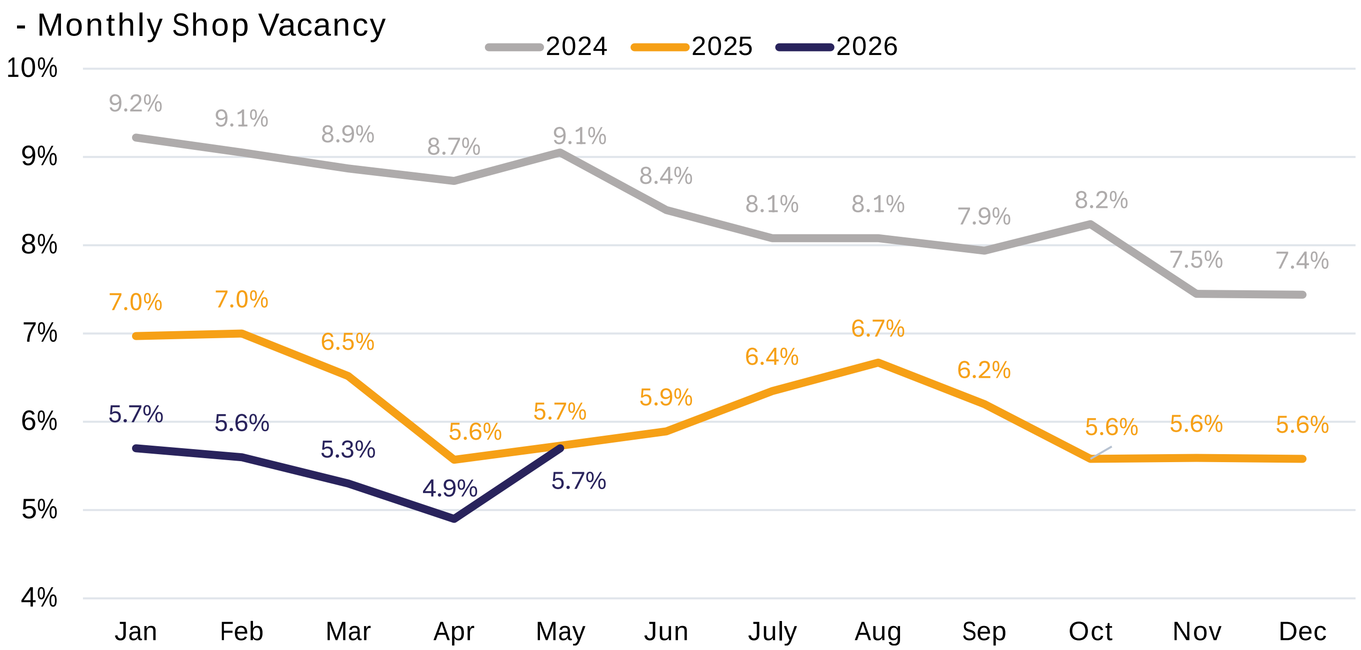


Figure 6. *The average monthly percentage of vacant retail units recorded in York city centre, since the beginning of 2024.* ***(Source:*** ***York Open Data*)**

Shop vacancy rates saw a slight increase of **+0.8** percentage points, raising to **5.7%** in May 2026. This still represents continued resilience in occupancy despite wider retail challenges. For context, figures published by Savills in its Shopping Centre and High Street Report estimate the national vacancy rate at **13.5%** as of the end of Q3 2025.

About The Hub

York Economic Data Hub is a free, easy-to-use online resource designed to provide York's business community with clear, accessible insights into the economic performance of York city centre over time. Historical insights reports, news articles, and webinar recordings are available via our Insights Archive.

Please refer to the Glossary of Terms for definitions of the terms and abbreviations used in this report, along with maps outlining the geographic coverage of each dataset.

If you have any questions or queries about the data, feel free to contact the York BID at info@theyorkbid.com.

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