

YORK



York Economic Snapshot:

How York Performed This Festive Season

Webinar: Thurs 22nd Jan 2025, 10:00am



Overview



1. Introduction to York Data Intelligence Hub
2. York Headline Performance Stats: Festive Trading Period
3. Spending Insights (**Beauclair**)
4. Footfall Insights (**BT Active Intelligence**)
5. Hotel Occupancy (**CoStar with STR**)
6. Shop Vacancy (**York Open Data**)
7. Audience Q&A



Chris Bush

Business Manager

View historical insights reports here: [Insights Archives - The York BID](#)

chris.bush@theyorkbid.com

York Data Intelligence Hub



York Data Intelligence Hub brings together a range of robust, trusted data sources to deliver clear insight into York's economic performance and emerging trends over time.

The initiative is delivered in partnership with York St John University Business School, which provides in-kind support through a dedicated data analyst. It is funded by the York and North Yorkshire Combined Authority and supported by a growing network of contributing partners, including City of York Council, Hospitality Association York, and LNER.



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York Data Intelligence Hub: Core Objectives



- 1  Equip local businesses with actionable data to inform day-to-day operations and strategic planning
- 2  Provide a robust evidence base to evaluate the impact of projects/events and strengthen the case for future investment
- 3  Support policy-makers with informed decision-making on critical city centre issues
- 4  Foster alignment and consistency in communications around York's economic narrative, boosting business confidence

York Data Intelligence Hub: Key Outputs



- 1  **Dedicated webpage and interactive dashboard** providing easy access to the latest economic insights
- 2  **Quarterly Economic Snapshot webinars**, interpreting trends and performance against regional and national benchmarks
- 3  **Monthly insight reports** published via the York BID website, delivering regular, accessible updates on key indicators

Headline Performance Metrics: Festive Trading Period (Nov & Dec) 2025



1

Spend vs 2024

York
Nov & Dec 2025

-5.0% YoY
-1.8% YTD

2

Footfall vs 2024

York
Nov & Dec 2025

-8.1% YoY

3

Hotel Occupancy

York
Nov & Dec 2025

+2.3% YoY
+1.3% YTD

4

Shop Vacancy

York
Nov & Dec 2025

5.6%

Spending Insights: Beauclair



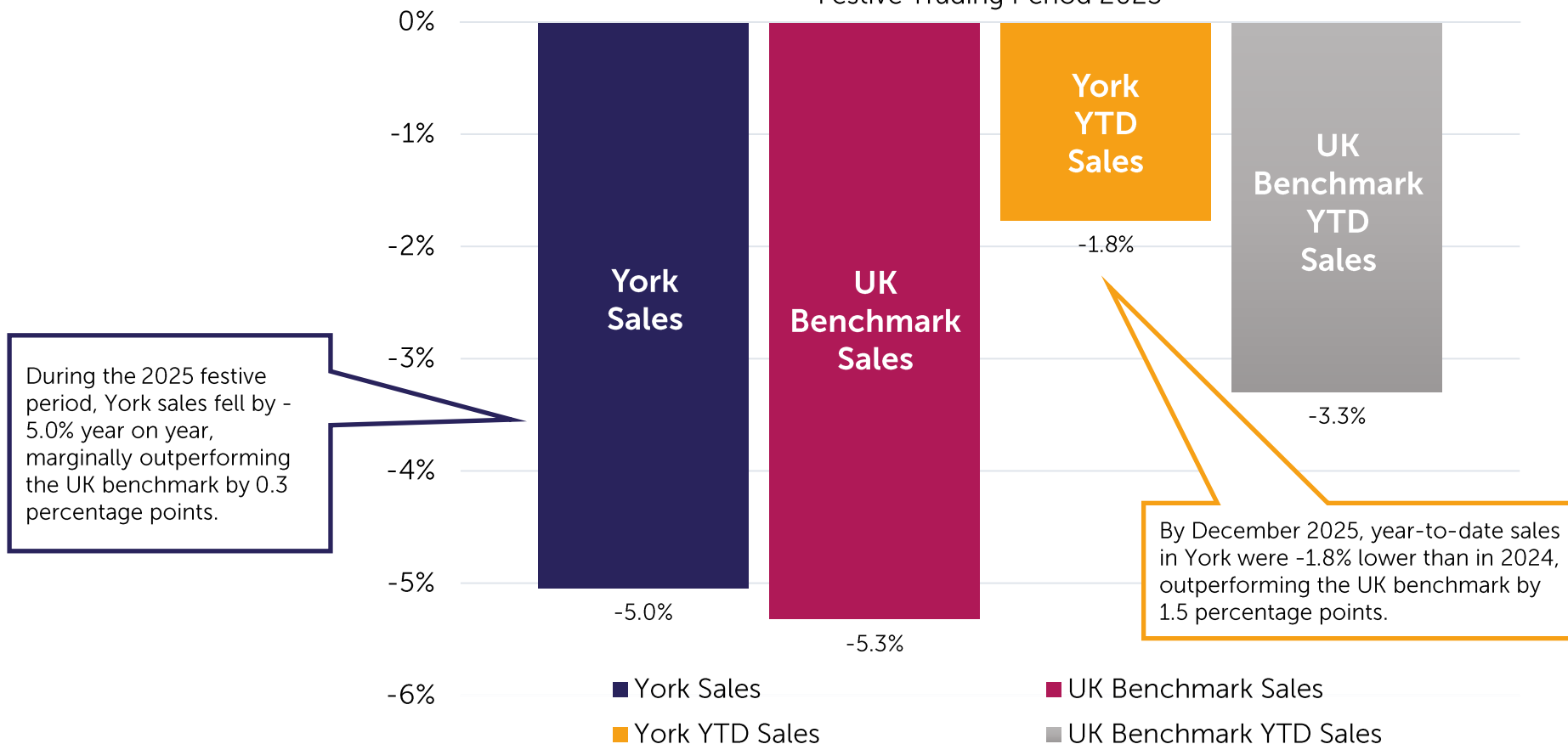
- 1  The dataset includes approximately 1.5 billion offline debit card transactions annually, totalling around £45 billion – representing roughly 7.5% of all UK debit card spending
- 2  New data is updated monthly, typically three weeks after month end
- 3  Historical data from early 2022 allows analysis of trends and growth over time
- 4  Exclusions: the dataset does not cover credit card transactions, online purchases, cash payments, or debit cards issued outside the UK

Festive Trading Sales (Nov & Dec) 2025



- Year on Year Sales Growth

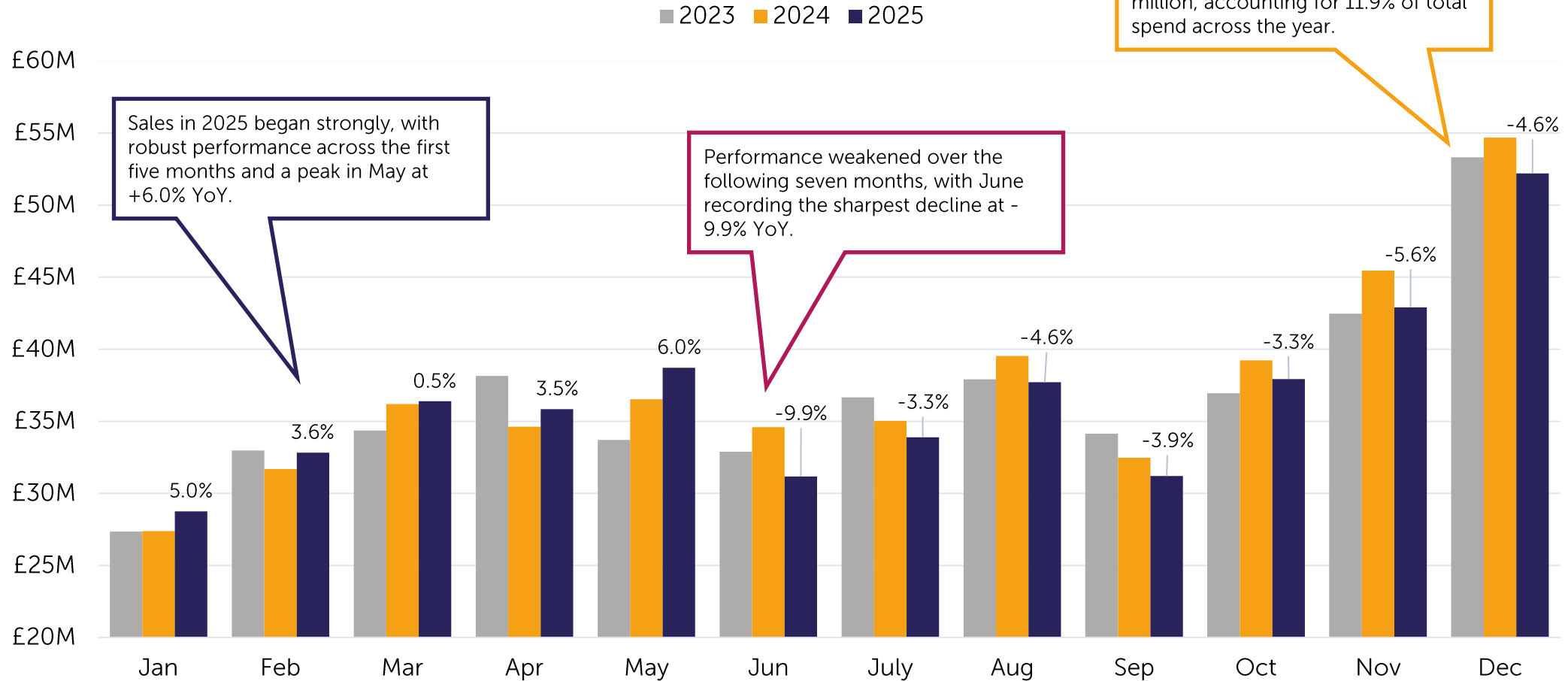
Festive Trading Period 2025



Monthly Sales Trends 2023-2025



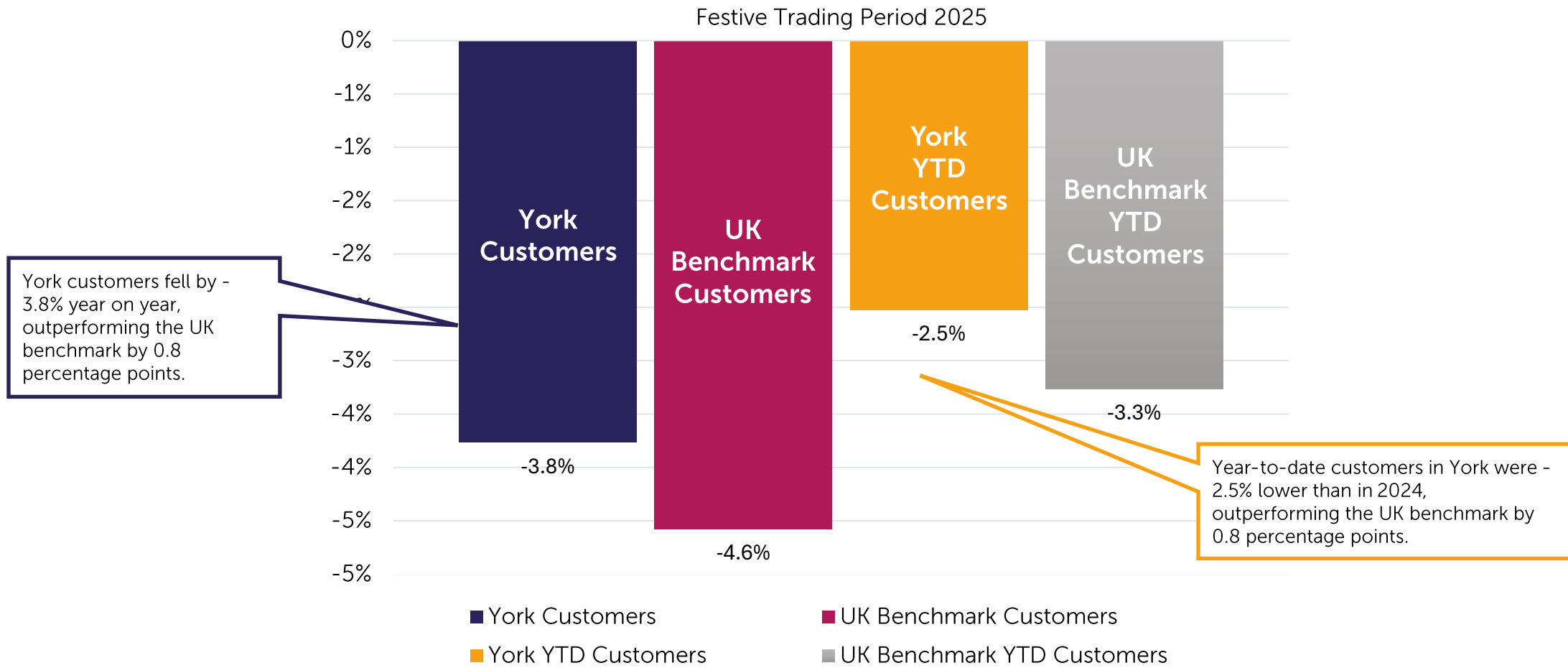
- Monthly Sales



Festive Trading Customers (Nov & Dec) 2025



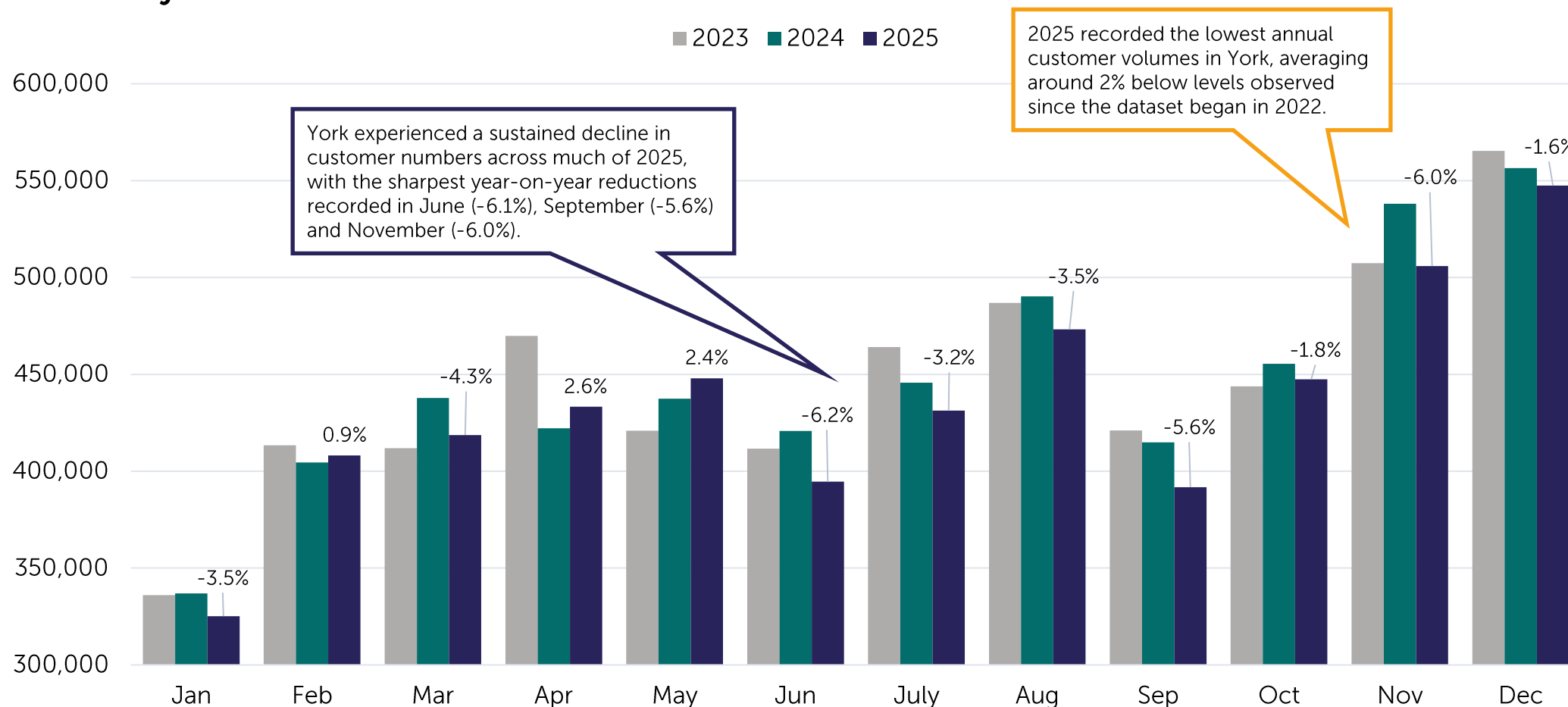
- Year on Year Customers Growth: Nov & Dec 2025



Monthly Customer Trends 2023-2025



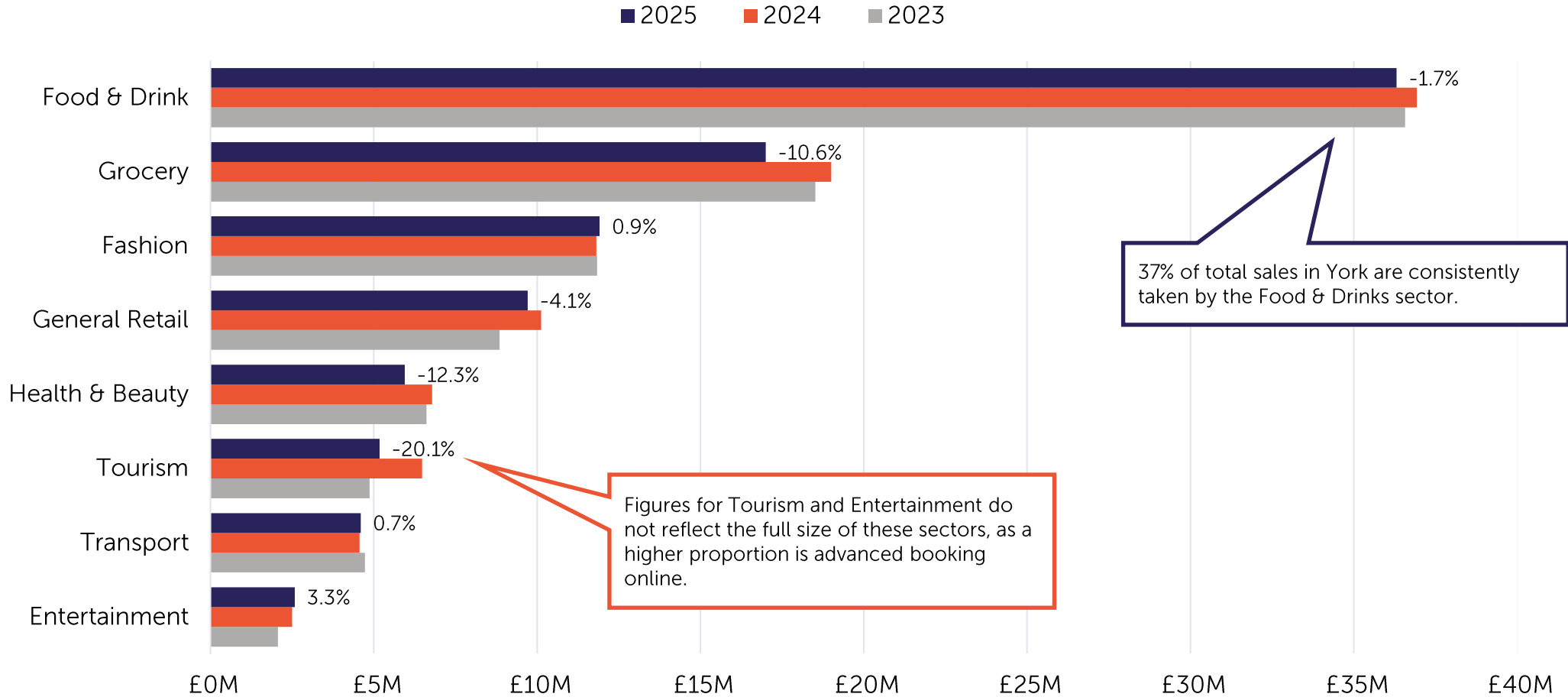
- Monthly Customers



Festive Trading 2023-2025: Sector Sales



- Festive Trading Sector Sales

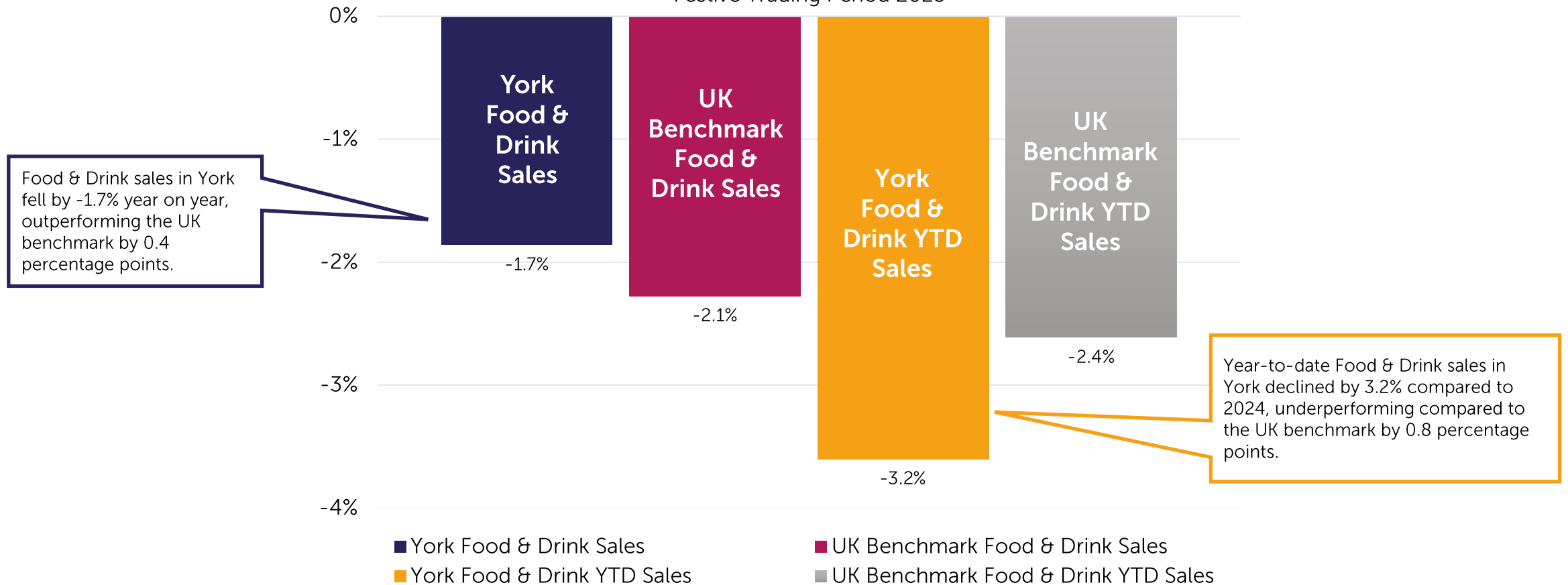


Festive Trading 2025: Food & Drink Sales



- Year on Year Growth In Food & Drink Sales

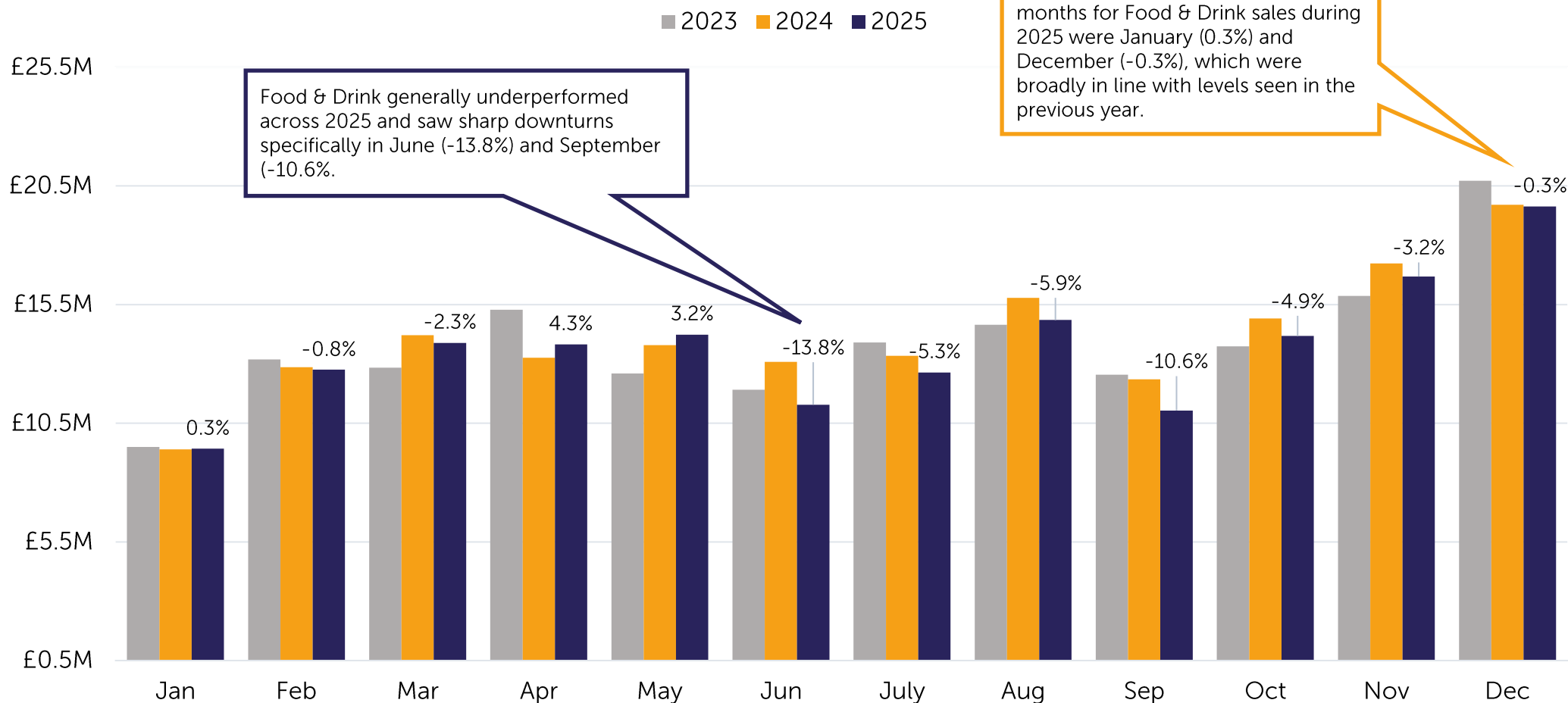
Festive Trading Period 2025



Monthly Food & Drink Sales Trends 2023-2025



- Monthly Sector Sales: Food & Drink

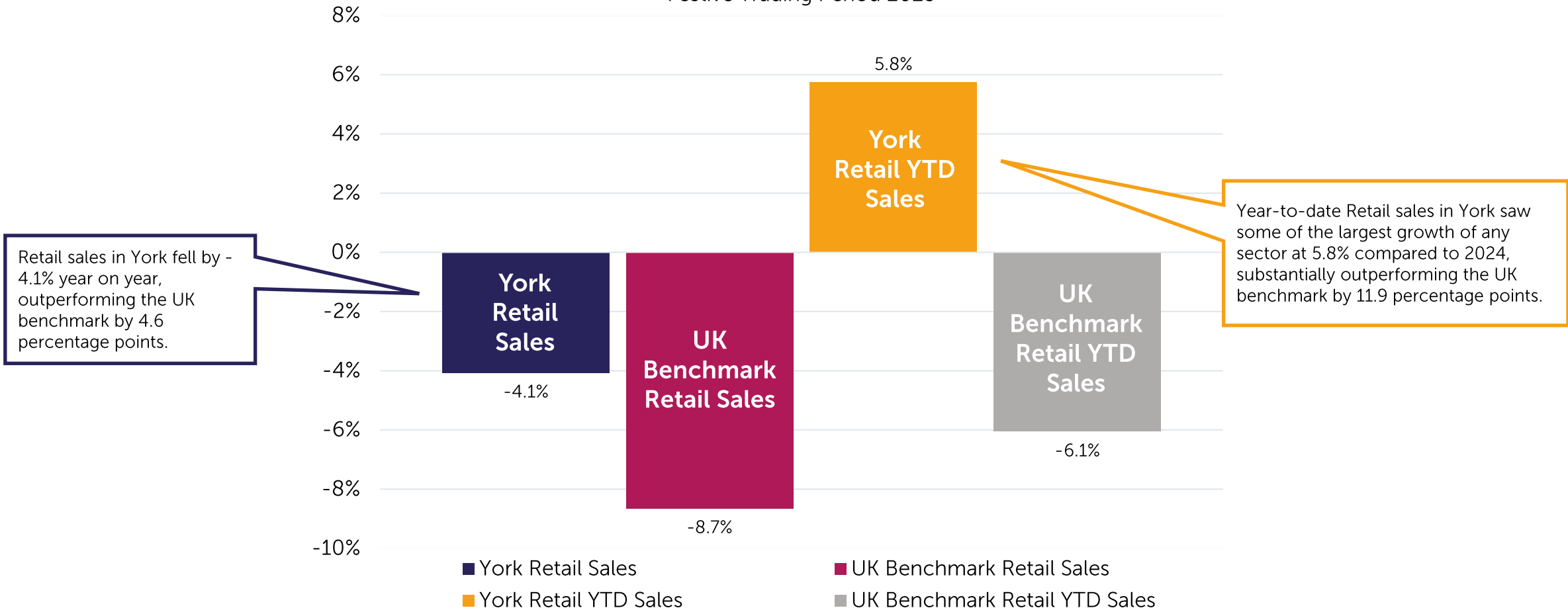


Festive Trading 2025: Retail Sales



- Year on Year Growth In Retail Sales

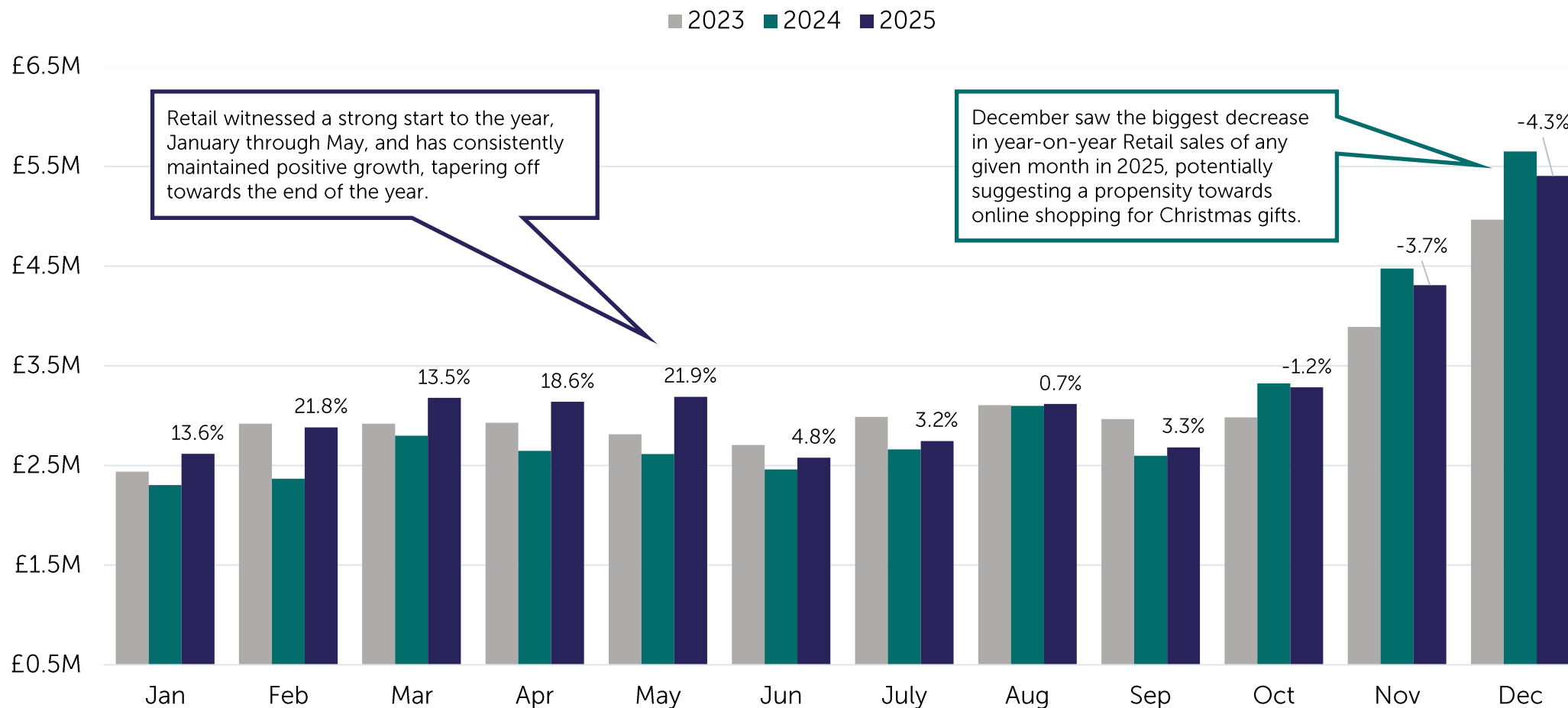
Festive Trading Period 2025



Monthly Retail Sales Trends 2023-2025



- Monthly Sector Sales: General Retail



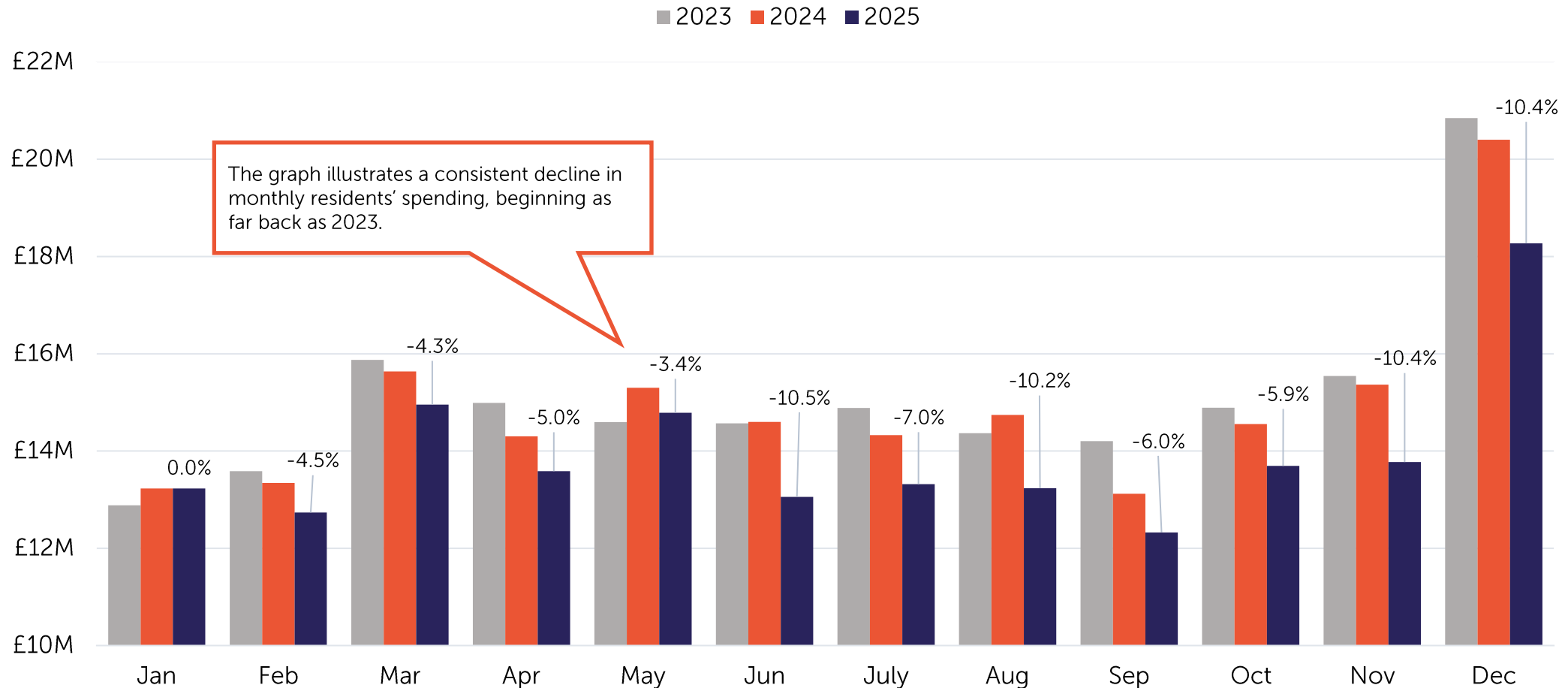


How do these trends match up with your observations?

Monthly Sales By York Residents 2023-2025








- Monthly Sales by York Residents



Visitor Insights: BT Active Intelligence

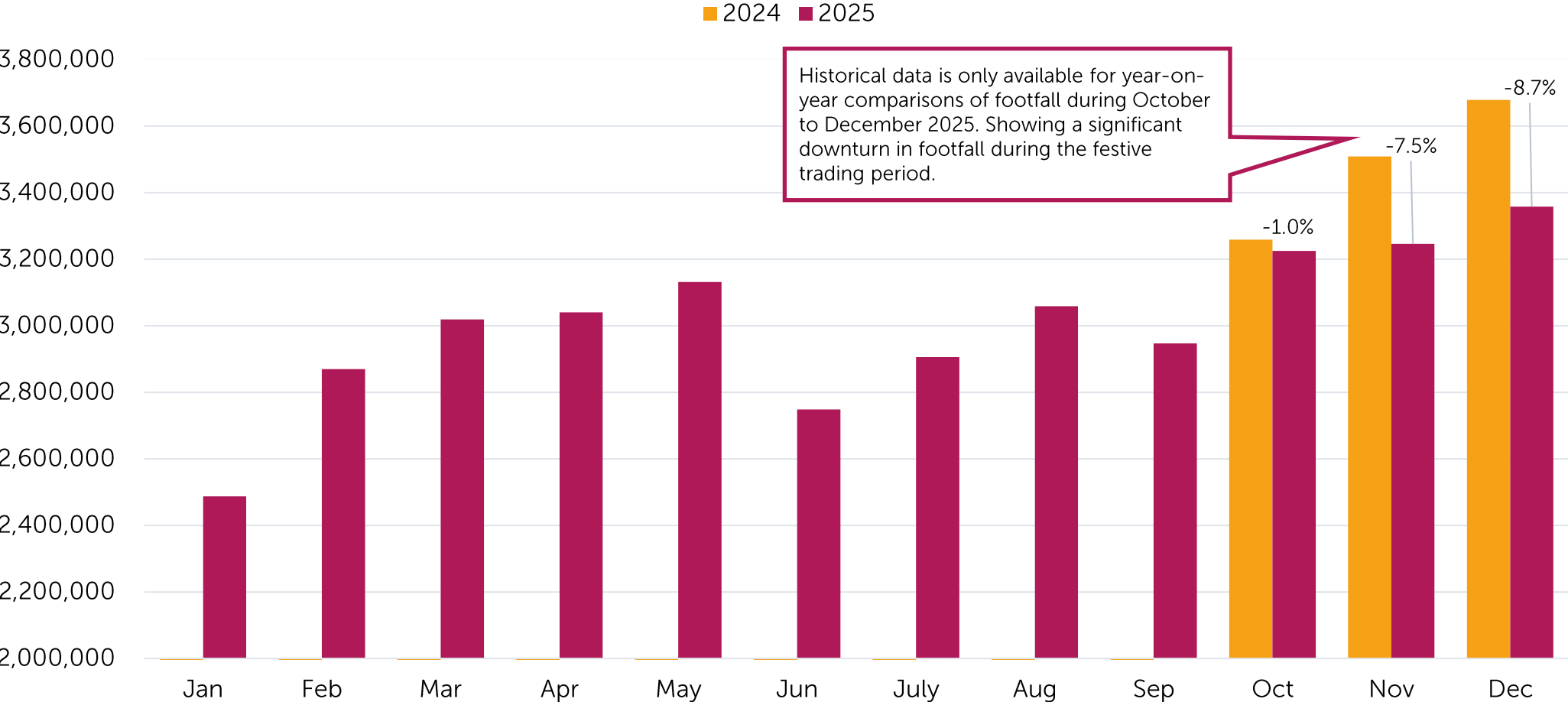


- 1  Anonymised, aggregated **handset location data** sourced from the **EE and BT network**, the UK's largest 4G and 5G mobile network
- 2  Coverage of **over 24 million mobile customers**, representing **more than one third of the UK** adult population
- 3  **Data updated monthly** under a software license held by City of York Council
- 4  Footfall insights **available by hour and day**, with bespoke reporting for specific events or time periods
- 5  **Historical data available from October 2024** onwards

Monthly Footfall Trends Oct 2024-Dec 2025



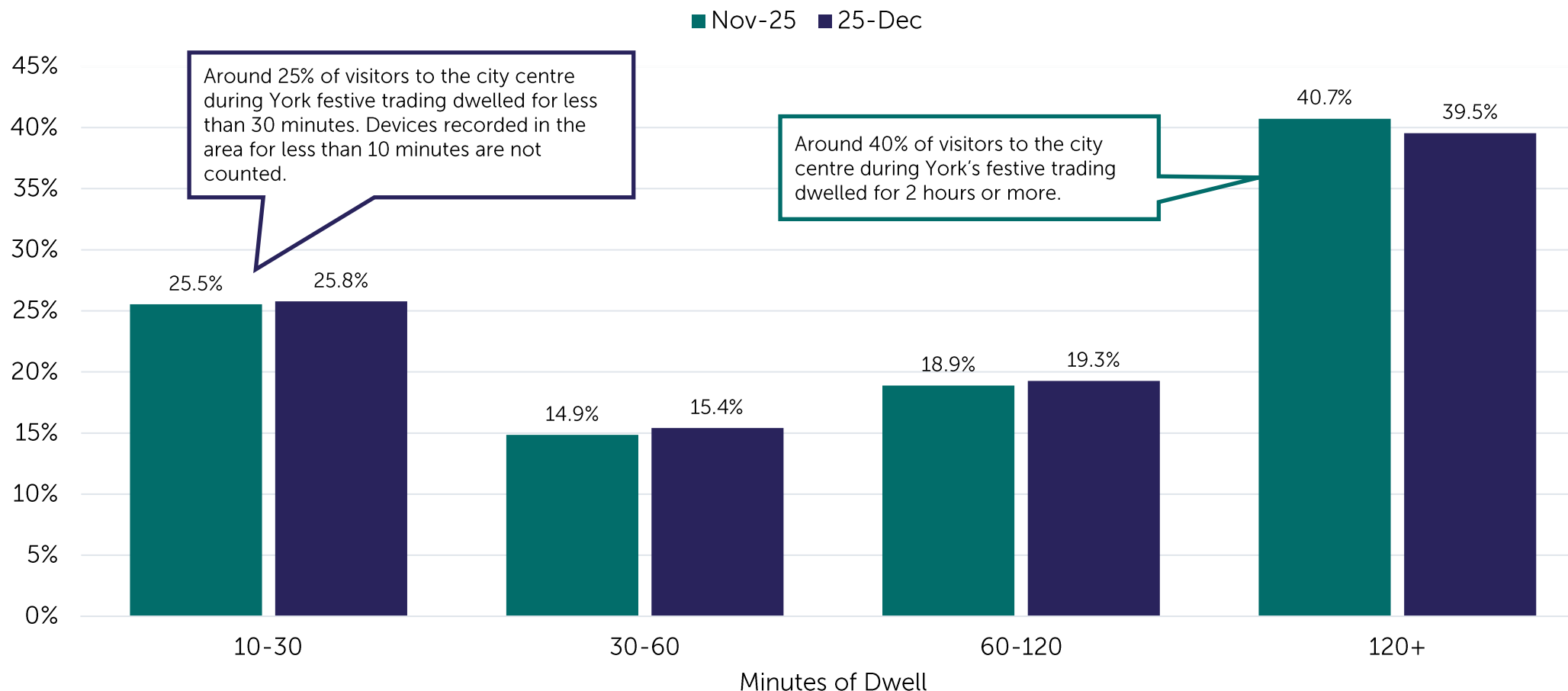
- Total Monthly Footfall



Monthly Footfall Trends Oct 2024-Dec 2025



- Monthly Dwell Time







Festive Trading 2025: Peak Hours



| | | | | | | | | | | | | | | | | | | | | | | | | | |
|----------|-----------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| November | Monday | 0.3% | 0.3% | 0.2% | 0.2% | 0.3% | 0.3% | 0.3% | 0.3% | 0.4% | 0.5% | 0.6% | 0.7% | 0.8% | 0.8% | 0.8% | 0.7% | 0.7% | 0.6% | 0.5% | 0.5% | 0.4% | 0.4% | 0.4% | 0.3% |
| November | Tuesday | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.5% | 0.6% | 0.7% | 0.8% | 0.9% | 0.9% | 0.9% | 0.8% | 0.8% | 0.7% | 0.6% | 0.5% | 0.5% | 0.4% | 0.4% | 0.4% |
| November | Wednesday | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.4% | 0.5% | 0.6% | 0.7% | 0.8% | 0.9% | 0.9% | 0.9% | 0.9% | 0.8% | 0.7% | 0.6% | 0.6% | 0.5% | 0.5% | 0.5% | 0.4% |
| November | Thursday | 0.4% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.4% | 0.5% | 0.6% | 0.7% | 0.9% | 1.0% | 1.0% | 1.0% | 0.9% | 0.8% | 0.7% | 0.7% | 0.6% | 0.5% | 0.5% | 0.4% | 0.4% |
| November | Friday | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.4% | 0.5% | 0.6% | 0.7% | 0.9% | 1.0% | 1.0% | 1.0% | 1.0% | 1.0% | 0.9% | 0.8% | 0.8% | 0.7% | 0.7% | 0.6% | 0.6% |
| November | Saturday | 0.5% | 0.5% | 0.4% | 0.4% | 0.3% | 0.3% | 0.3% | 0.4% | 0.4% | 0.6% | 0.8% | 1.1% | 1.3% | 1.5% | 1.5% | 1.5% | 1.4% | 1.2% | 1.1% | 1.0% | 0.9% | 0.8% | 0.7% | 0.6% |
| November | Sunday | 0.5% | 0.5% | 0.4% | 0.4% | 0.3% | 0.3% | 0.3% | 0.4% | 0.4% | 0.5% | 0.7% | 0.9% | 1.0% | 1.1% | 1.1% | 1.0% | 0.8% | 0.7% | 0.6% | 0.5% | 0.5% | 0.4% | 0.4% | 0.4% |
| December | Monday | 0.3% | 0.3% | 0.2% | 0.2% | 0.3% | 0.3% | 0.3% | 0.3% | 0.4% | 0.5% | 0.7% | 0.8% | 0.9% | 1.0% | 1.0% | 0.9% | 0.8% | 0.7% | 0.6% | 0.5% | 0.5% | 0.4% | 0.4% | 0.3% |
| December | Tuesday | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.4% | 0.6% | 0.7% | 0.9% | 1.0% | 1.0% | 1.0% | 1.0% | 0.9% | 0.8% | 0.7% | 0.6% | 0.5% | 0.5% | 0.4% | 0.4% |
| December | Wednesday | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.4% | 0.5% | 0.7% | 0.8% | 0.9% | 1.0% | 1.0% | 0.9% | 0.8% | 0.7% | 0.7% | 0.6% | 0.6% | 0.5% | 0.5% | 0.4% |
| December | Thursday | 0.3% | 0.3% | 0.3% | 0.2% | 0.2% | 0.2% | 0.2% | 0.3% | 0.4% | 0.5% | 0.6% | 0.7% | 0.8% | 0.8% | 0.8% | 0.7% | 0.7% | 0.6% | 0.5% | 0.5% | 0.5% | 0.4% | 0.4% | 0.3% |
| December | Friday | 0.3% | 0.3% | 0.2% | 0.2% | 0.2% | 0.3% | 0.3% | 0.3% | 0.4% | 0.5% | 0.7% | 0.8% | 0.9% | 1.0% | 1.0% | 0.9% | 0.8% | 0.8% | 0.7% | 0.7% | 0.7% | 0.6% | 0.5% | 0.5% |
| December | Saturday | 0.4% | 0.4% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.4% | 0.6% | 0.8% | 1.1% | 1.4% | 1.6% | 1.7% | 1.7% | 1.5% | 1.3% | 1.1% | 1.0% | 0.9% | 0.8% | 0.7% | 0.6% |
| December | Sunday | 0.5% | 0.5% | 0.4% | 0.4% | 0.3% | 0.3% | 0.3% | 0.3% | 0.4% | 0.5% | 0.7% | 0.9% | 1.1% | 1.2% | 1.2% | 1.1% | 1.0% | 0.8% | 0.7% | 0.6% | 0.5% | 0.5% | 0.4% | 0.4% |

Hotel Occupancy: CoStar with STR

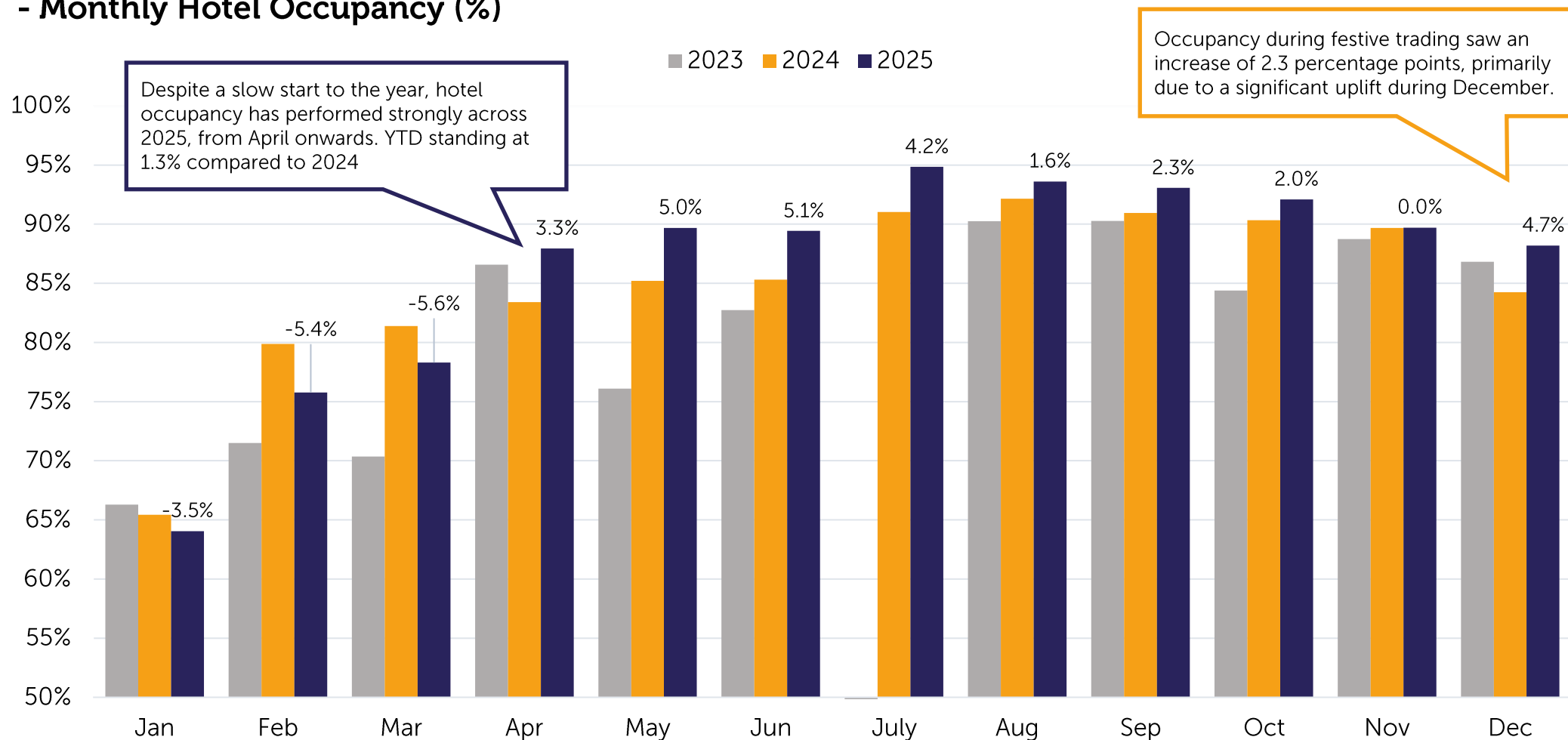


- 1  Performance data collected **directly from participating hotels**
- 2  Occupancy is calculated as the **average number of rooms sold**, divided by the by **total rooms available**
- 3  Average Daily Rate (ADR) is calculated as the **average revenue earned per occupied room** over a specific period
- 4  York dataset **updated monthly**, provided by **Hospitality Association York**

Monthly Hotel Occupancy 2023-2025



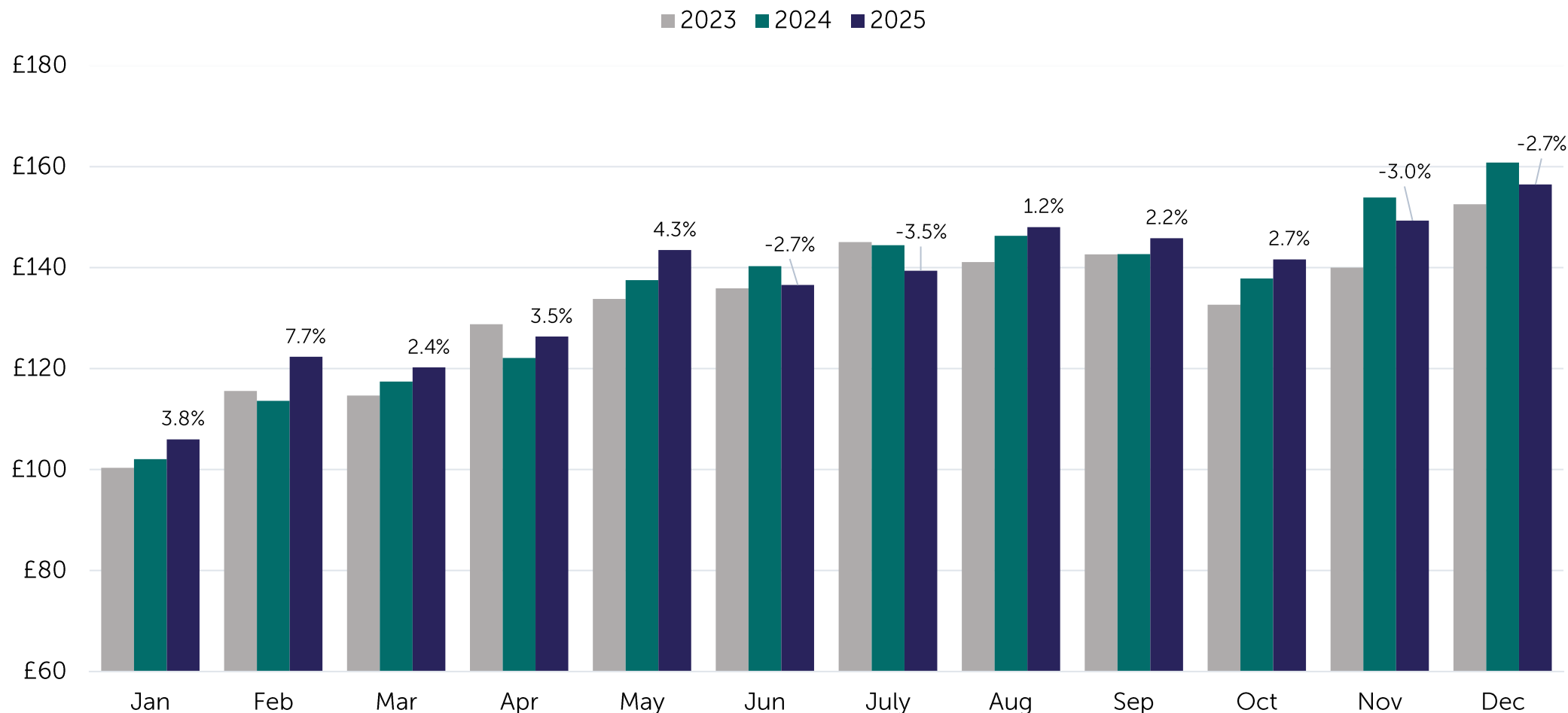
- Monthly Hotel Occupancy (%)



Monthly Hotel Occupancy 2023-2025







- Monthly Hotel Average Day Rate (£)



Shop Vacancy: York Open Data

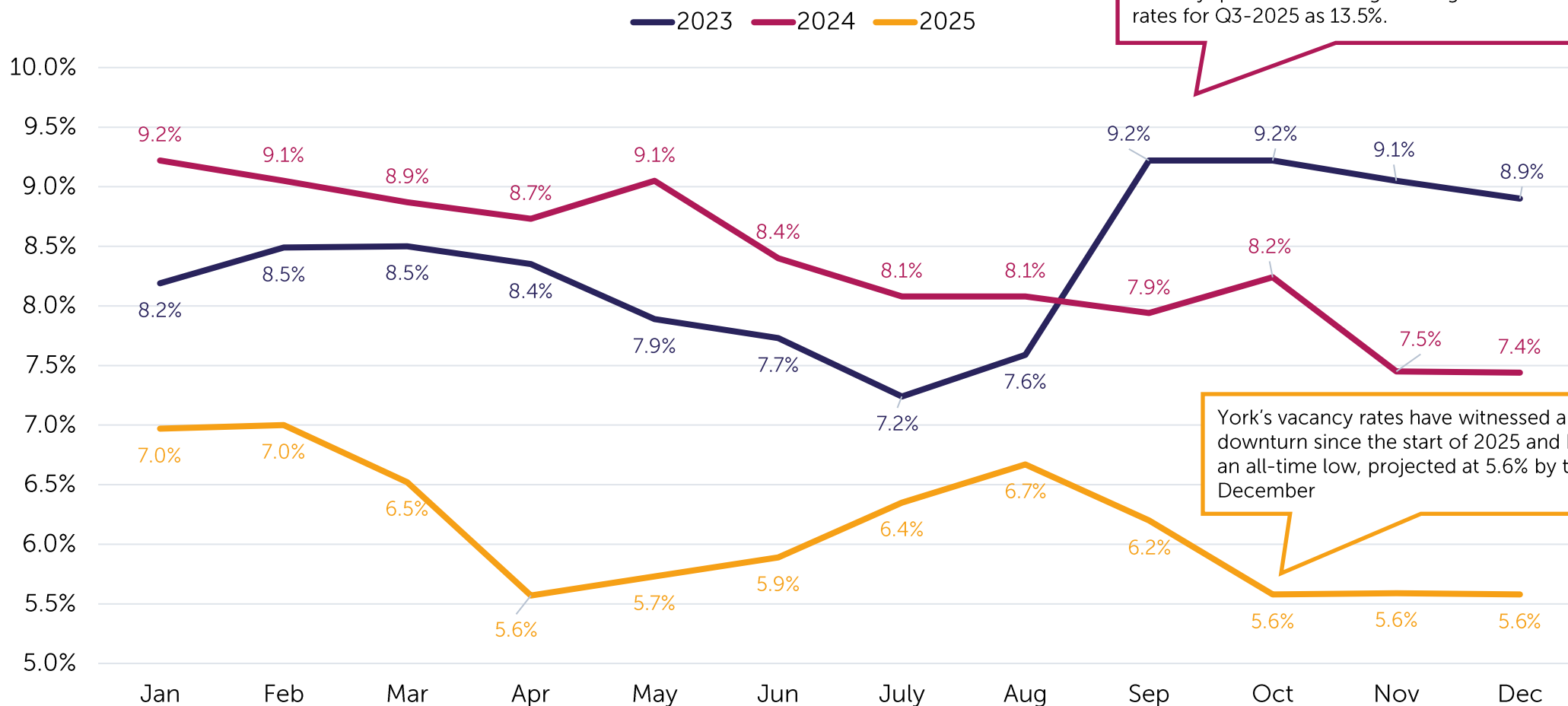


- 1  Definition: proportion of **retail units that are unoccupied** in a given area, expressed as a percentage of total units.
- 2  Vacancies are tracked through surveys, landlord reports, letting agents, and commercial property databases.
- 3  Time Comparison: Vacancy rates are **benchmarked over time** to identify trends, seasonal patterns, or the impact of economic changes.
- 4  **Data updated monthly** made available on **York Open Data** web portal

Monthly Hotel Occupancy 2023-2025



- Monthly Shop Vacancy in York City Centre (%)



Summary



1. 🏪 York experienced a **decline in consumer spending and customer** numbers during the festive trading period and across much of 2025; however, performance consistently remained **stronger than the UK benchmark** on both measures.
2. 🍴 The **Food & Drink sector** continues to account for the **largest share of total debit card spend** in York, but recorded **declines during festive trading and year-to-date**, underperforming relative to the UK benchmark.
3. 📦 Despite a notable fall in festive trading sales, the **retail sector** delivered some of the **strongest sales growth** of any sector in York during 2025, significantly **outperforming the UK benchmark**.
4. 🏠 **Spending by York residents has continued to decline**, with the downturn particularly pronounced during the festive trading period.
5. 🚶 **Footfall fell sharply over the festive period**, although the decline in customer numbers was less severe, indicating changes in visit behaviour rather than demand alone.
6. 🏨 **York's hotel sector recorded a strong uplift in occupancy** during the festive trading period, alongside a more moderate but positive year-to-date increase across 2025.
7. 🏪 **Shop vacancy rates in York are currently at a historic low** and remain substantially below the most recently reported average for UK high streets.



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