

York's Summer Recovery

Monday 11th Oct 2021

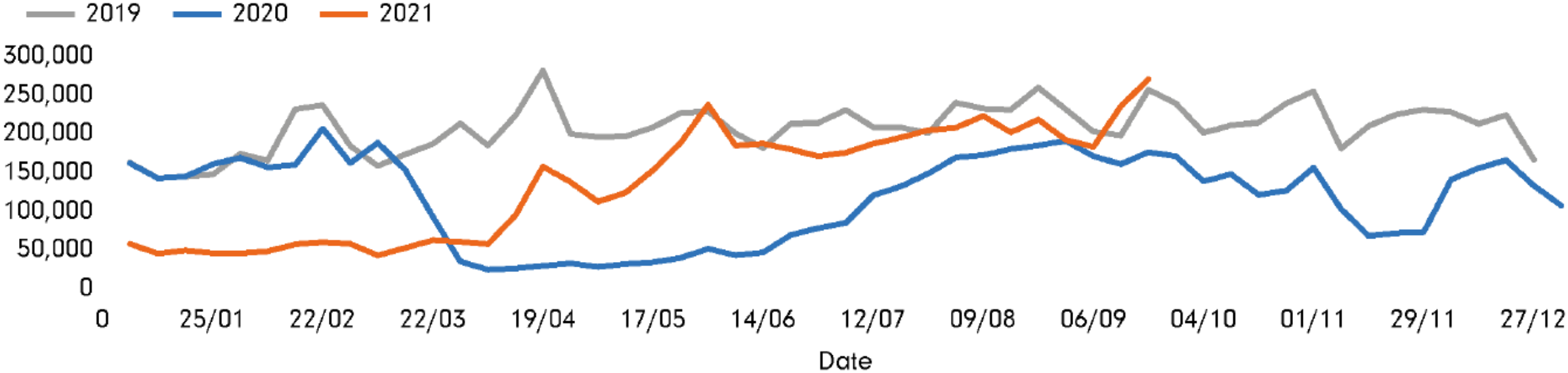


OVERVIEW

- This is a summary report, looking at how York's city centre economy has performed this summer (with focus on school holidays going into Sept).
- The report also looks at how highstreets are performing in a national context (H1 2021) and places York within that context.
- The report uses several sources of information including Springboard, Local Data Company and Movement Insights.
- The report was compiled by the York BID, in line with its partner working with CYC in procuring and using performance data.

Footfall - York

Footfall by week



August 2021 Footfall compared to UK

	AUGUST
	2021 Vs 2019
York	-10.8 %
North & Yorkshire	-18.4 %
UK	-23.1 %

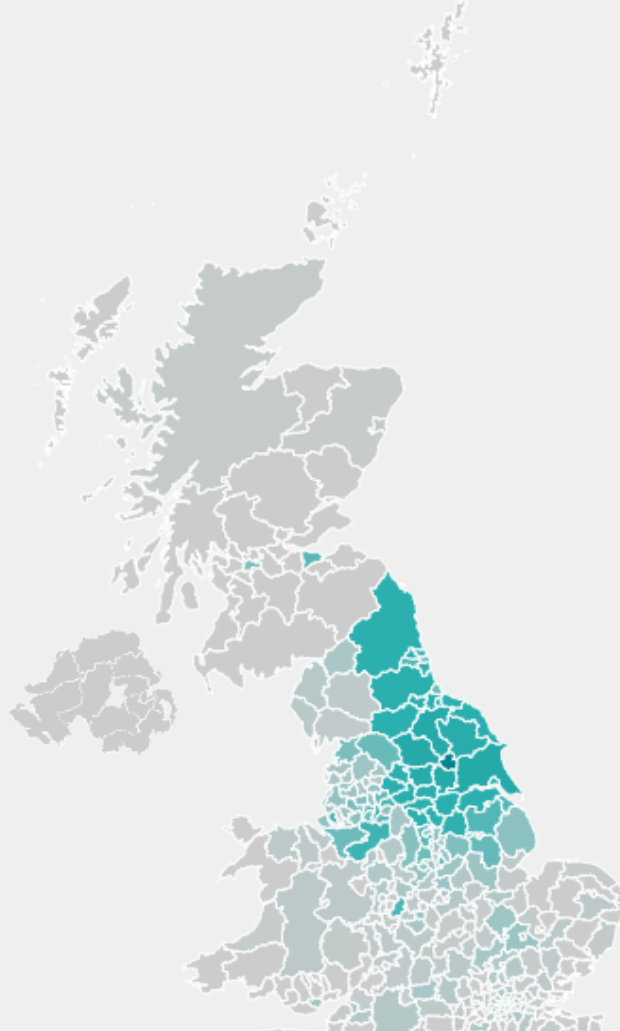
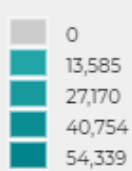
York is compared to the high street index.

- NOTE! - Footfall in York for 2021, still overall 38% down on 2019 (start of 2021 saw lockdowns that lasted three months)

APRIL – VISITOR ORIGIN

ANNEX 1

Home Catchment - Local Authority District
Home catchment grouped by local authority district.



Top 20 Local Authorities by home location
Home catchment percentage split by local authority.

	Local Authority District	Home Volume	%
1.	York	54,339	39.47%
2.	Harrogate	9,032	6.56%
3.	Selby	8,923	6.48%
4.	Hambleton	8,636	6.27%
5.	East Riding of Yorkshire	8,586	6.24%
6.	Leeds	6,722	4.88%
7.	Ryedale	4,597	3.34%
8.	Wakefield	2,135	1.55%
9.	Scarborough	1,761	1.28%
10.	Kirklees	1,582	1.15%
11.	Sheffield	1,465	1.06%
12.	Doncaster	1,390	1.01%
13.	Bradford	1,305	0.95%
14.	Kingston upon Hull, City of	1,242	0.9%
15.	County Durham	1,181	0.86%
16.	Barnsley	868	0.63%
17.	Newcastle upon Tyne	792	0.58%
18.	Manchester	790	0.57%
19.	Stockton-on-Tees	665	0.48%
20.	Redcar and Cleveland	646	0.47%

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Top Postcode Districts by home location
Home catchment percentage split by postcode district.

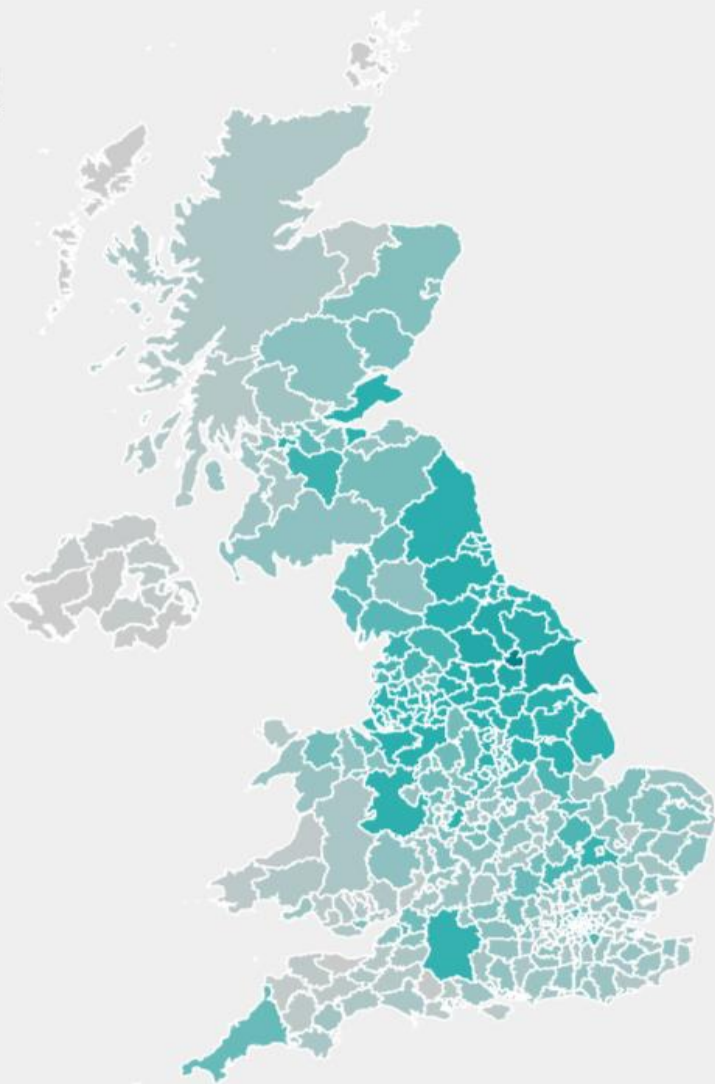
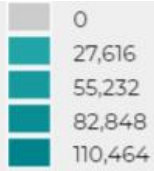
	Postcode District	Home Volume	%
1.	YO10	15,669	11.36%
2.	YO31	13,427	9.74%
3.	YO30	8,091	5.87%
4.	YO24	8,065	5.85%
5.	YO26	7,007	5.08%
6.	YO23	5,965	4.32%
7.	YO32	5,897	4.28%
8.	YO1	3,894	2.82%
9.	YO8	3,571	2.59%
10.	YO19	3,069	2.23%
11.	YO41	1,852	1.34%
12.	YO42	1,711	1.24%
13.	YO17	1,417	1.03%
14.	DN14	1,362	0.99%
15.	YO61	1,248	0.9%
16.	LS24	982	0.71%
17.	LS25	944	0.68%
18.	YO12	833	0.6%
19.	YO25	721	0.52%
20.	HU17	671	0.49%

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60% from York, Harrogate, Selby or Hambleton

AUG/ SEP – VISITOR ORIGIN

ANNEX 1



	Local Authority District	Home Volume	% ▾
1.	York	110,464	18.98%
2.	East Riding of Yorkshire	28,480	4.89%
3.	Selby	21,621	3.71%
4.	Leeds	21,529	3.7%
5.	Harrogate	20,764	3.57%
6.	Hambleton	18,852	3.24%
7.	Ryedale	12,445	2.14%
8.	County Durham	9,342	1.61%
9.	Wakefield	8,193	1.41%
10.	Kirklees	8,072	1.39%
11.	Sheffield	7,066	1.21%
12.	Doncaster	6,529	1.12%
13.	Bradford	6,481	1.11%
14.	Kingston upon Hull, City of	6,405	1.1%
15.	Scarborough	5,708	0.98%
16.	Northumberland	5,183	0.89%
17.	Newcastle upon Tyne	5,013	0.86%
18.	Barnsley	4,507	0.77%
19.	Sunderland	4,367	0.75%
20.	Stockton-on-Tees	4,196	0.72%

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	Postcode District	Home Volume	% ▾
1.	YO10	30,308	5.21%
2.	YO31	27,943	4.8%
3.	YO24	16,580	2.85%
4.	YO30	15,243	2.62%
5.	YO26	13,695	2.35%
6.	YO32	13,130	2.26%
7.	YO23	12,886	2.21%
8.	YO8	8,946	1.54%
9.	YO19	7,180	1.23%
10.	YO1	7,040	1.21%
11.	YO42	4,819	0.83%
12.	YO41	4,472	0.77%
13.	YO17	3,735	0.64%
14.	DN14	3,445	0.59%
15.	YO12	2,914	0.5%
16.	HU17	2,903	0.5%
17.	LS25	2,850	0.49%
18.	YO61	2,812	0.48%
19.	YO25	2,677	0.46%
20.	LS24	2,363	0.41%

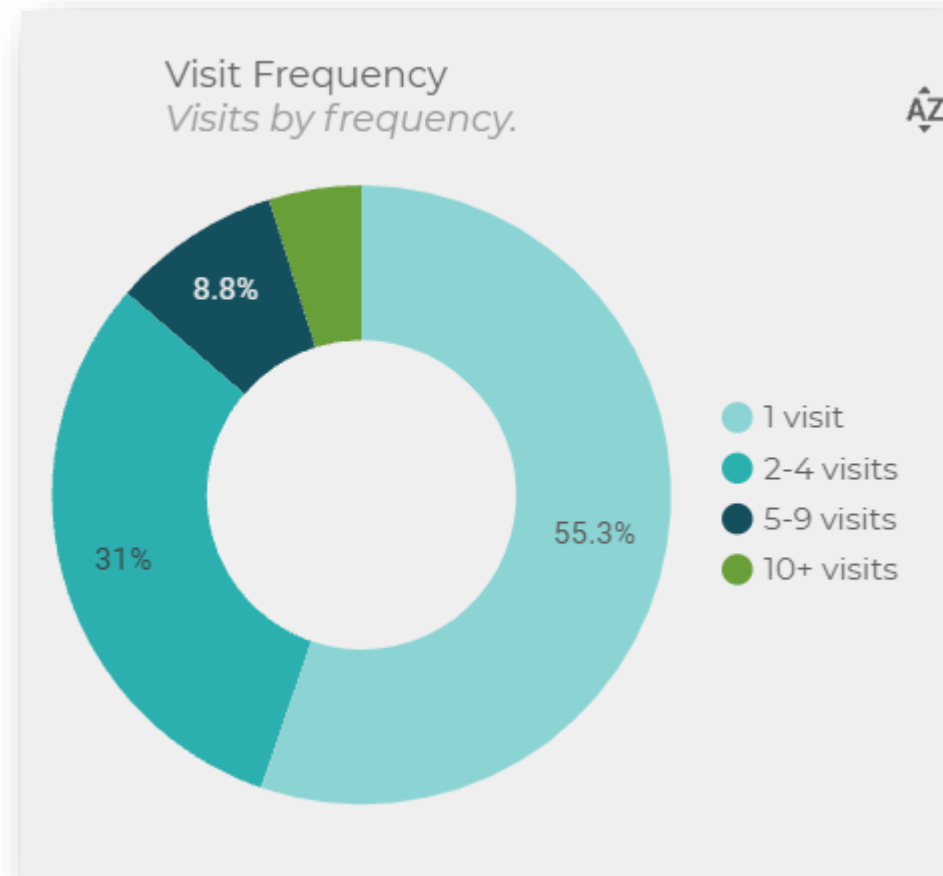
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32% from York, Harrogate, Selby or East Riding

AUG / SEP – VISITOR ORIGIN

ANNEX 1

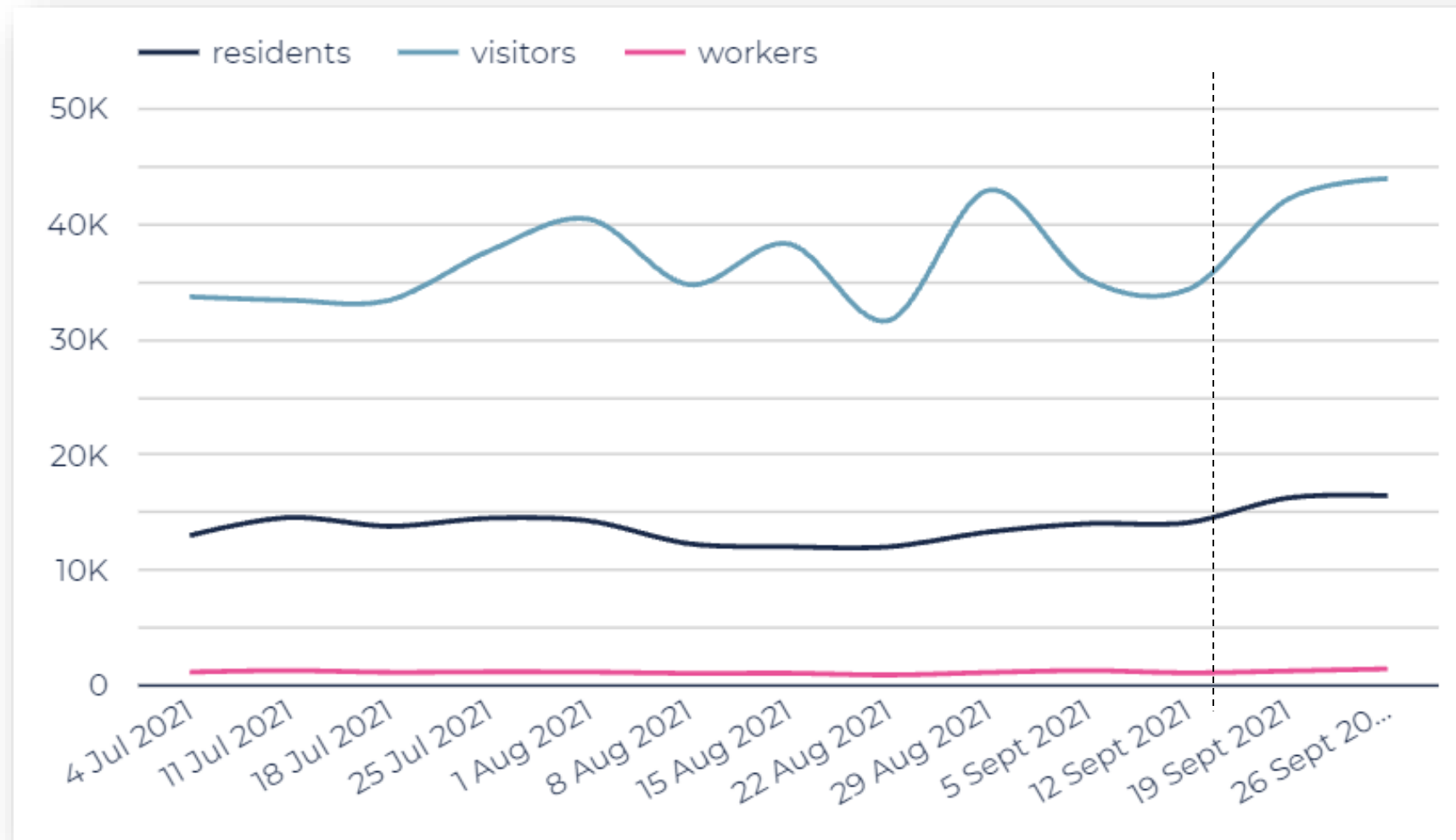
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19.	Sunderland	4,367	0.75%
20.	Stockton-on-Tees	4,196	0.72%



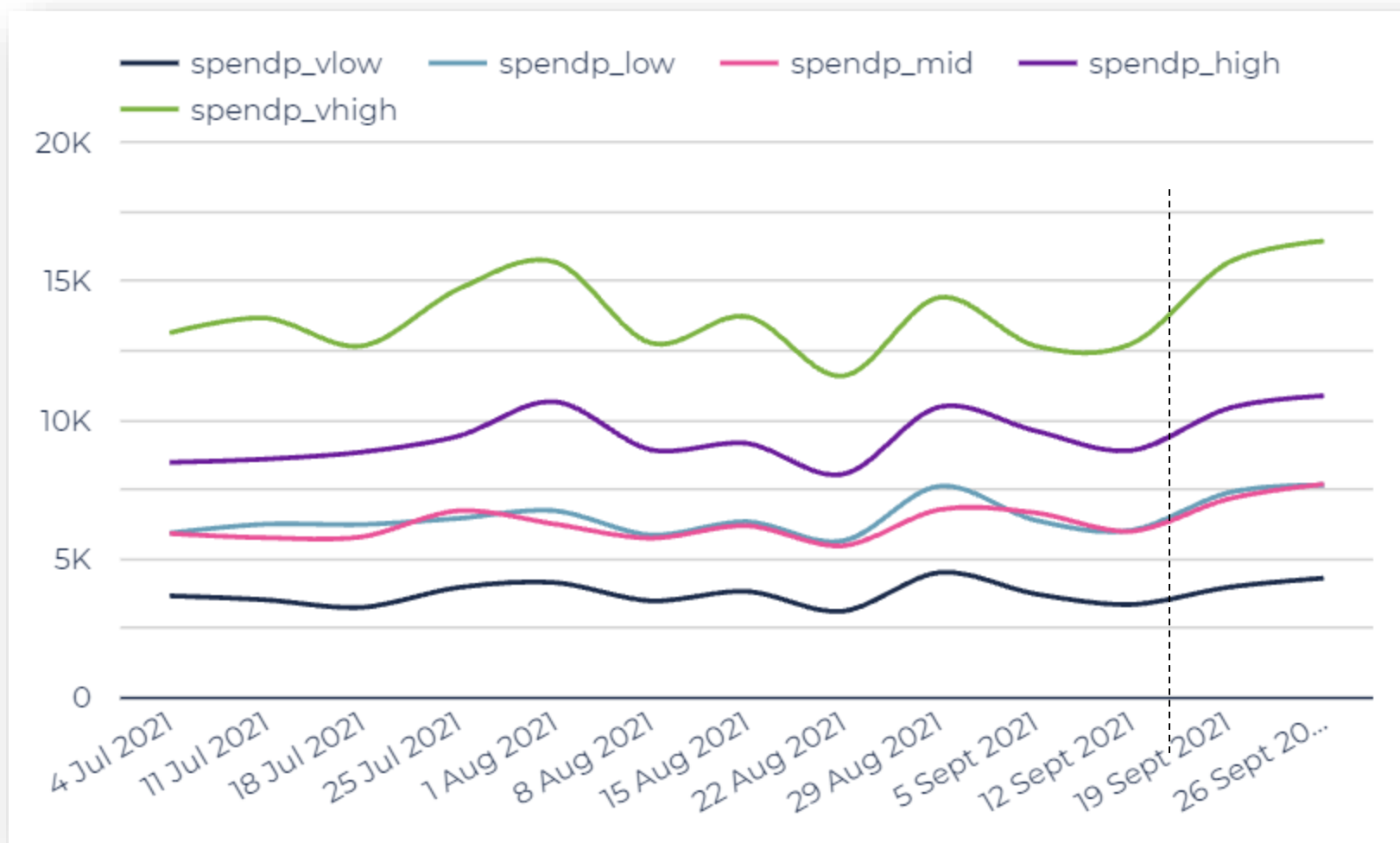
57% (top 20 of all visitors) travel from a circa 2 hour radius.

Day tripper market has been strong

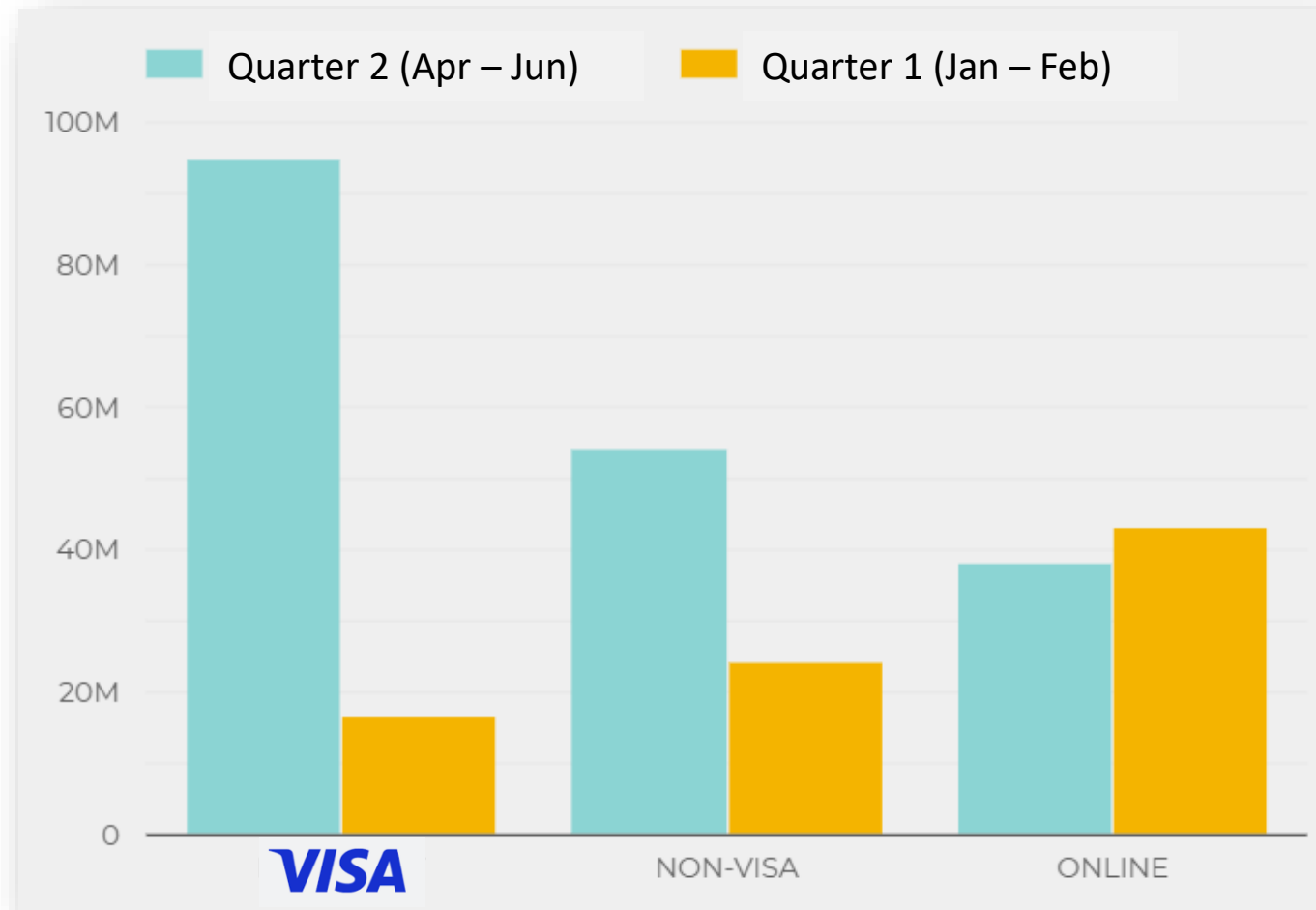
Food & Drink Festival end of September gave city a real boost



York benefits from attracting high spenders



Spend Recovery



- NOTE! – Quarter 3 (Jul – Sep) data not available yet

UK HIGHSTREET RECOVERY



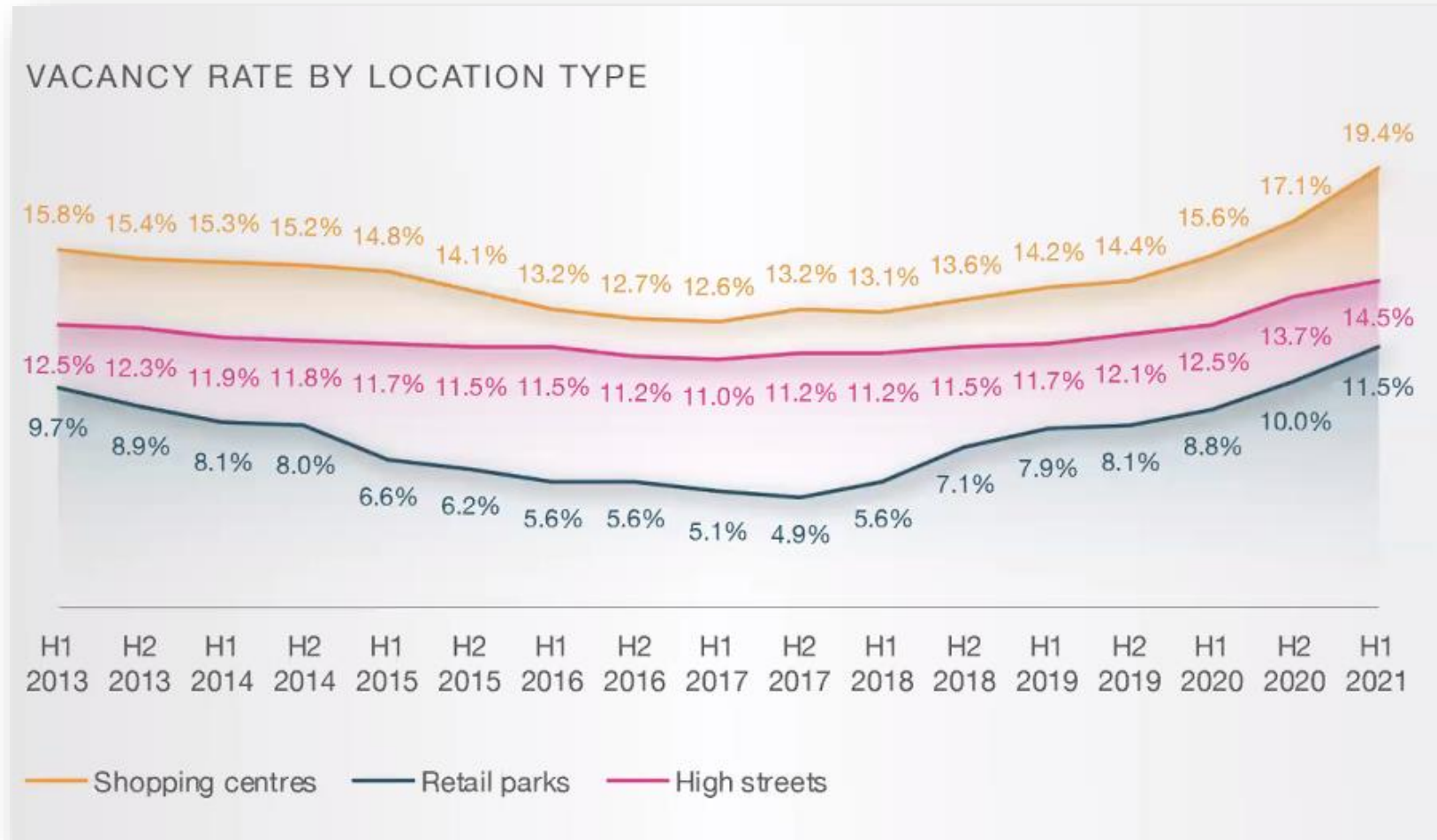
UK – STORE OPENINGS & CLOSURES

OPENINGS AND CLOSURES, H1 2014 TO H1 2021



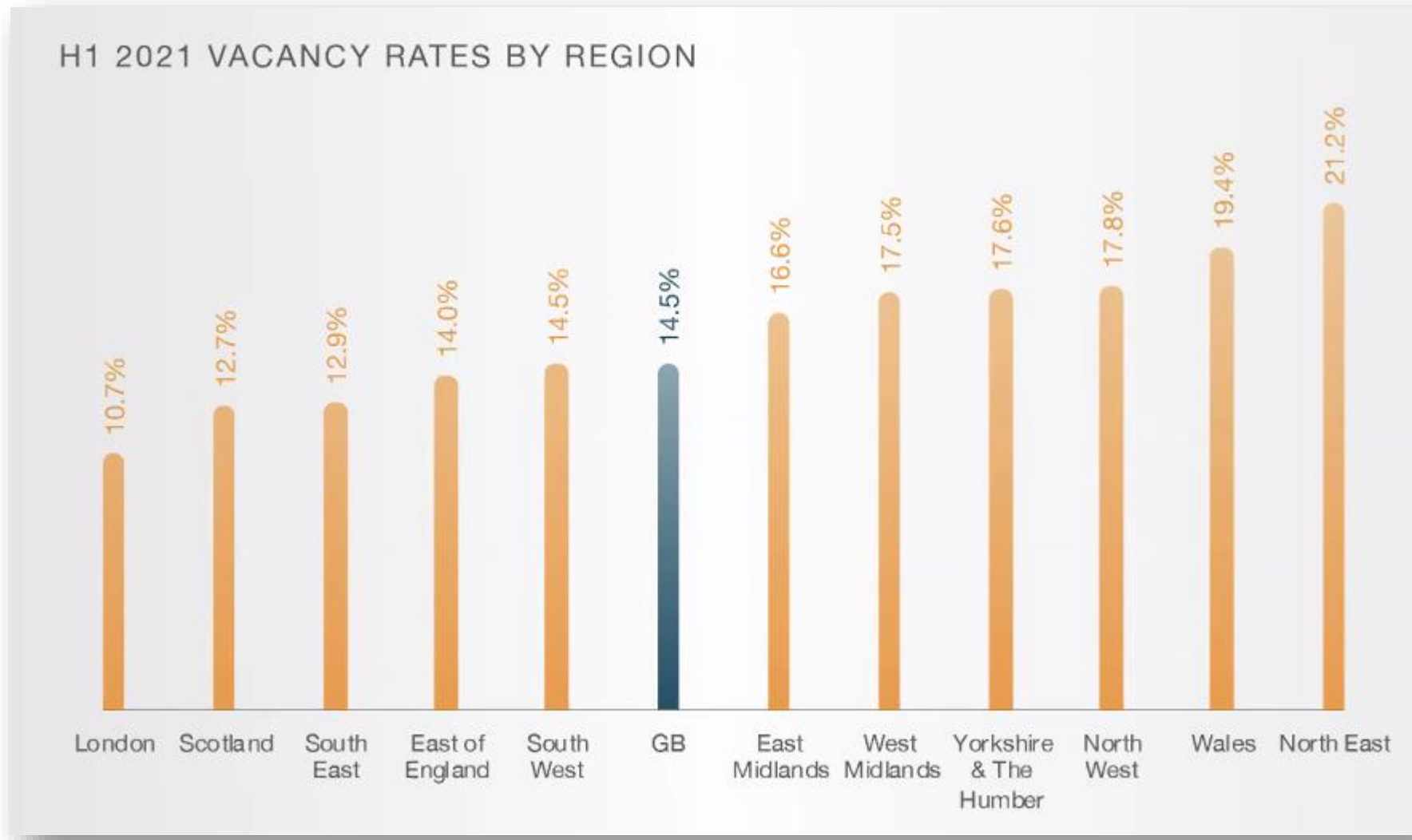
4,000 net loss
in H1 2021,
compared to
8,000 net loss
H1 2020

VACANCIES – HIGH ST SHOWING RESILIENCE !



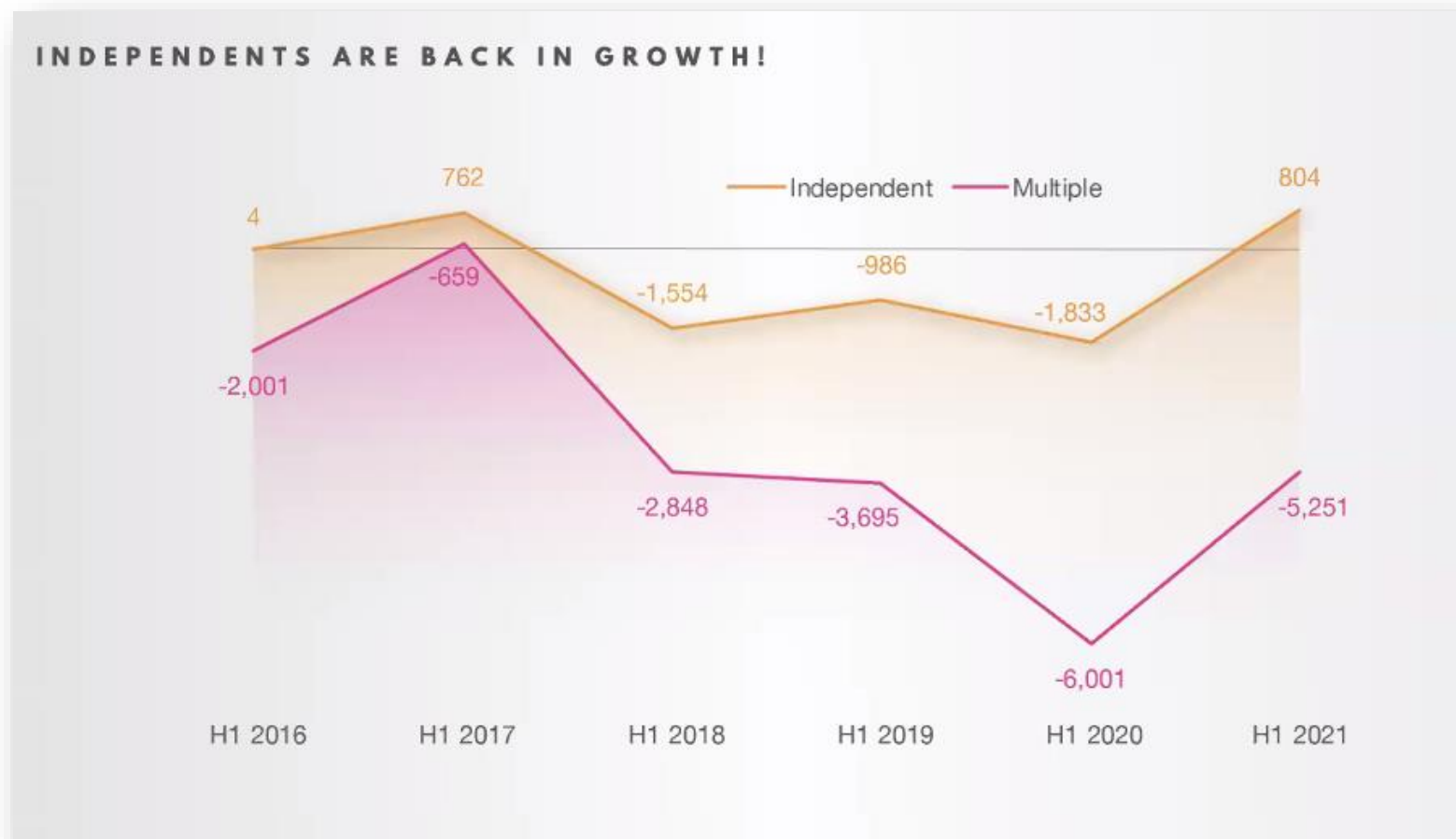
Shopping centres feeling the brunt, with big chains such as Debenhams, Frankie and Benny's etc leaving large holes.

UK VACANCY RATES BY REGION



NOTE! - York's Vacancy rate circa 9-11% - so compares well to national figures

UK NET OPENINGS - INDIE'S DRIVING GROWTH - FIRST GROWTH IN INDIE'S SINCE 2017!



Bodes well for York with strong Indie scene!

UK SECTORS HIT HARD DURING H1 2021

FASHION CONTINUES TO
FACE CHALLENGES



UK SECTORS THAT HAVE SEEN GROWTH H1 2021

FAST FOOD AND CONVENIENCE
STORES HAVE BENEFITTED FROM
COVID-SPECIFIC TRENDS

