Spending Insights November 2025

This month	Growth vs last year	UK benchmark	Year to date	Growth ytd vs last year	UK benchmark
£42.87m Sales	-5.64% Sales	-7.01% Sales	£387.04m Sales	-1.40% Sales	-3.26% Sales
504.74k Customers	-6.00% Customers	-4.83% Customers	4.65m Customers	-2.87% Customers	-3.18% Customers
2.15m Transactions	-6.97% Transactions	-8.53% Transactions	20.42m Transactions	-4.09% Transactions	-4.43% Transactions
£84.94 ARPC	0.39% ARPC	-2.29% ARPC	£83.15 ARPC	1.50% ARPC	-0.08% ARPC
£19.98 ATV	1.44% ATV	1.67% ATV	£18.95 ATV	2.80% ATV	1.23% ATV

The figures above summarise in-store debit card spending activity in York city centre during November 2025. For definitions of terms and abbreviations used in this report, please see the Glossary on pages 10–11.

Monthly **Sales** in York were down **-5.6%** YoY, outperforming the UK benchmark decline of **-7.0%.** YTD **Sales** were down **-1.4%** YoY, again beating the UK benchmark decline of **-3.3%**.

Customer volumes in York fell by **-6.0%** YoY, underperforming against the UK benchmark decline of **-4.8%.** YTD **Customers** were down **-2.9%,** broadly in line with the UK benchmark decrease of **-3.2%.**

Transaction volumes recorded a sharp declined of **-6.9%** YoY, representing a stronger performance than the UK benchmark fall of **-8.5%**. YTD **Transactions** decreased by **-4.1%,** closely aligned with the UK benchmark reduction of **-4.4%**.

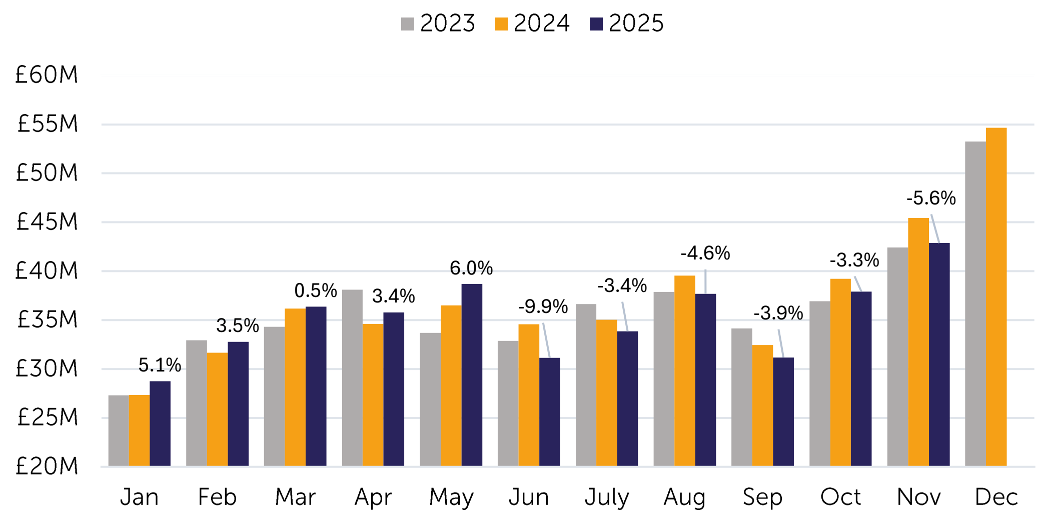
ARPC saw a marginal increase of **+0.4%** YoY, outperforming the UK benchmark at -**2.3%**. YTD **ARPC** rose by **+1.5%,** contrasting with a 0.1% decrease at the UK benchmark.

ATV grew by **+1.4%** YoY, broadly in line with the UK benchmark increase of **+1.7%.** YTD **ATV** rose by **+2.8%** outperforming the UK Benchmark growth, recorded at **+1.2%**

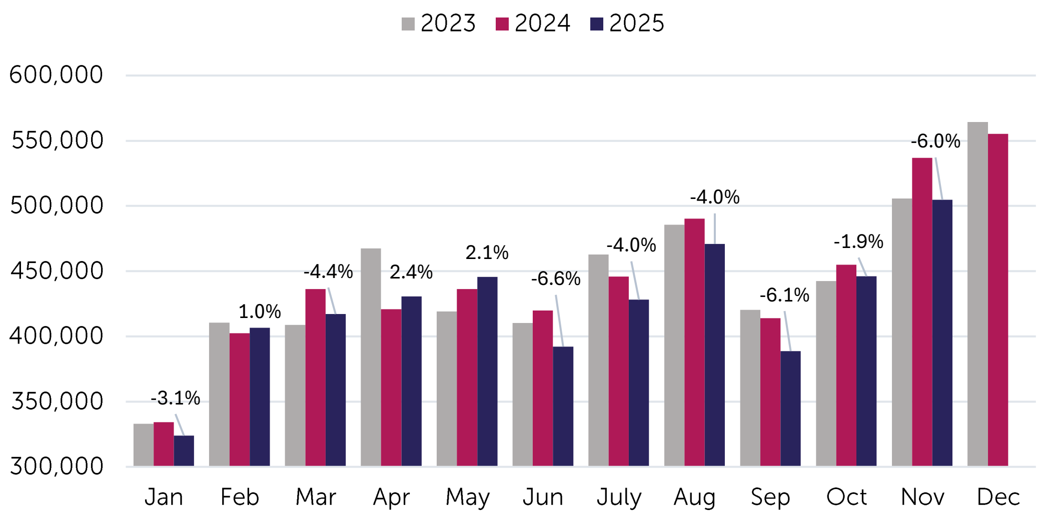
Source: Beauclair Retail Spend Insights

Spending Insights November 2025

- Monthly Sales



- Monthly Customers



The tables above illustrate monthly spending trends in York city centre since 2023, with data labels indicating year-on-year (YoY) growth.

Sales in 2025 began strongly, with robust performance across the first five months and a peak in May at **+6.0%** YoY. This early uplift was largely driven by higher **ARPC**, which saw particularly strong growth in January (**+5.1%** YoY).

Performance has softened over the following six months, with June recording the sharpest decline at **-9.9%** YoY. This downturn was primarily due to reduced **Customer** numbers, most noticeably in June **(-6.6%)** and September **(-6.1%).**

YTD **Sales** to the end of November 2025 stood at **-1.4%,** which is not particularly strong when considering inflation (CPI) stood at **3,2%** in November 2025.

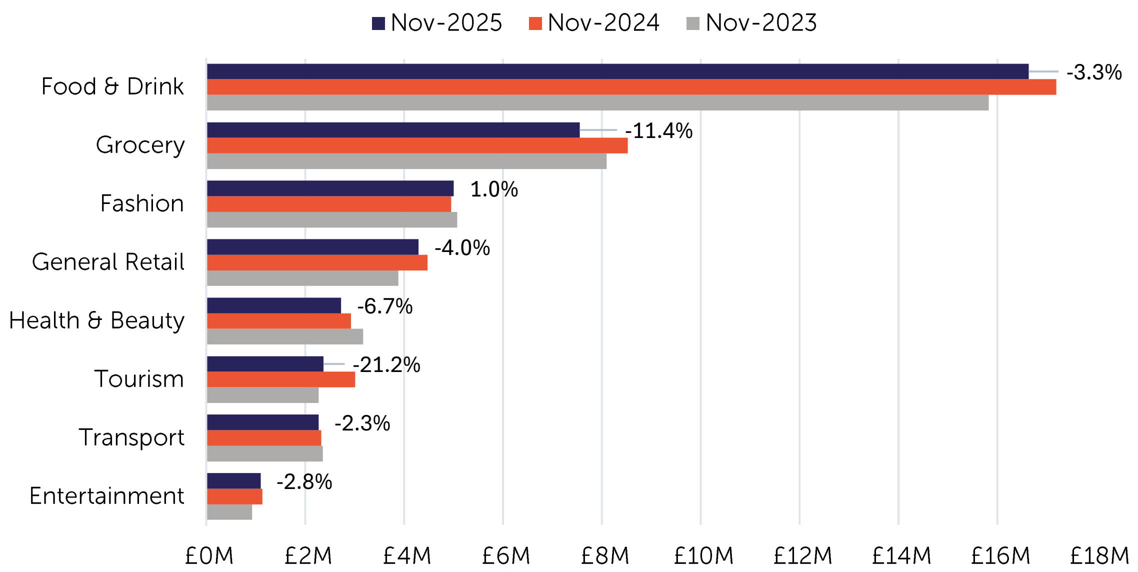
The festive trading period (November and December) typically delivers the highest monthly sales each year. In 2024, festive sales grew by **+4.6%** compared with the previous year.

Within 2025, November recorded the highest monthly **Sales** at nearly **£43 million**, and the largest Customer volume at more than **500,000**. January 2025 saw the biggest YoY increase of any month at **+5.1**.

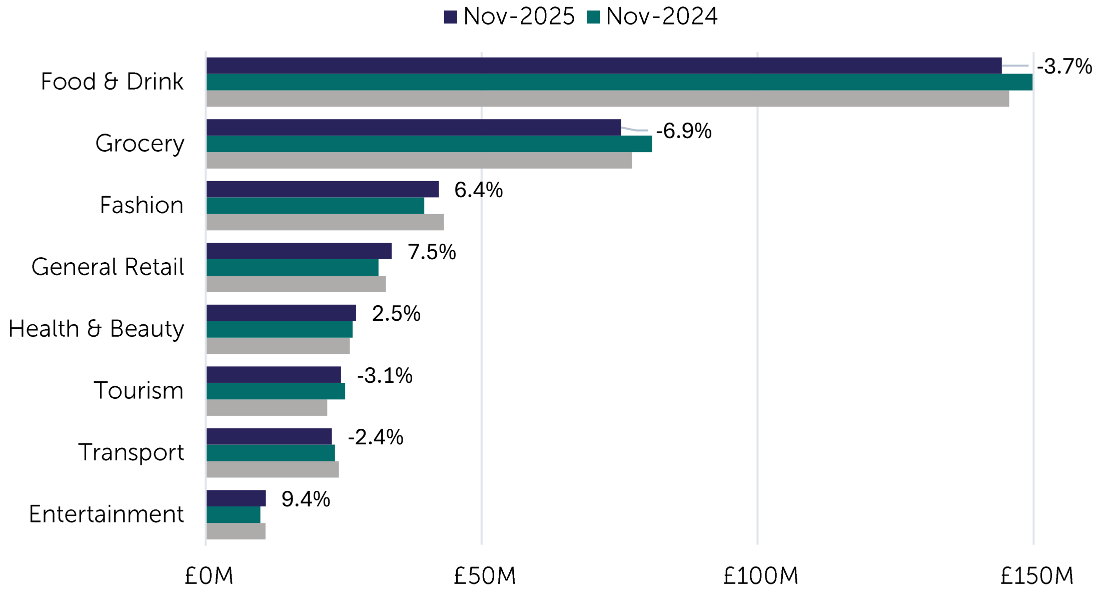
Source: Beauclair Retail Spend Insights

Sector Spending November 2025

- Monthly Sector Sales Year-on-Year



- Year To Date Sector Sales



The tables above detail year-on-year growth in sales and customer numbers for key business sectors in York city centre during November 2025.

The **Food & Drink** sector accounted for **37%** YTD **Sales** during 2025. Performance in this sector has remained weak throughout the year, with a **-3.3%** decline YoY in November and a **-3.7%** reduction YTD. Comparatively, the UK benchmark has performed better, showing a **-1.8%** decrease YoY during November 2025 and a **-2.2%** reduction YTD.

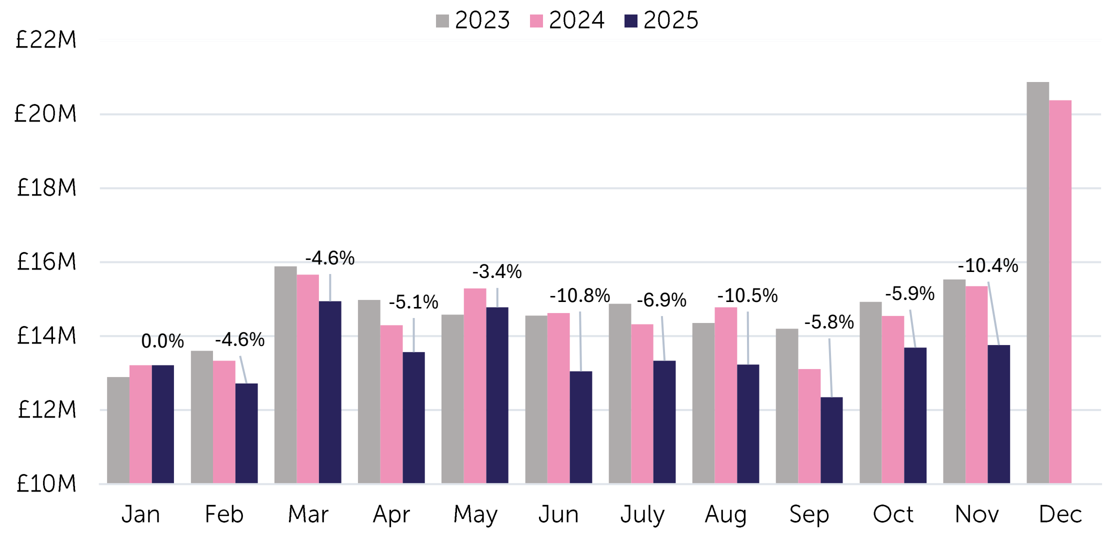
The **General Retail** and **Fashion** sectors experienced modest changes in growth during November, yet they have achieved some of the highest YTD sales growth this year at **+6.4%** and **+7.5%** respectively. In contrast, the UK benchmarks for these sectors show significantly weaker growth, at **-4.4%** and **-4.8%.**

The Leisure sector saw the biggest YTD uplift in Sales at **+9.4%** compared to 2024. Conversely, the **Tourism** and **Grocery** sector saw the sharpest YTD declines, with sales down **-21.2%** and **-11.4%** respectively.

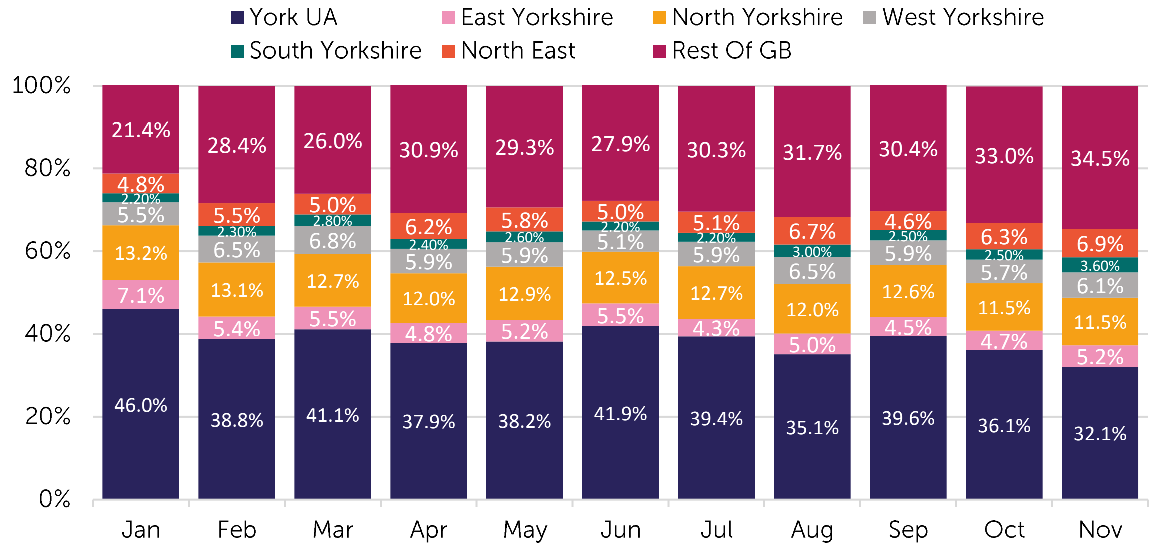
Source: Beauclair Retail Spend Insights

Catchment Spending November 2025

- Monthly Sales by York Residents



- Share of Monthly Sales by Region (2025)



The graphs above illustrate monthly sales trends among customers residing within the York Unitary Authority (UA) area since 2023.

Overall, trends indicate a gradual decline in spending by York residents, with the steepest YoY drops observed in June **(-10.8%)** and August **(-10.5%)** and November **(-10.4%)** 2025. YTD residents' spending is down **£9.9 million (-6.2%)** compared with 2024.

Historically, the highest resident spending occurs in December, which in 2024 accounted for **37%** of total monthly sales and **11.4%** of annual resident sales.

The second graph shows the distribution of quarterly sales by origin, including York residents, the wider Yorkshire region, the North East, and the rest of the UK.

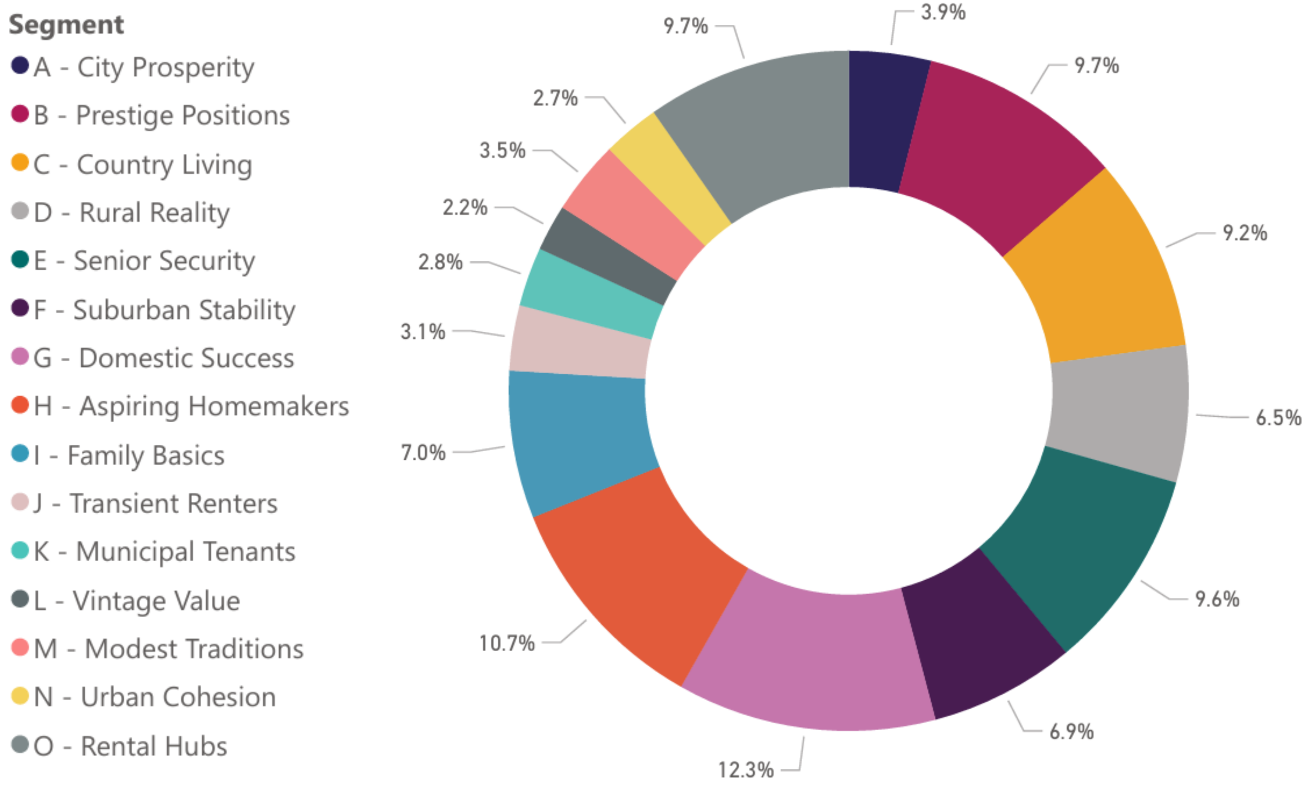
In November 2025, York residents contributed **32.1%** of total sales, representing a YOY decline of **-1.0%.** Comparatively, the rest of GB contributed **34.5%** of monthly sales, representing a YOY increase of +**3.3%**

YTD, approximately **65%** of all sales have been generated by customers across the wider Yorkshire region, with North Yorkshire alone contributing around **12.4%.**

Source: Beauclair Retail Spend Insights

Spending by Segments November 2025

Sales by segment



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

During this period, the highest levels of spending (accounting for **44%** of total monthly sales) were made by the following four demographic groups:

- **G – Domestic Success (12.3%):** Thriving families balancing career progression with raising children (average age 36–45).
- **H – Aspiring Homemakers (10.7%):** Younger households establishing themselves in affordable housing (average age 26–35).
- **O – Rental Hubs (9.7%):** Educated young adults privately renting in urban neighbourhoods (average age 26–35).
- **B – Prestige Positions (9.7%):** Established families in large detached homes living upmarket lifestyles (average age 56-65).

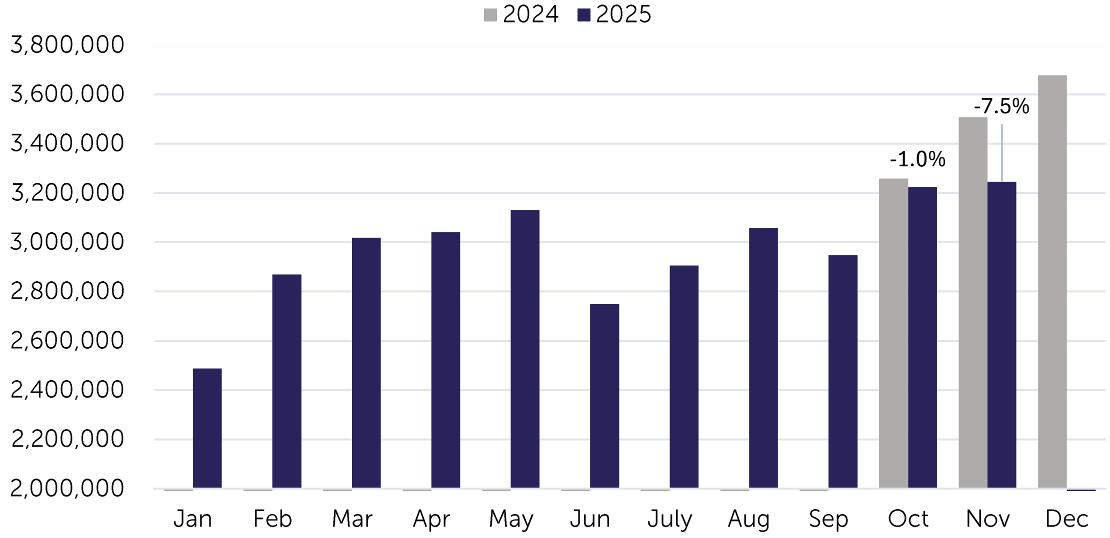
In summary, the largest share of the concentration lies within established, affluent, family-oriented homeowners and renters. The lowest presence is in the more financially vulnerable, elderly, or municipal segments.

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

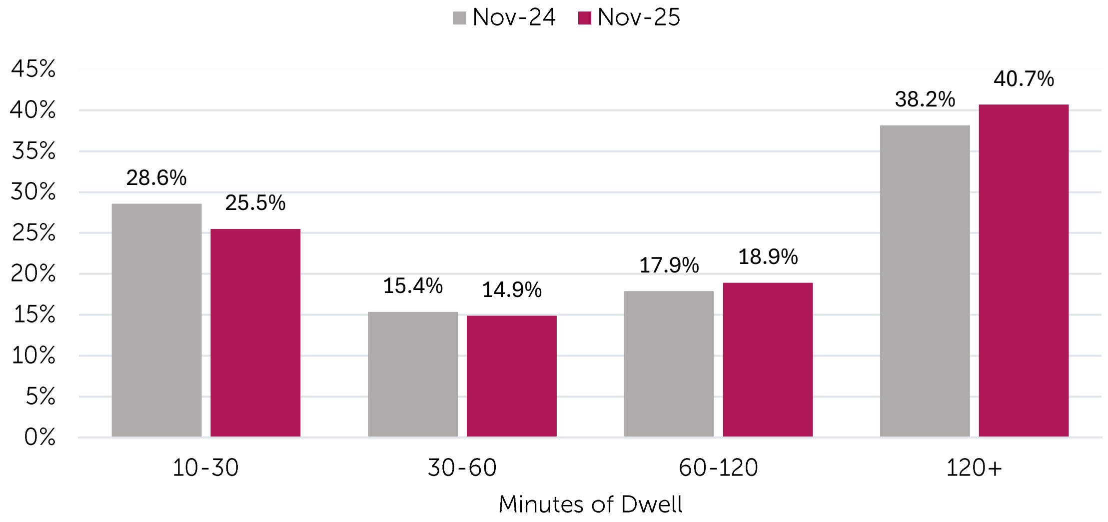
Source: Beauclair Retail Spend Insights

Visitor Insights November 2025

- Total Monthly Visitors



- Monthly Dwell Time



The graphs above show the monthly volume of visitors to York City Centre, and visits made by international tourists since October 2024. The data is derived from BT/EE mobile devices and are counted once regardless of multiple visits.

In November 2025, **3.2 million** visits were recorded to York City Centre, the highest monthly footfall volumes recorded during the year so far. However, this represents a **-7.5%** YoY decline compared to 2024.

YTD visitor volumes are recorded at over **31 million**. A full year of data is not yet available to benchmark against or calculate growth.

The average daily footfall recorded during November 2025 stood at **96,999, an -8.7%**.YoY decrease compared to Nov 2024.

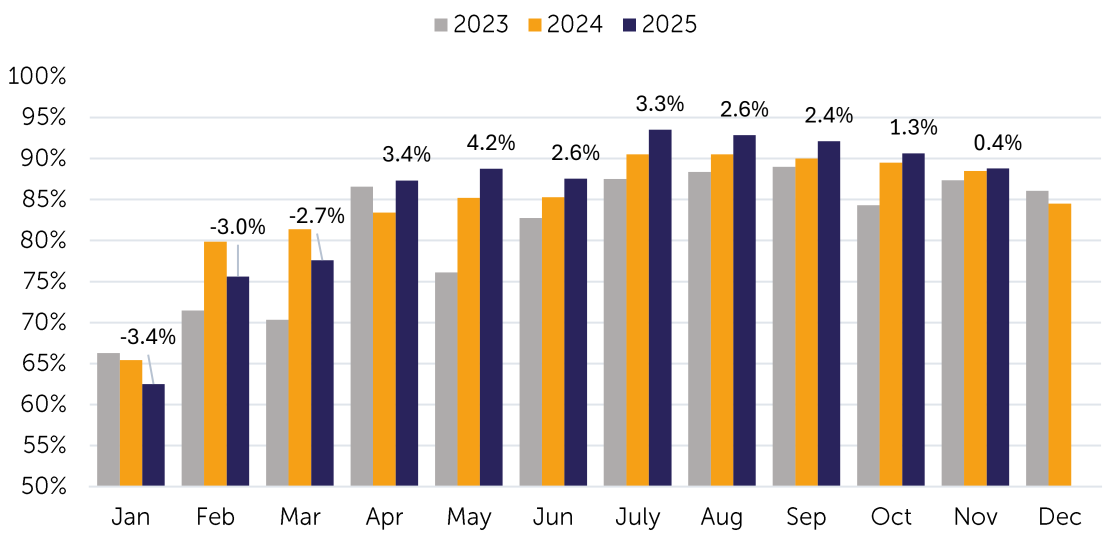
During November, over **40%** of visitors spent **more than 2 hours** in York City Centre, representing a **+2.5%** YoY increase compared to Nov 2024. The share of visitors dwelling for 30 minutes or less decreased by **-3.1%** YoY to **25.5%**

A detailed analysis of the BT Active dataset is available in the **City of York Council City Centre Movement and Place Pack for November 2025–26**, accessible via the link below.

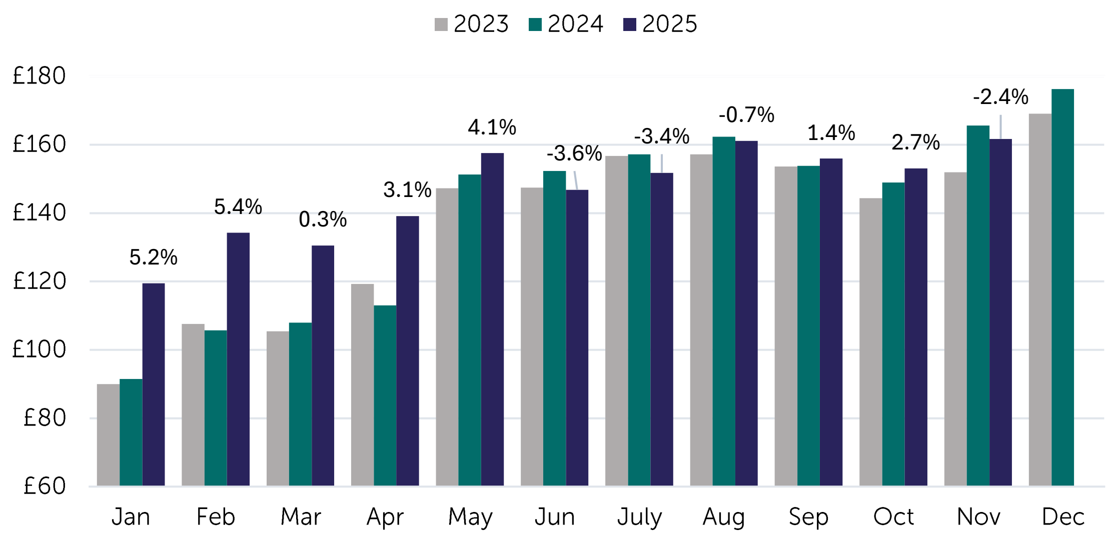
Source: BT Active Intelligence (provided by City of York Council)

Hotel Occupancy November 2025

- Monthly Hotel Occupancy (%)



- Monthly Hotel Average Day Rate (£)



The graph above shows average monthly hotel occupancy rates across York's city-wide hotels and serviced accommodation since 2023, with data labels indicating YoY growth.

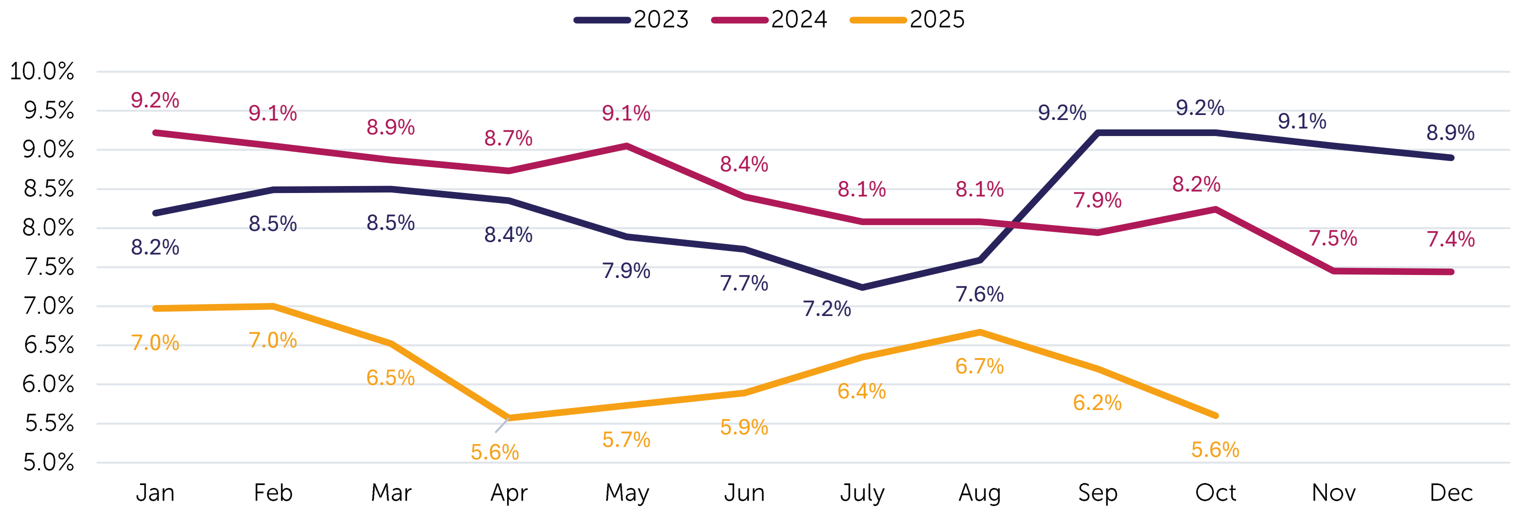
In November 2025, average occupancy reached **88.8%,** representing a marginal YoY increase of **0.4%** compared with November 2024. YTD occupancy is 85.2%, representing a **+1.2%** increase on 2024.

July recorded the highest occupancy level at **93.5%** and also delivered some of the strongest year-on-year growth, increasing by **+3.3%.**

The second graph presents the average daily rate (ADR) per room. In November 2025, ADR stood at **£161.71**, marking a notable YoY decrease of **-2.4%** compared with the same month in 2024. This was also the highest monthly ADR recorded during 2025.

Shop Vacancy November 2025

- Monthly Shop Vacancy in York City Centre (%)



The graph shows the average monthly percentage of vacant shops recorded in York city centre, published through the Council's Open Data platform, dating back to the beginning of 2023.

As of November 2025, shop vacancy levels stood at **5.6%,** which represents a **-2.6%** reduction on the same period in the previous year. Year to date, vacancy levels in York have shown a marked improvement compared with the previous two years**.**

For context, Retail Analytics Pro (formerly Local Data Company, LDC) have published provisional figures for national vacancy in November, standing at **13.7%.**

Source: York Open Data **(provided by** City of York Council**) and** Retail Analytics Pro (formerly Local Data Company, LDC)

York Data Intelligence Hub

This report is powered by the York Data Intelligence Hub, an initiative delivered in partnership by York BID and York St John University. The Hub brings together a range of robust and trusted data sources to provide insight into York's economic performance and emerging trends over time. These insights will be published on a monthly basis, with periodic quarterly summaries, and made available to local businesses and key strategic partners to support evidence-based decision-making.

Data sources included in the report:

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

The 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 delivered in partnership with 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 November – 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.