



York Data Intelligence Hub

QUARTER 3 2025 CITY CENTRE INSIGHTS

Est.
1841

YORK
ST JOHN
UNIVERSITY

This quarter	Growth vs last year	Year to date	Growth ytd vs last year	UK benchmark
£103.65m Sales	-4.33% Sales	£309.07m Sales	-0.77% Sales	-3.03% Sales
1.3m Customers	-4.32% Customers	3.72m Customers	-2.35% Customers	-3.09% Customers
5.63m Transactions	-5.17% Transactions	16.5m Transactions	-3.90% Transactions	-4.24% Transactions
£80.03 ARPC	-0.02% ARPC	£82.98 ARPC	1.62% ARPC	0.06% ARPC
£18.43 ATV	0.88% ATV	£18.74 ATV	3.26% ATV	1.26% ATV

During Quarter 3 (July–September) 2025, total debit card sales in York were **£103.7 million**, a decrease of **-4.3%** compared with the same period in 2024. Comparatively, the UK benchmark recorded a smaller year-on-year decline of **-3.4%**.

By the end of September 2025, year-to-date (YTD) debit card sales totaled **£309.1 million**, representing a modest decline of **-0.8%** compared with the previous year. This remains notably stronger than the YTD UK benchmark, which was down by **-3.0%** over the same period.

The number of quarterly customers fell by **-4.3%** year-on-year, a more pronounced decrease than the UK benchmark decline of **-1.7%**. YTD customer numbers in York city centre were down by **-2.4%** compared with 2024.

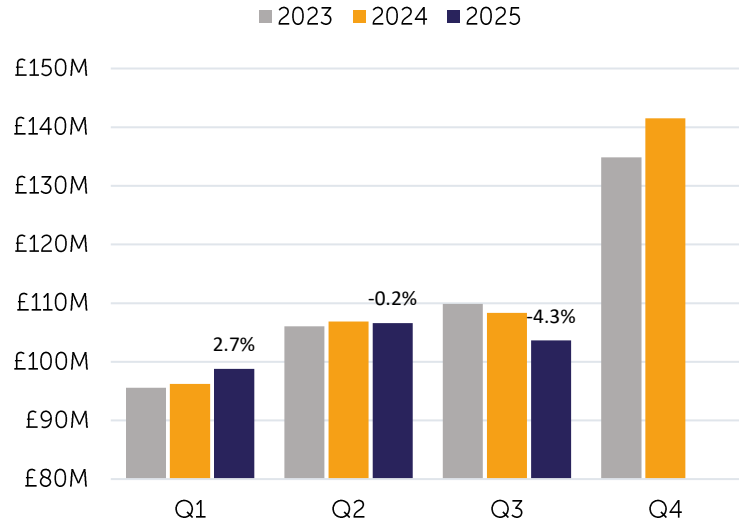
The Average Revenue Per Customer (ARPC) in Quarter 3 was **£80.03**, showing minimal change from the previous year (**-0.02%**). This remained more resilient than the UK benchmark, which recorded a decline of **-1.7%**.

Overall, ARPC growth remained subdued at **0.02%** year-on-year, significantly below 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, refer to the Glossary, on pages 9 & 10 of this report.

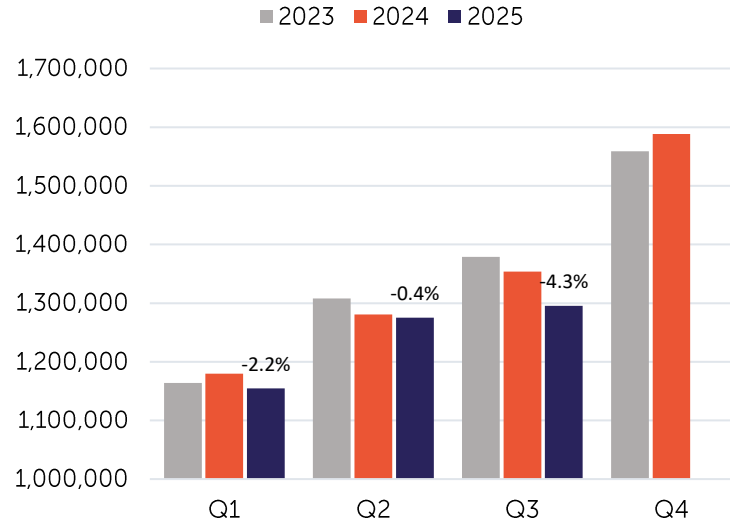
- Quarterly Sales



During Quarter 1 of 2025, sales performance was strong, increasing by **+2.7%** compared with the same period in 2024. This growth was driven primarily by a **+5.2%** year-on-year (YOY) rise in average revenue per customer (ARPC), despite total customer numbers declining by **-2.2%**.

Sales momentum weakened over the following quarters, reflecting a gradual reduction in annual customer volumes. In Quarter 3, customer numbers fell by **-4.3%** year-on-year, bringing year-to-date (YTD) sales for 2025 to **-0.8%**. By comparison, the UK benchmark recorded a steeper decline of **-3.0%**.

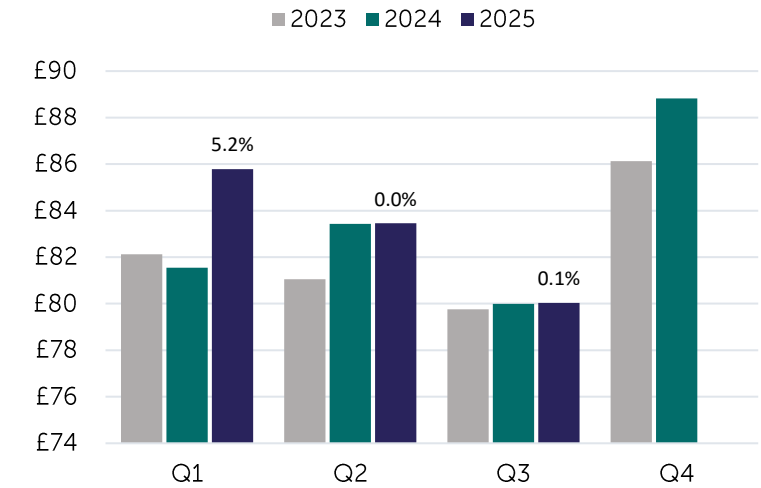
- Quarterly Customers



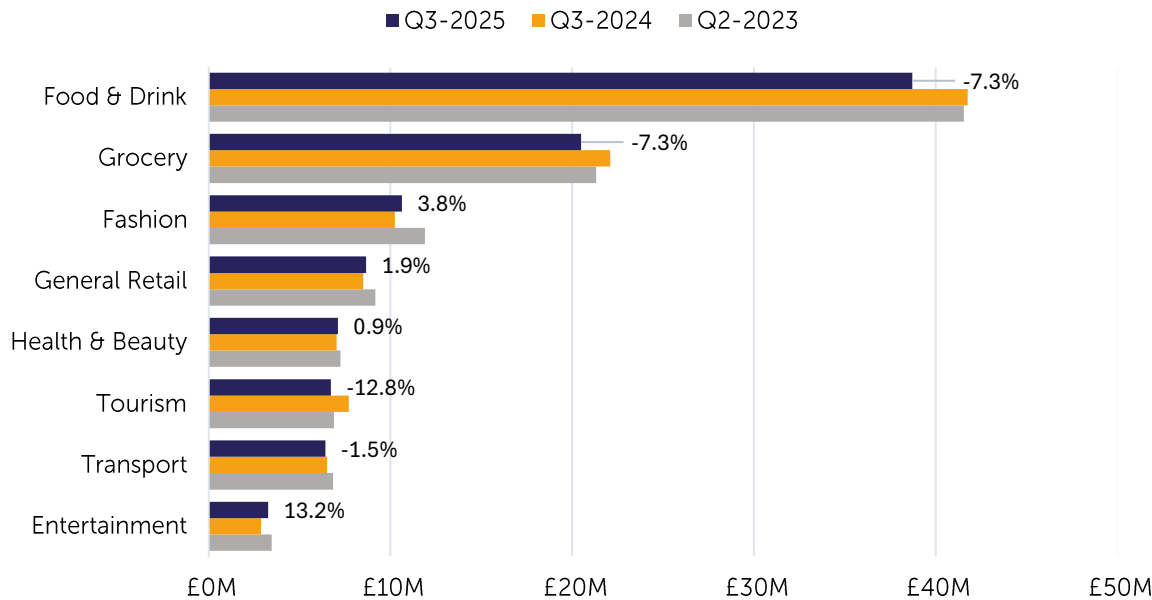
Within the year, May recorded the highest spending levels, exceeding **£39 million**, while August attracted the largest number of customers at more than **2 million**. Notably, January 2025 saw the highest sales recorded for that month in the past five years.

YTD customer numbers currently stand at **-2.3%**, outperforming the UK benchmark of **-4.2%**. Meanwhile, YTD ARPC stands at **£83**, representing a **+1.6%** increase on the previous year, compared with minimal growth of **+0.06%** across the UK benchmark.

- Quarterly Average Revenue Per Customer (ARPC)



- Quarterly Sector Sales

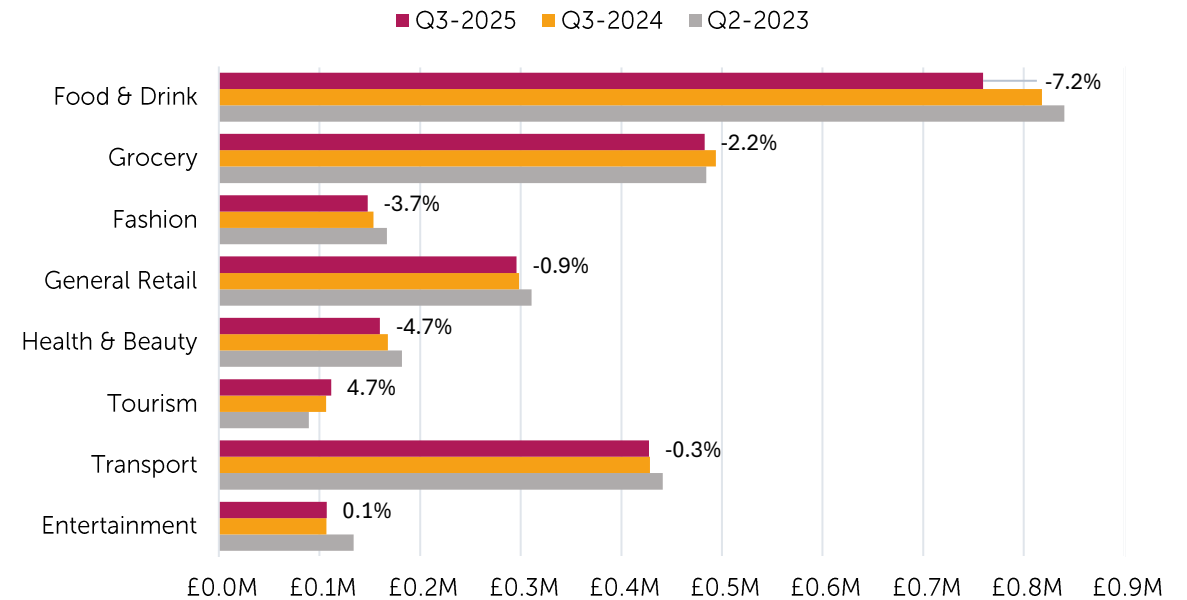


By the end of September 2025, the **Food & Drink** sector accounted for **38%** of total quarterly sales and **37%** of YTD sales.

During Quarter 3 of 2025, the **Entertainment** sector achieved the largest YOY sales growth at **+13.2%**, driven by a **+13.9%** increase in ARPC.

The **Fashion (+3.8%)** and **General Retail (+1.9%)** sectors also saw positive YOY sales growth compared to a UK benchmark of **-4.4%** and **-4.0%** respectively.

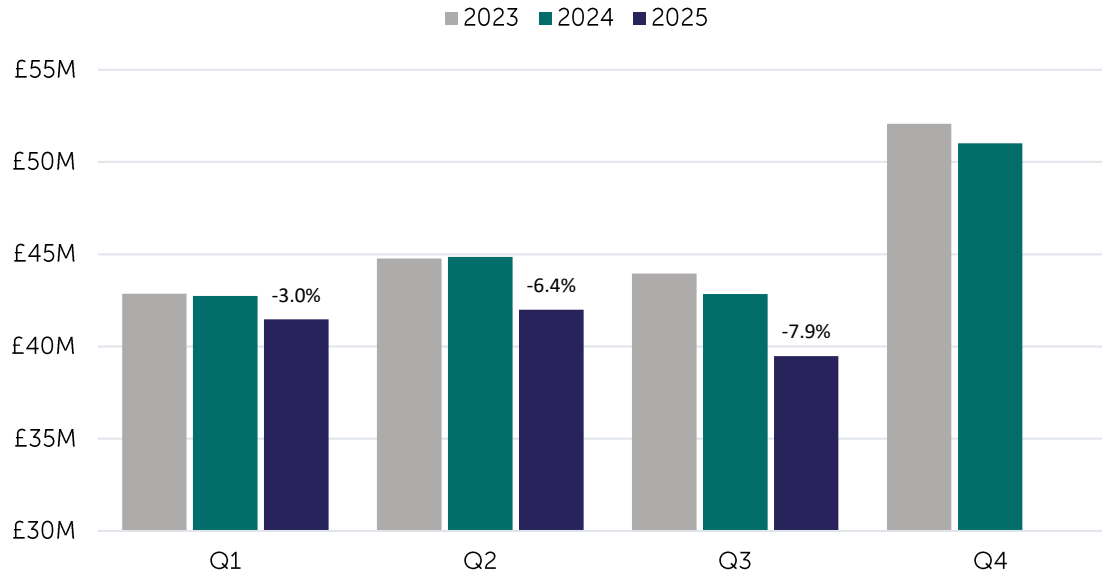
- Quarterly Sector Customers



In contrast, the **Tourism** sector saw the sharpest decline in quarterly growth, with YOY sales down by **12.8%**, driven by a **-15.1%** decline in ARPC.

The **Food & Drink (-7.3%)** and **Grocery (-7.3%)** sectors also experienced a consistent YOY downturn in sales which was considerably more exaggerated than the UK benchmark of **-3.1%** and **-1.63%** respectively. In the case of Food & Drink this was driven by a **-7.3%** YOY downturn in customers.

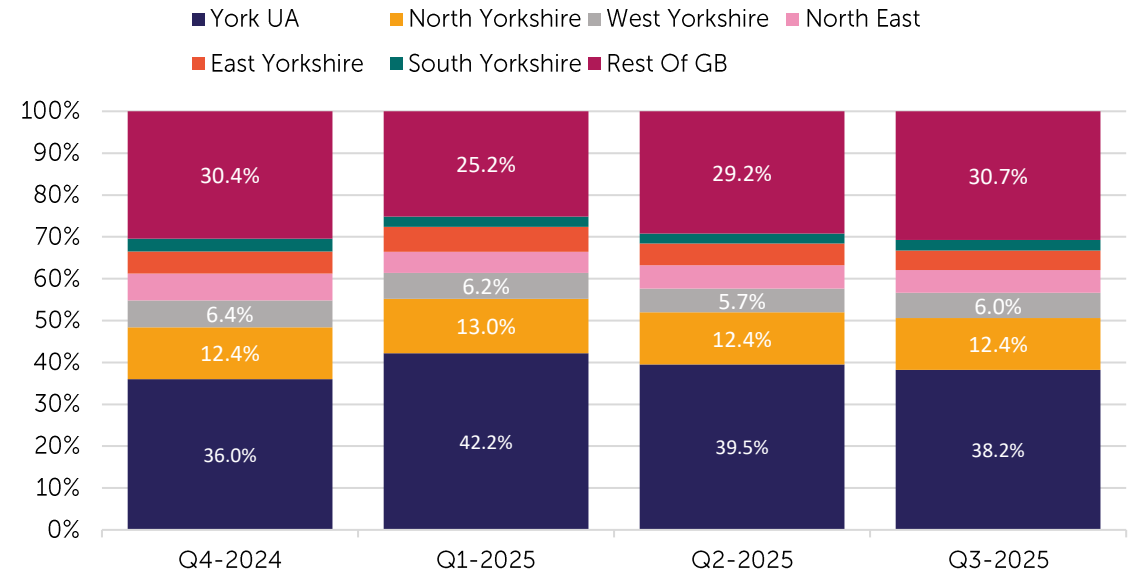
- Quarterly Sales made by York Residents



The graphs above illustrate quarterly sales trends among customers residing within the York Unitary Authority (UA) area since 2023. Overall, annual trends indicate a gradual decline in spending by York residents, with the most pronounced downturns recorded in Quarter 2 (-6.4%) and Quarter 3 (-7.9%) of 2025.

Historically, the highest levels of resident spending have occurred in Quarter 4, which coincides with the festive trading period. In Quarter 4 2024, sales accounted for **28.1%** of total annual turnover, representing a **-2.1%** decrease compared with 2023.

- Share of Quarterly Sales made by York Residents



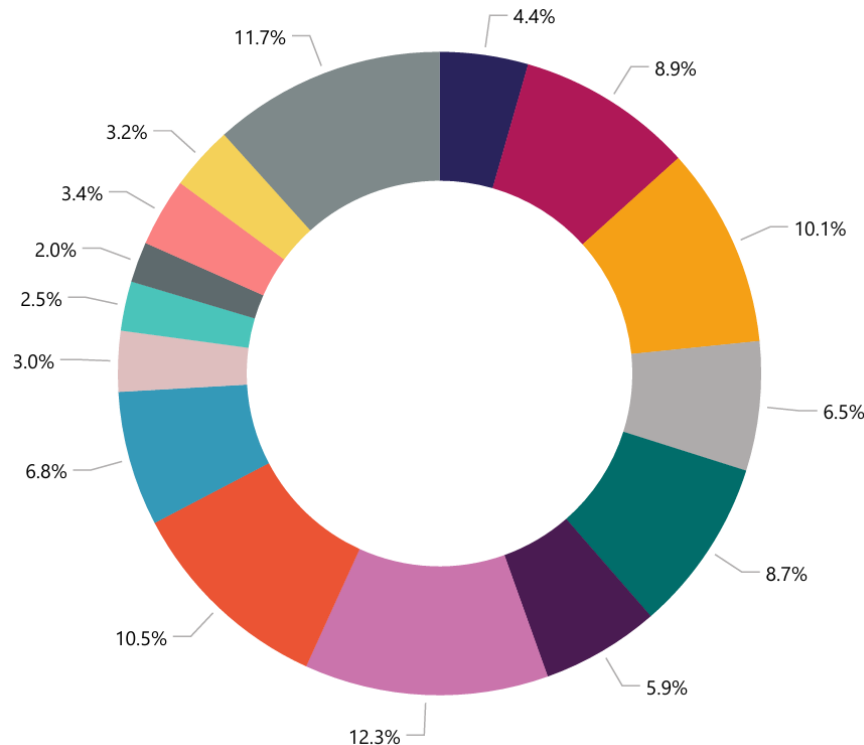
The second graph highlights the proportion of quarterly sales generated by residents of York, the wider Yorkshire region, the North East, and the rest of the UK. In Quarter 3 2025, York residents accounted for **38.2%** of total sales, a Year-on-year decrease of **-1.3%**.

Year-to-date, approximately **66%** of all sales have originated from customers across the wider Yorkshire region, with North Yorkshire representing the largest regional contributor at around **13%**.

Sales by segment

Segment

- A - City Prosperity
- B - Prestige Positions
- C - Country Living
- D - Rural Reality
- E - Senior Security
- F - Suburban Stability
- G - Domestic Success
- H - Aspiring Homemakers
- I - Family Basics
- J - Transient Renters
- K - Municipal Tenants
- L - Vintage Value
- M - Modest Traditions
- N - Urban Cohesion
- O - Rental Hubs



The pie chart illustrates the percentage share of total monthly sales during Quarter 3 2025, segmented by demographic groups as defined by [Experian's MOSAIC classification](#).

During this period, the highest levels of spending (collectively accounting for **45%** of total monthly sales) were made by the following four demographic groups:

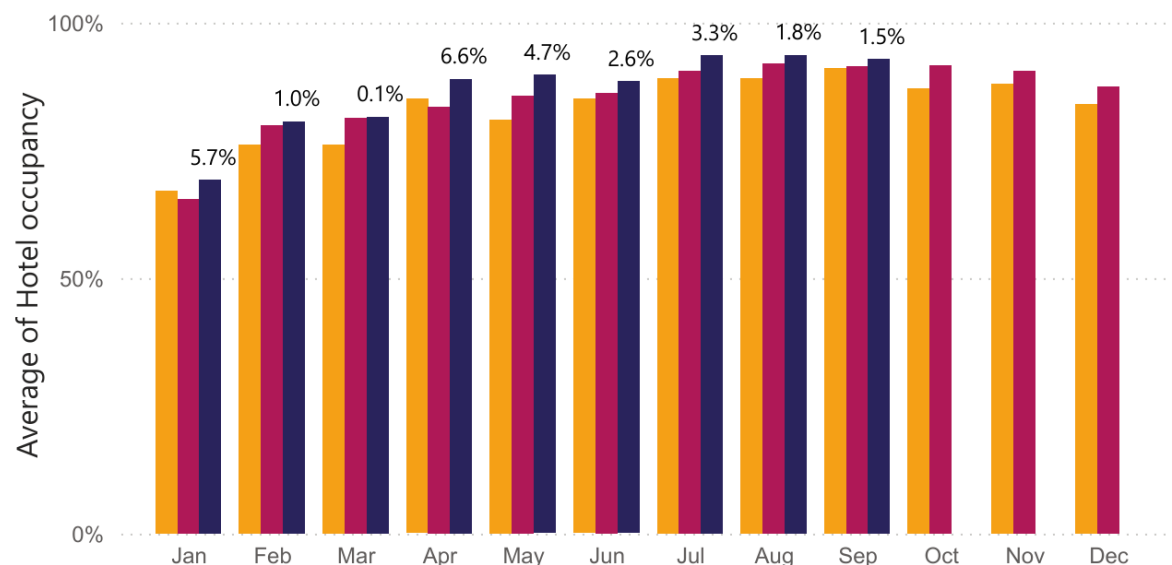
- **G – Domestic Success (12.3%):** Thriving families balancing career progression with raising children (average age 36–45).
- **O – Rental Hubs (11.7%):** Educated young adults privately renting in urban neighbourhoods (average age 26–35).
- **H – Aspiring Homemakers (10.5%):** Younger households establishing themselves in affordable housing (average age 26–35).
- **C – Country Living (10.1%):** 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](#)

Average hotel occupancy by month and year

Year ● 2023 ● 2024 ● 2025

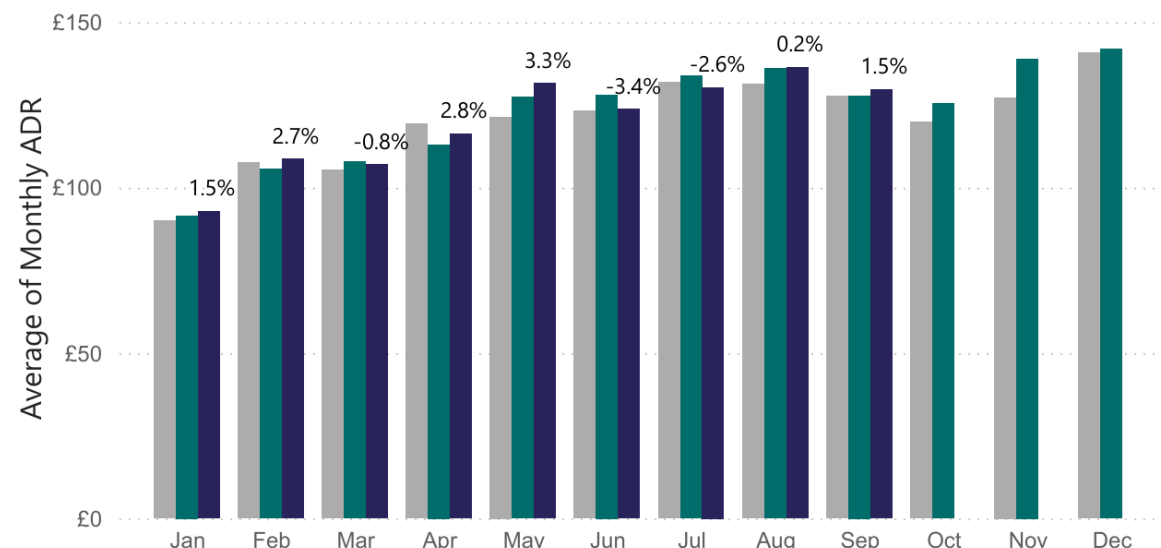


The graph above illustrates the average monthly hotel occupancy rates across York's city-wide hotels and serviced accommodation since 2023.

During Quarter 3 2025, monthly occupancy ranged between **92.8%** and **93.6%**, representing an average year-on-year (YOY) increase of **+2.2%** compared with the same period in 2024. July and August recorded the highest occupancy levels of the year to date, both at **93.6%**, with July showing the strongest YOY growth during the quarter at **+3.3%**.

Average hotel day rate by month and year

Year ● 2023 ● 2024 ● 2025

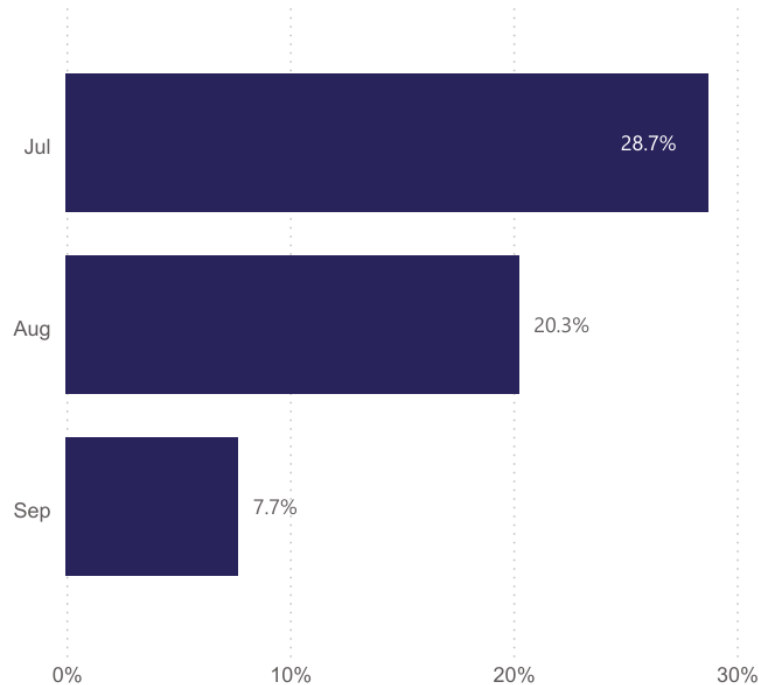


Across Quarter 3, **Saturdays** remained consistently the busiest day of the week, averaging **98.3%** occupancy, while **Sundays** were the quietest, averaging **87.0%**.

The second graph presents the **average daily rate (ADR)** per room, which stood at **£132.11** during Quarter 3 — a marginal **-0.3%** decrease compared with 2024. The highest monthly ADR was recorded in August at **£136.35**, reflecting a modest **+0.2%** increase year-on-year.

Passenger journey growth

Year ● 2025

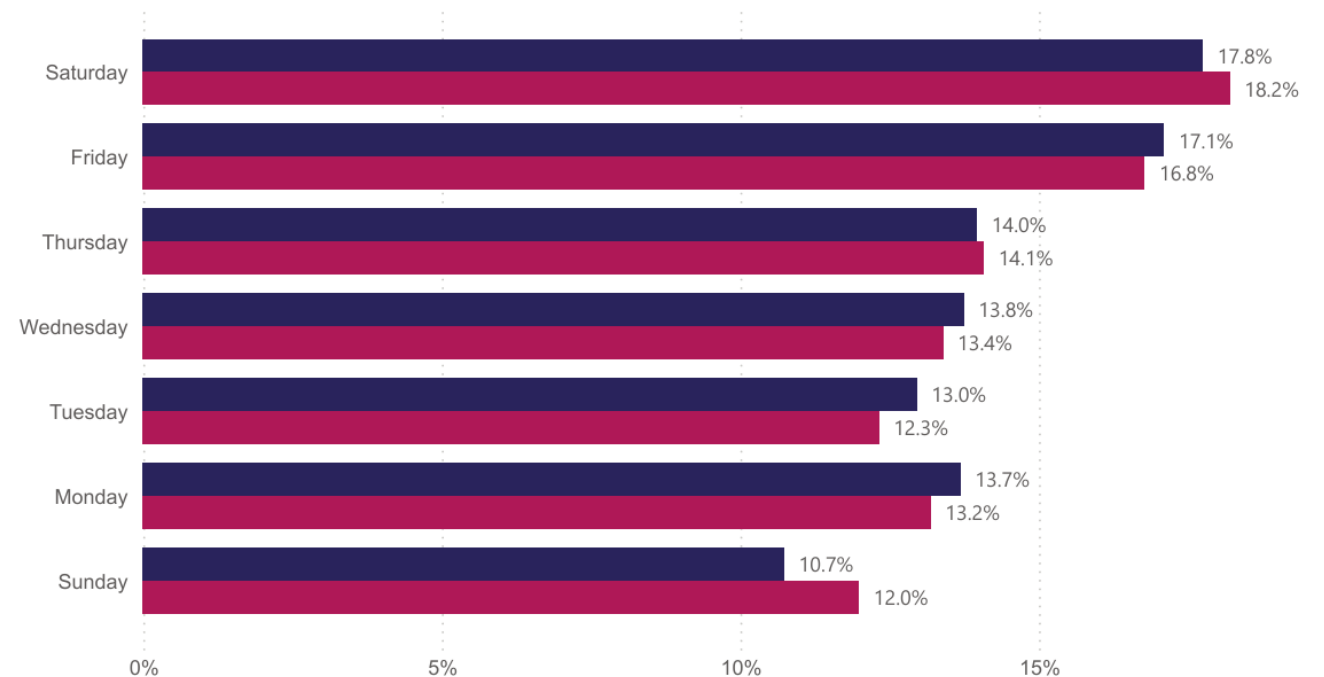


During Quarter 3 of 2025, the number of train tickets purchased for journeys to York increased by an average of **+18.9%** year-on-year.

The strongest monthly growth was recorded in July 2025, with customer journeys up **+28.7%** compared to the same month in 2024.

Train journeys split by day

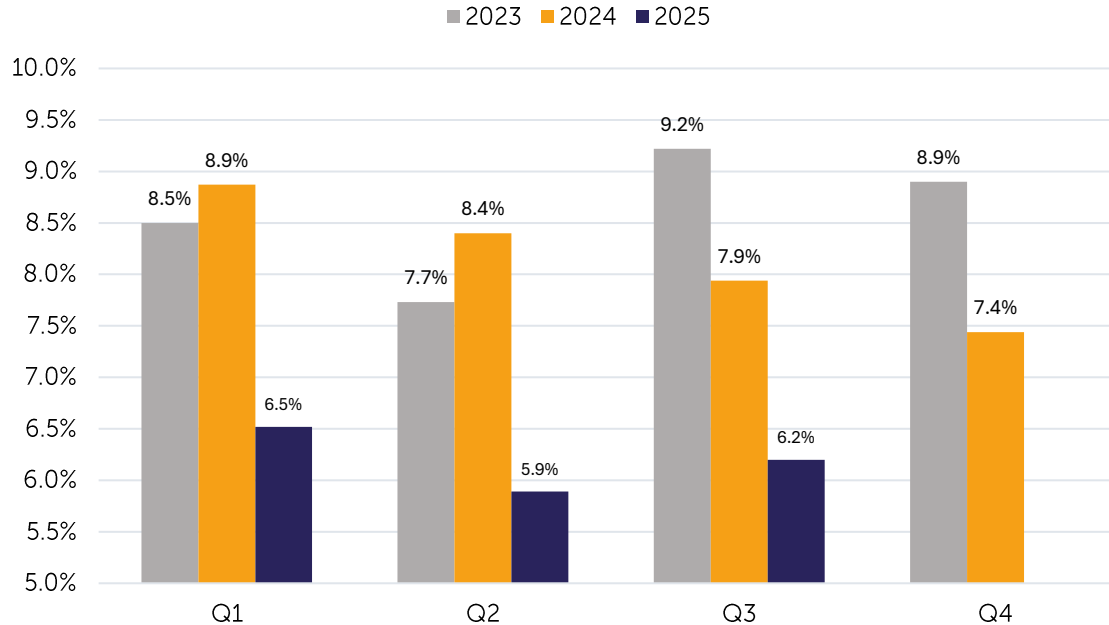
Year ● 2024 ● 2025



Fridays and Saturdays remained the busiest travel days, together accounting for approximately 35% of all train journeys during both Q3 2025 and the whole of 2024.

In contrast, Sundays consistently recorded the lowest travel volumes, though they still experienced a modest **+1.3%** year-on-year increase.

- Quarterly Shop Vacancy Rate



The graph shows the quarterly 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 Quarter 3 2025, shop vacancy levels in York city centre stood at **6.7%**. Year to date, vacancy levels in York have shown a marked improvement compared with the previous two years, reaching their lowest point in Quarter 2 2025 at **5.9%**.

For context, Savills reported that the national high street vacancy rates across the UK stood at **16.9%** at the end of Q2 2025.

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.

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.

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.