



Annex 3

# York's Summer Recovery

Monday 11<sup>th</sup> Oct 2021



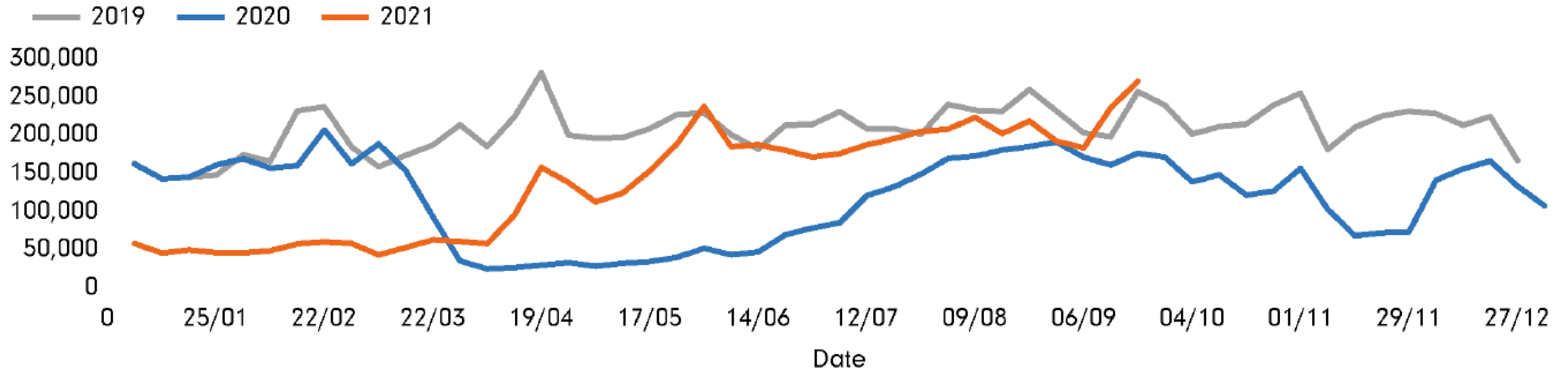


# OVERVIEW

- 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

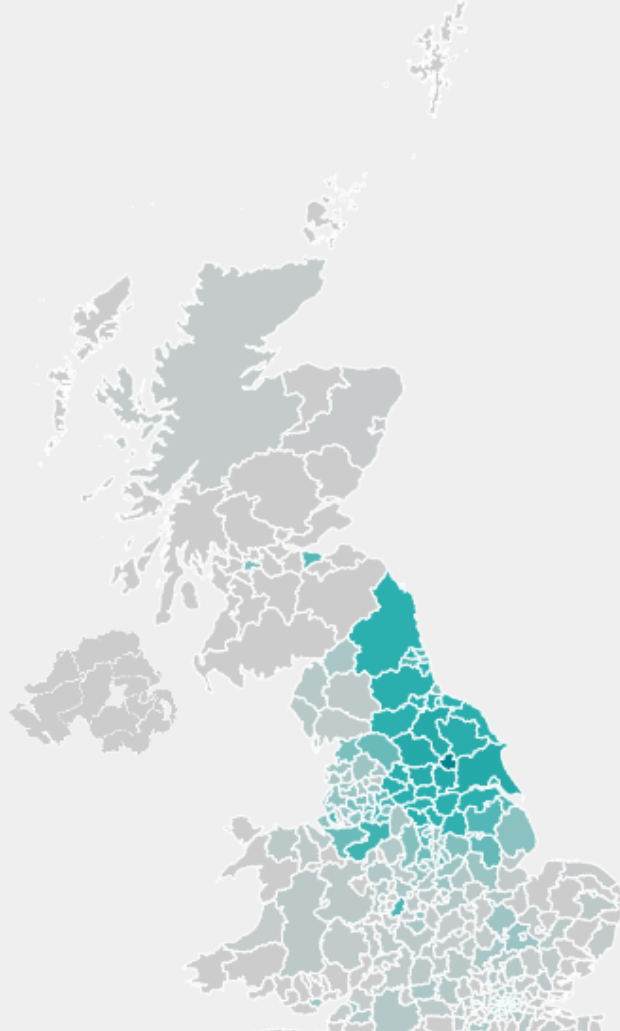
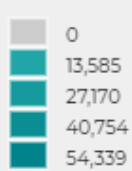
	AUGUST
	2021 Vs 2019
York	<b>-10.8 %</b>
North & Yorkshire	<b>-18.4 %</b>
UK	<b>-23.1 %</b>

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

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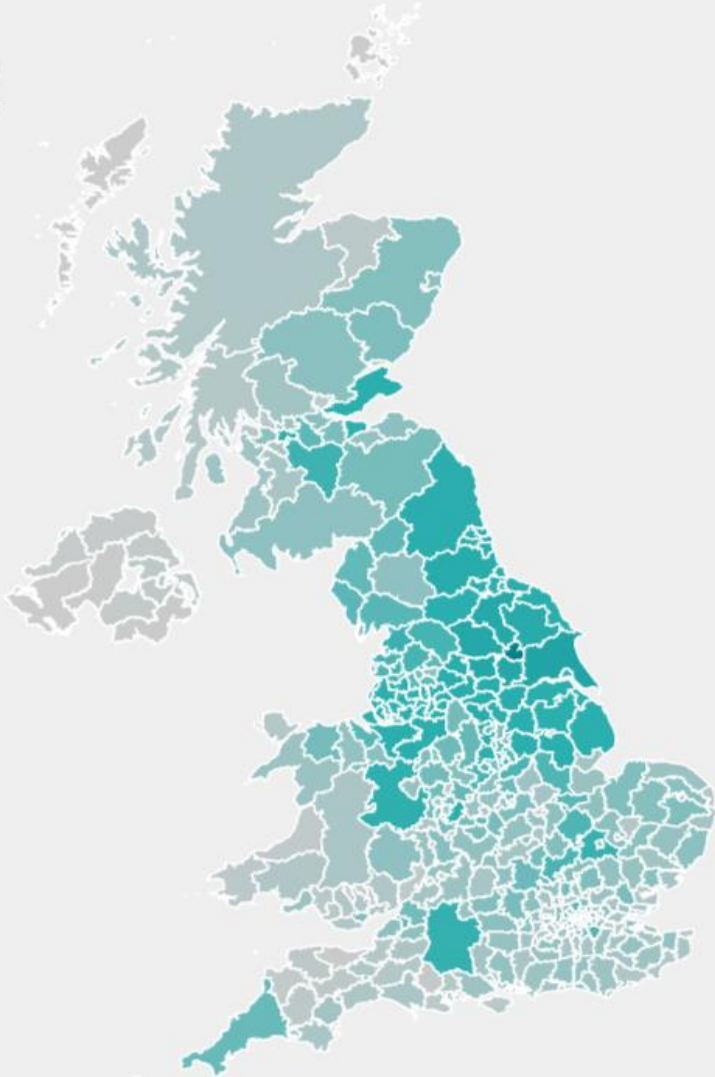
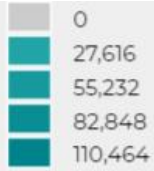
Top Postcode Districts by home location  
Home catchment percentage split by postcode district.

	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



	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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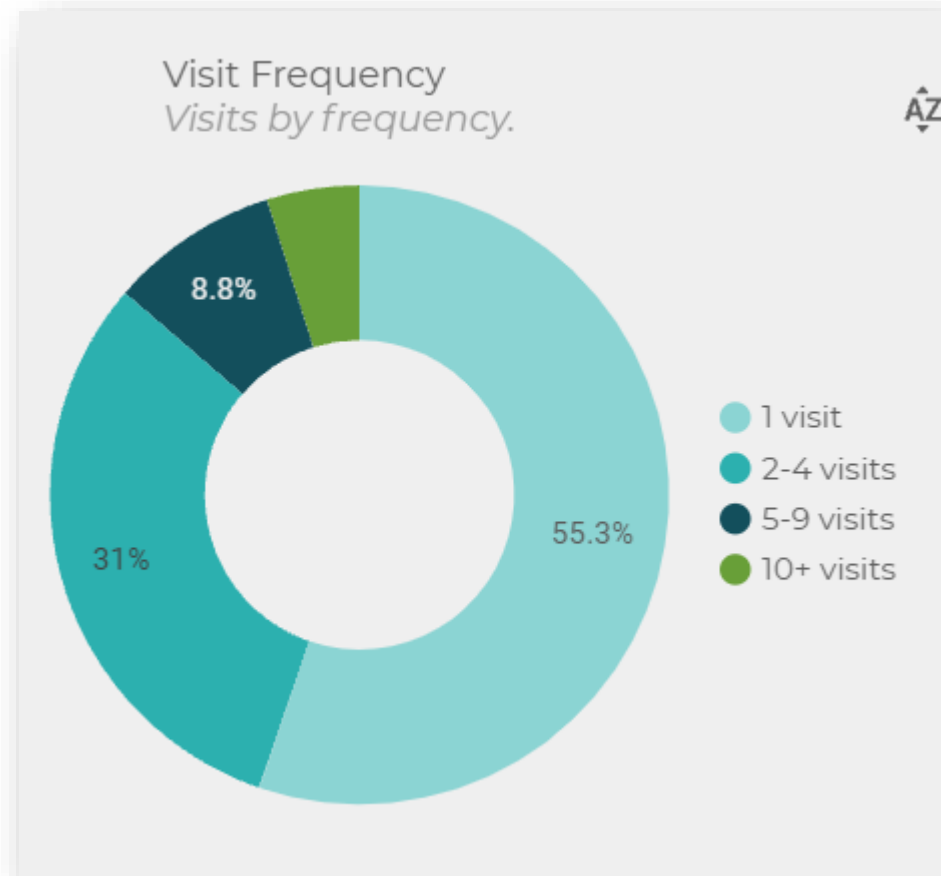
	Postcode District	Home Volume	% ▾
1.	YO10	30,308	5.21%
2.	YO31	27,943	4.8%
3.	YO24	16,580	2.85%
4.	YO30	15,243	2.62%
5.	YO26	13,695	2.35%
6.	YO32	13,130	2.26%
7.	YO23	12,886	2.21%
8.	YO8	8,946	1.54%
9.	YO19	7,180	1.23%
10.	YO1	7,040	1.21%
11.	YO42	4,819	0.83%
12.	YO41	4,472	0.77%
13.	YO17	3,735	0.64%
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

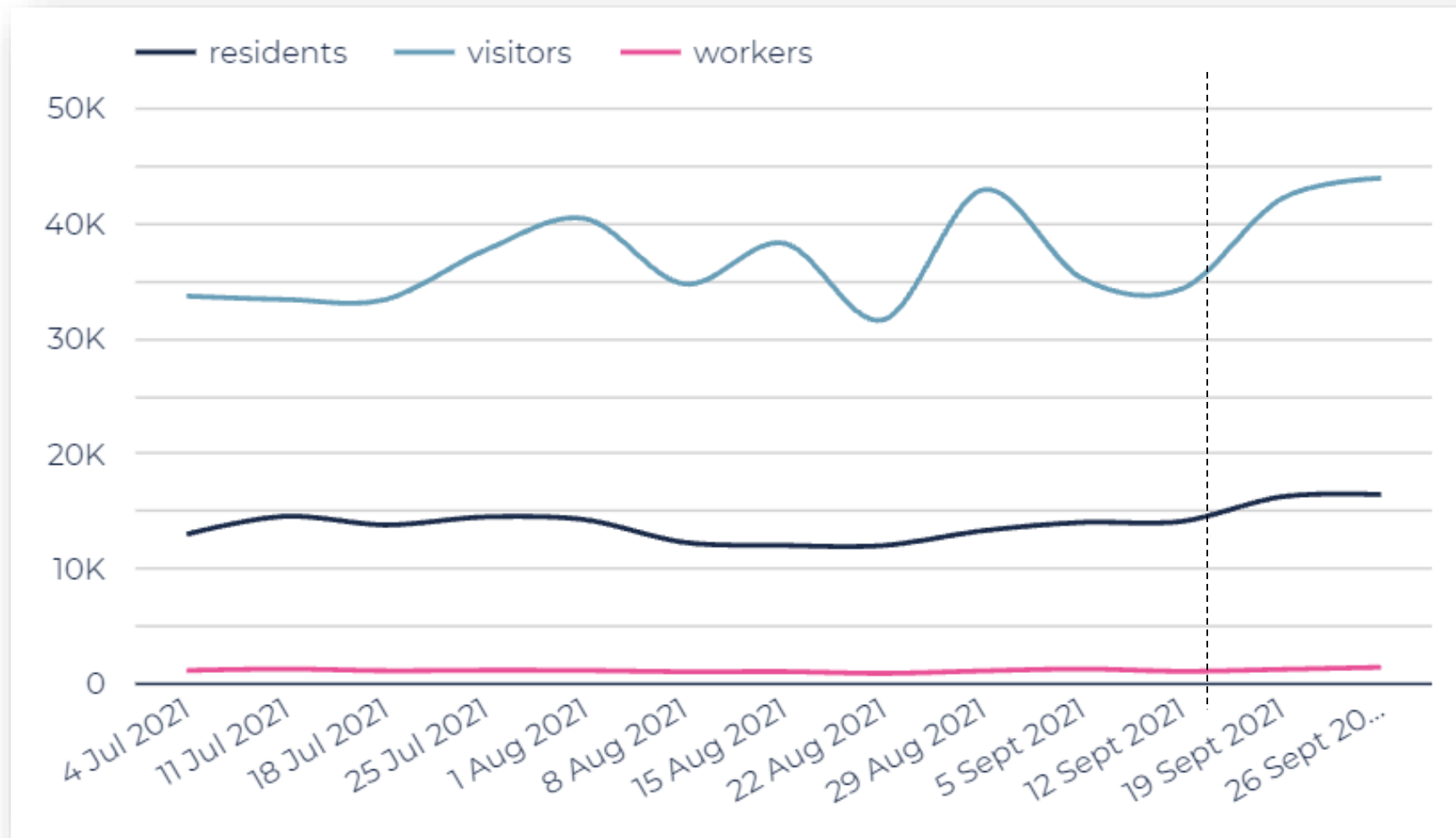
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57% (top 20 of all visitors) travel from a circa 2 hour radius.

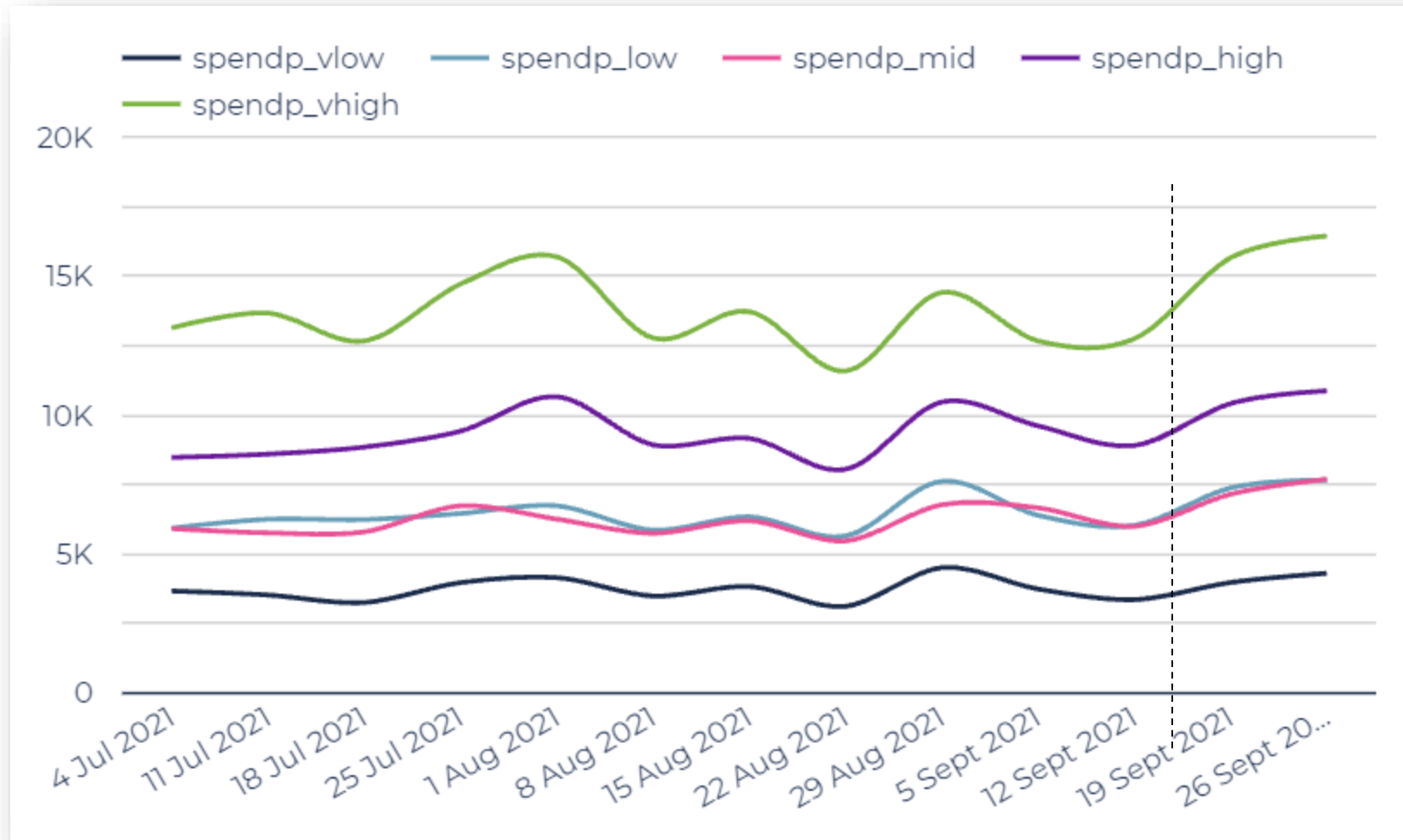
Day tripper market has been strong

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

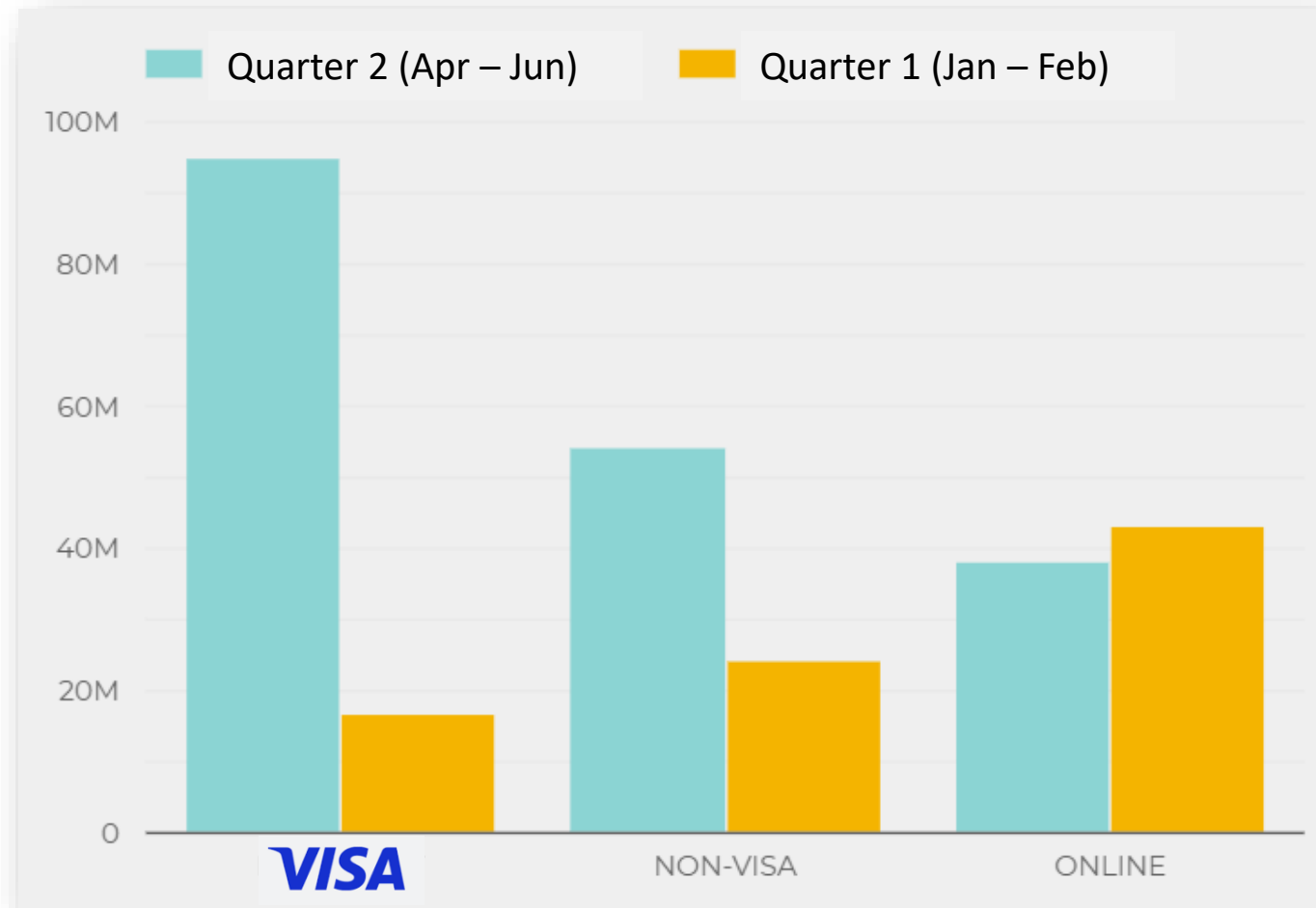




# York benefits from attracting high spenders



# Spend Recovery



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

# UK HIGHSTREET RECOVERY

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# UK – STORE OPENINGS & CLOSURES

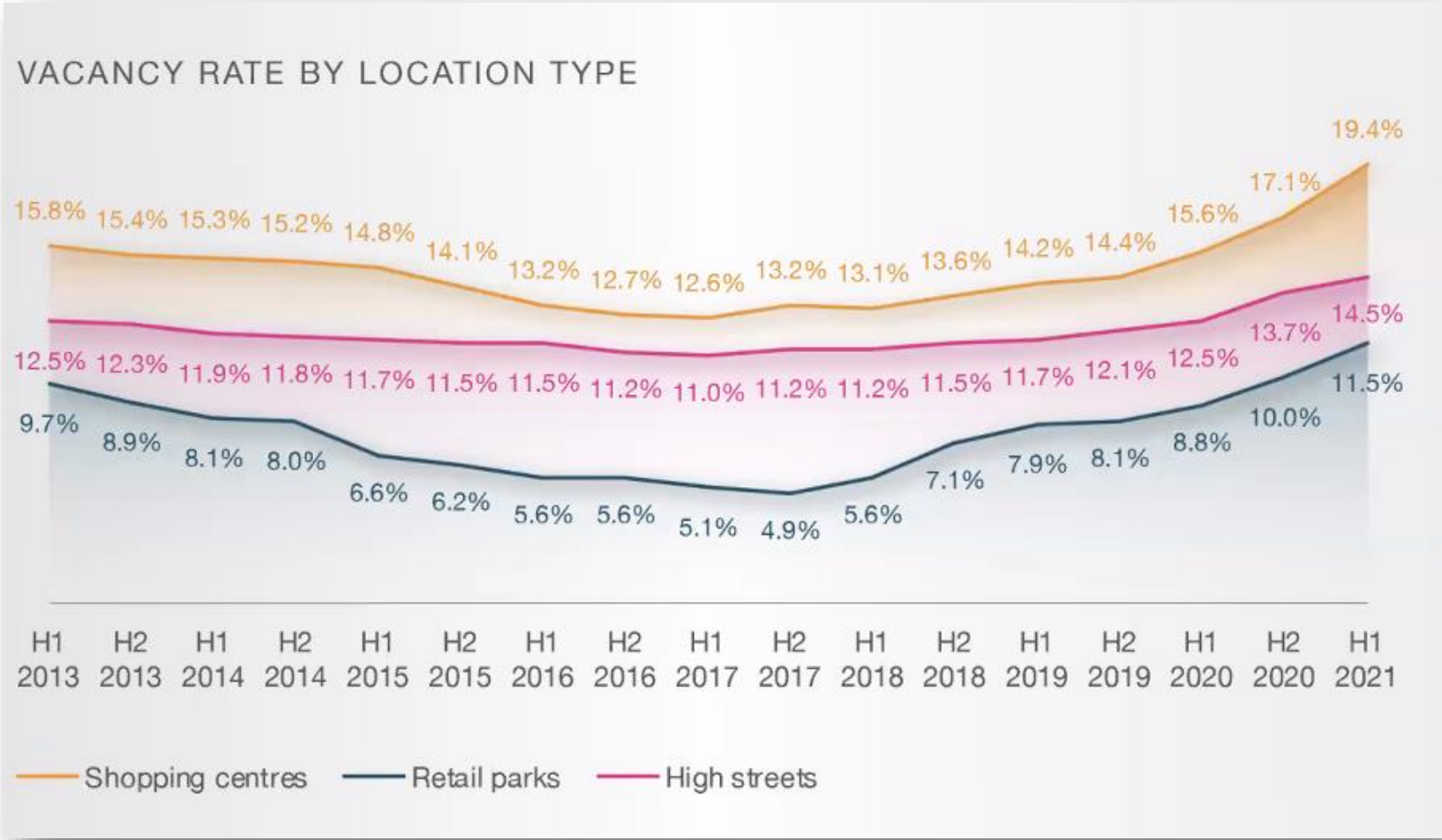
OPENINGS AND CLOSURES, H1 2014 TO H1 2021



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

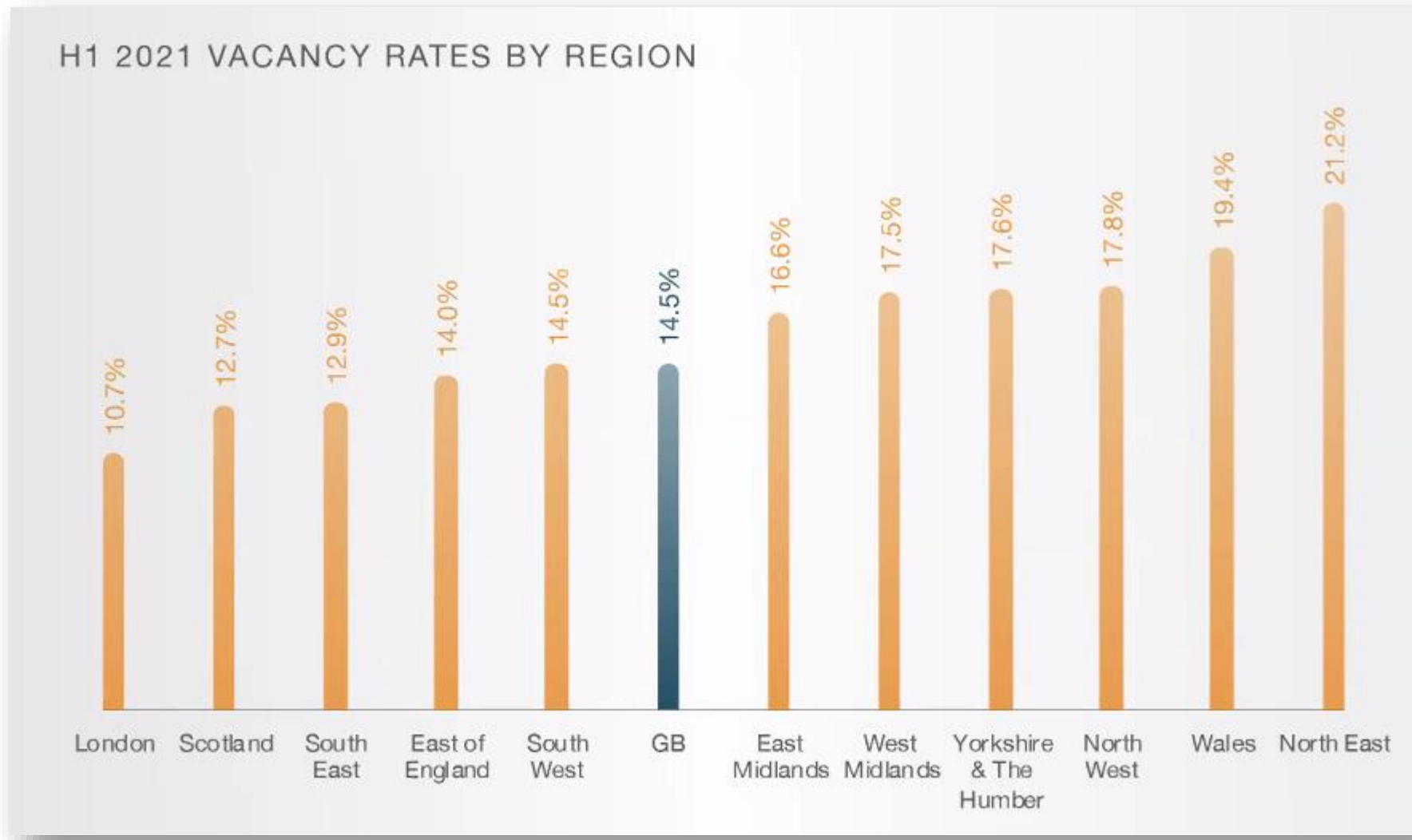


# VACANCIES – HIGH ST SHOWING RESILIENCE !



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

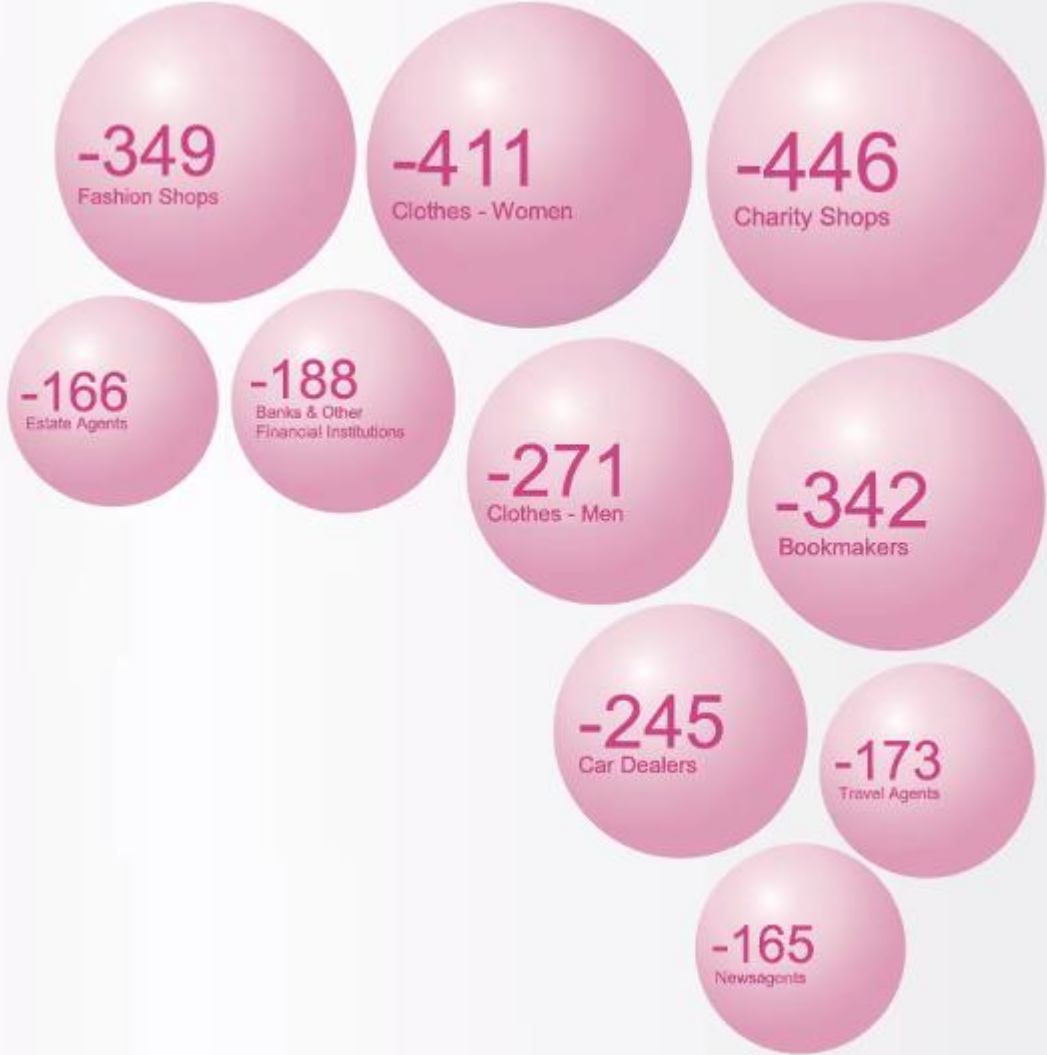
# UK NET OPENINGS - INDIE'S DRIVING GROWTH – FIRST GROWTH IN INDIE'S SINCE 2017!



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

