York City Centre Insights Report
Quarter 1 – 2025

York BID collaborates regularly with data providers to compile insights into the economic performance of York city centre. This report is structured into sections that highlight key indicators of commercial activity, including debit card spend, footfall, visitor origins etc. Businesses are encouraged to review these trends alongside their own data sources to support daily operational decision-making.

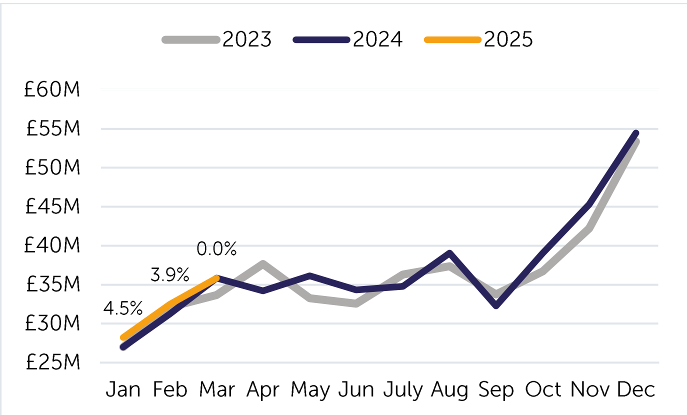
All merchant and customer data presented in this report is strictly anonymised and aggregated, ensuring full compliance with GDPR and data protection regulations.

Beauclair Spend Data

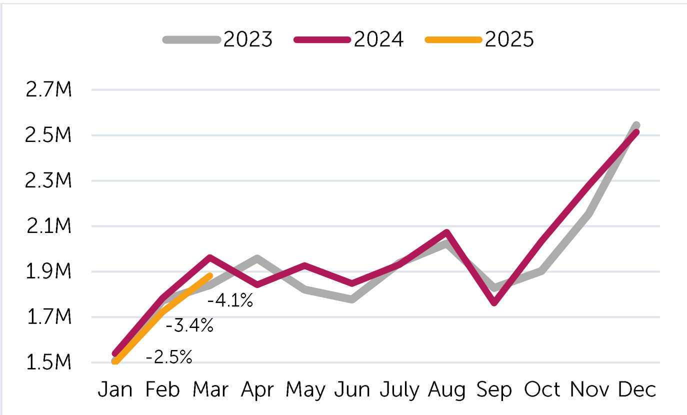
- During Q1 (Jan-March), 2025 York's sales were **£96.5 million,** a year-to-date increase of **+2.6%**.
- January 2025 saw the biggest monthly increase in sales at **+4.5%** year-on-year.
- This quarterly increase in sales was primarily driven by a year-to-date increase of **+6.2%** in average transaction value (ATV), and **+6.3%** in average revenue per customer (ARPC).
- By contrast, the quarterly total number of transactions was down by **-3.4%**, and number of customers was down by **-3.2%** year-on-year.

Metric	Q1-2025	Q1-2025 vs Q1-2024
Sales	£96.5m	2.6%
Transactions	5.11m	-3.4%
Customers	1.16m	-3.2%
ATV	£18.90	+6.2%
ARPC	£83.05	+6.3%

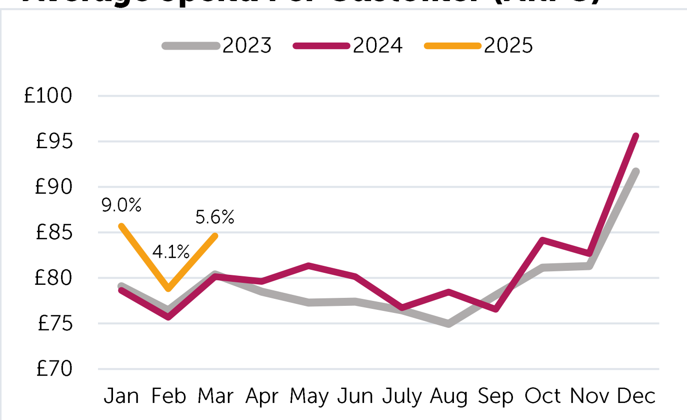
- Monthly Sales Annual Trend



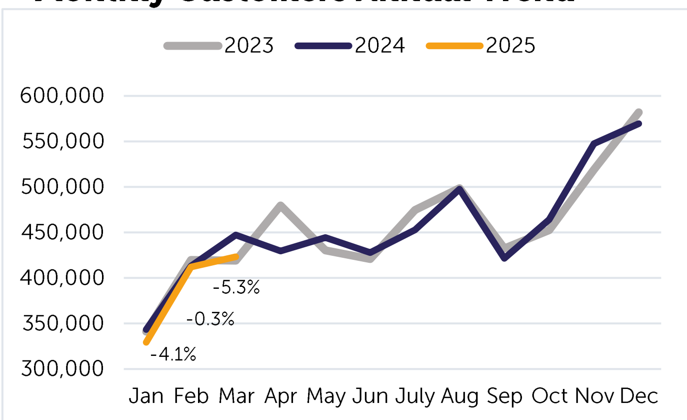
- Monthly Transactions Annual Trend



- Average Spend Per Customer (ARPC)



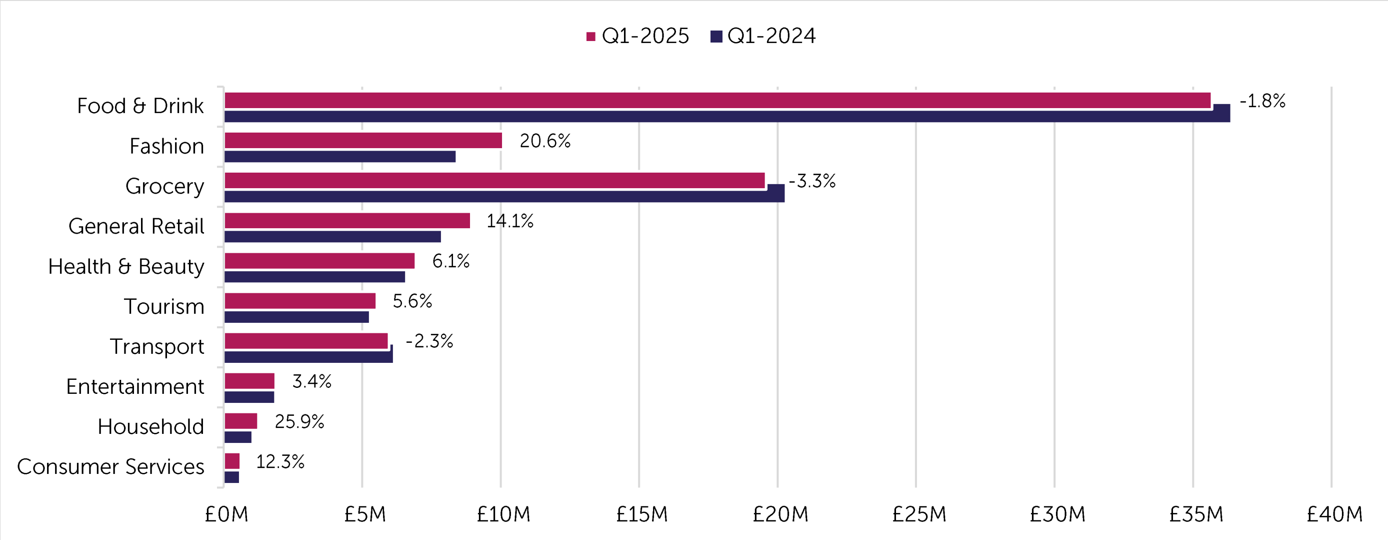
- Monthly Customers Annual Trend



Sector Spend

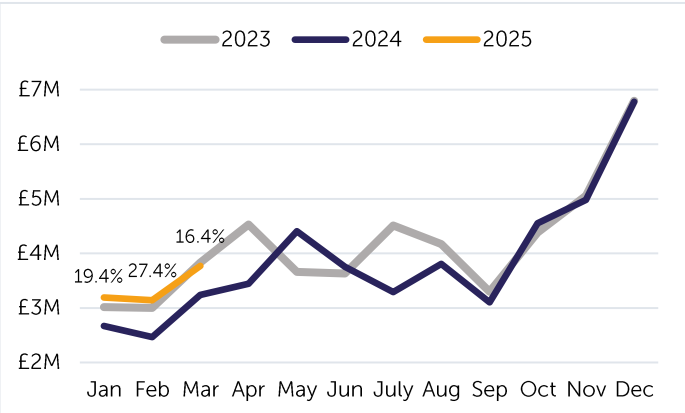
- The Food & Drink sector continues to attract the largest share of sales, accounting for **36.7%** of the total sales recorded in Q1-2025.
- Sectors with the highest growth during Q1 were Fashion with **+20.6% increased** sales and General Retail with **+14.1%** increased sales.
- Sectors with the biggest losses during Q1 were Grocery **(-3.3% sales)** and Food & Drink (**-1.8% sales)**.

- Quarterly Sales Comparison by Sector

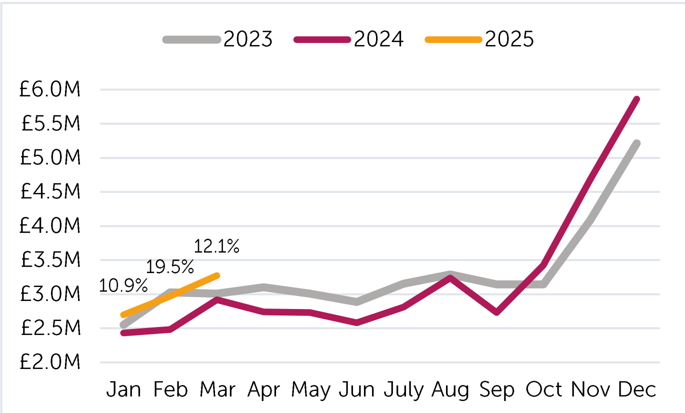


- In the **Fashion** sector, quarterly customers numbers decreased by **-6.6%,** however the average spend per customer increased by **29.3%**. The highest increase in monthly sales was seen during February at **+27.4%** year-on-year.
- In the **General Retail** sector, quarterly customers numbers increased by **+4.3%,** and the average spend per customer increased by **9.4%**. The highest increase in monthly sales was seen during February at **+19.5%** year-on-year.

- Monthly Fashion Sales Annual Trend

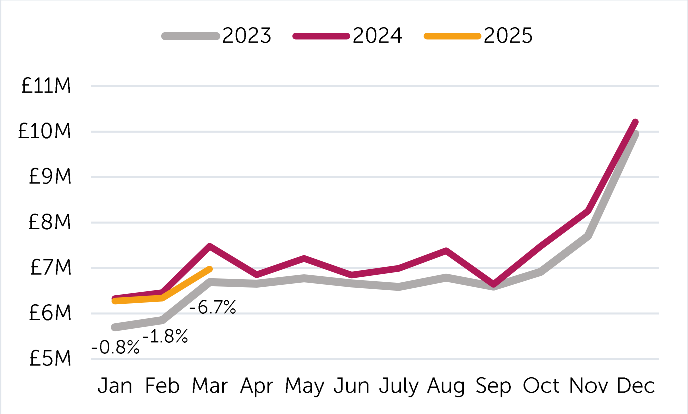


- Monthly Retail Sales Annual Trend

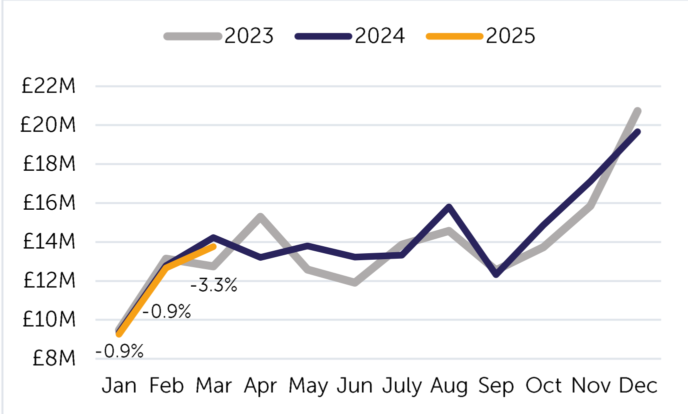


- In the **Grocery** sector, quarterly number of transactions decreased by **-4.7%,** and the average spend per customer decreased by **-2.7%**. The biggest decrease in monthly sales was seen during March at **-6.7%** year-on-year.
- In the **Food & Drink** sector, quarterly customer numbers decreased by **-5.8%,** however the average spend per customer increased by **+4.3%**. The biggest decrease in monthly sales was seen during March at **-3.3%** year-on-year.

- Monthly Grocery Sales Annual Trend



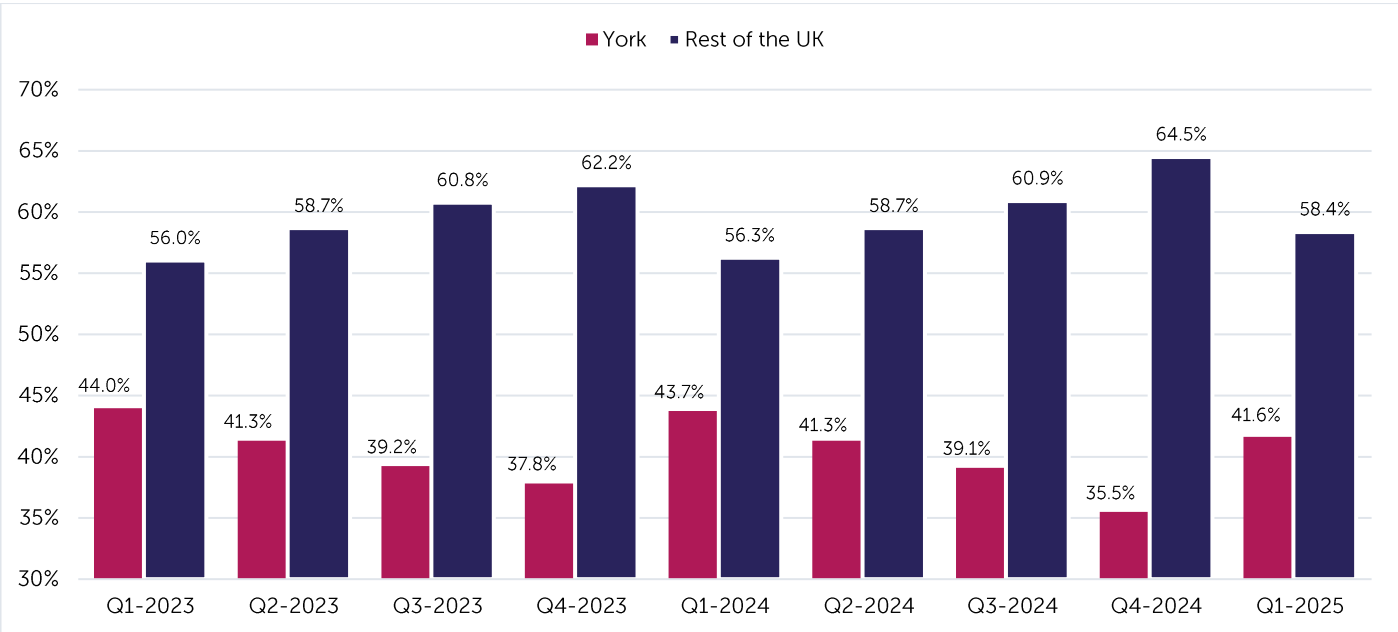
- Monthly Food & Drink Sales Annual Trend



Customer Catchment

- During Q1-2025, **39.8%** of sales were made by residents of the York Unitary Authority Area (UA), a **2.5%** decrease on the same period in the previous year, whereas **60.3%** was made by visitors from elsewhere in the UK.
- The highest proportion of spend made by visitors from outside York was witnessed during February, accounting for **61.3%** of total monthly sales, a **+2.6%** year-on-year increase compared to Feb 2024.

- Share Of Quarterly Customer By Home Location, York vs Rest of the UK



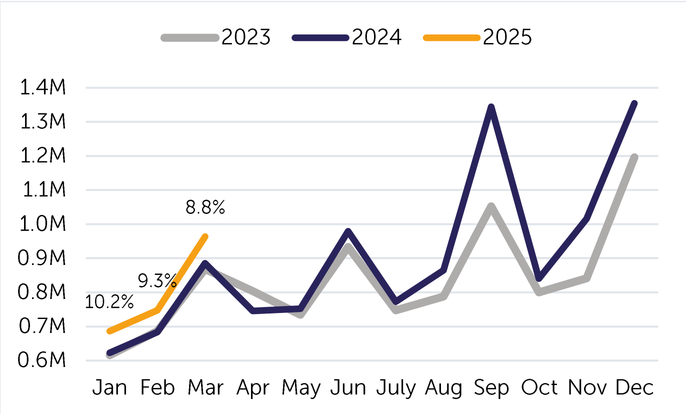
Beauclair provides a national data set of in-store debit card transactions sourced from over 11 million individual domestic bank accounts. Each transaction is geo-tagged to track merchant location, retail sector and online vs offline. All merchant and customer data is strictly anonymised and aggregated to comply with GDPR and data protection requirements.

For more information, please see the **Beauclair FAQ Document**.

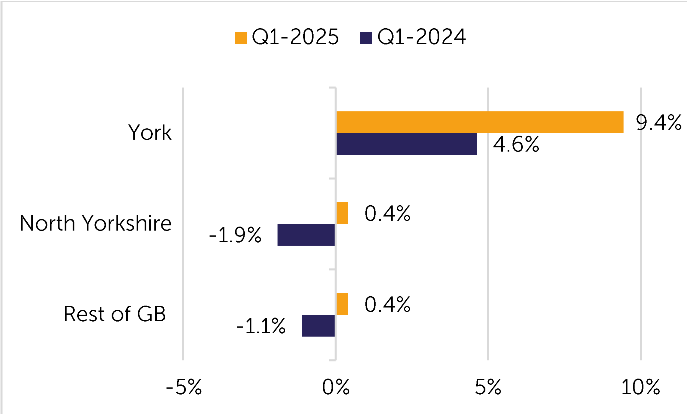
Springboard Footfall Data

- During Quarter 1 of 2025, footfall in York totaled at **2,397,608** visitors, a substantial **+9.4%** year-on-year increase.
- Comparatively, footfall in North Yorkshire and the rest of the UK was up by just **+0.4%**
- Year-to-date footfall reached **10,549,275**, up **+8.8%** from the previous year.
- The busiest month of Q1 was March with **963,621** visitors in total, an **+8.8%** year-on-year increase and accounting for **40.1%** of the quarterly total.

- Monthly Visitors Annual Trend



- Benchmarking Annual Visitors Trend

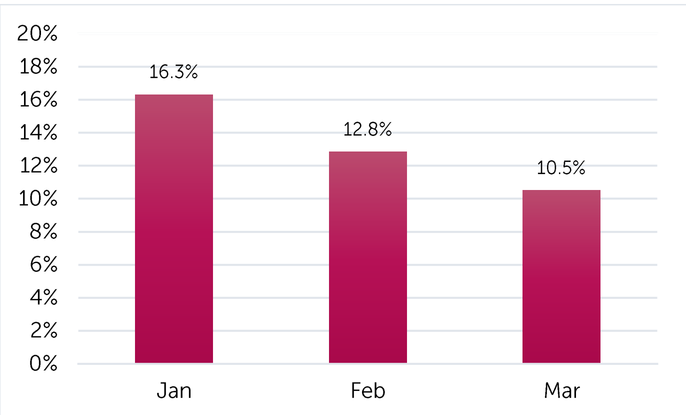


[Springboard (Powered by MRI)](#) utilises on-location cameras to measure passing footfall in town and city high streets. There are currently two footfall cameras located in York city centre, on Parliament Street and Micklegate. Although the dataset is limited, the figures indicate how footfall trends change over time.

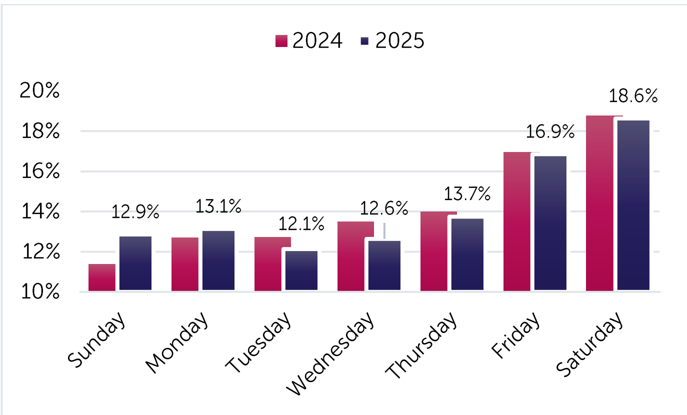
Train Journeys to York

- During Quarter 1 of 2025, the number of tickets purchased for train journeys York increased by **+12.9%** year-on-year.
- The biggest growth in monthly customer journeys was witnessed in January 2025, reporting a **+16.3%** year-on-year increase.
- Fridays and Saturdays are consistently the busiest days of the week, accounting for around **35.6%** of all train journeys in Q1-2025 and the whole of 2024. Comparatively, Sunday is consistently the quietest day.

- Monthly Train Journeys During Q1-2025



- Train Journeys Split by Days of the Week

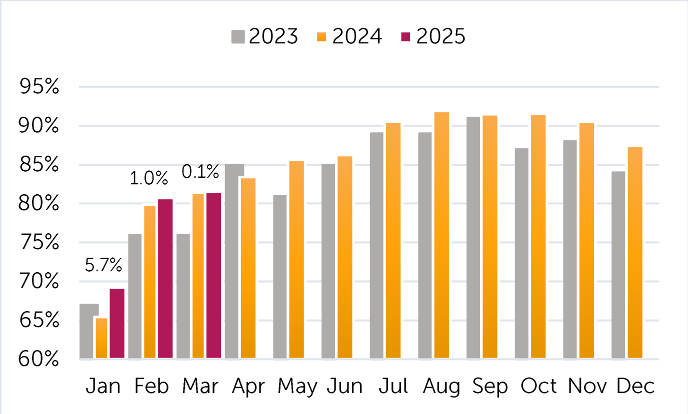


Data provided by [LNER](#) includes all train journeys to York, excluding season tickets (not just journeys on LNER services). Growth is the difference between calendar years 2024 and 2025. Return tickets are only recorded as one journey within the data. Numbers are not adjusted for split ticketing. The journey splits use the average journeys for the days of travel. Saturdays and Sundays are more likely to be affected by engineering works than weekdays.

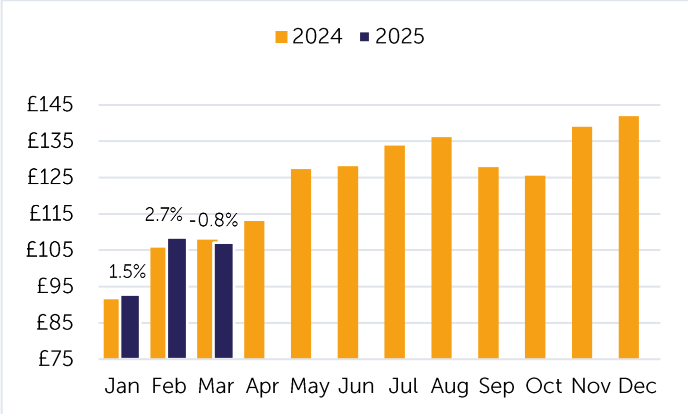
Hotel Occupancy

- 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.

- Average % Monthly Hotel Occupancy



- Average Day Rate (£)

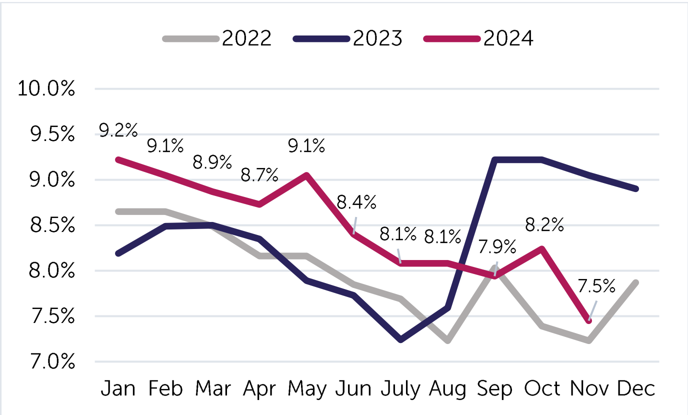


Hotel Occupancy data is provided by [Hospitality Association York (HAY)](), sourced from [STR](), a leading provider of market data, benchmarking, and analytics. STR data is used by hotels and other industry stakeholders to analyse performance, compare against competitors, and make informed decisions.

Shop Vacancy

- The most recent shop vacancy data for York city centre, published via the Council's Open Data platform, indicates a vacancy rate of 7.5% as of November 2025 — the lowest level recorded since July 2023. The next data release is anticipated in late June 2025.
- In comparison, Savills reported that the national high street vacancy rate across the UK stood at 13.8% at the end of Q4 2024.

- % of Vacant Shops In York City Centre



We would like to thank HAY, LNER, and City of York Council for their contributions to the data featured in this report. To view previous reports and further insights, please visit: https://www.theyorkbid.com/category/insights/

If you have any questions regarding the data, please feel free to contact a member of the York BID team at info@theyorkbid.com or by phone on 01904 809970.