Spending Insights October 2025

	This month	Growth vs last year	UK benchmark	Year to date	Growth ytd vs last year	UK benchmark
Sales	£37.91m	-3.64%	-4.13%	£345.26m	-0.88%	-3.23%
Customers	445.88k	-2.05%	-3.21%	4.15m	-2.33%	-3.14%
Transactions	1.95m	-5.86%	-5.75%	18.33m	-3.99%	-4.15%
ARPC	£85.02	-1.62%	-0.95%	£83.13	1.49%	-0.10%
ATV	£19.44	2.36%	1.72%	£18.84	3.24%	0.96%

The figures above summarise in-store debit card spending activity in York city centre for October 2025.

Total sales reached **£37.9 million**, down **-3.6%** year on year, performing slightly better than the UK benchmark decline of **-4.1%.** Year-to-date sales reached **£345 million**, a modest **-0.9%** decrease, contrasting with a **-3.2%** drop nationally.

Customer numbers declined by **-2.0%** year on year, outperforming the national decrease of **-3.1%.** On a year-to-date basis, customer volumes in York were down 2.3%, again comparing favourably with the UK benchmark decline of **-3.1%.**

Transaction volumes declined by **-5.9%** YoY and **-4.0%** YTD, in line with the UK benchmark (**-5.8%** YoY and **-4.1%** YTD).

Despite lower volumes, value-based indicators showed improvement. Average Revenue Per Customer (ARPC) reached **£83.13**, up **+1.5%** YoY, compared with a **-1.7%** national decline.

The Average Transaction Value (ATV) rose to **£19.44**, a **+2.4%** YoY increase, outperforming the UK benchmark **(+1.7%).**

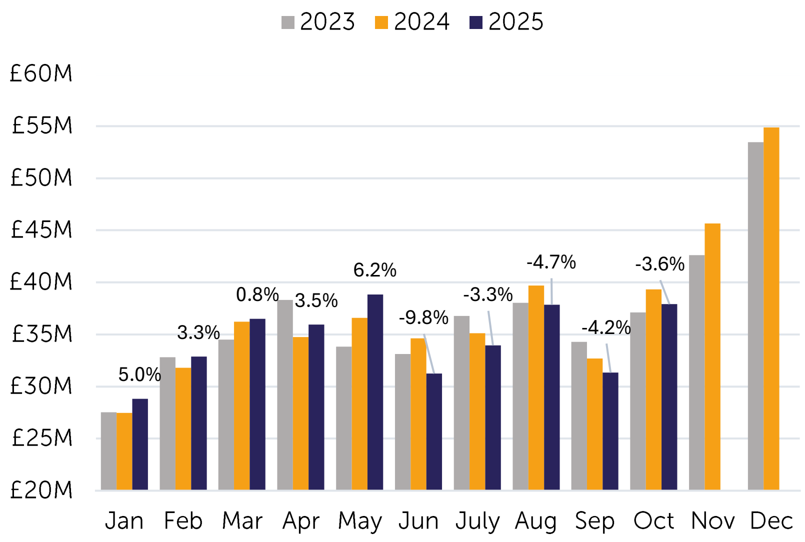
Due to a technical fault with the Springboard camera located on Parliament Street, accurate footfall data for October is unavailable and has therefore been excluded from this month's report.

For further definitions, please see the Glossary on pages 10–11.

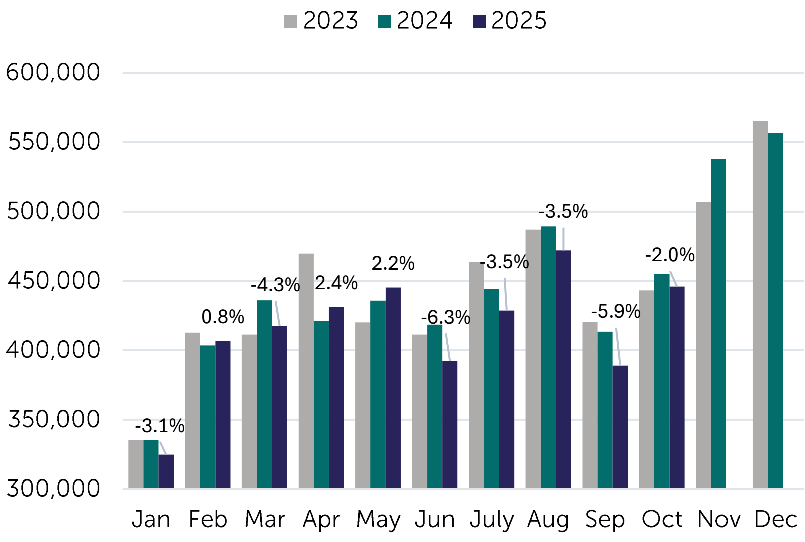
Source: Beauclair Retail Spend Insights

Spending Insights October 2025

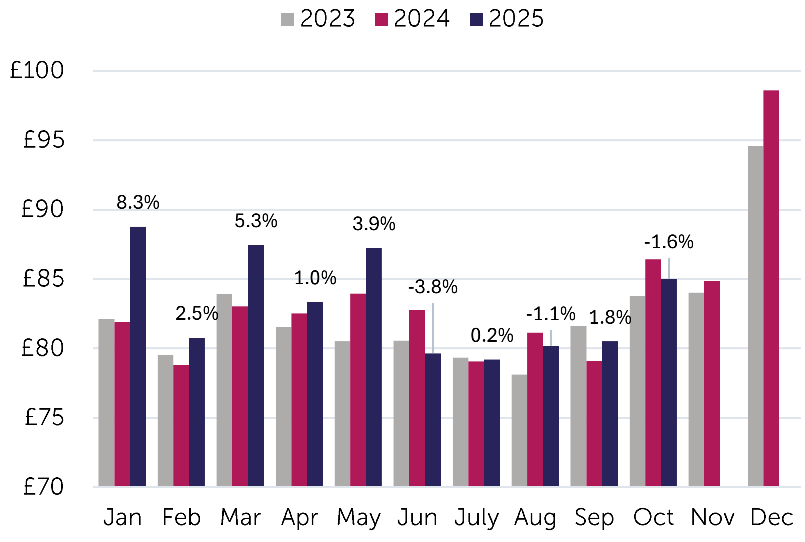
- Monthly Sales



- Monthly Customers



- Monthly Average Revenue Per Customer



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

Sales in 2025 began strongly, with robust performance across the first five months and a peak in May at **+6.2%** YoY. This early uplift was largely driven by higher average spend, which saw particularly strong growth in January (**+8.3%** YoY).

Performance softened over the following five months, with June recording the sharpest decline at **-9.8%** YoY. This downturn was primarily due to reduced customer numbers, most noticeably in June **(-6.3%)** and September **(-5.9%).**

As a result, year-to-date sales to the end of October 2025 stood at **-0.9%.**

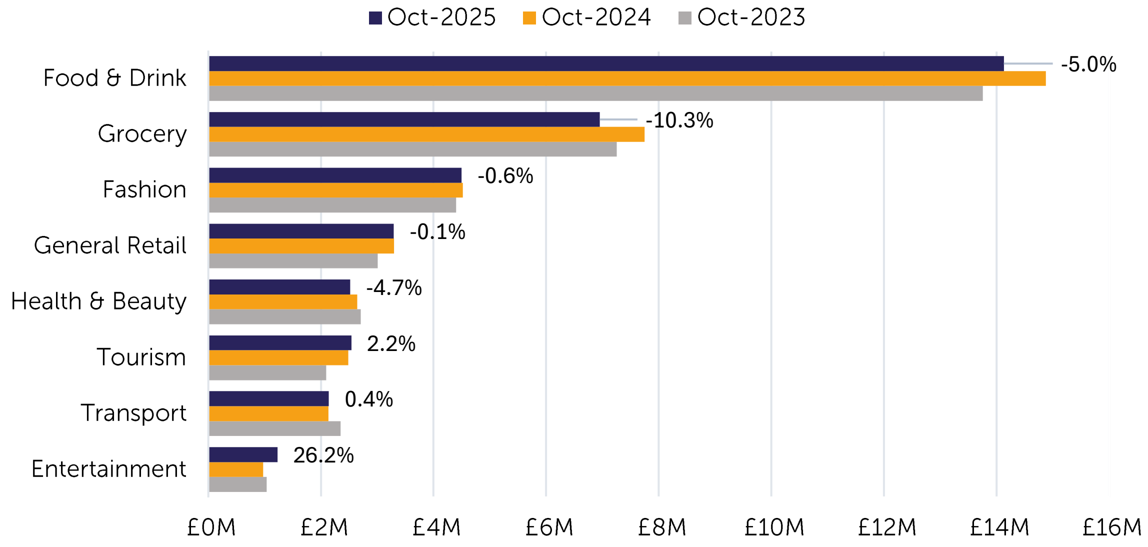
The festive trading period (November and December) typically delivers the highest monthly sales each year. In 2024, festive sales grew by **+4.6%** compared with the previous year.

Within 2025, May recorded the highest total spending at over **£39 million**, while August attracted the largest customer volume at more than **2 million**. January 2025 also marked the strongest January performance in the past five years.

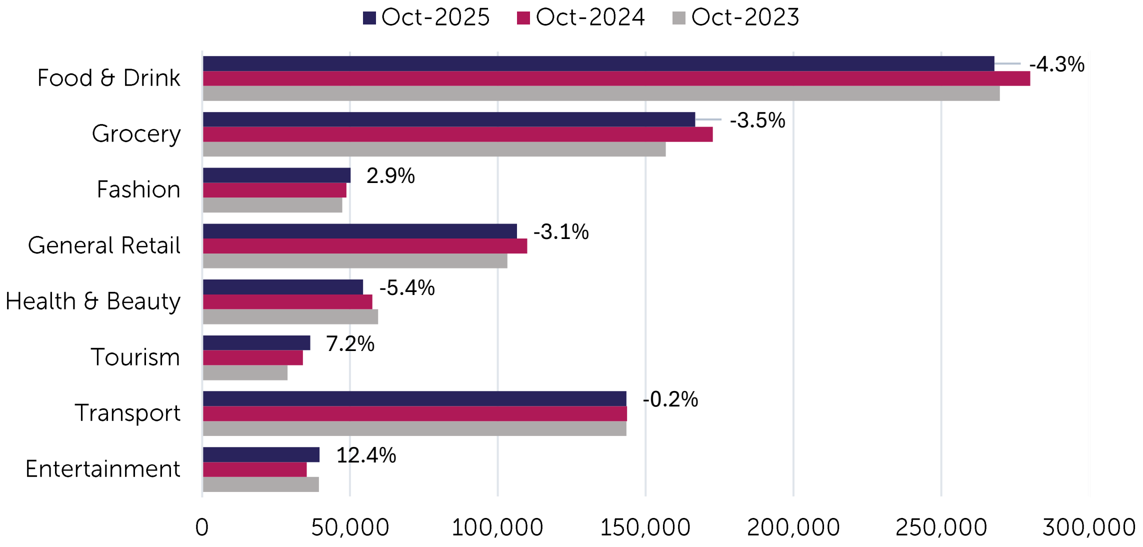
Source: Beauclair Retail Spend Insights

Sector Spending October 2025

- Monthly Sector Sales



- Monthly Sector Customers



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

The **Food & Drink** sector accounted for **37%** of both total monthly and year-to-date (YTD) sales. However, sales performance in this sector has remained weak throughout 2025, with a **-5.0%** decline in October and a **-3.6%** reduction YTD, compared with a slightly smaller national decline of **-2.8%.**

The **Entertainment** sector recorded the strongest year-on-year sales growth at **+26.2%,** supported by a **+12.4%** increase in customer numbers.

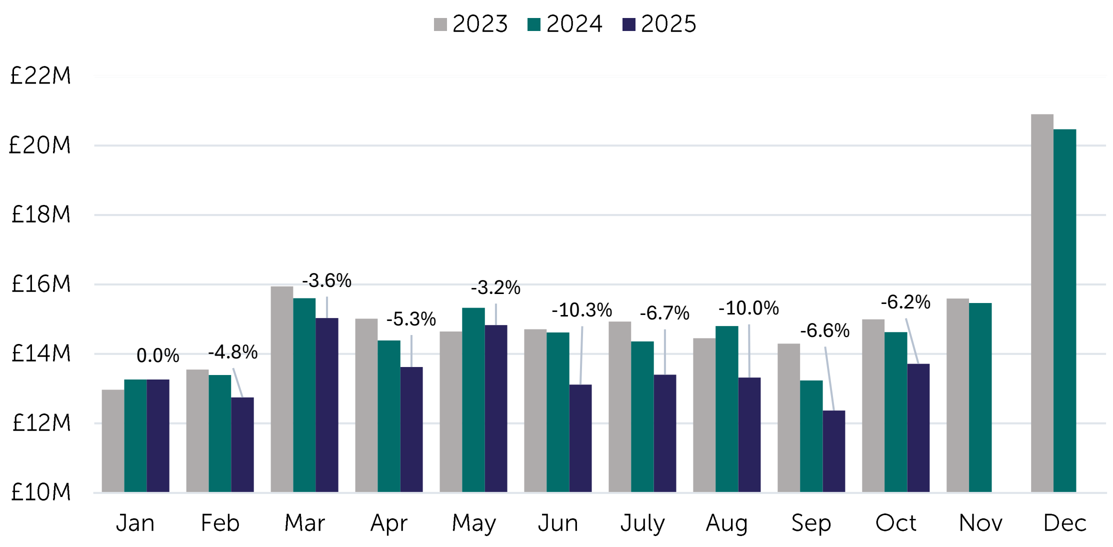
General Retail and **Fashion** sectors experienced modest declines in October, yet they have achieved some of the highest YTD sales growth this year at **+9.4%** and **+6.9%** respectively. In contrast, the UK benchmarks for these sectors show significantly weaker growth, at **-3.1%** and **-4.6%.**

Conversely, the **Grocery** sector saw the largest YTD decline of any sector in York, with sales down **-6.6%** and customer numbers falling **-6.8%.** This contrasts with the national benchmark, which recorded a smaller decline of **-2.8%.**

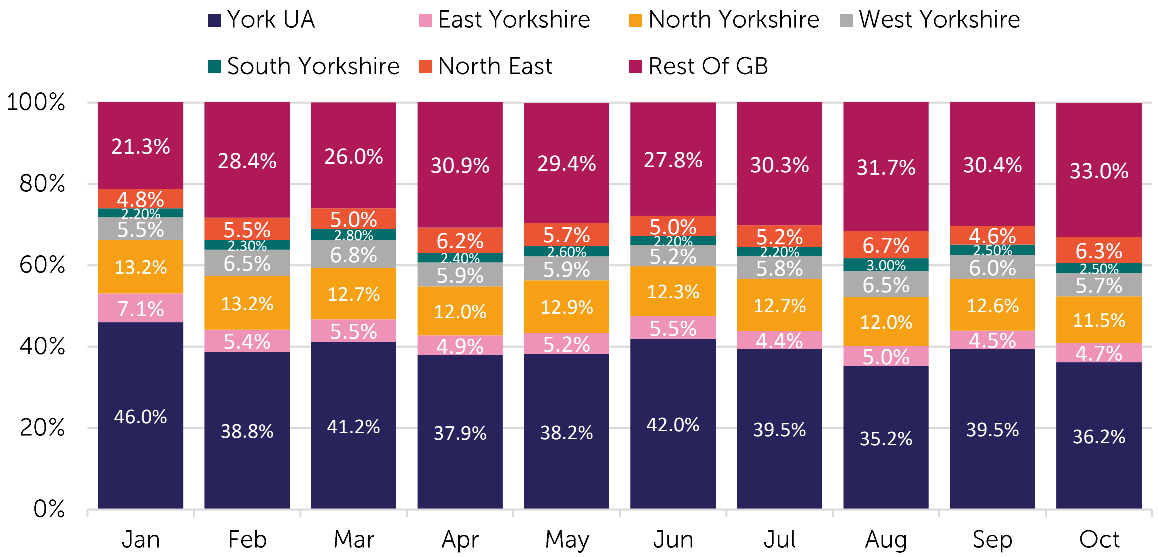
Source: [Beauclair Retail Spend Insights]

Catchment Spending October 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 drops observed in June **(-10.3%)** and August **(-10.0%)** 2025. Year-to-date, residents' spending is down **£8 million (-5.7%)** 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.

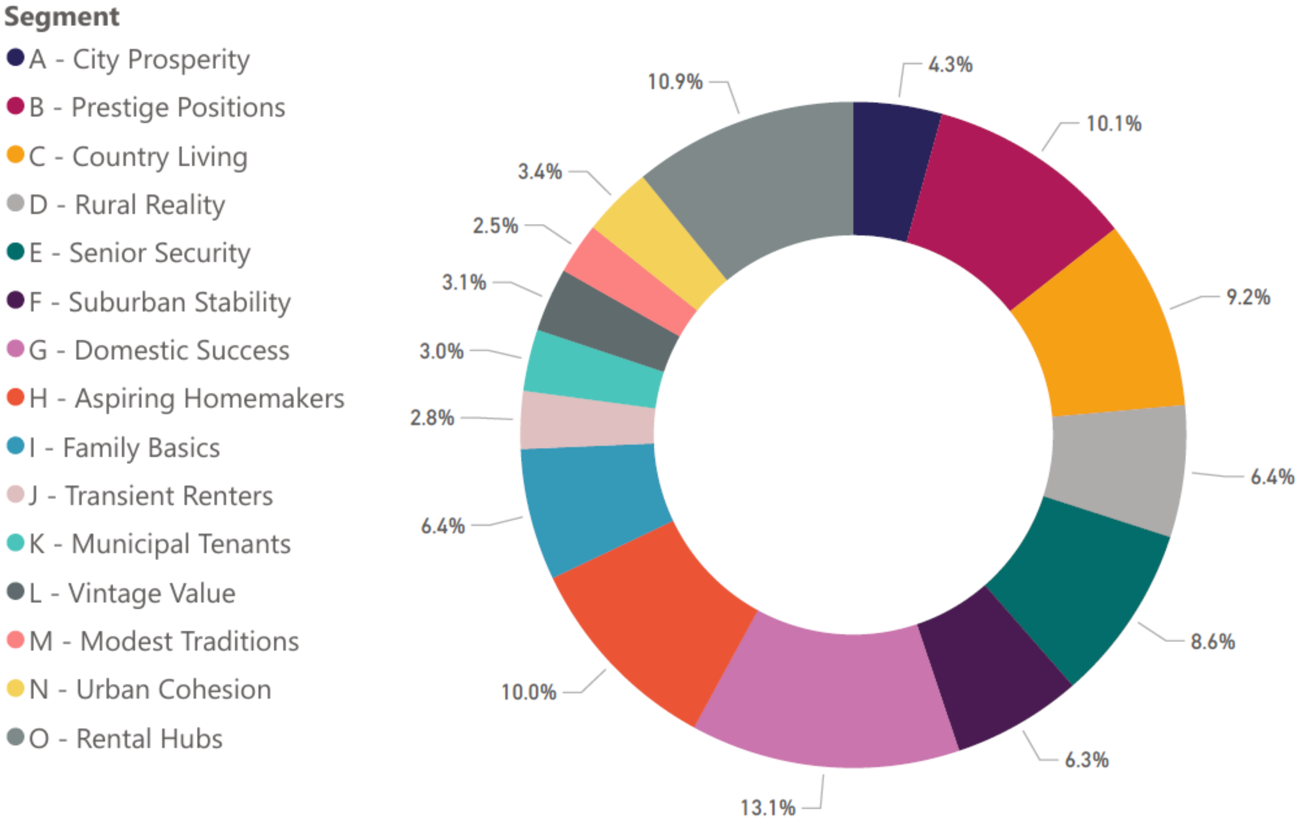
The second graph shows the distribution of quarterly sales by origin, including York residents, the wider Yorkshire region, the North East, and the rest of the UK.

In October 2025, York residents contributed **36.2%** of total sales, representing a year-on-year decline of **-1.0%.** Year-to-date, approximately **66%** of all sales have been generated by customers across the wider Yorkshire region, with North Yorkshire alone contributing around **13%.**

Source: [Beauclair Retail Spend Insights]

Spending by Segments October 2025

Sales by segment



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

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

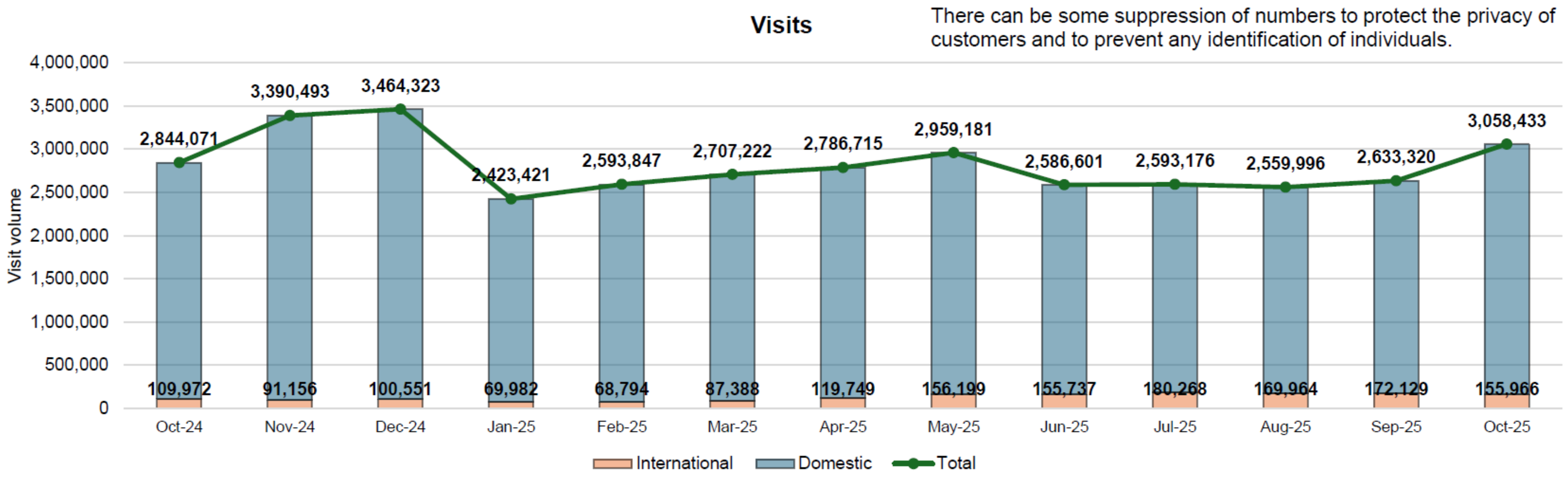
- **G – Domestic Success (13.1%):** Thriving families balancing career progression with raising children (average age 36–45).
- **O – Rental Hubs (10.9%):** Educated young adults privately renting in urban neighbourhoods (average age 26–35).
- **B – Prestige Positions (10.1%):** Established families in large detached homes living upmarket lifestyles (average age 56-65).
- **H – Aspiring Homemakers (10.0%):** Younger households establishing themselves in affordable housing (average age 26–35).

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 October 2025



The graph above presents total monthly visits to York city centre, including visits made by international tourists. The data is derived from BT/EE mobile devices detected within the city centre, with each individual counted once regardless of multiple visits.

Historical data is available from October 2024; however, figures for this initial month carry a higher risk of error. As a result, year-on-year comparisons have not been included.

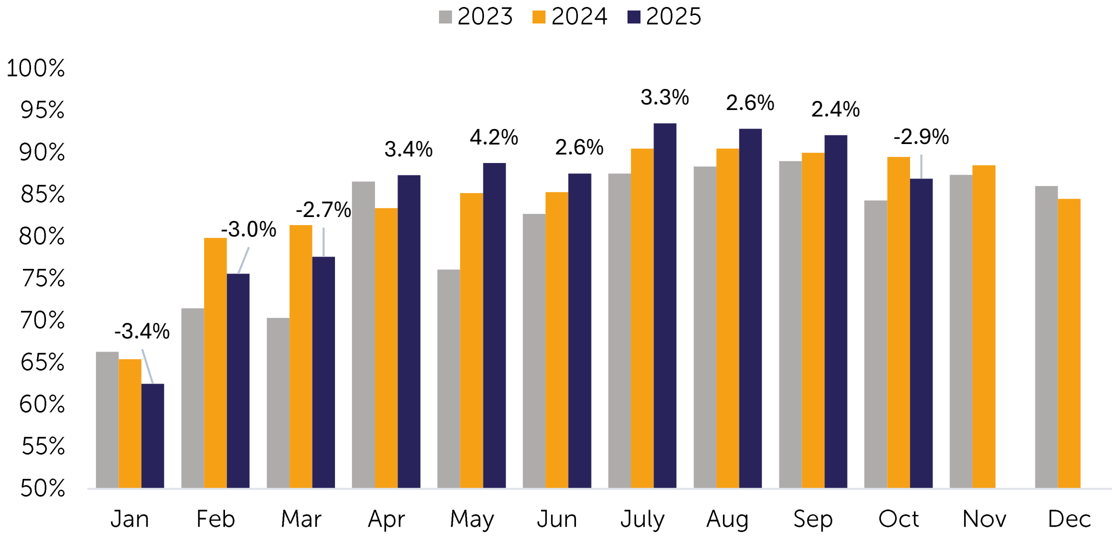
In October 2025, more than **3 million** visits were recorded, representing the highest monthly total of the year. Of these, approximately **156,000** visits were made by international tourists. Average daily footfall during October 2025 stood at **99,100**.

A more detailed analysis of the BT Active dataset is available in the **City of York Council City Centre Movement and Place Pack for October 2025–26**, accessible via the link below. Future editions of this report will seek to incorporate a broader range of these insights.

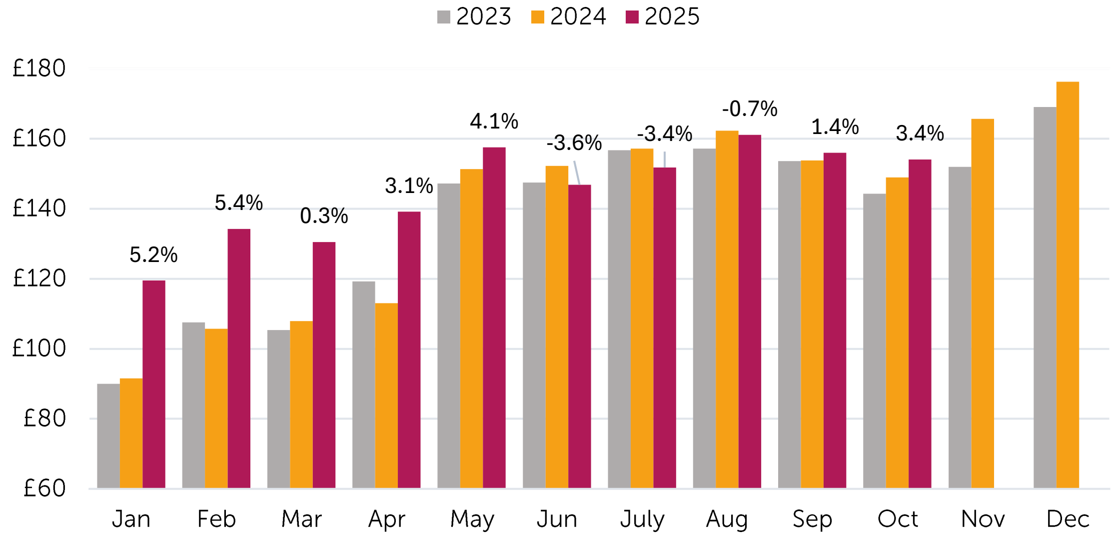
Source: BT Active Intelligence (provided by City of York Council)

Hotel Occupancy October 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 year-on-year change.

In October 2025, average occupancy reached **86.9%,** representing a year-on-year decrease of **-2.9%** compared with October 2024. Despite this monthly decline, year-to-date occupancy remains **+1.3%** higher than the equivalent period in 2024.

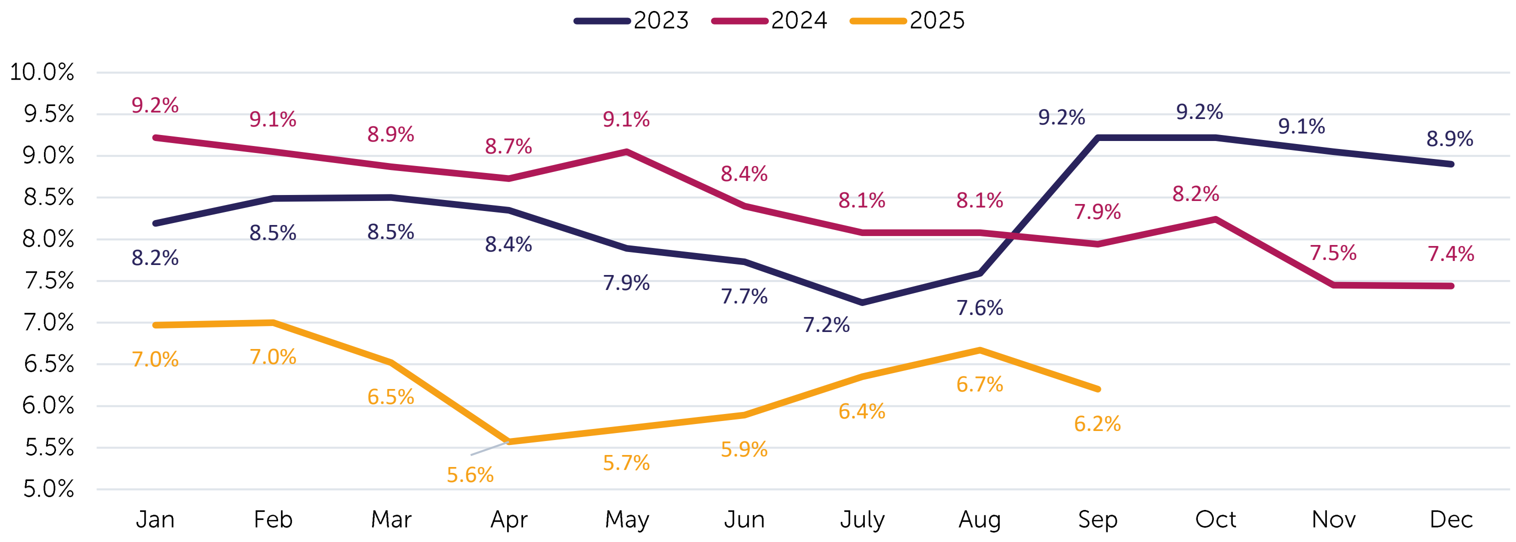
July recorded the highest occupancy level at **93.5%** and also delivered some of the strongest year-on-year growth, increasing by **+3.3%.**

The second graph presents the average daily rate (ADR) per room. In October 2025, ADR stood at **£154.07**, marking a notable increase of **+3.4%** compared with the same month in 2024. The highest monthly ADR was recorded in August **at £161.09**, although this represented a modest year-on-year decrease of **-0.7%.**

Source: Hoteliers Association York **(powered by** CoStar**)**

Shop Vacancy October 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 October 2025, shop vacancy levels stood at **6.2%,** which represents a **-1.7%** reduction on the previous year. 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%.**

For context, at the end of Quarter 2 2025, CBRE published that the national high street vacancy rates across the UK stood at **13.0%**, a slight reduction of previous periods.

Source: York Open Data **(provided by** City of York Council**)**

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 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 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 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.