



**Decision Session – Executive
Member for Economy and Strategic
Planning**

23rd December 2020

Quarterly Economic Update

Summary

1. York has come through the early economic challenges of the COVID pandemic in a comparatively strong position. Unemployment has risen, but by less than any other UK city, and some businesses have closed, particularly in highly-leveraged retail and hospitality chains. The city's efforts to distribute grant funding and support businesses have helped thousands of local employers.
2. Our economy has fared better than many other cities, with York proving a continued draw to visitors and the city centre adapting rapidly to support new ways of trading. Our pro-active response as a city has enabled our businesses to reopen and get money coming through the tills. But national lockdowns and the current Tier system are difficult for the city centre economy, and many businesses will find the reduced Christmas trade very difficult, with restrictions expected to continue through the coming winter.
3. The longer term economic impacts of COVID are not yet clear and though the news of the delivery of vaccines in the coming months will buoy up some businesses and provide hope for improvements during the coming months this may be hampered if the vaccination programme takes time to roll out. National forecasts suggest that recovery will take several years at least, and York will need to work hard to attract investment and find replacement employment if the retail, leisure and hospitality sectors take longer to bounce back. The partnership approaches developed in York over the past nine months, with the Council working closely with BID, Chamber, FSB, IoD, our Universities and colleges and Make It York, provide a strong platform for our city.

Recommendations

4. The Executive Member is asked to:

1) Note the contents of the report

Reason: To support York's economic response to the COVID -19 pandemic

State of the Economy

5. This report covers the period October 2020 to December 2020. Following a strong August and September in York City centre, the autumn saw the introduction of new social distancing rules through October, followed by Tier 2 local restrictions, and a national lockdown in November. The city emerged back into Tier 2 at the start of December, with the prospect of continued restrictions through to next March at the earliest.
6. In the wider economy, many companies have continued to trade well, with national surveys suggesting that around half of all businesses have seen decreased turnover, a third are unaffected by lockdown, and more than 10% have seen turnover increase.
7. The same survey¹ suggests that 30% of all businesses, and 44% of those in the hospitality sector, are carrying less than 3 months cash reserves, putting them at significant risk of failure in the months ahead. Much of the effort, both locally and nationally, to shore up the economy has focussed on providing grants to help business cashflow. York has continued to distribute such funds widely and quickly and has retained future funds for further lock down support should it be needed. This funding is clearly helping, however we must begin to consider the longer term impacts of the pandemic for employers in the local economy.
8. The Chancellor was clear in his November 2020 Autumn Statement speech that we are only beginning to see the economic impacts of the COVID-19 pandemic. Forecasts from the Office for Budget Responsibility, launched to support the Chancellor's statement, make sobering reading. At national level, unemployment is forecast to double in the first half of next year, while the 11% hit to GDP will not be regained for 5 years. Projecting these forecasts onto the York economy, we still might see our claimant count hit 10,000 by next summer, while the impact of COVID can be estimated at £300m in the current year.
9. The Government's Business Register and Employment Survey (BRES) for 2019 was published in October. This data provides an annual snapshot of the number of jobs by industry, with a breakdown by full time (>30hrs per week) and part time (<30hrs). With the data being from October 2019, there is no insight into the impacts of COVID on the economy. Rather, it is an indicator of how the York economy was progressing prior to the pandemic.

¹<https://www.ons.gov.uk/businessindustryandtrade/business/businessservices/bulletins/coronavirusandtheeconomicimpactsontheuk/19november2020>

10. The headline from BRES is that employment in York had grown to over 111,500 jobs, with increases in construction, education and administration and support services. While full time work remained stable, part time working had seen a further increase, as had self-employment. The medium term trend has seen 1,000 jobs per annum added to the York economy, and the proportion of part time roles has increased to 40% of all employment. This contrasts with the GB average of 32%. This reflects the relatively high living costs of York, leading many households to rely on multiple incomes from a mix of full time and part time employment, together with self-employment in micro-

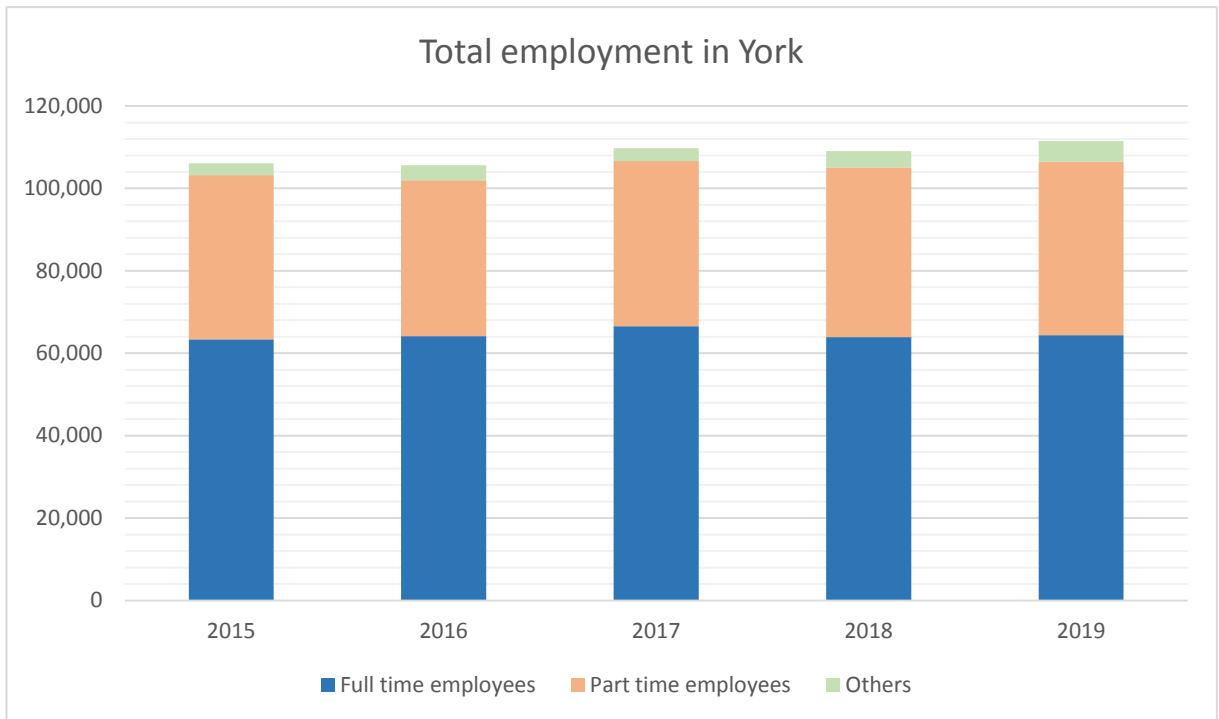


Figure 1 Employment in York, 2015 to 2019

businesses.

11. Further insight is provided by the Government's Annual Survey of Hours and Earnings (ASHE), with the 2020 update being published in October. These statistics provide details of hourly, weekly and annual pay and hours worked. In normal times, we would focus on median pay as a measure of progress in the economy. However, the survey was undertaken in April 2020, a month into the first national lockdown and prior to the development of grant mechanisms. It was this period which saw the York claimant count rise from 1,800 to 5,000 as employers sought to shed staff in the face of severely restricted trade.

12. The ASHE pay figures² show a 0.2% decrease in median full time pay for York residents, but with an underlying 12.4% increase in female full time pay. Looking beyond the average pay figures, ASHE reveals a clearer picture of job losses, with full time male works and part time female workers seeing significant reductions in the York economy. While ASHE figures should be treated with some caution as they are survey based,

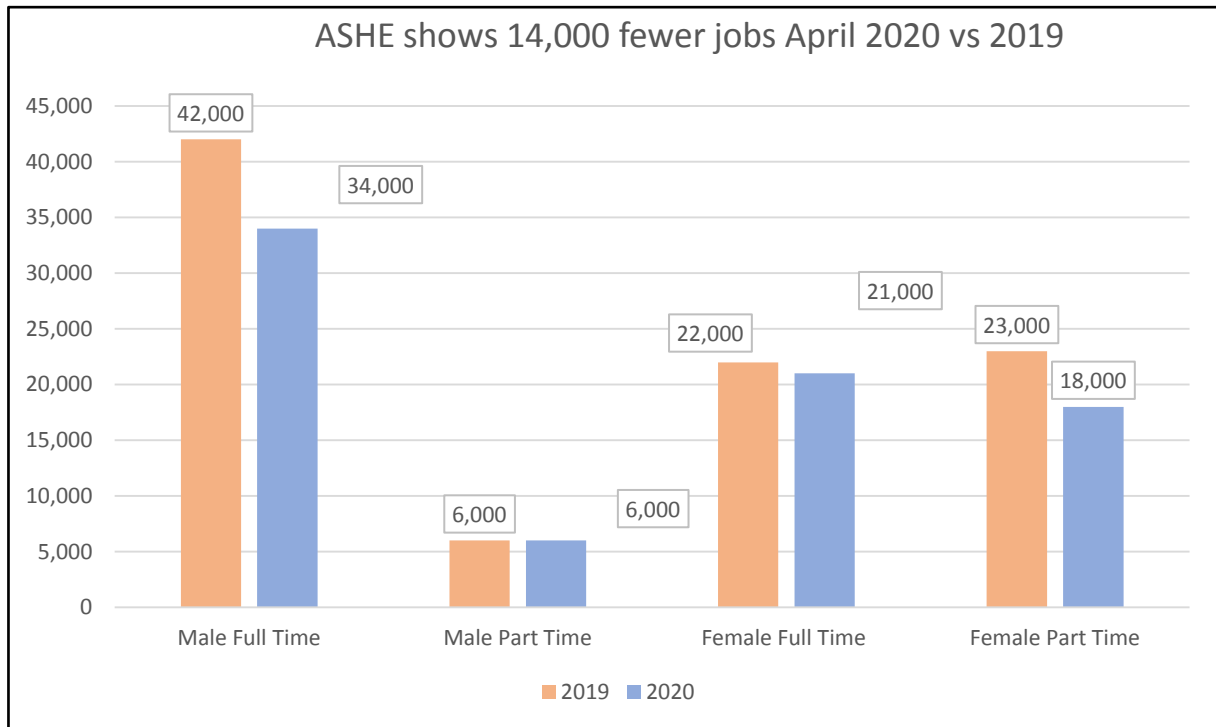


Figure 2 Changes in employment, April 2019 to April 2020

the figures show a reduction of 14,000 in the number of workers in York.

Unemployment (Annex 1 pp.12-13)

13. The impact of the COVID pandemic is shown very clearly in the claimant count³ (Annex 1 p12). This saw the largest increase in at least 35 years in the months since lockdown when the count rose from 1,800 to 5,000 in April, however the total has remained stable since then. This is despite the apparent decrease of 14,000 in those working in York, shown by the ASHE figures discussed above.
14. Centre for Cities have been monitoring increases in unemployment across their cohort of 68 UK centres⁴. York is the city with the lowest percentage increase in unemployment, despite the influence of our retail, tourism and hospitality businesses.
15. Two factors are influencing our claimant count statistics.

² <https://www.nomisweb.co.uk/query/construct/summary.asp?menuopt=200&subcomp=>

³ Data from <https://www.nomisweb.co.uk/query/select/getdatasetbytheme.asp?collapse=yes>

⁴ <https://www.centreforcities.org/data/uk-unemployment-tracker/>

- We know that many of the city's students undertake part time work to support their studies, typically in the retail, tourism and hospitality sectors. As students were sent home at the start of lockdown, they do not show in the York claimant count.
 - As the claimant count measures those receiving out-of-work benefits, and its availability is influenced by other sources of household income, this is perhaps a consequence of the high level of part time work in the city, with many of those now out of work unable to claim benefits.
16. Updates figures for the Job Retention Scheme (JRS) and Self Employment Income Support Scheme (SEISS) have been published by Government⁵. These show a total of 6,800 people furloughed by York employers and a further 5,700 claiming self-employed support at the end of September 2020. The furlough figures have dropped substantially from the 30,300 reported for July, unlike the self-employed figures which have fallen only slightly from 6,500.
17. The Job Retention Scheme is set to continue until March 2021, and those furloughed on the scheme remain at high risk of losing their jobs in the coming months. Our unemployment support, set out in the Skills paper also reporting to this Decision Session, will need to support such workers, alongside those who have already lost work, whether they are able to claim benefits or not.

City centre economy (Annex 1 pp.3-9 + Annex 2)

⁵ <https://www.gov.uk/government/statistics/self-employment-income-support-scheme-statistics-october-2020> and <https://www.gov.uk/government/statistics/coronavirus-job-retention-scheme-statistics-november-2020>

18. Our Springboard footfall counter data, (Annex 1 p3), shows the overall pattern of the year to date. The initial lockdown in March, April and May saw city centre customer numbers consistently below 30% of normal levels. With the easing of restrictions in July and August, people returned, with the peak at August Bank Holiday seeing levels above 80%.
19. A slow but steady decrease across September saw levels in October down to around 60% prior to the second national lockdown in November, which brought numbers down to less than 40% of typical levels.
20. Just prior to the March 2020 lockdown, CYC and York BID agreed to trial new ways to measure footfall and spend in the city centre. Annex 2 provides the first report from the new Movement Insights system, which will continue to develop over the year ahead.
21. Footfall provides a good indication of how busy the city centre was, but for businesses in the city centre, the key question is how much were customers spending? This is where Movement Insights can begin to shed some light. In the last quarterly report, we looked at Centre for Cities data which suggested that spend was strong in York over the summer. Movement Insights presents a similar picture, showing strong sales in city centre restaurants, retail, supermarkets and clothing in the period July to September 2020.
22. Customer origin is also shown in Annex 2, with 68% of customers in the last week of October being from within 6 miles of the city centre, in contrast to the pre-COVID balance of one third locals/two thirds visitors. The balance of locals to visitors has thus changed significantly, while total numbers are well-down on pre-COVID levels. Spend in the crucial pre-Christmas period of November and December is not yet known, but hoteliers, the restaurant sector and hospitality are all concerned about the impact of both the November lockdown and the emergence into Tier 2.
23. Shop and restaurant vacancies have inevitably risen in York over the year. Our own figures, derived from the Business Rates system, show vacancies at 8.1%, up from 7.4% earlier in the year (Annex 1 p.4). As reported last quarter, Local Data Company's surveys show a larger increase, but with York still below the national average. What has been noticeable in recent month is the accelerating rate of closure among national and international retail and hospitality chains. This trend leads to sites in York being closed because of pressures elsewhere on owners.

Tourism (Annex 1 p4 + Annex 3)

24. Make It York's Tourism dashboard for October shows the scale of impact on that sector. While overall footfall remained at 60% or so through October, visits to our smaller attraction were down 80% on the year, and our hotels saw much reduced occupancy.
25. We have refreshed our relationship with Welcome to Yorkshire, agreeing a new Service Level Agreement with the organisation, and are working closely with Make It York to make the most of what scope there is to attract visitors to York. Marketing is beginning to focus on spring and summer 2021, when we hope to be able to welcome tourists back to York, supplementing campaigns to promote the use of local independent shops for Christmas spending.

Business start-ups (Annex 1, pp.10, 11)

26. In a typical year, around 1,000 businesses are started in York. The total for the current year, with 5 months remaining, is just below 400, 75% of what would be expected.
27. Looking at individual wards (Annex 1 p11), those with the highest clamant counts (Westfield, Clifton, Heworth and Holgate) are also showing higher levels of business startups.

Regional update

28. As discussed in September's Quarterly Economic Update, York and North Yorkshire LEP (Y&NY LEP) has developed a sub-regional Economic Recovery Plan titled "COVID-19 – A Plan to Reshape Our Economy" in response to the pandemic. Launched on 19th October 2020, this was followed by a ten day campaign based on each of the ten pledges. This showcased what response activity was being done, and what the LEP had pledged.
29. The LEP's Local Industrial Strategy and Reshaping the Economy COVID-19 Plan form the basis of its future work and priorities. Work is underway to turn the LEP's strategies and plans into clear delivery/implementation plans, setting out clearly the outcomes to be achieved and the actions needed. All of the LEP's strategies will be aligned under a single Economic Plan aimed at achieving their overall vision of a Greener, Fairer and Stronger Economy and becoming a carbon negative region.

30. Resources have also been secured by the LEP to provide additional support to businesses as the UK leaves the EU at the end of the year. This support will work closely with the Make It York team, and will include a mix of online workshops and 1-2-1 advice.

Update on work initiated at previous decision sessions

Economic Strategy

31. Work continues to take place on developing a new Economic Strategy for York, with the approach outlined at the Executive Member's October 2020 Decision Session. The approach to developing a new strategy was reviewed by the Council's Economy and Place Policy and Scrutiny Committee in October
32. Current activity is centred on reviewing and refreshing the existing economic evidence base which will underpin the development of the strategy. Gap analysis work is also being undertaken to ensure that the impacts of the pandemic are incorporated into this economic evidence base, as well as identifying additional themes requiring further research and analysis work and/or engagement. Activity is also underway to reflect on the data and trends emerging from the Council's resident engagement channel Our Big Conversation, as well as the intelligence from the Sector Roundtable initiative.
33. A more detailed progress update on the development of the Council's Economic Strategy is scheduled to be tabled at the Executive Member's January Decision Session. This will include a draft evidence base slide pack, draft plans around engagement activity and a summary of key strategic themes with accompanying text. Consultation on the Council's new Economic Strategy is planned for February to March 2021, with Executive sign off scheduled for May 2021. The strategy will also be considered again by Economy and Place Scrutiny Committee prior to completion.

BID update

34. The York BID presented a draft Business Plan to their Board on 25th November for their proposed 2021-2026 term. It was agreed that the threshold for the levy be raised from £12,500 to £17,500. This means a reduction of 192 hereditaments, and £28,500 less levy funding to be collected than now.
35. The broad themes for the BID have been set out in a draft Business Plan to act as a manifesto for their proposed term. This shows that the existing work that businesses have valued such as additional street

cleansing, the Street Rangers and business support will continue, but there will be an additional element to include green, sustainable and environmental issues.

36. The processes required to bring the BID 2020 renewal ballot paper to the Executive for approval is almost complete, with Members set to consider the report on January 14th 2020, with the ballot beginning the following month.
37. The BID has announced their Winter campaign of events for the City Centre to bring as many visitors as is safely possible back into York. These include the Make a World of Difference business support project which encourages people to shop locally, the Gift Card Advent Calendar and the Fantastic Fiction project at the vacant Debenhams store where all five shop windows be dressed to recreate popular children's stories.

Secondary shopping areas

38. The My Front Street project - looking at wider long-term impacts and economic growth in Acomb Front Street and the surrounding shopping area - was impacted by the second national lockdown in November, and work to engage with the public and other stakeholder had to be temporarily suspended shortly before the pilot was launched for health and safety reasons. The consultants will begin work again as soon as is possible, with the intention of completing the initiative by May 2021.
39. Both Acomb and Haxby now have Christmas lights in situ, designed to encourage footfall and engagement with the local areas. For the first time, Haxby and Wigginton Traders' Association has been able to make a capital investment in Christmas lights for the length of The Village due to the funding set aside by the Council for secondary shopping areas. This has been extremely well received by the local community, with several hundred positive interactions on social media about the project..

Business Support

EU Exit

40. Y&NY LEP have developed six-specific EU transition webinars taking place over November and December 2020, in partnership with professionals Garbutt & Elliot and Thrive Law. Subject areas include preparing for the end of EU transition; key legal changes; financial planning and managing cash flow; importing and exporting in 2021; and tariffs & taxation in 2021.
41. The LEP has also received additional funding from BEIS to deliver advisory support around EU transition up to 31st March 2021. Emphasis

is being placed on impactful business support with speedy delivery and collaboration. The Council's Economic Growth team is working closely with York's key business support agencies and the LEP's Growth Hub to ensure that local businesses have the necessary support and advice to effectively prepare for the UK leaving the EU. A range of information is available from the Make it York website to help businesses during the transition period and beyond.

York Business Week

42. November 2020 saw the return of York Business Week, marking the 10th iteration of the annual event. Taking place between 9th and 13th November, the week-long programme of free virtual events centred around the theme of "Build Back Better", and focused on York's economic recovery from COVID-19.
43. In keeping with the work undertaken to strengthen partnership working throughout the pandemic, a collaborative approach was taken to York Business Week with the Federation of Small Businesses, Institute of Directors, York Professionals, Make It York and the Council all putting on events during the course of the week. The programme also saw participation from York and North Yorkshire Chamber of Commerce, York BID, Welcome to Yorkshire, BioVale, York's two universities and Y&NY LEP.
44. The programme covered many of the common issues raised by businesses through the Council's Sector Roundtable initiative, with events and business support seminars and workshops addressing the topics of EU exit, skills, adapting business models, and leadership development. There were also a series of health and wellbeing events taking place during the week for businesses of all sizes, as well as targeted support sessions for start-ups and tourism businesses.
45. Promotion of York Business Week took place through a number of regional and local media outlets, as well through social media channels. Social media activity around the event reached 123k people, with 2,040 registrations in total throughout the week. Make it York statistics show that website traffic during business week itself increased 19% on the previous year, reflecting the great work of Make it York and its partners in putting on engaging content for a wide range of business audiences.

Partnerships

Circular Yorkshire Month

46. November 2020 also saw the return of Y&NY LEP's Circular Yorkshire Month, which brought together partners and stakeholders from across Yorkshire to accelerate region's transformation towards a circular economy. This year's campaign featured 27 partners (up from 16 last year) and an extensive social media and press campaign, the latter reaching over 200,000 people.
47. Throughout Circular Yorkshire Month, the LEP, its Growth Hub and partners raised awareness of how Circular practices – focusing on the reuse of materials and sustainable business practices - can help businesses prosper by providing a variety of information and guidance. The campaign included a series of webinars, the launch of a package of resources for businesses (including e-guides, animations and case studies), and a range of high profile communication activities. Along with BioVale and the University of York, City of York Council were active participants in Circular Yorkshire Month with the Council's Assistant Director of Housing and Community Safety taking part in a webinar exploring how practically towns and communities can adopt circular economy practices within the built environment. The Council's Housing Delivery Programme and the creation of zero carbon homes and inclusive communities drew widespread interest from attendees.

York Business Accelerator Project

48. September's Quarterly Economic Update report updated the Executive Member for Economy and Strategic Planning on a joint initiative between the University of York and City of York Council to undertake a feasibility study into the establishment of a York-based technology accelerator. Such a facility would bring together emerging and growing technology businesses and aim to accelerate growth through an intensive programme of specialist advice and insight. The feasibility study would test whether the right conditions are in place for such an initiative in York.
49. Completed by Whitecap Consulting, the study assessed the appetite and opportunity for a business accelerator to deliver job growth, attract new inward investment and to support the expansion of York's innovation and technology ecosystem.
50. Following a consultative process involving approximately 100 stakeholders, the report concluded that an accelerator could enable and support tech start-ups to succeed in York and attract high value inward investment, with strong passion and commitment shown by all stakeholders to drive innovation in the city.
51. Key findings from the report include the need for more suitable physical spaces in the city for innovation and collaboration, a stronger relationship

between start-ups and established businesses, a focus on retaining graduates and ensuring they have attractive local career opportunities in exciting growth sectors, and greater interaction between York's universities and start-ups and established businesses. It was also highlighted that York has multiple sector strengths that would benefit from alignment with key regional and pan-northern innovation activities.

52. A launch event took place on 30th November 2020 to promote the findings of the report and raise awareness amongst the wider York business community and key stakeholders. Further stakeholder engagement is planned through 1-2-1 meetings to gauge the level of support from key stakeholders for the York Accelerator in regards to funding, resourcing and developing a suitable accelerator business model. Additional work is required to assess the validity of the potential operating models such as neutral and independently run; in partnership with an existing accelerator; as a corporate accelerator.
53. In addition to co-funding the original report, Council support includes ongoing officer resource to support the development of the project and well as utilising our relationships across the city and beyond to move the initiative forward. The project has demonstrated citywide commitment to supporting both local employment and entrepreneurs who want to establish and grow businesses in York.

Consultation

54. Consultation on the economy and our COVID response has been through weekly intelligence calls with key partners, the civic partnership structures, 12 sector roundtables and regular meetings of the Executive Economic Recovery Group.

Council Plan

55. Our work addresses the following outcomes from the Council Plan:
 - Good health and wellbeing;
 - Well-paid and an inclusive economy;
 - A better start for children and young people;
 - A greener and cleaner city; and,
 - Safe communities and culture for all.

Implications

- **Financial** – no new financial commitments.
- **Human Resources (HR)** – no implications;
- **One Planet Council / Equalities** – our work positively supports the Council's equalities objectives;

- **Legal** – no implications;
- **Crime and Disorder** – no implications;
- **Information Technology (IT)** – no implications;
- **Property** – no direct implications

Risk Management

There are no specific risks identified in respect of the recommendations.

Contact Details

Author:

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Chief Officer Responsible for the report:

Tracey Carter
Interim Director of Place

Report Date

Wards Affected: List wards or tick box to indicate all

All

For further information please contact the author of the report

Background Papers:

Annexes

Annex 1: Economic Recovery Data Pack – Dec 2020

Annex 2: York BID and CYC Movement Insights report

Annex 3: Tourism dashboard



City of York Council



Economic Recovery Data Pack

December 2020

Economic Recovery - Contents

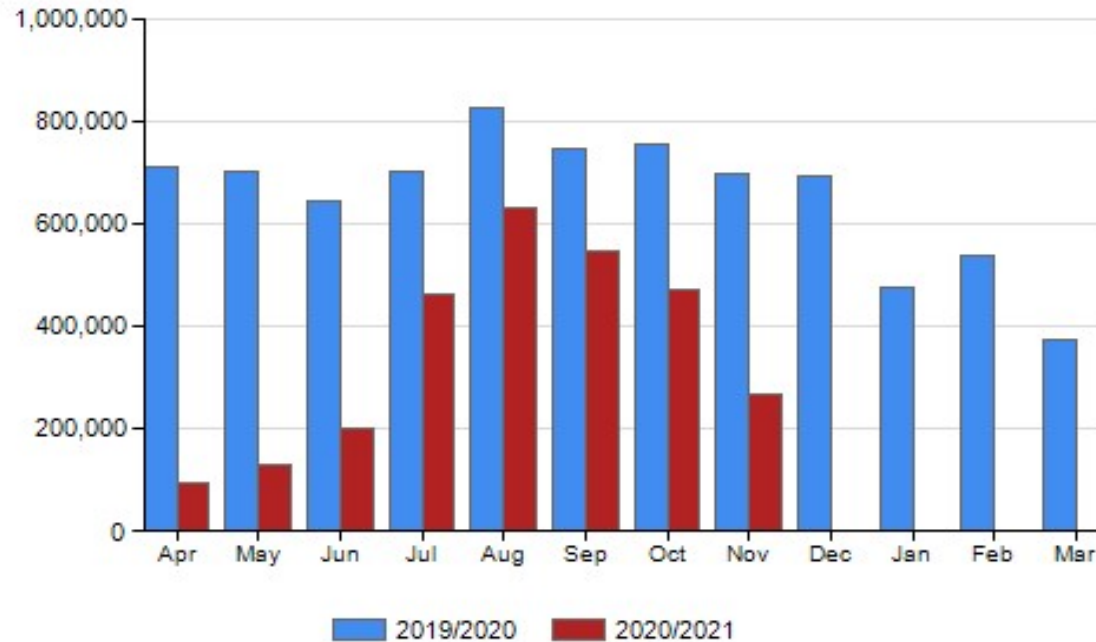
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Community Mobility	April-November	07-Dec-20
2. Parking:		
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Occupancy from CCTV counters	April-November	07-Dec-20
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Bus Journeys	April-October	07-Dec-20
4. Business Start Ups:		
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5. Job Seekers Allowance / Universal Credit:		
ONS Claimant Count 1986 to present	October	07-Dec-20
Claimant Count by Ward	October	07-Dec-20

Economic Recovery - City Centre

Footfall

- Following more positive footfall through the summer months a reduction can be seen at the end of the summer holiday period and further more during the second national lockdown.
- During November Parliament street footfall was around one third of the same period in 2019
- Footfall is predicted to be 47% down against the entire year

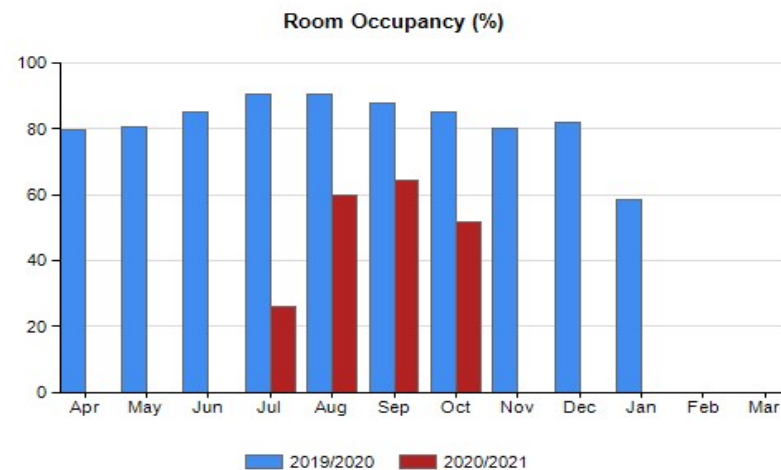
Parliament Street Footfall



Economic Recovery - City Centre

Tourism

- At the end of October 8.11% of shops within the city centre were vacant which is a small increase from 7.43% at the start of the year. The percentage vacant for the same period 2019 was 6.7%
- Hotel room occupancy is around two thirds of usual levels however some recovery can be seen following Q1 closures and the average room rate remains similar to 2019
- Visits to large attractions during October were around one third of the levels seen in previous years, this is due to operating at a reduced capacity with pre-booked visits only

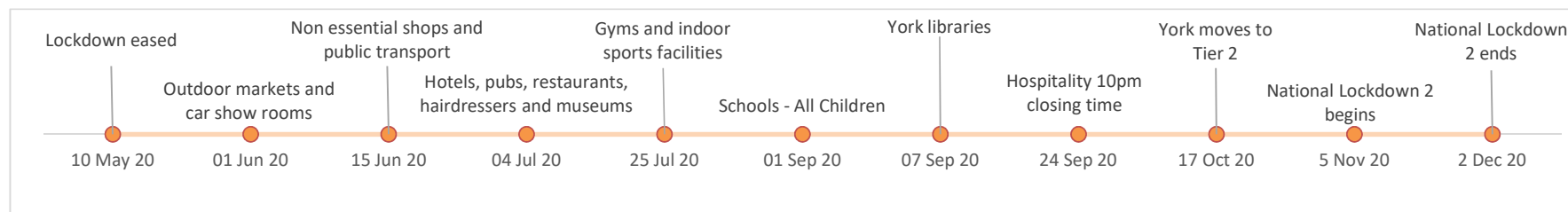


Economic Recovery - Community Mobility

Community Mobility

- Community mobility data has been available regularly from Google since the start of the pandemic to track how visits and length of stay at places such as shops and transit stations are changing.
- Data is sourced through phone location history where consented and changes for each day are compared to a baseline value for that day of the week taken during January.
- The following charts show monthly snapshots of activity at retail and recreation, supermarket and pharmacy, public transport and workplace venues since the start of lockdown.

Key Reopening Dates



Retail and Recreation:

York largely spent more time at these venues over the summer period compared to the national picture. Activity has steadily declined from the end of the summer period but has been greater than during the first lockdown.

Community mobility compared to baseline (%) - Retail and recreation (by Month) - 2020/2021

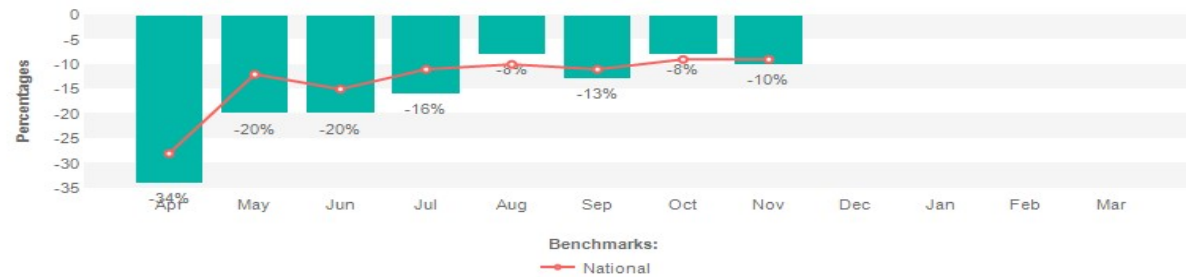


Economic Recovery - Community Mobility

Supermarket and Pharmacy:

Snapshots for the past 3 months show that time spent at supermarket and pharmacy venues has been around 10% less compared to baseline. Activity appears to have remained relatively high despite the second lockdown.

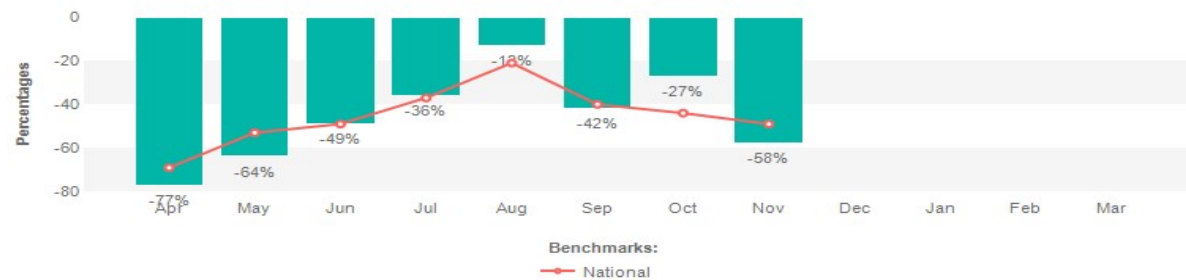
Community mobility compared to baseline (%) - Supermarket and pharmacy (by Month) - 2020/2021



Public Transport:

The November snapshot for visits to transit stations is the furthest from baseline since May. Further information on bus journeys for the authority can be seen later in this report.

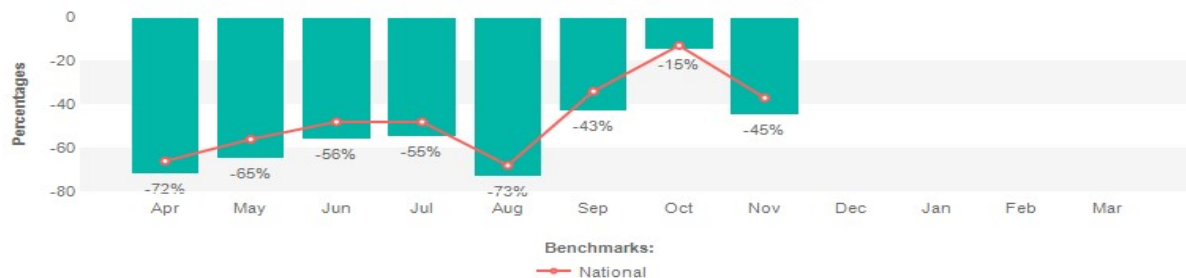
Community mobility compared to baseline (%) - Public Transport (by Month) - 2020/2021



Workplaces:

York follows the national trend for time spent at the work place whilst largely having less visits compared to the national data.

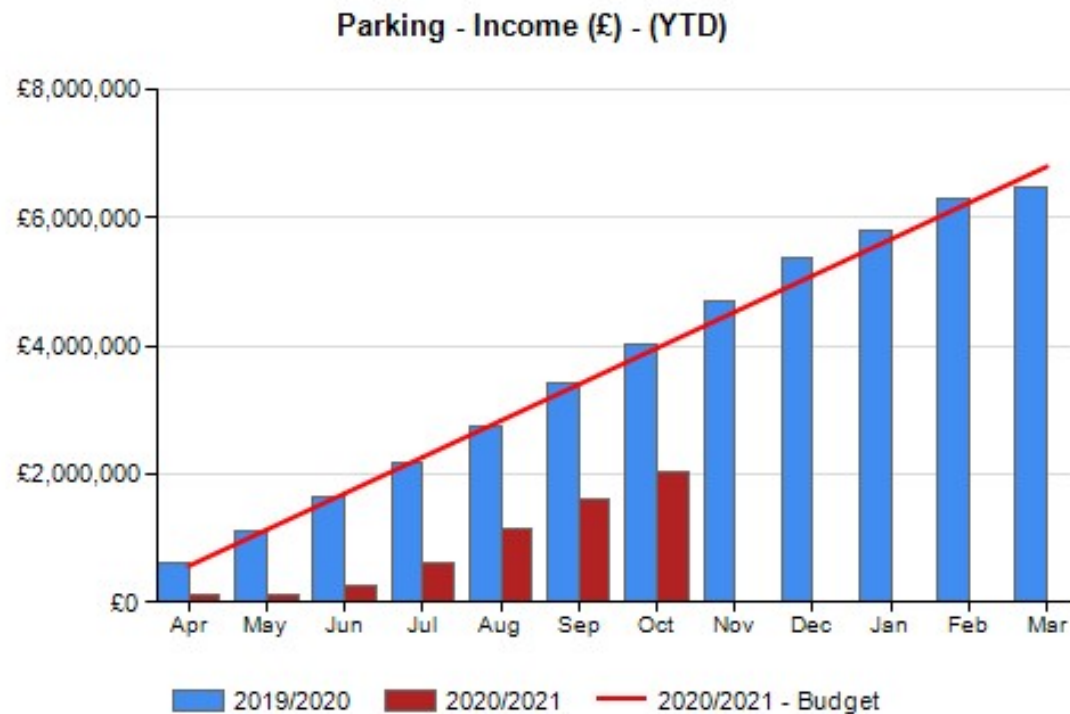
Community mobility compared to baseline (%) - Workplaces (by Month) - 2020/2021



Economic Recovery - Parking

Income

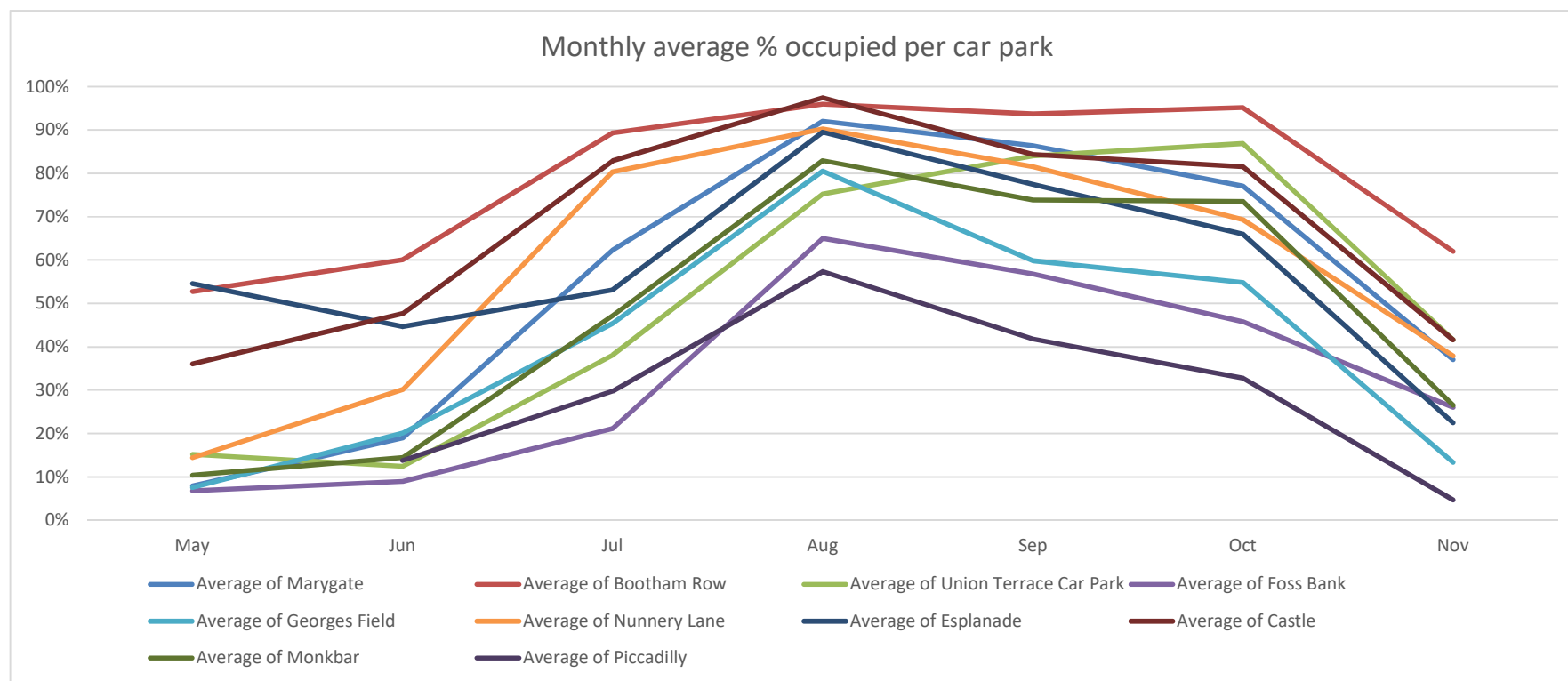
- YTD Parking income at October was £2,030,177 this is below the target amount of £3,967,197
- YTD Parking fines income at October was £116,788 which is also below the target amount of £362,163
- Parking is an area of income which will receive government funding for shortfalls due to COVID-19 and it is hoped the end of year picture will be more positive



Economic Recovery - Parking

Occupancy - CCTV counters

- Parking counts via CCTV counters are available daily
- The chart below shows average occupancy for May to November based on daily figures
- During November St Georges Field and Esplanade have been closed at times due to flooding. Piccadilly has been closed during lockdown.
- Average occupancy rates are now also available on the KPI Machine and can be accessed through a new Parking scorecard

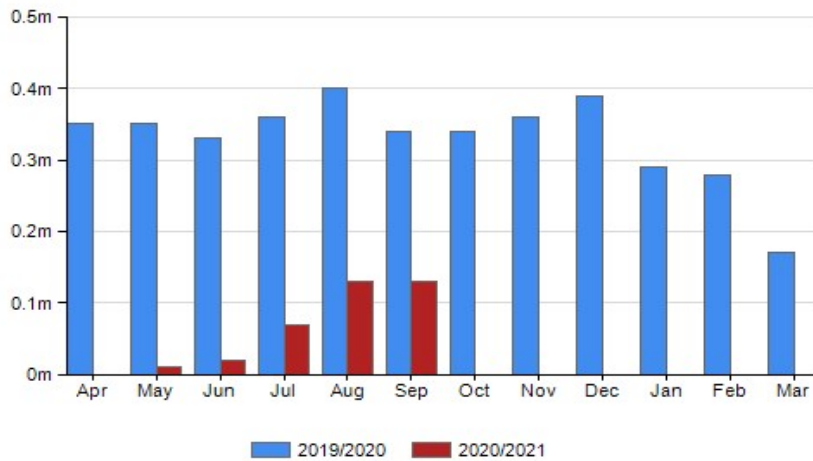


Economic Recovery - Public Transport

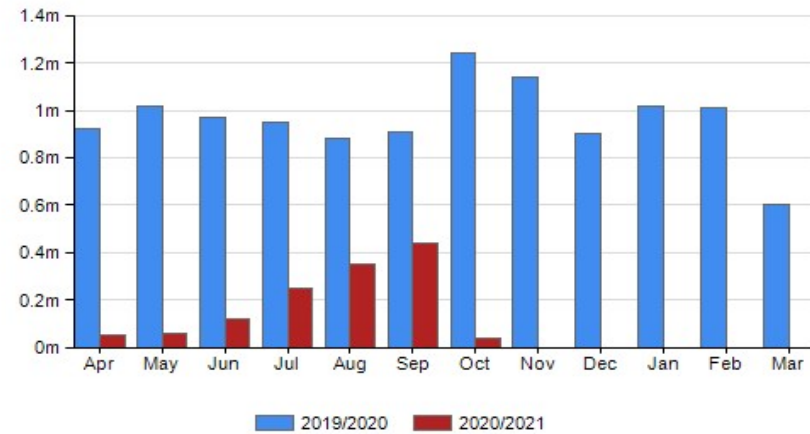
Bus Journeys

- The following charts show monthly patronage for bus journeys within the authority
- Discounted tickets have been on offer during the summer and following the end of the autumn lockdown to incentivise travel

P&R Passenger Journeys - (LI 3 b) - (2009 baseline: 3,941,852)



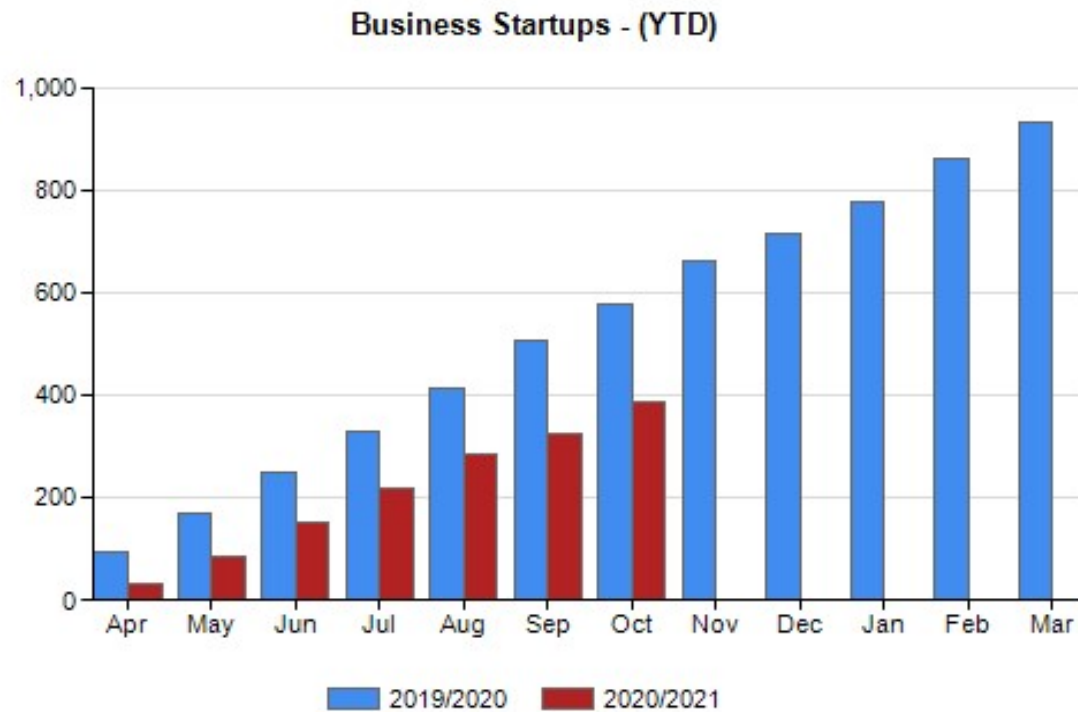
Local bus passenger journeys originating in the authority area (excluding P&R) (LI 3 a) - (2009 baseline: 10,832,614)



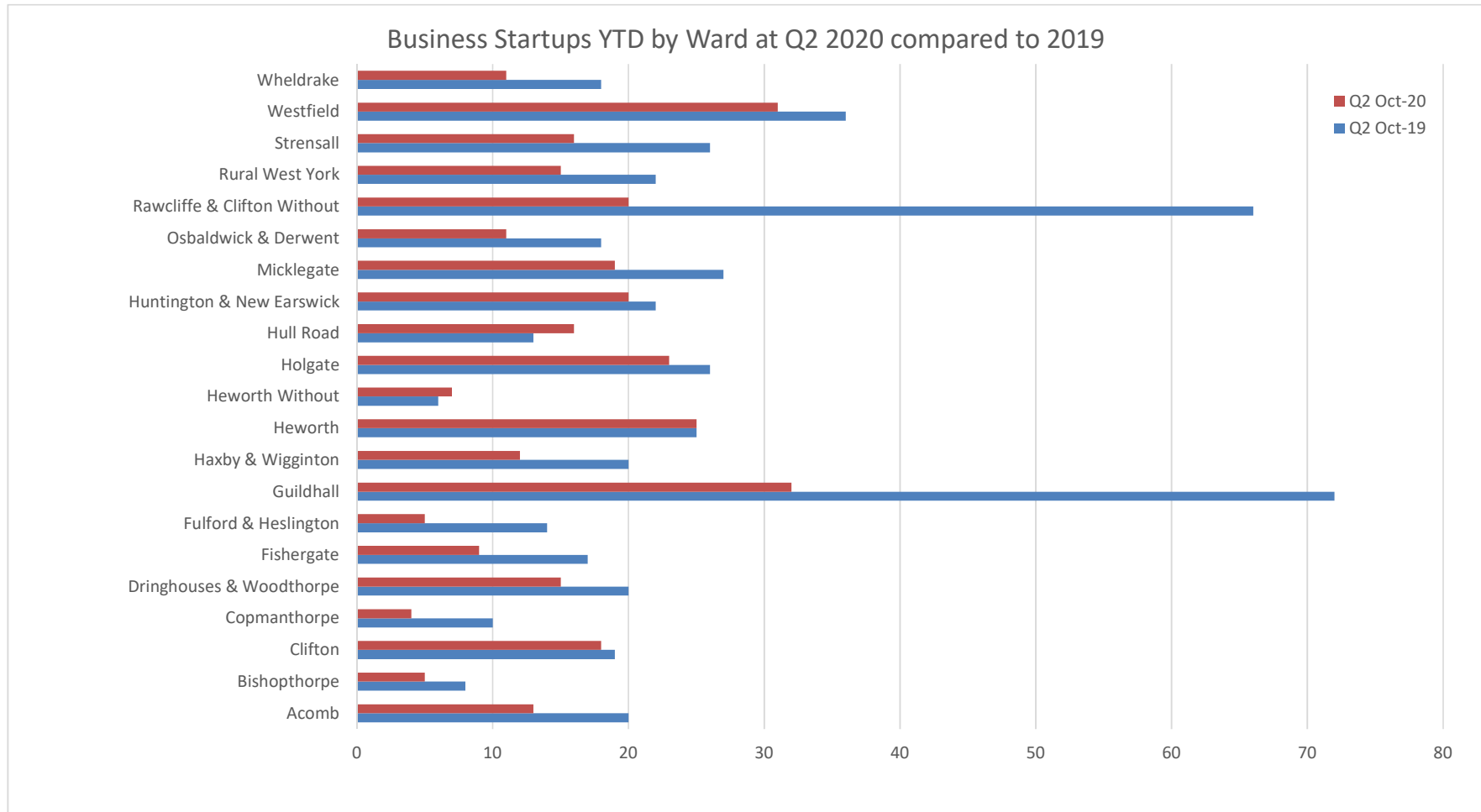
Economic Recovery - Business Startups

Business Startups - BankSearch

- The number of business startups YTD at October was 389 which is a rate of 28 per 10,000 working age population. Although a steady increase can be seen over recent months this is still below the 2019 figure of 580 (41.8 per 10,000 working age population) for the same period
- The chart on the following page shows the number of startups per ward at Q2 compared to 2019

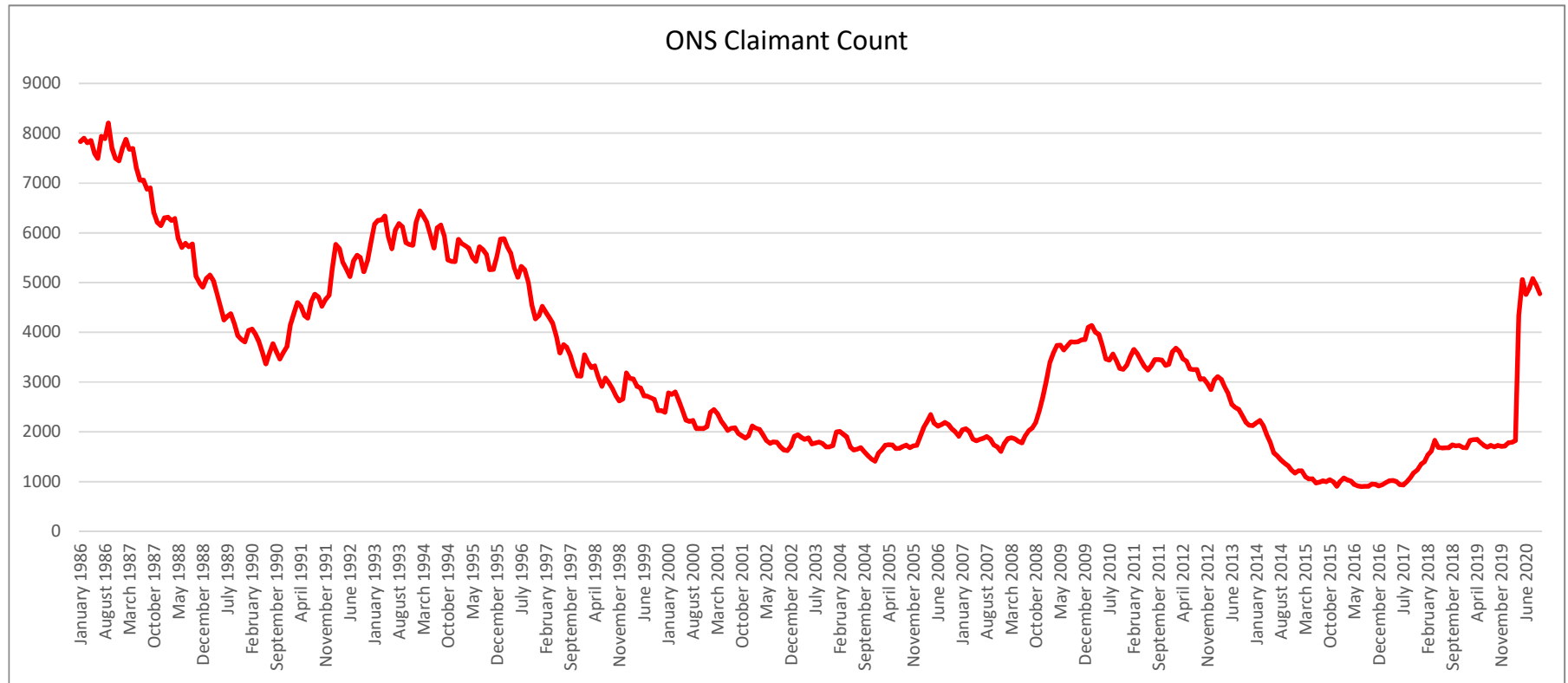


Economic Recovery - Business Startups



ONS Claimant Count

Long term measure of unemployment benefit claimants



Source: [nomis - official labour market statistics \(ONS\)](#)

This experimental series counts the number of people claiming Jobseeker's Allowance plus those who claim Universal Credit and are required to seek work and be available for work and replaces the number of people claiming Jobseeker's Allowance as the headline indicator of the number of people claiming benefits principally for the reason of being unemployed.

ONS Claimant Count by ward

October 2020

Wards	Claimant rate (%age of 16-64 population)	All categories: Age 16+	Aged 16-24	Aged 25-49	Aged 50+
Westfield	6.1	540	120	295	120
Clifton	5.1	365	95	195	75
Heworth	4.8	480	125	255	100
Holgate	4.4	385	75	220	90
Micklegate	3.9	370	60	215	95
Huntington & New Earswick	3.7	275	55	135	80
Acomb	3.6	205	45	120	40
Dringhouses & Woodthorpe	3.4	235	60	110	65
Guildhall	3.3	480	100	285	95
Rawcliffe & Clifton Without	2.9	225	55	105	65
Bishopthorpe	2.8	60	15	30	20
Heworth Without	2.6	55	15	25	15
Osbalwick & Derwent	2.6	120	20	75	25
Strensall	2.6	130	20	75	35
Fishergate	2.4	195	45	110	40
Fulford & Heslington	2.4	55	15	30	10
Hull Road	2.2	275	85	145	40
Rural West York	2.2	100	30	45	25
Wheldrake	2.2	55	15	30	10
Haxby & Wigginton	2.1	135	30	70	35
Copmanthorpe	2.0	45	15	25	5
York total	3.4	4,775	1,090	2,595	1,090

Source: [nomis - official labour market statistics \(ONS\)](#)

This experimental series counts the number of people claiming Jobseeker's Allowance plus those who claim Universal Credit and are required to seek work and be available for work and replaces the number of people claiming Jobseeker's Allowance as the headline indicator of the number of people claiming benefits principally for the reason of being unemployed.

How York city centre performed in 2020

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



Introduction



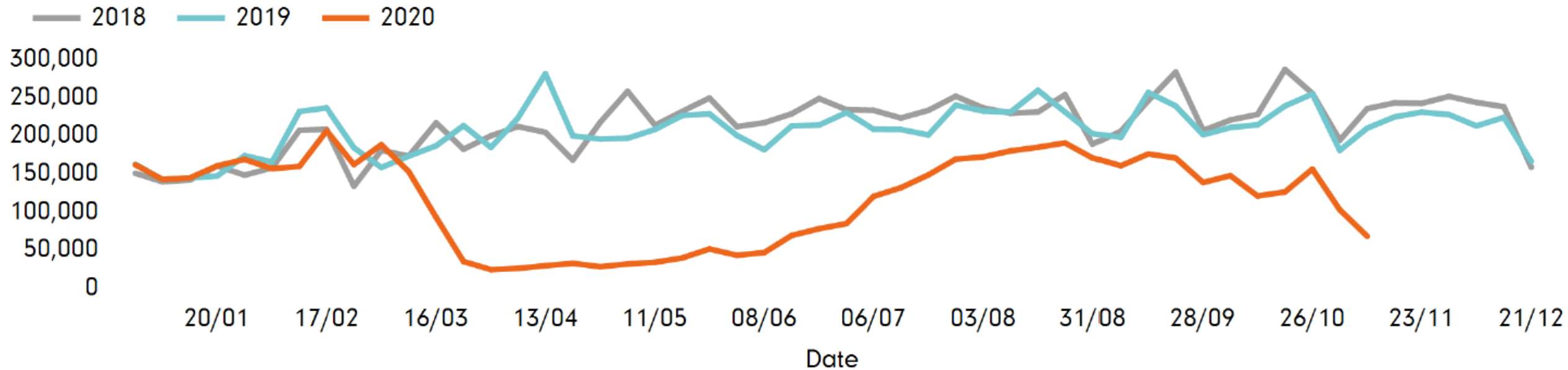
York BID and City of York Council have purchased information from Movement Insights to better understand the performance of York City centre. In summary;

- 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 1st Nov 2020

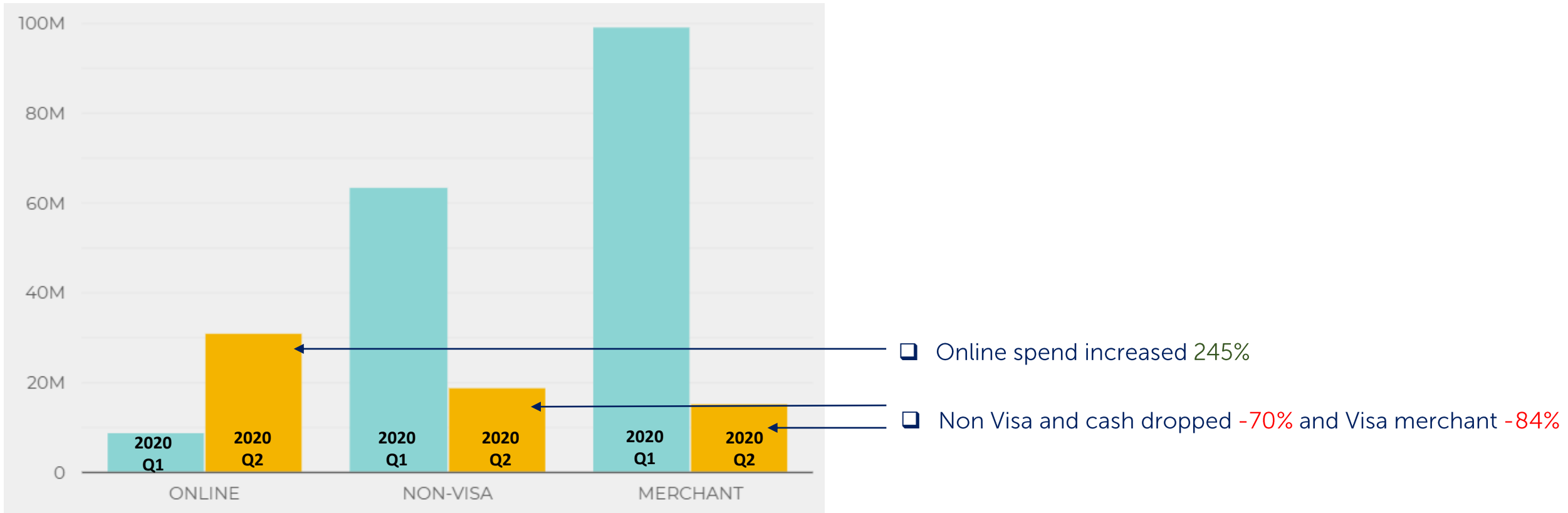


- ❑ Footfall in York was performing as normal before mid March. The graph shows a steep drop off during lockdown.
- ❑ Footfall started to recover from June, but year to date (1st Jan – 15th Nov) it is **43.4% down** on the equivalent time period in 2019. The UK average is **44.1% down**.
- ❑ York did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



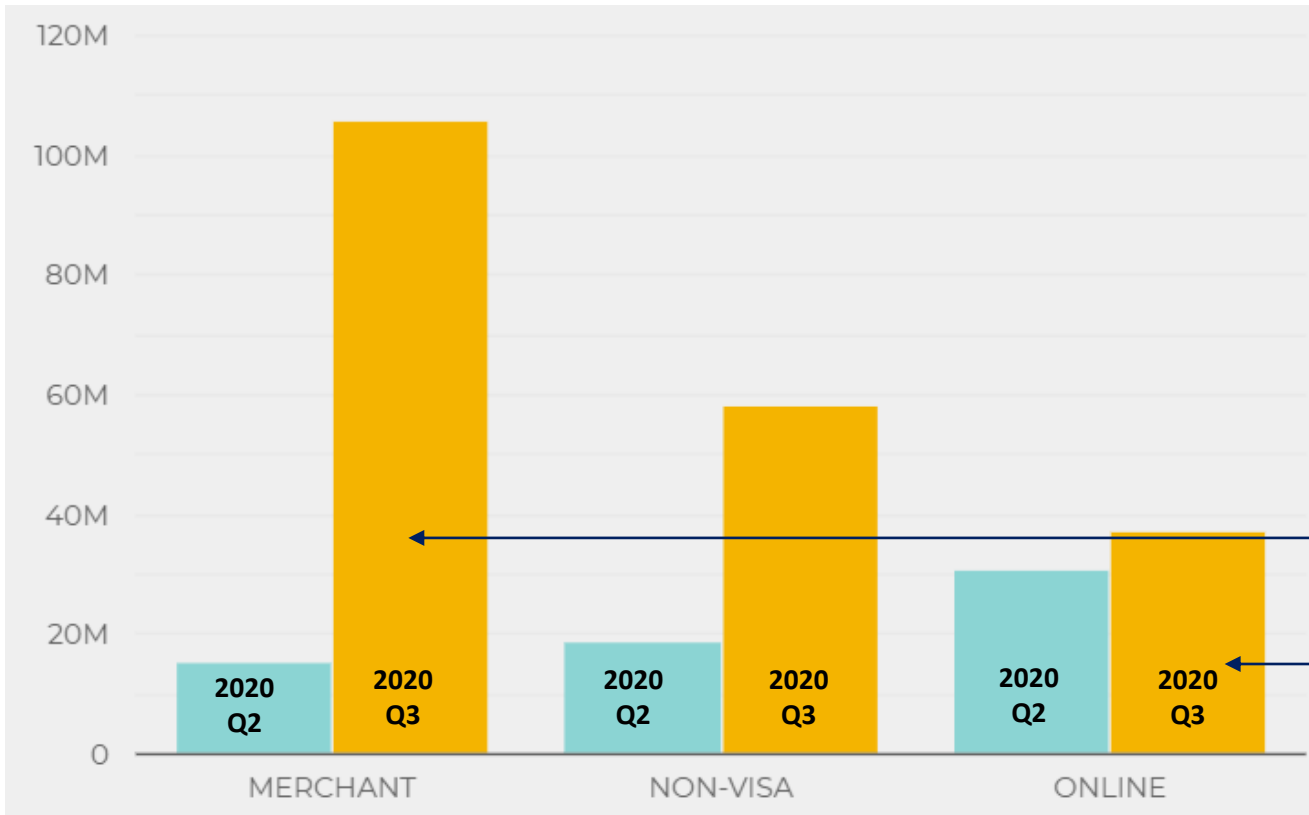
Notes:

- ❑ 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 23rd March 20, with non essential retail opening 15th 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



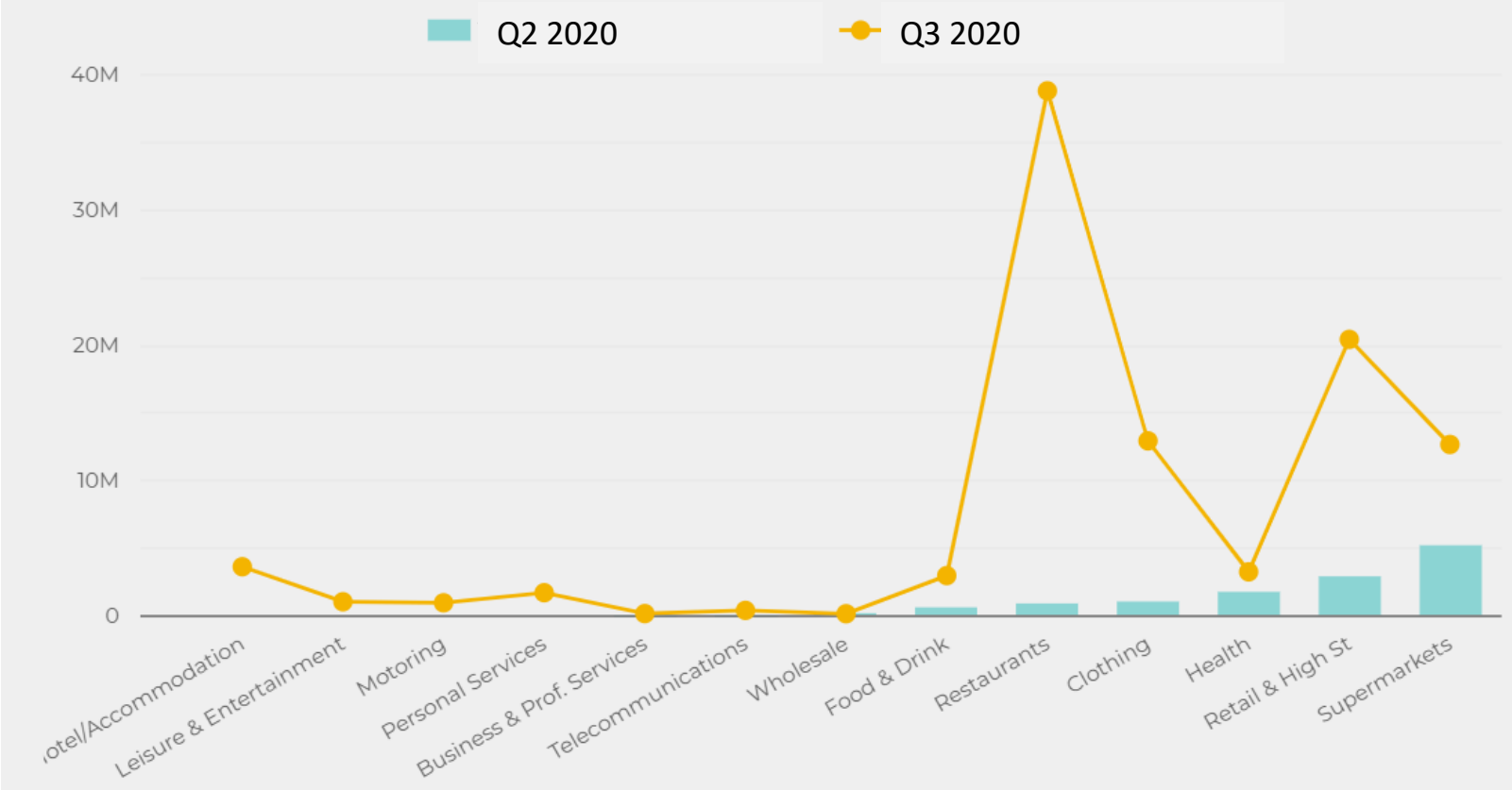
- ❑ Q3 Visa merchant up **582%** on Q2 at £106m spend. For comparison, Q4 2019 (run up to Xmas) saw £146m spent.
- ❑ Online remains strong 37m, 20% higher than Q2 (lockdown) and 315% higher than Q1 (pre-covid trading).

- ❑ 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



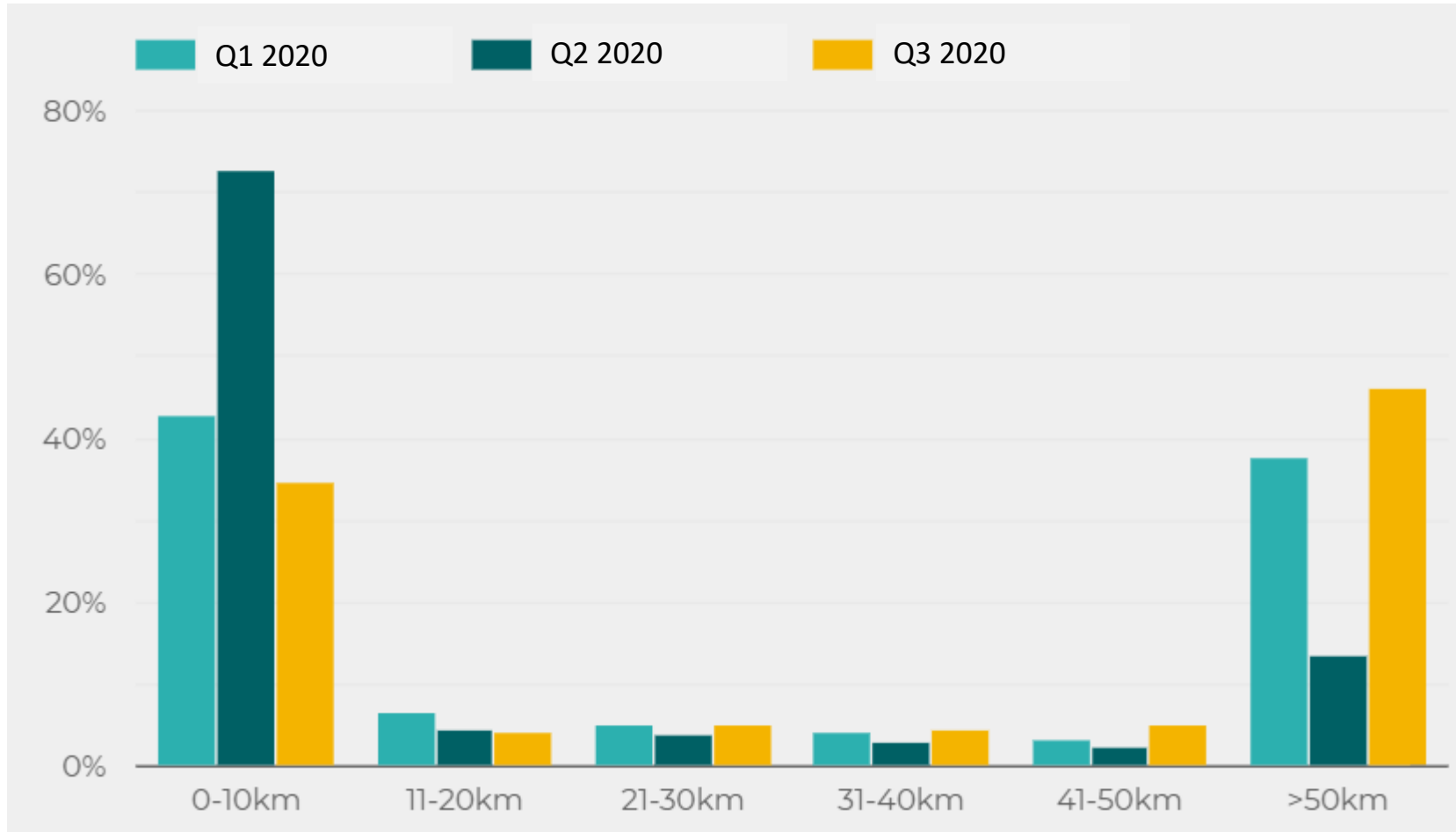
Big benefactors of the city re-opening clearly restaurants, retail and city centre supermarkets

- 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)



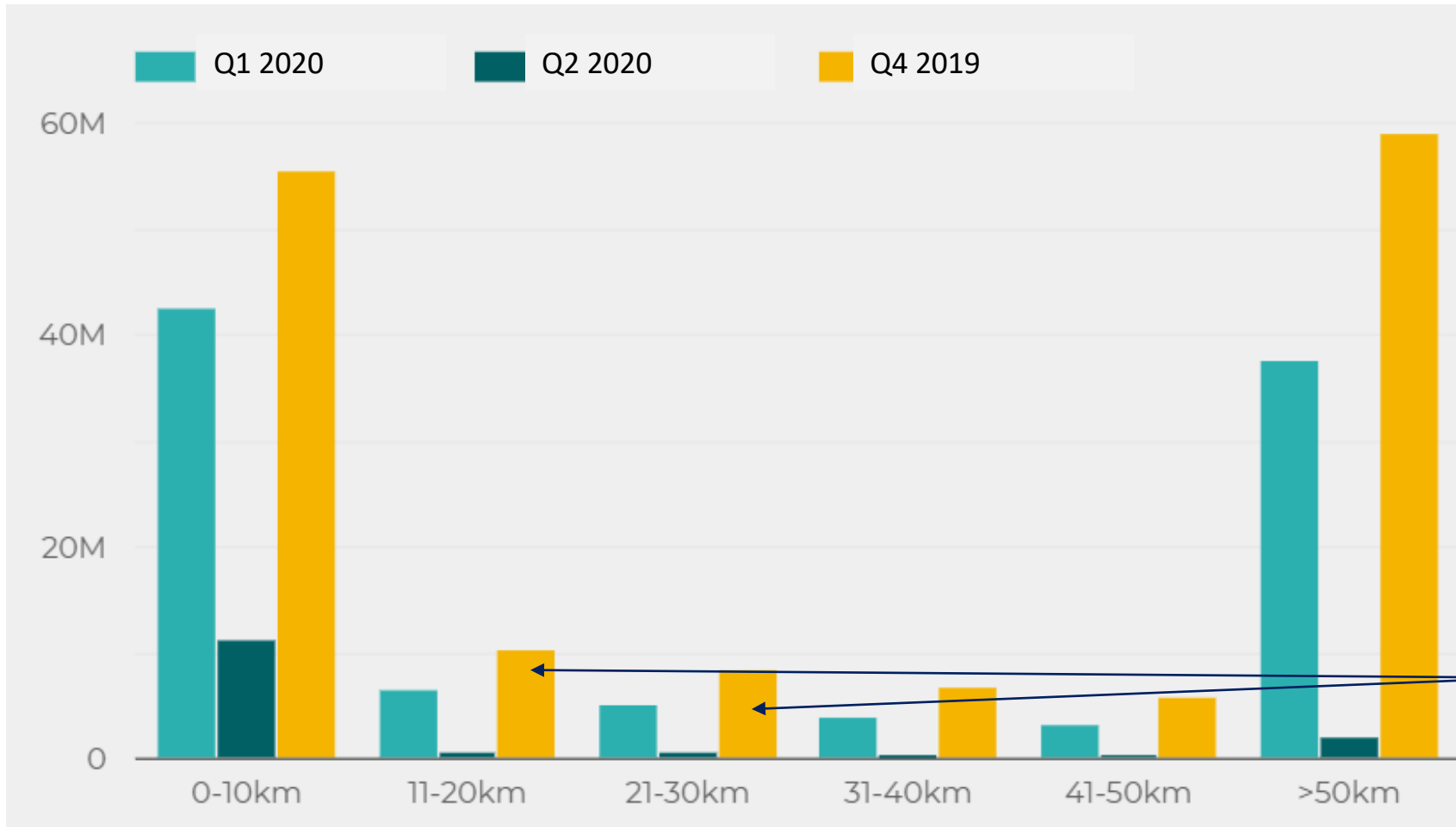
- ❑ Q1 (Jan – Mar) largest spenders in city centre were local people within 10km.
- ❑ During Q2 lockdown, 73% of spend came from locals.
- ❑ In Q3 (the recovery), 46% of spend came from visitors 50km + away.

❑ 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

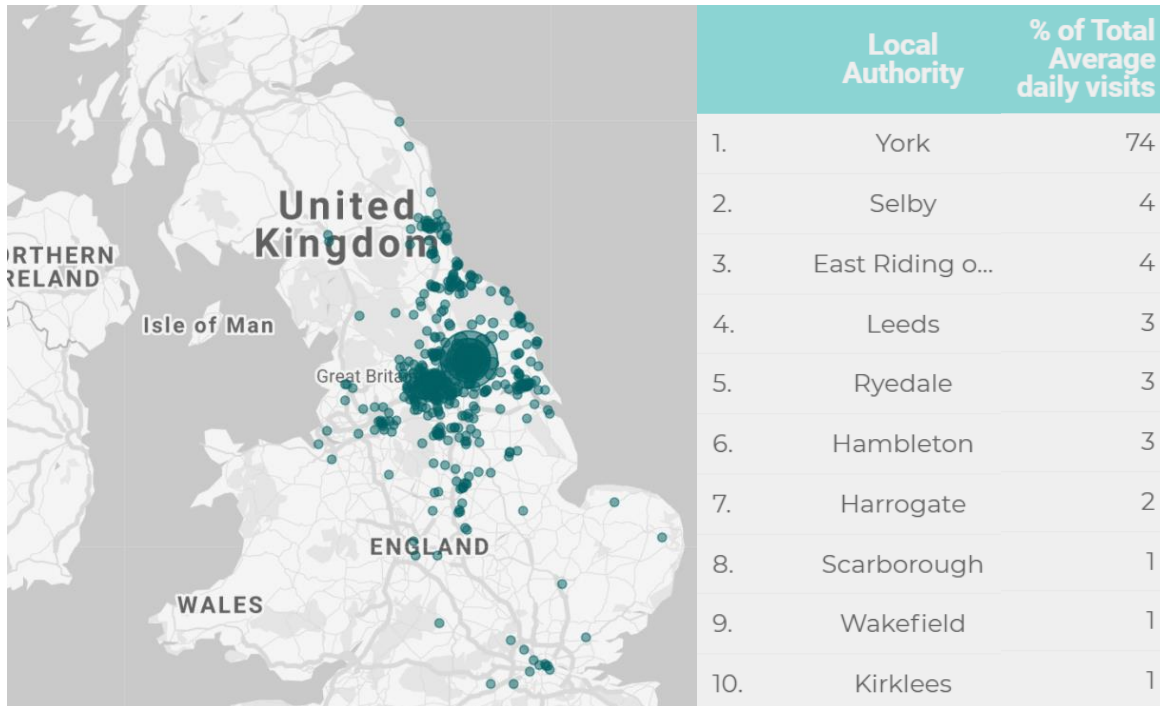


- Q4 2019 (run up to Christmas, circa £59m spent by visitors 50km+. Large majority of these consumers likely not to come in 2020!
- £55m was spent by local people.
- A further £10m by those 11-20km away and £8m from those 21-30km away.
- Targeting these groups for Christmas 2020 essential!

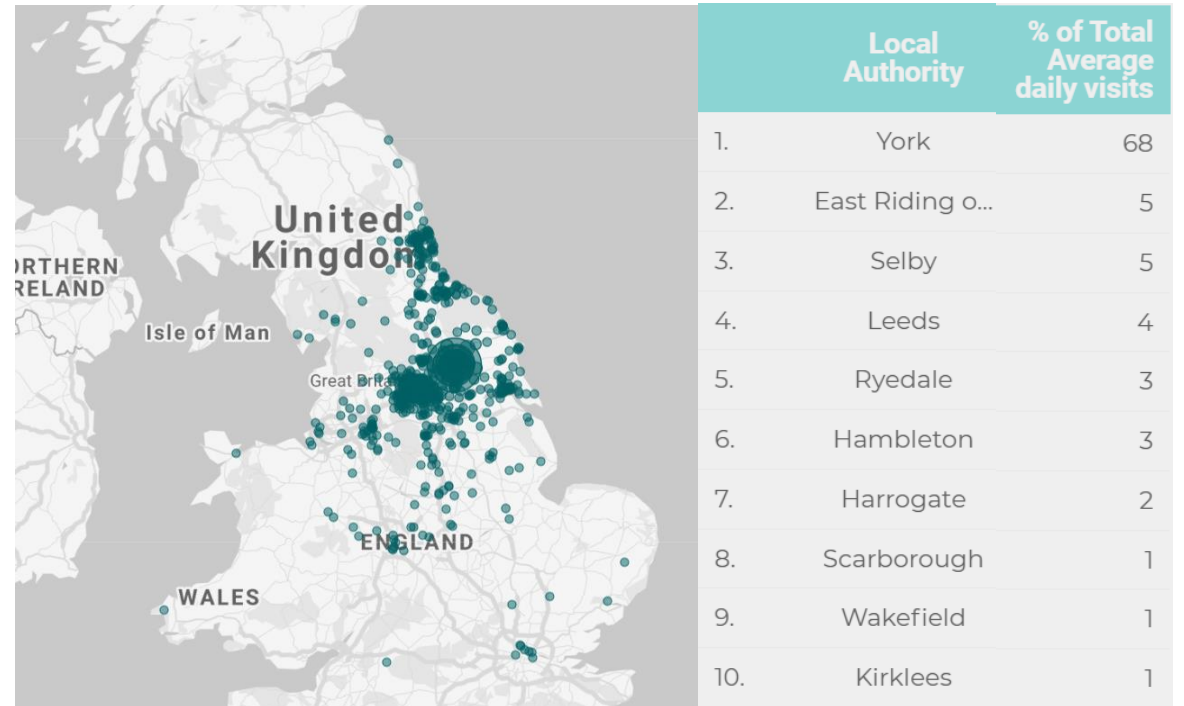
Visitor Origin

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 25th October



Map: Visitors to York week ending 1st November (half term)

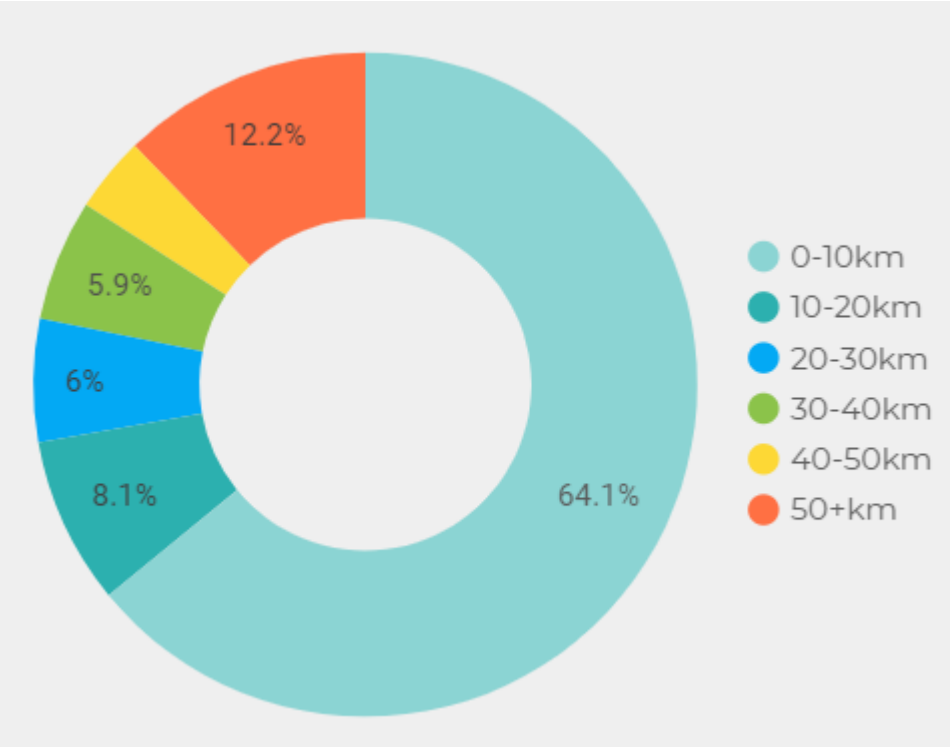


☐ Data from O2 is anonymous

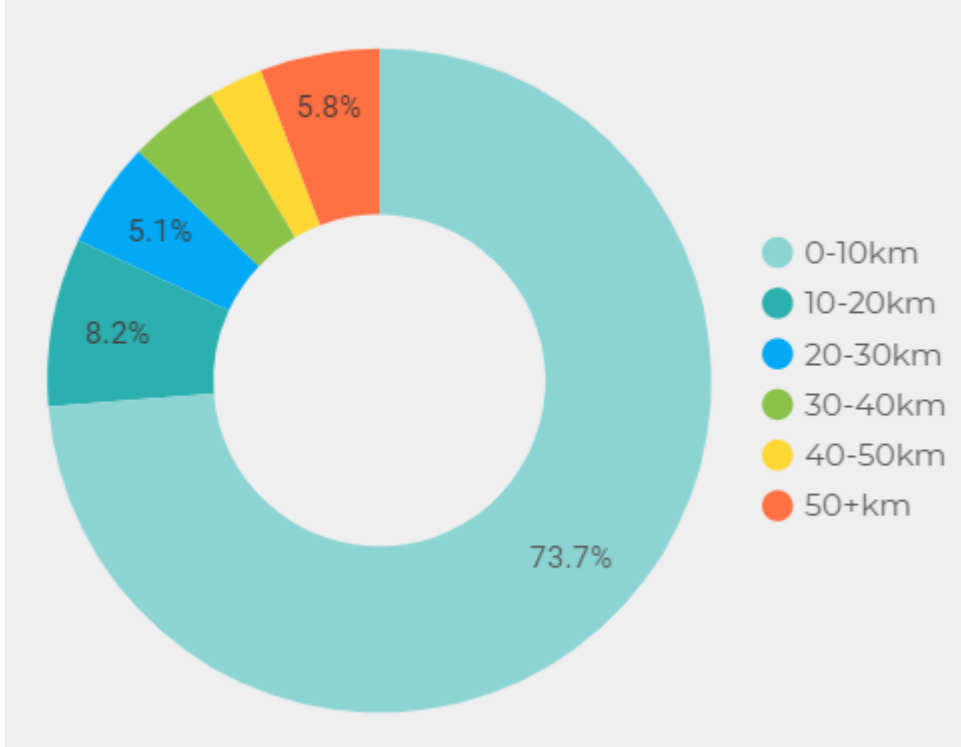
Visitor catchment distance

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 6th Sept 20 (last week summer holidays)



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

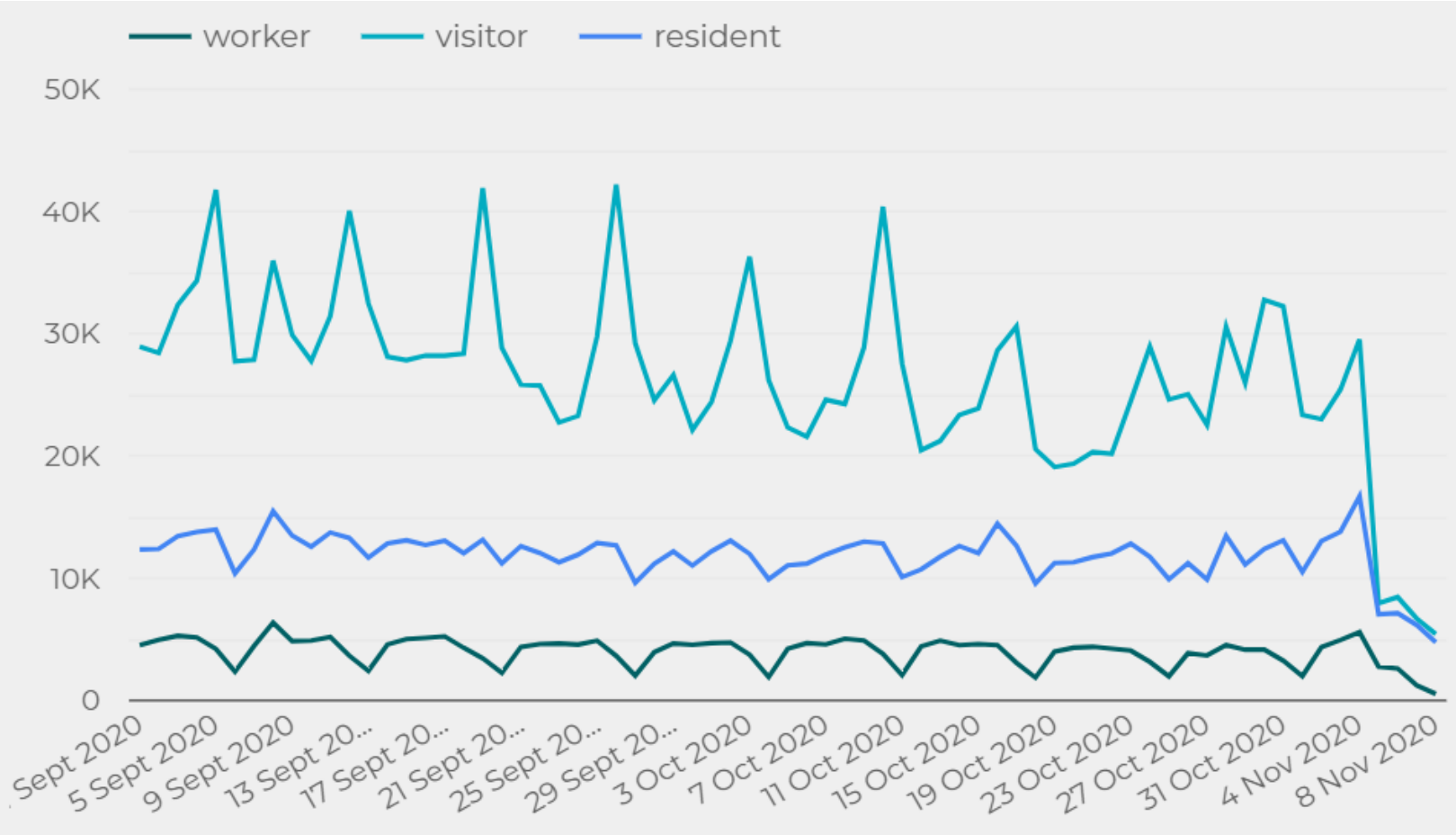


- ❑ Data includes residents, visitors and workers.
- ❑ The graphs show clearly that the majority users of the city centre are what would be classed as local i.e. within 10km of city centre.
- ❑ Data from O2 only starts 1st Sept, so no data available before this period i.e. unable to look at whole summer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

Visitor Type

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

Graph: Daily number of journeys by visitor type



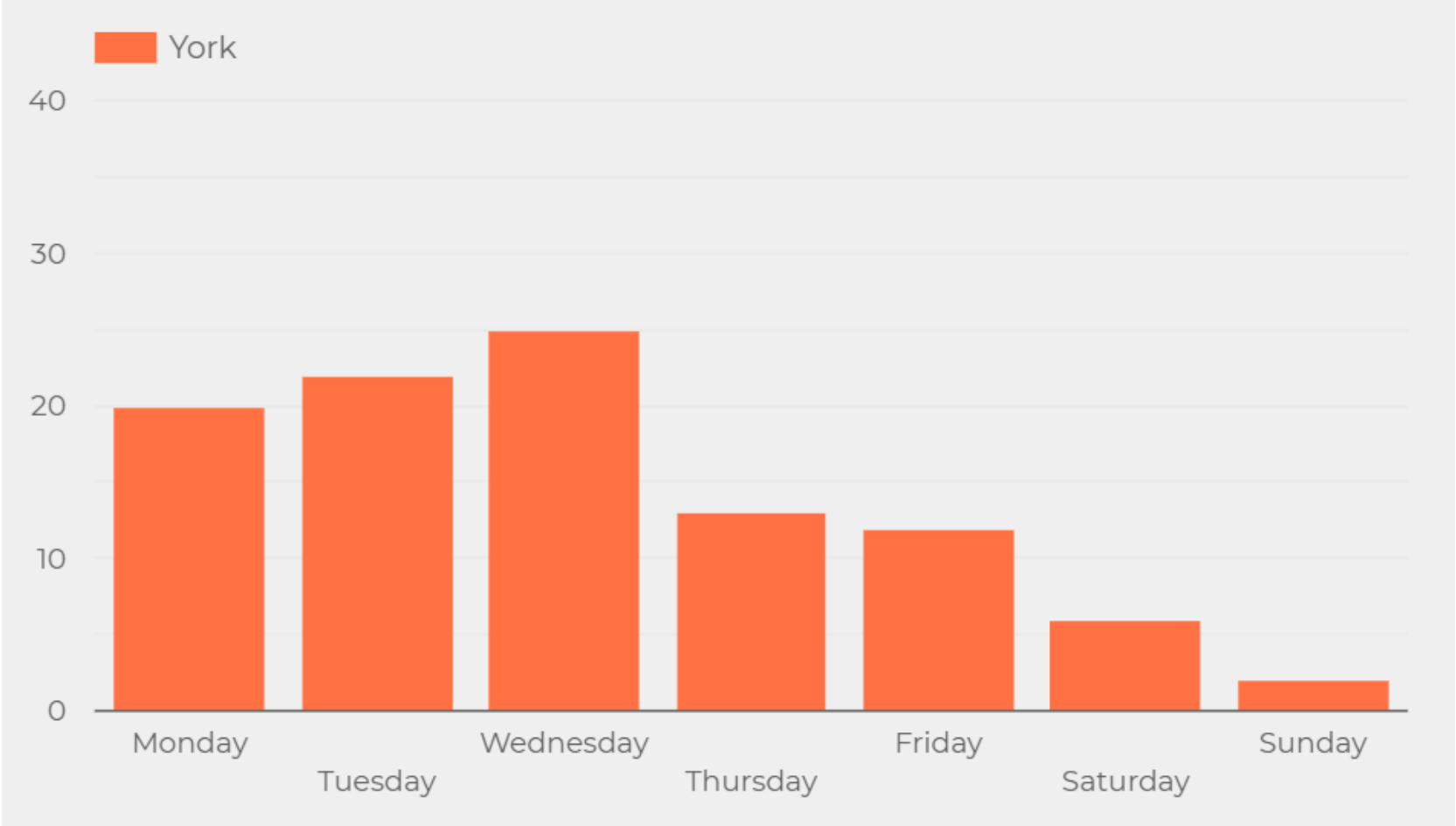
- Graphs shows clear patterns on usage, with visitors coming at the weekend (Saturdays in particular) where resident usage is consistent.
- Sunday is the day with least workers in the city centre.

- Time period is 1st Sept – 8th Nov 2020
- Resident** is classed as someone who lives within 1km of city centre
- Data collection only started 1st 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 8th Nov

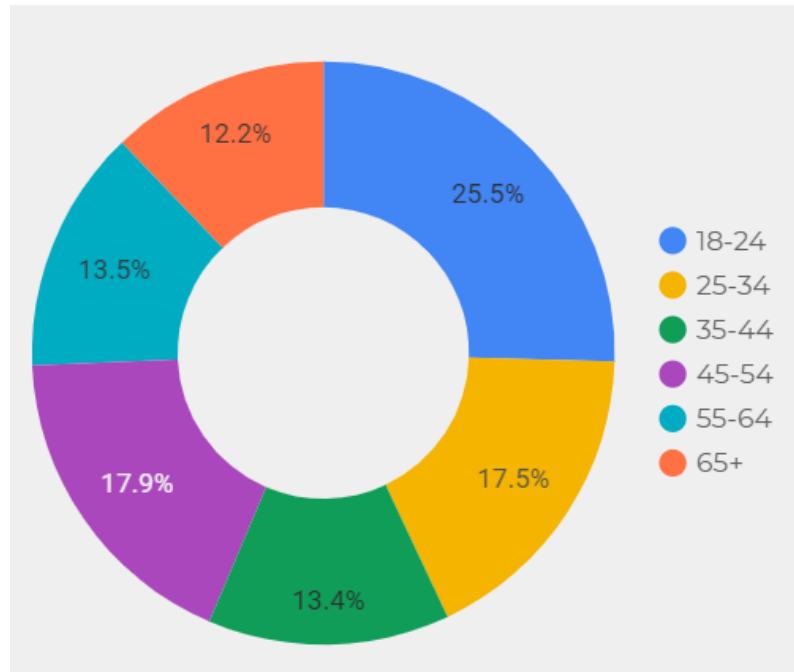


□ Time period week ending 8th Nov 2020
□ Worker locations are where users spend a substantial period during the working day (all data anonymised)

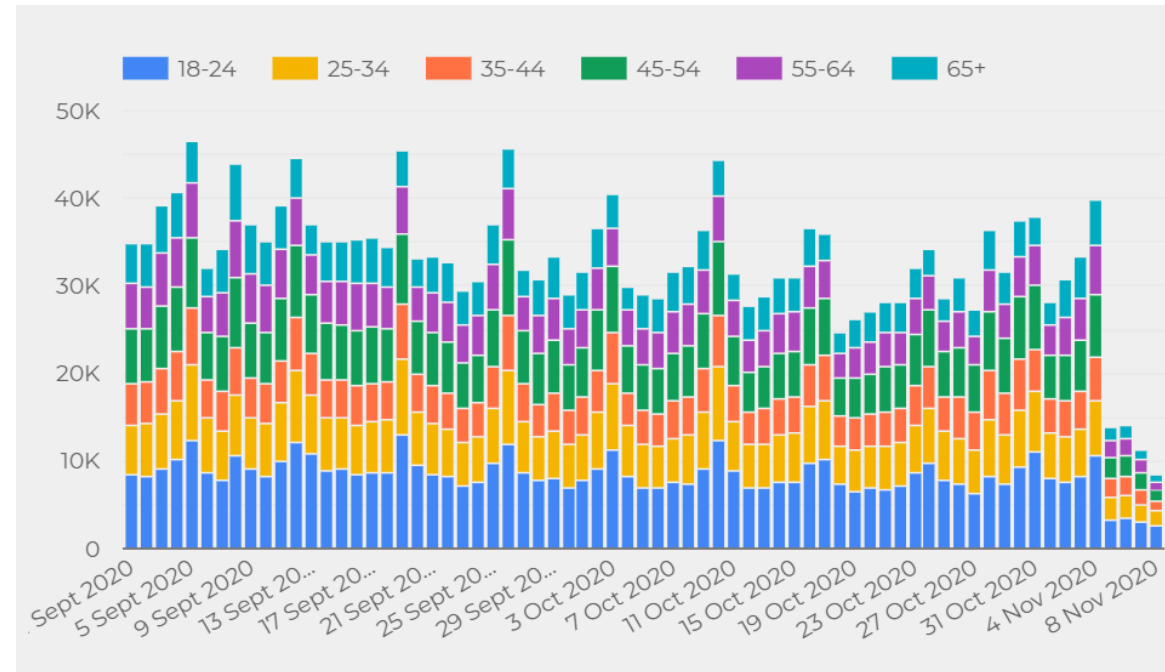
Visitor age

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

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



Graph: Visitor by age 1st Sept – 8th Nov 20



- ❑ Second national lockdown began 4th 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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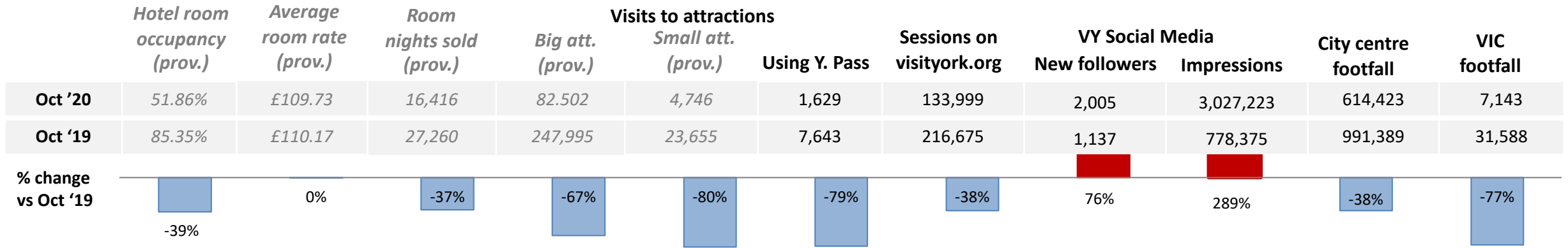


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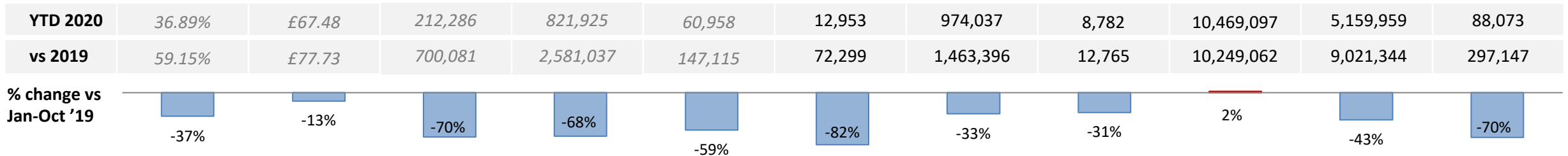


For more info contact info@theyorkbid.com

Tourism KPIs: October 2020



- The provisional data for hotels shows a -39% decrease in hotel occupancy vs October 2019, however the average room rate is on par with the same month last year - thanks to the government's support scheme allowing hospitality businesses to reduce their VAT from 20% to 5%. October 2020 has also continued the downward trend in terms of room nights sold, with a -37% decrease vs October 2019. Year to date all of the metrics continue to show a decline.
- Big attractions have had significantly less visitors in October vs the same month last year (-67%), while small attractions have seen a decrease of -80% in visitors. This is due to big attractions operating at a reduced capacity with pre-booked visits only and many small attractions deciding not to re-open in 2020 after the lockdown was lifted. October 2019 also includes numbers from school visits during half-term – group visits were not possible this year due to Covid-19. Year on year data continues to show a decrease with big attractions reporting a -68% drop in visitors and small attractions showing a -59% decrease when compared to 2019.
- The number of visits using York Pass is significantly down (-79%) compared to October 2019, which is due to a reduced number of visitors travelling to York.
- Sessions on visityork.org have decreased (-38%) vs October 2019. However, social media channels have seen a major rise in both number of followers (76% up) and impressions (289% up) vs October 2019. This is due to the paid social media campaign promotion of 'Light and Dark' and the October half-term/Halloween offer.
- City centre footfall is down by -38%, when compared to October 2019, while year to date the numbers are down -43%. Footfall into the Visitor Information centre has decreased significantly (-77%) vs October 2019.



Climate: Ave temp 10°C. **Events:** York's Medieval & Magical Treasure Trail, York Mediale 2020, York Design Week

[Find out more about the profile of visitors to York and consumer sentiment here](#)