

# How York city centre performed in 2020

Summary report looking at footfall, visitor origin and visitor spend data



# Introduction



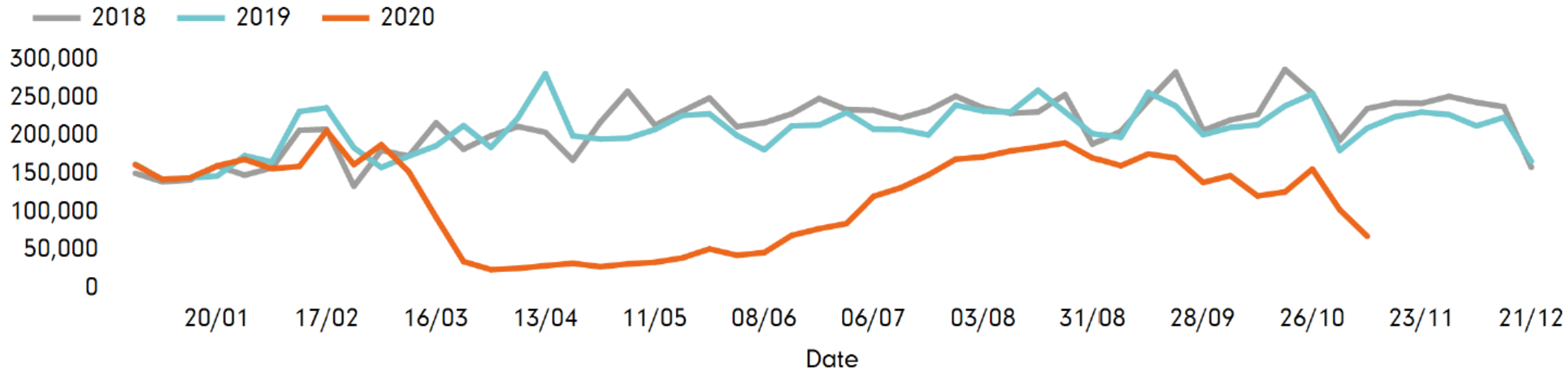
York BID and City of York Council have purchased information from Movement Insights to better understand the performance of York City centre. In summary;

- this report is by no means definitive – part of its purpose is to demonstrate the type of data the city now has the ability to analyse;
- all information is anonymous;
- data from O2 (one third of all UK mobile users) shows the origin of visitors that come to York city centre. This can be analysed weekly to compliment footfall data;
- data from Visa (accounting for £1 in every £3 spent in the UK) can be analysed quarterly;
- data analysis is primarily focused on the city centre, although data is available for York local authority area;
- analysis of data will be used to better understand city performance and help inform investment decisions e.g. targeted marketing spend;
- this report focuses on data from January 2020 through to November 2020.

# Footfall

The drop in visitors coming to York city centre in 2020 is clear & stark!

Graph: Footfall in York Jan 2020 to 1<sup>st</sup> Nov 2020

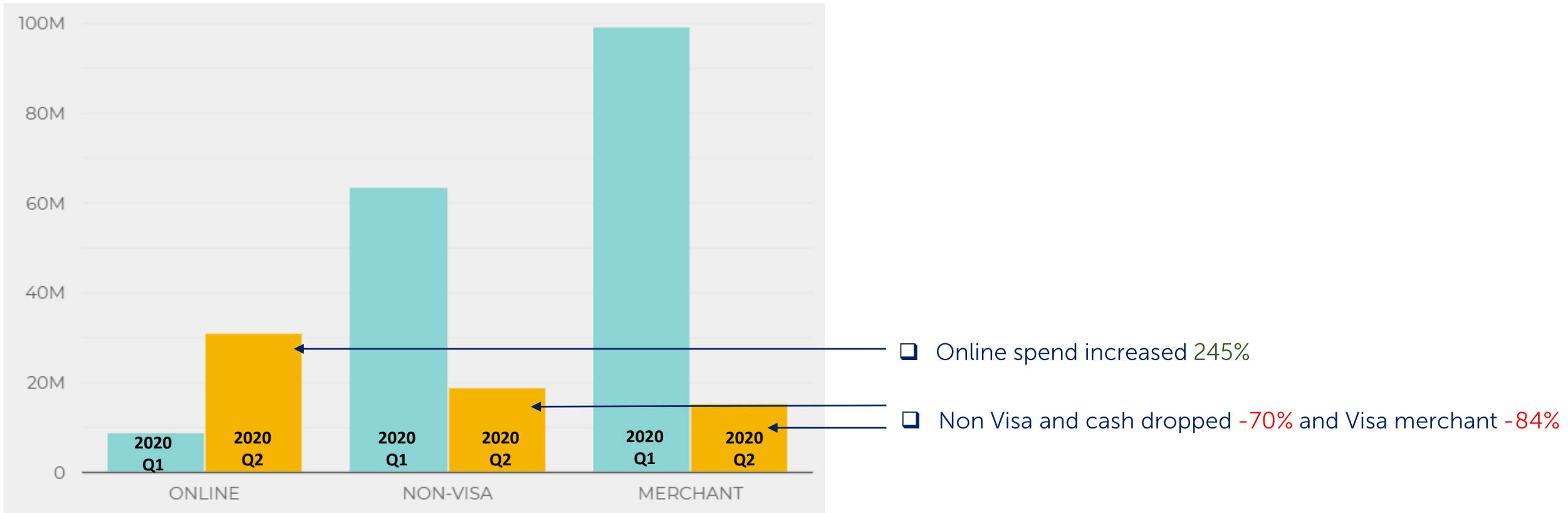


- ❑ Footfall in York was performing as normal before mid March. The graph shows a steep drop off during lockdown.
- ❑ Footfall started to recover from June, but year to date (1<sup>st</sup> Jan – 15<sup>th</sup> Nov) it is **43.4% down** on the equivalent time period in 2019. The UK average is **44.1% down**.
- ❑ York did perform better than many UK cities over the summer period, due to the demand for staycations. For example, when looking at the week ending 30<sup>th</sup> August, footfall in York was down -17% on the same week in 2019, where the equivalent UK average was -33%.

# Spend

## Drop in city centre spend in Q2 (lockdown) pronounced

Graph: 2020 Q1 vs Q2 spend for Visa online, Visa merchant and non Visa/cash



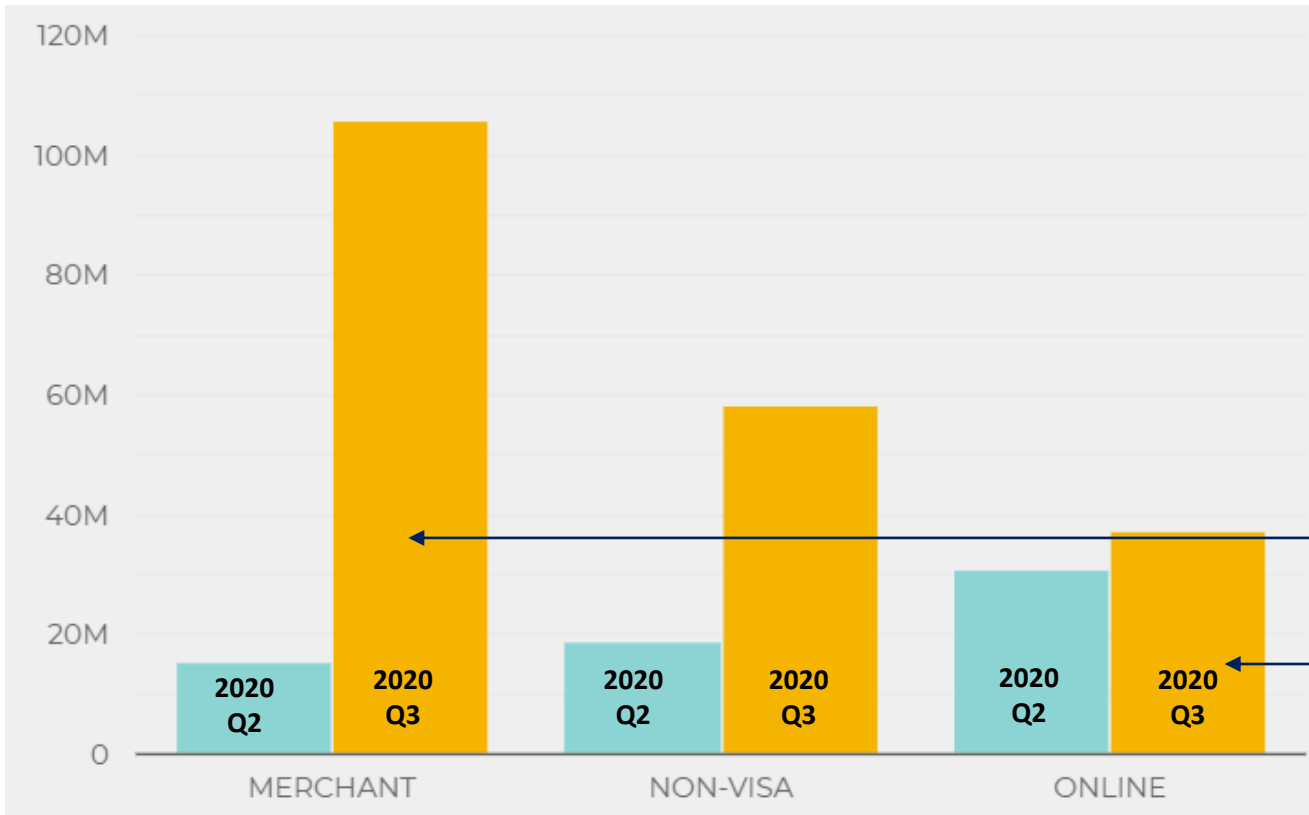
Notes:

- ❑ BID has access to VISA data for 2020 quarters (calendar year) 1-3, with some historical data for 2019.
- ❑ York city centre, defined as YO1 postcode (circa 1km radius from the centre).
- ❑ Note that UK entered full lock down restrictions 23<sup>rd</sup> March 20, with non essential retail opening 15<sup>th</sup> June.
- ❑ Merchant data = Visa spend in store / Non Visa = other card providers / online = internet spend for people living in YO1 postcode

# Spend

The city centre recovered in Q3, but shift to online remained and increased

Graph: 2020 Q2 vs Q3 Spend for Visa online, Visa merchant and non Visa & cash



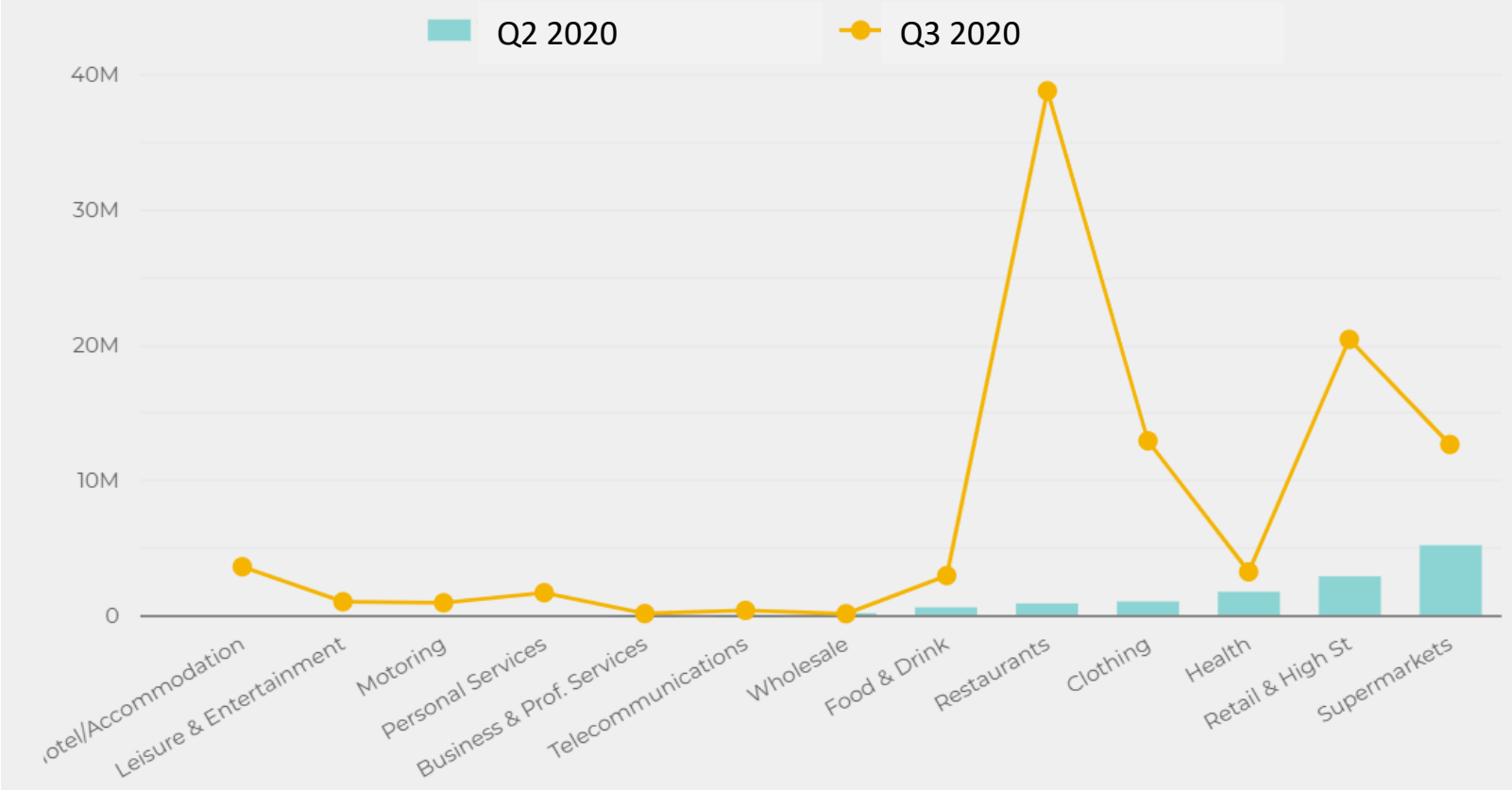
- ❑ Q3 Visa merchant up **582%** on Q2 at £106m spend. For comparison, Q4 2019 (run up to Xmas) saw £146m spent.
- ❑ Online remains strong 37m, 20% higher than Q2 (lockdown) and 315% higher than Q1 (pre-covid trading).

- ❑ Data gives an indication of **how the city centre recovered**
- ❑ Merchant data = Visa spend in store / Non Visa = other card providers / online = internet

# Spend

The spending bounce back was significant for certain sectors

Graph: 2020 Q2 vs Q3 for Visa merchant only



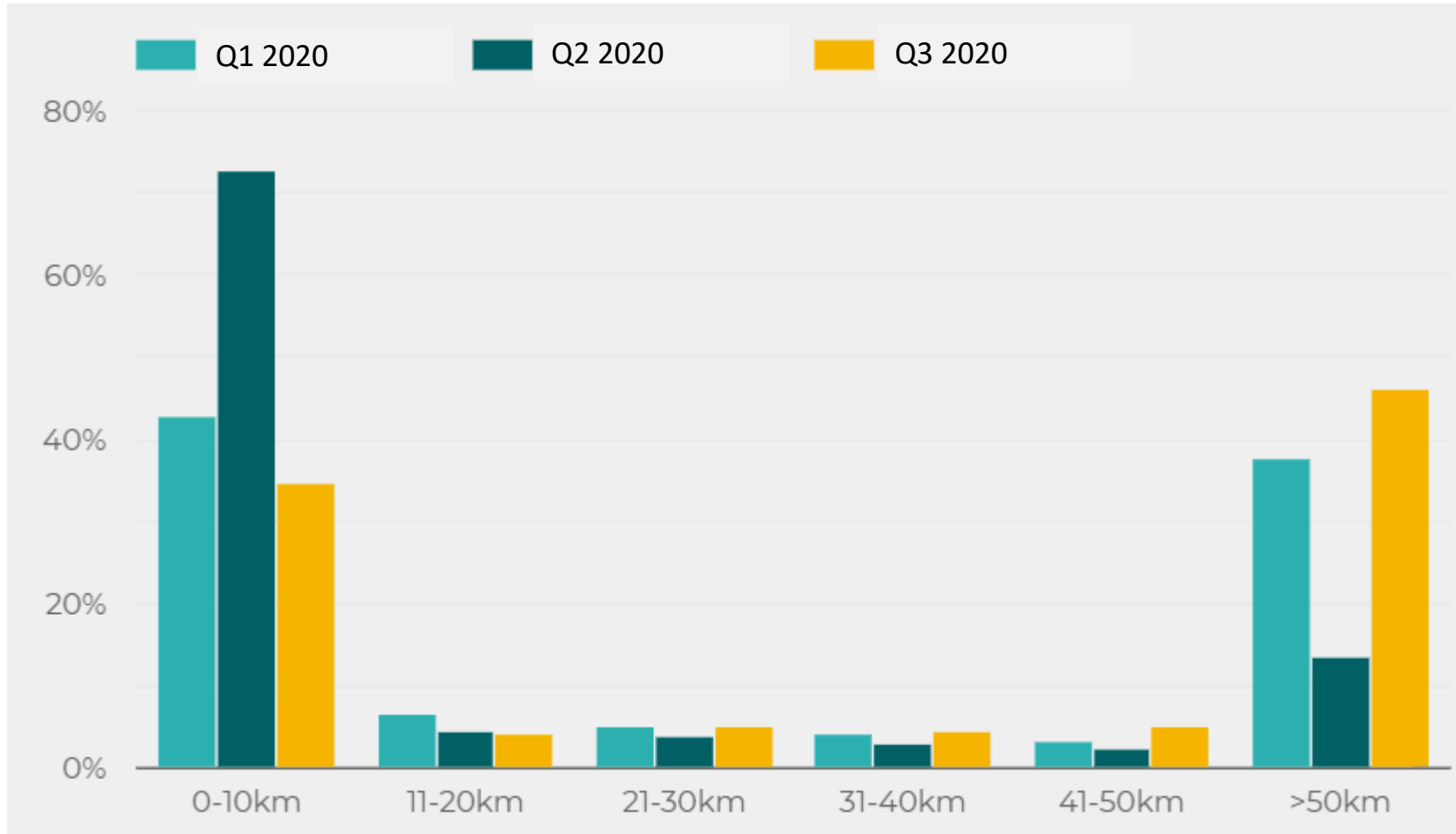
Big benefactors of the city re-opening clearly restaurants, retail and city centre supermarkets

- The table shows the VISA merchant data, Q2 vs Q3 broken down by category.
- NOTE: Categories such as professional services and hotel/ accommodation must be treated with caution, as payments often made online in advance, as opposed to with the merchant in the city centre.

# Spend

There are two distinct 'spenders' in the city; locals and visitors from further afield

Graph: % Merchant spend by distance (Q1 – Q3 2020)



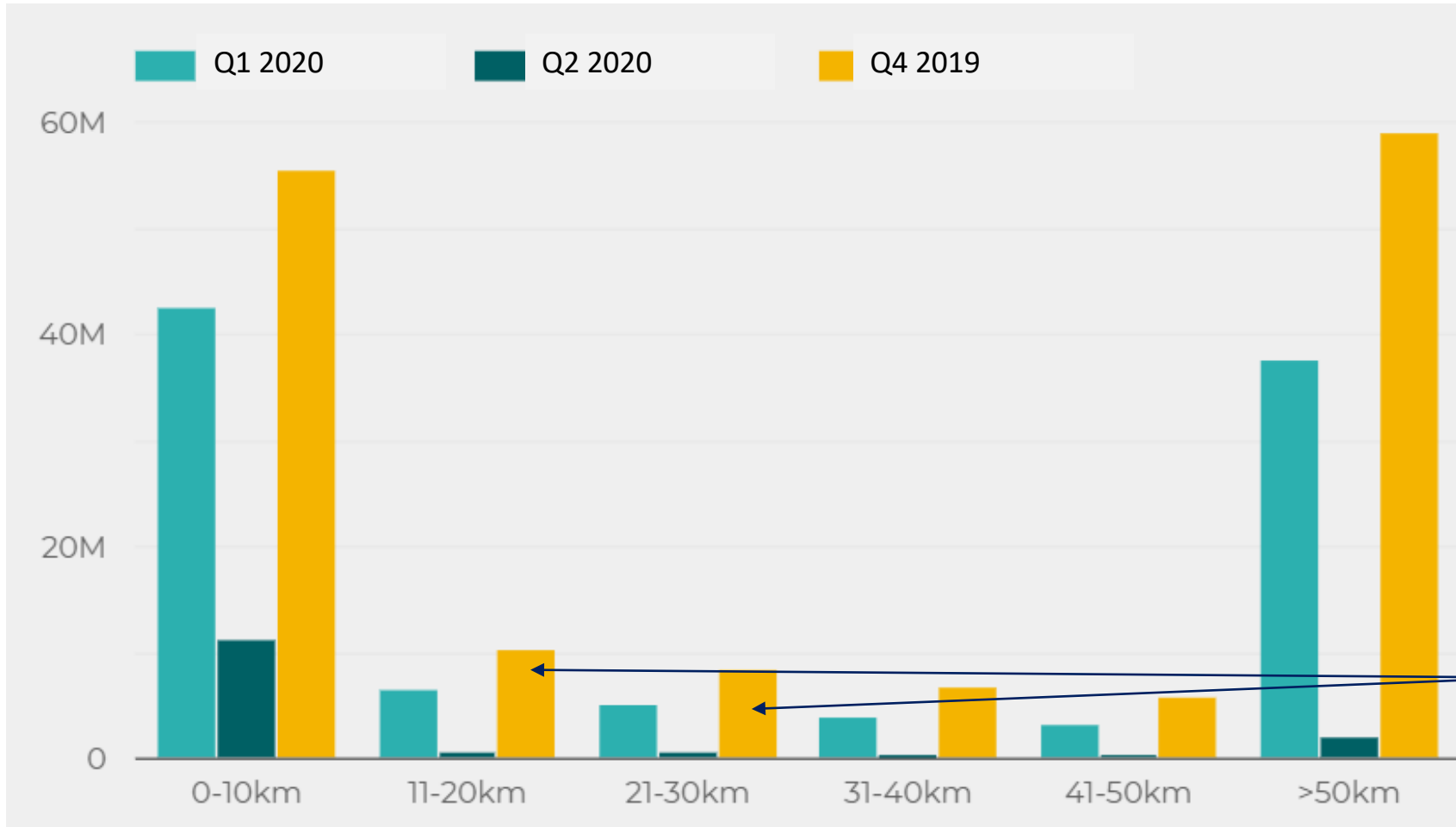
- ❑ Q1 (Jan – Mar) largest spenders in city centre were local people within 10km.
- ❑ During Q2 lockdown, 73% of spend came from locals.
- ❑ In Q3 (the recovery), 46% of spend came from visitors 50km + away.

❑ Data is for VISA merchant spend

# Spend

Lost spend from visitors >50km means marketing to York hinterland crucial

Graph: £ Merchant spend by distance Q1 & 2 2020 & Q4 (run up to Xmas) 2019



- Q4 2019 (run up to Christmas, circa £59m spent by visitors 50km+. Large majority of these consumers likely not to come in 2020!
- £55m was spent by local people.
- A further £10m by those 11-20km away and £8m from those 21-30km away.
- Targeting these groups for Christmas 2020 essential!



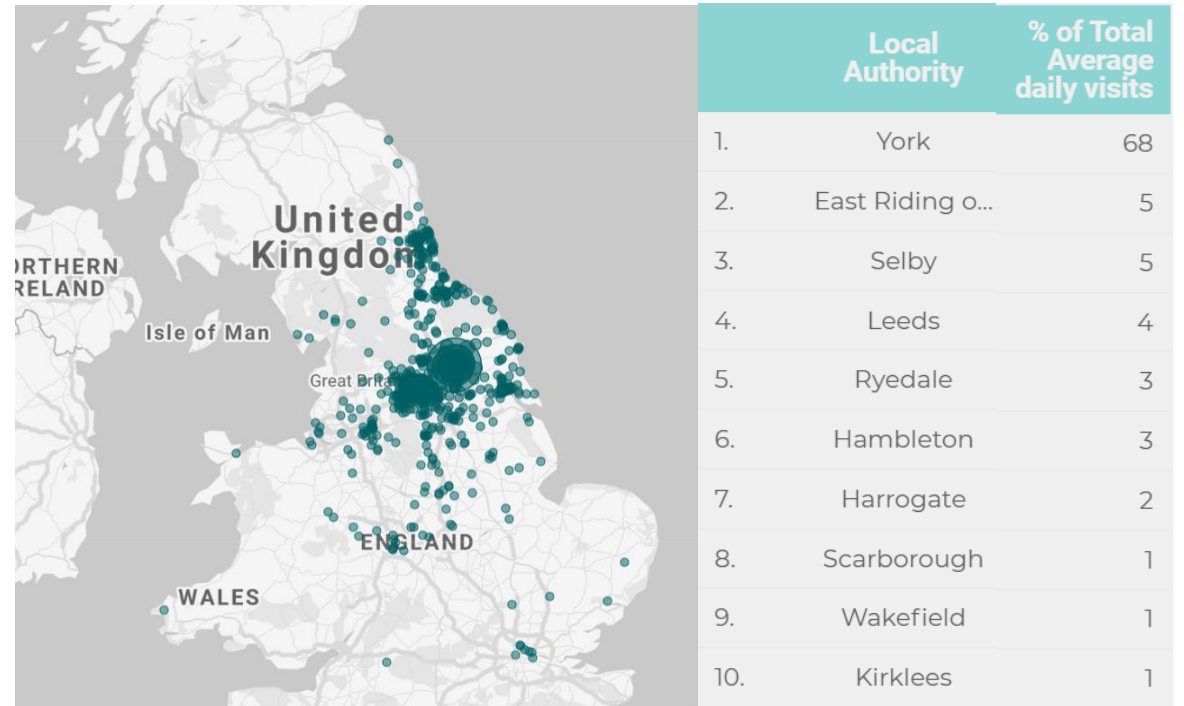
# Visitor Origin

The main users of the city centre are local - even in half term holiday, 68% of people using city were from York

Map: Visitors to York week ending 25<sup>th</sup> October



Map: Visitors to York week ending 1<sup>st</sup> November (half term)

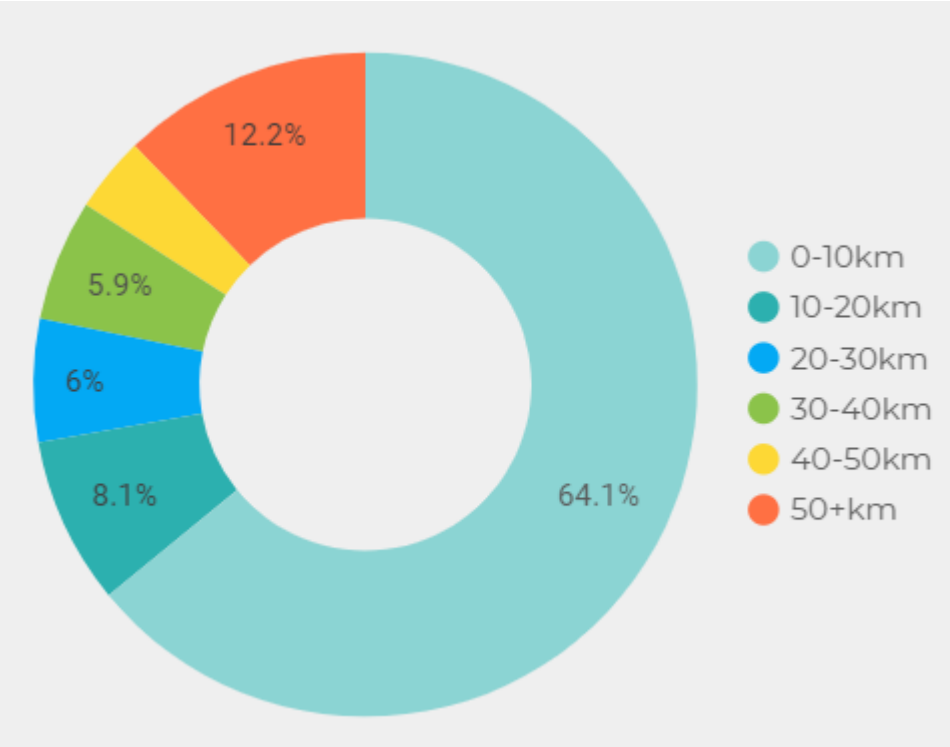


☐ Data from O2 is anonymous

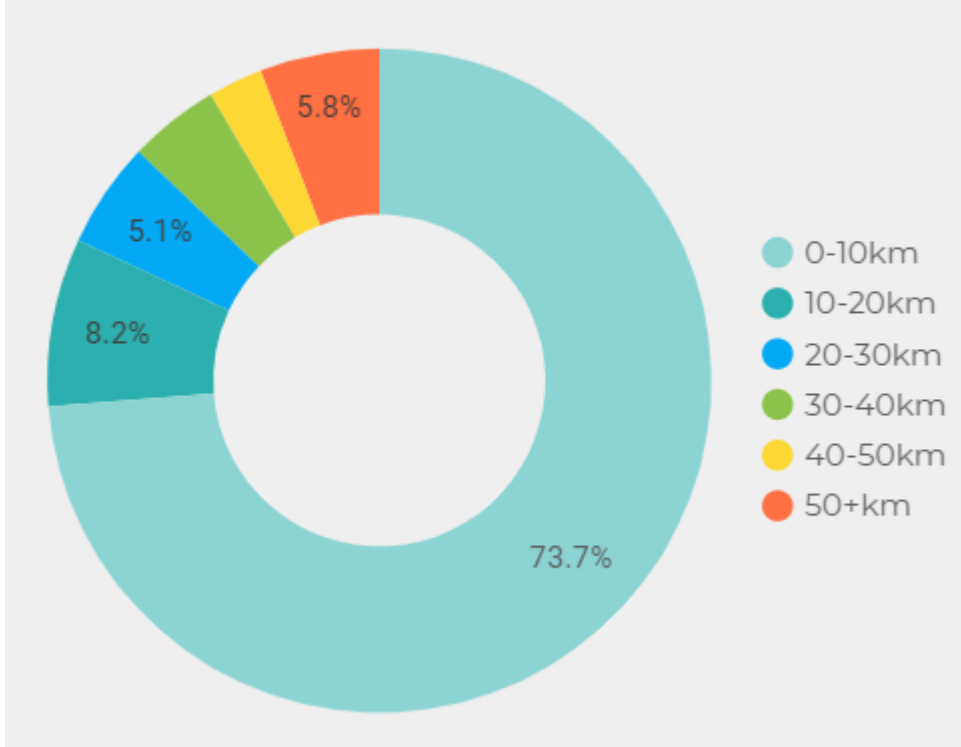
# Visitor catchment distance

Holiday periods effect visiting patterns for those living 0-10km and 50km+; but patterns for those living 10 – 50km remains consistent.

Graph: Catchment distance wk/ ending 6<sup>th</sup> Sept 20 (last week summer holidays)



Graph: Catchment distance wk/ ending 25<sup>th</sup> Oct 20 (a 'non holiday week')

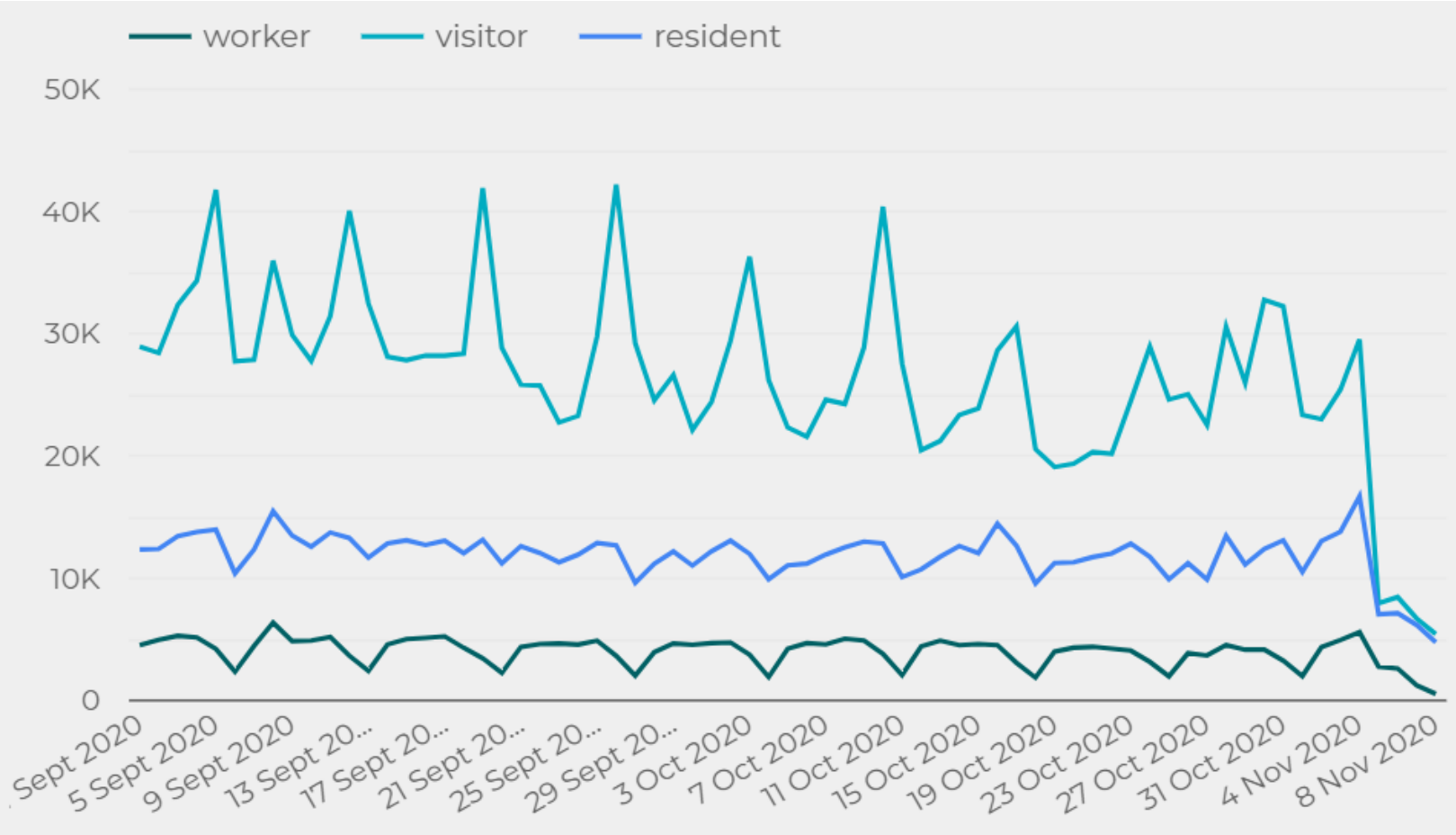


- ❑ Data includes residents, visitors and workers.
- ❑ The graphs show clearly that the majority users of the city centre are what would be classed as local i.e. within 10km of city centre.
- ❑ Data from O2 only starts 1<sup>st</sup> Sept, so no data available before this period i.e. unable to look at whole summer holiday period.

# Visitor Type

Data shows that workers, visitors and residents have all respected second lockdown

Graph: Daily number of journeys by visitor type



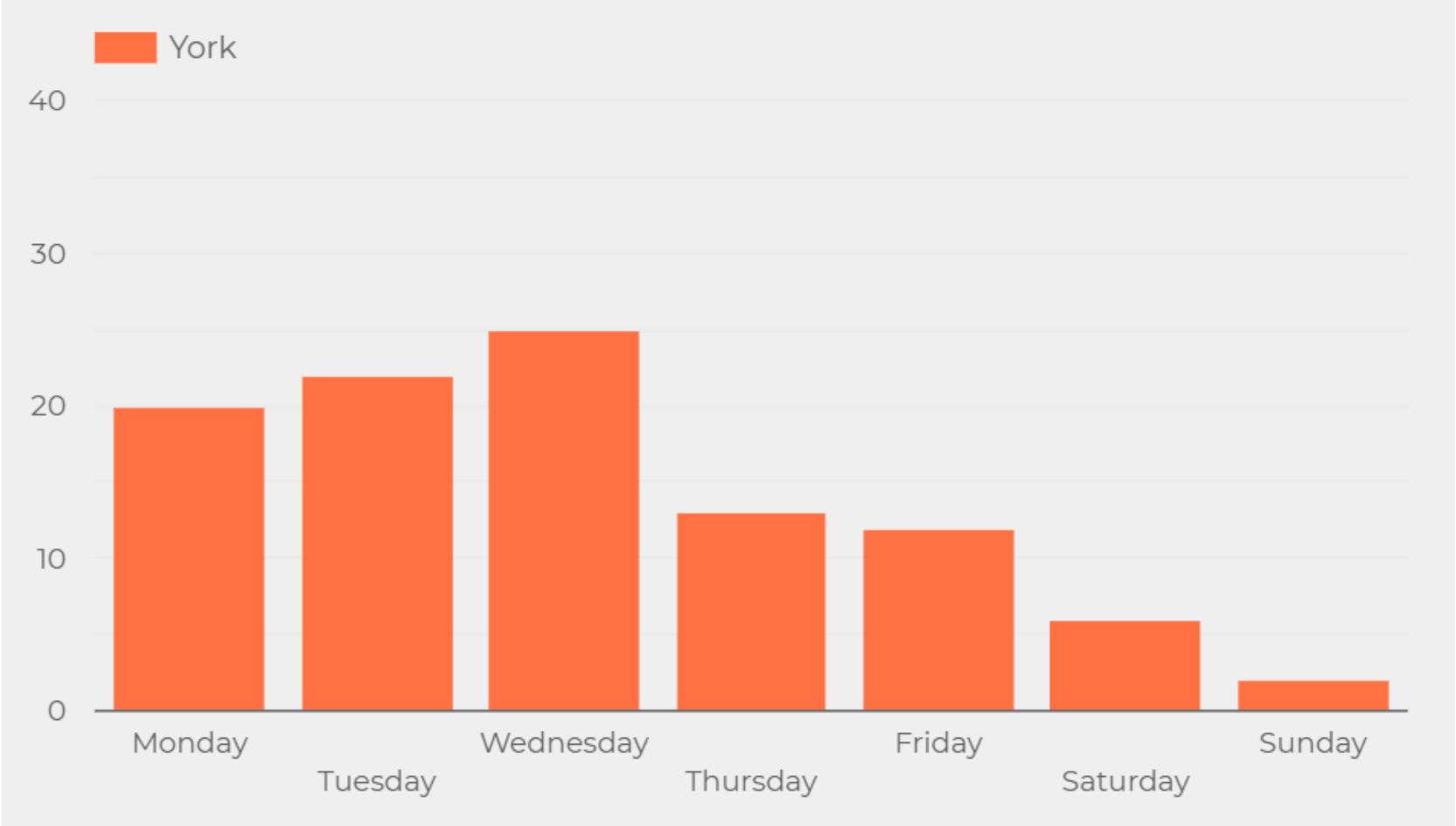
- Graphs shows clear patterns on usage, with visitors coming at the weekend (Saturdays in particular) where resident usage is consistent.
- Sunday is the day with least workers in the city centre.

- Time period is 1<sup>st</sup> Sept – 8<sup>th</sup> Nov 2020
- Resident** is classed as someone who lives within 1km of city centre
- Data collection only started 1<sup>st</sup> Sept, so there is no comparison information for what pre-Covid journeys by visitor type look like

# Worker patterns in lockdown 2

Data shows that workers make more journeys into the city at the start of the week

Graph: % of journeys for workers/ commuters wk/ ending 8<sup>th</sup> Nov

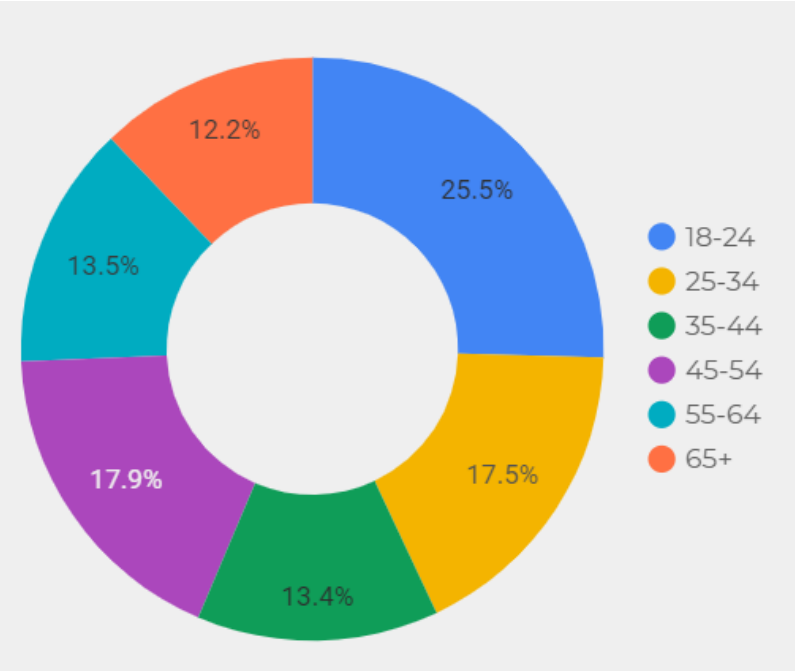


□ Time period week ending 8<sup>th</sup> Nov 2020  
□ Worker locations are where users spend a substantial period during the working day (all data anonymised)

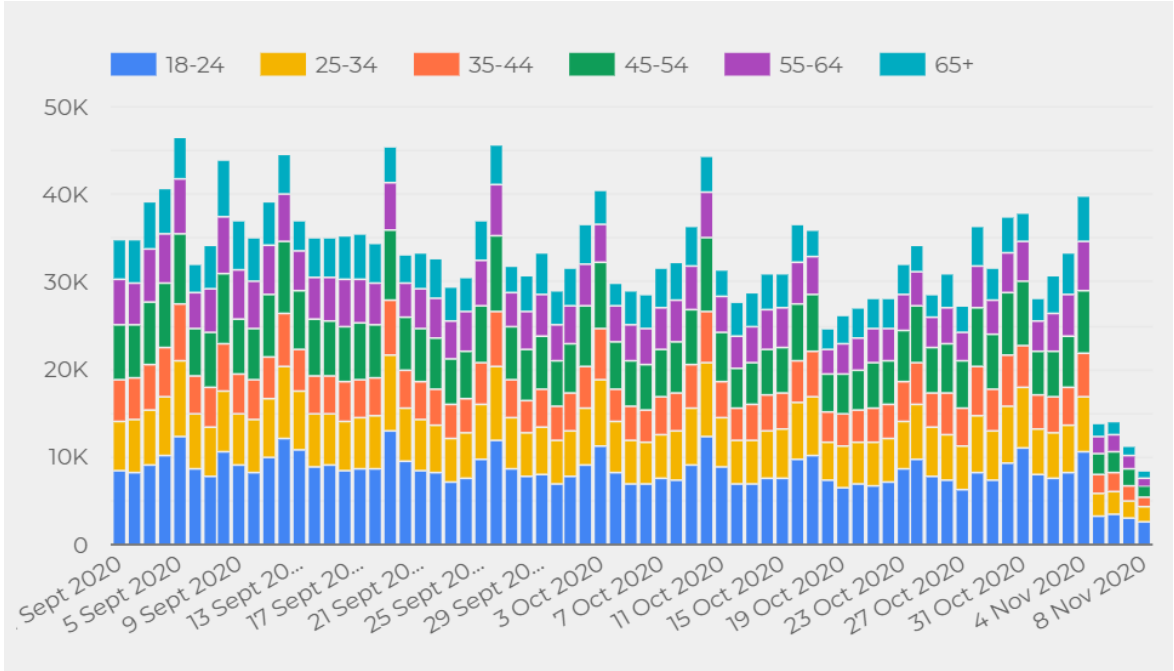
# Visitor age

During Oct half term main users of city centre those aged 18 - 34

Graph: Visitor age for wk ending 1<sup>st</sup> Nov 20 (Oct half term)



Graph: Visitor by age 1<sup>st</sup> Sept – 8<sup>th</sup> Nov 20



- ❑ Second national lockdown began 4<sup>th</sup> November 2020
- ❑ Individual days can be analysed to observe patterns e.g 18 – 34 percentage share of visits increases on Saturdays, probably linked to early eve economy.



# Thank You

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