

Meeting:	Executive
Meeting date:	14 April 2026
Report of:	Garry Taylor, Director of City Development
Portfolio of:	Councillor Claire Douglas, Leader of the Council

Decision Report: York Christmas Market Operating Hours and Economic Impact

Subject of Report

1. At March 2026 Executive, Members considered a report on City centre Events and Permanent Anti-Terrorism Traffic Regulation Order (ATTRO). The report set out a strategic approach to events and accessibility of the city centre.
2. As well as agreeing the report's recommendations, Members asked 'that further work be undertaken to establish the viability of ensuring greater access, rest days and times during the Christmas Market'. The desire is to explore opportunities for residents, visitors and disabled people to have additional time over the Christmas period to enjoy the city centre and access shops and facilities over this time, and for this to be explored specifically through the running of the Market on 6 days of the week as opposed to 7 days as currently.
3. With underlying seasonal increases in footfall experienced across the city at this time of year, the Christmas Market is the busiest of the city centre's events by some way. Creating time during this busy period for residents and visitors to quietly enjoy the city centre, and access essential services will bring key benefits.
4. The March Executive report articulated at high level the impacts of amending the hours of the Market. These included: Improved accessibility of the city centre; changes to footfall, overnight stays and spend; impacts on servicing and deliveries for city centre businesses; loss of income to the Council and Make it York (with potential for implications for service delivery). This report considers options around changes in Christmas Market hours, and their associated

effect, including more detailed analysis of the economic impact for the city.

5. The options and recommendations have been prepared in the context set out previously of a need to improve the accessibility of the city centre in line with corporate policy, and reflecting its critical importance as a key hub for social, cultural, knowledge exchange, and commercial activity.

Background

6. In March 2026, Executive agreed to the principle of maintaining a wide range of City Centre events, and managing their impacts over the short medium and long term through improvements to how they are accessed, managed and operated, and how city centre infrastructure operates.
7. A short-term package of measures to improve accessibility was approved by Members, as part of an ongoing process to improve access. Options for reduced or amended hours of operation were previously considered as part of the 2025 event planning as summarised in the October and November 2025 Executive Papers. These resulted in the approach ultimately adopted of delaying commencement of the Market from its usual 10am- 7pm operating hours to instead commence at 10.30 (aligning with the start of footstreet hours under the permanent TRO for the area) and maintaining the 7pm closure.

Benefits and Challenges

8. City Centre events drive significant footfall and activity in York, sustaining and underpinning its retail, food & beverage and social offer, bringing people together and driving vibrancy and attractiveness. The Christmas Market event in particular is very successful, and generates significant footfall in its central location, with visitors also spending time and money in the broader city centre across retail, food and beverage, and many visitors to the market staying overnight. Travel to the city centre at this time supports bus and rail services, and generates parking revenue that supports investment in highway and transport infrastructure.
9. With the market having been held for many years, and its length having extended over time, it is difficult to disaggregate the footfall

and trade generated by the market itself, from that of the broader city centre at this busy time of year to allow assessment of the market’s economic impact. Looking at footfall figures, an uplift over the time period is clearly discernible, though the degree to which this is driven by seasonal shopping patterns or the market itself is less clear:

Table 1: BT Active footfall data

	Average daily footfall 2025	Average Daily Market Footfall 2025	Increase on Market Days
City Centre	101,032	117,383	16%

10. With a protected area covering much of the city centre, and the statutory need to consider and protect events from terrorist attack including Vehicle as Weapon (VAW) attack, many city centre users are unable to access essential services and activities in the centre when events are operating, and even outside of events, due to its configuration of the city centre, accessibility is reduced. Previous reports have principally considered the needs around mobility access such as Blue Badge holders, but a broader spectrum of our communities is impacted, with the events having the potential to marginalise those with a wide range of physical and non-physical conditions.
11. As well as those with protected characteristics, the Christmas Market also impacts general residents and visitors to the city, with disruption and increased footfall putting some off from visiting the centre. Reducing the hours or days of operation would also bring benefits to these residents and visitors – a day closure option could see the city centre being used as a rest day, with opportunities to come together, access shops and services and quietly enjoy the city centre.
12. Proactive and effective communication of any changes to the hours or days of operation would be essential to avoid reputational damage to the city from people still visiting when the market is not operating.

Policy Basis for Decision

13. The 10-year plan sets a vision that everyone can benefit from and take pride in the city with the Council Plan setting a priority that the Council will set the conditions for a healthier, fairer, more affordable, more sustainable, and more accessible place where everyone can feel valued.

14. This vision sets a clear policy that “an accessible place” is a priority for the Executive. The Executive has set out Four Core objectives in the Council Plan to support the delivery of their vision. One of which is: “Equalities and Human Rights - Equality of Opportunity - We will create opportunities for all, providing equal opportunity and balancing the human rights of everyone to ensure residents and visitors alike can benefit from the city and its strengths. We will stand up to hate and work hard to champion our communities.”
15. The Council’s Local Transport Strategy establishes a vision by 2030 of an ‘accessible, affordable and resilient transport network’, and a city that is accessible to everyone. The Council’s 10-year Economic Vision seeks to promote a vibrant and resilient city centre economy, supporting the city’s strong independent businesses, and promoting inclusive growth. The My City Centre 10-year vision defines objectives including creating a welcoming and accessible city centre for all, ensuring the city centre meets the needs of residents and supporting economic vibrancy. These strategies recognise the importance of events within the city centre economy, and their role in supporting businesses and the visitor economy.

Recommendation and Reasons

16. Executive are recommended to note the work to date and additional analysis presented in the report and to:
- i) Consider progressing a 6-day Christmas Market operation for 2026, with 10.30-7pm market operation the remaining days, and normal city centre operation on the 7th rest day, and on the basis of the evidence presented, to select Tuesday as the rest day.
 - ii) If progressing this approach, do so on a trial basis for 2026, with a further report in early 2027 containing detailed analysis of the impacts and outcome of this trial.

Reason: To allow the trialling of an approach to providing improvements for residents, visitors and disabled people in accessing the City Centre through reduced operating hours, and in

a way which is deliverable operationally, and minimises economic impacts to the city.

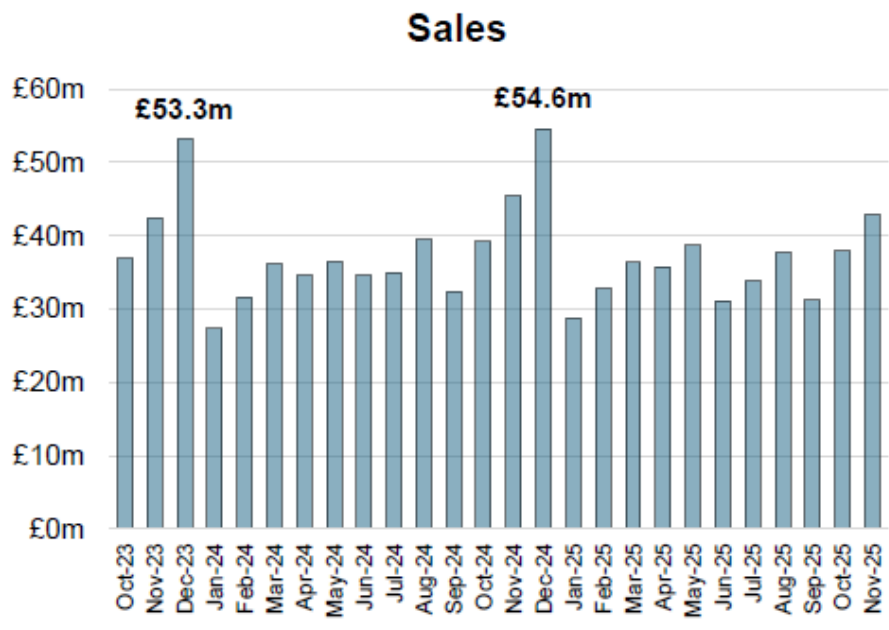
Options Analysis and Evidential Basis

17. The principal considerations in the development of options relate to operational matters (ability to service the city centre in terms of deliveries, waste etc, and manage vehicles inside the area during controlled hours), security (and potential risk of Vehicle as Weapon – VAW, or Improvised Explosive Device - IED terrorism attack), accessibility impacts (improvements to the ability of residents, visitors and disabled people to access city centre services), and economic impact (for the city as a whole).
18. Additional operating hours scenarios have also been considered as part of the development of this report. The default operating model for the Market is over 7 days of the week between 10.30-7pm. In addition to the 6-day option set out in the recommendations section above, the following scenarios have been considered and discounted:
 - 7-day operation with commencement further delayed (11am-7pm)
 - 7-day operation with reduced daytime hours and extended evenings (1pm-9pm)
19. Delaying commencement over 7 days to 11am would introduce a misalignment with the underlying TRO, which normally commences at 10.30am. It would also likely not significantly impact volumes of market footfall, with the relatively small scale of change leading to significant volumes of people in the City Centre ahead of market opening, and an event still taking place in the day. The advice of security partners is that the city centre access restrictions would be very likely to be required at this time, nullifying any access benefits. This scenario was
20. Delaying commencement over 7 days to 1pm and extending the evening hours to 9pm would also still result in an event taking place on the day, albeit with a later start. The views of security advisor partners would likely be that a closure to vehicular traffic would still be required in these circumstances, negating any accessibility benefits. Extending operating hours beyond 7pm would impact other

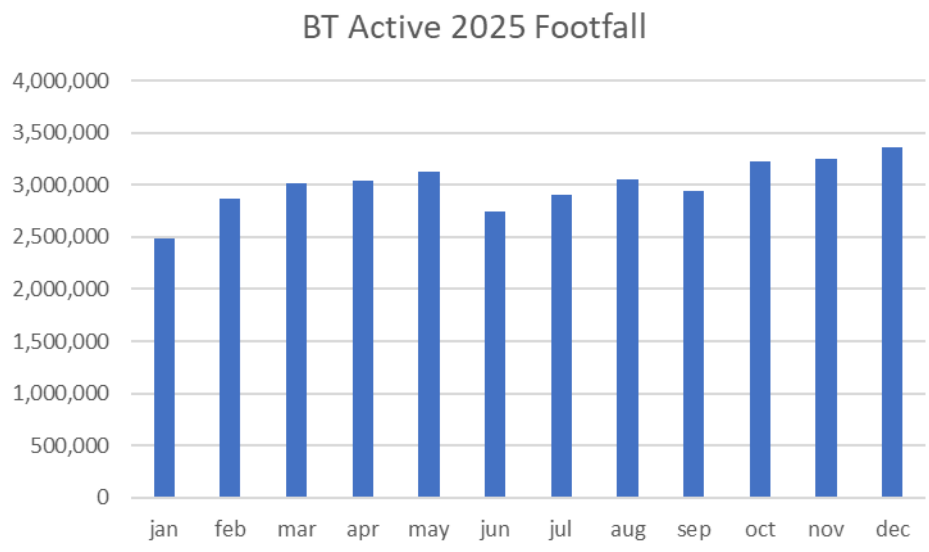
businesses operations (including Shambles Market who would be prevented from leaving the area under normal operations).

21. Reducing the Christmas Market to a 6-day operation would deliver improved accessibility to city centre users, with the city operating in 'business as usual' mode for one day a week. With an event not taking place on the rest day, Counter Terrorism Advisors and North Yorkshire Police have confirmed that, whilst the primary position is that the market should operate 7 days per week, in their view additional vehicular restrictions would not be required barring exceptional circumstances (such as a national security threat, specific intelligence or VIP visit) and normal operating with Blue Badge access would be available as usual. With the normal Christmas Market operating approach (10.30-7pm) over remaining days, tried and tested operational protocols would apply. The approach would result in a 14% reduction in the overall operating hours of the market against 2025. The specific day of the week selected should be informed by normal patterns of trade and visits (including overnight visits) to reduce its economic impact. This option has been explored in more detail as set out below.
22. The Christmas Market makes a significant contribution to York's economic performance, helping to contribute to the city's £2bn tourism and visitor economy, through driving footfall, overnight stays and high street spend. Make it York anecdotally report a positive impact on the city economy in the region of £80- £100m flowing from the Christmas Market.
23. The Council monitors spend through use of Beauclair data which captures debit card spend across retail tourism, entertainment, consumer services and transport. Spend is reported on a total monthly basis for the city centre area. The Council also monitors footfall in the centre through BT Active mobile data which is captured daily for the city centre area.
24. Beauclair spend data reveals seasonal spending patterns in common with the rest of the UK, with significant spikes in activity in the holiday periods, and most acutely spiking in November and December in the run up to Christmas. Figures for 2025 indicate monthly retail spend of £42.9m and £52.2m respectively for November and December. This is against year to date spend to November of £387m, with spend over these months accounting for around a quarter of the year's total. Not all spend is captured by

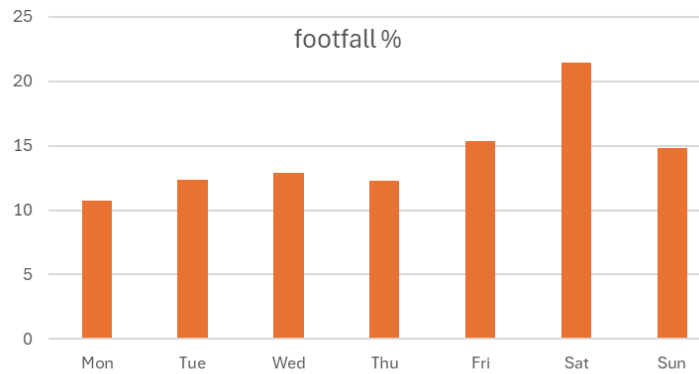
Beauclair, with cash sales, credit card and non-UK debit card transactions not captured.



25. BT Active footfall data shows broadly consistent patterns of footfall throughout the year, with December the busiest month, followed by November.



26. With daily data available from BT Active, heatmapping of footfall patterns throughout the days of the week is possible. This is shown below for the period over the 2025 Christmas Market period:



27. Dividing monthly beauclair spend data against daily footfall data has been undertaken to generate an estimate of how this total spend is profiled over the Christmas Market period. This generates an average spend of £13.22/ person and £15.55/ person over November and December respectively. This data is high level, capturing all spend (and footfall) in the city centre area, and it is important to note that:

- The footfall data captures all movement, including residents and workers, meaning that the average spend per person figure will be lower than the spend levels per person associated with leisure trips to the Christmas Market
- Additional spend outside of the City Centre area will take place over this period.
- Spend per head will typically be higher over the weekend when greater leisure activity takes place, and therefore weekday spend may be overstated, and;
- The beauclair data does not capture remote payments made in advance including for overnight accommodation.

However, over the Christmas Market period as a whole for 2025 (13th November to 21st December) this data generates a total City Centre spend figure of £66.24m.

28. Research by the British Retail Consortium indicates high street spend in the UK is typically comprised of around 67% debit card, 20% credit card and 12% cash payments. Applying these ratios would increase the total spend levels to £98.87m. BT active data also reveals around 3.63% of footfall in the city centre is international in nature - uprating spend for this figure generates a combined total uprated spend estimate of £102.46m (or £20.45 and £24.05 per person for November and December respectively).

29. Additional spend assessment has also been undertaken by Make it York, drawing on survey responses to analyse spend, using

- PCP in person visitor survey data and MiY online visitor survey to derive daily spend per person – average £65.93.
- Christmas Market survey 2025 and Visitor Survey data to derive overnight accommodation spend per person – average £215.8 per person, with 44% of people staying overnight.
- 2024 Christmas Market Visitor Survey to derive spend in wider city centre attractions – average spend of £38.71 per person.

30. The data overcomes some of the challenges of using beauclair spend data as highlighted in paragraph 28, being specifically targeted to leisure visitors, and reflecting spend made in advance and outside of the city centre area. The data is drawn from small sample sizes though, and there is a high risk of duplication across the categories of spend, with the £65.93 average visitor spend very likely duplicating elements of that captured within the £38.71 spend in wider city centre attractions, and the overnight accommodation spend also incorporating elements of food and drink spend captured also in the wider visitor surveys. The data generates a total spend of £199.59 per person, against £20.45-£24.05 in the preceding analysis.

31. The two methodologies for assessing spend represent either end of a spectrum, with the Beauclair/ BT Active data likely being understated (even when uprated), and the Make it York data significantly overstated. Taking an average blended rate across these two datasets as a most likely scenario is a proportionate way of assessing impact, this generates a spend of £106.99 per market visitor.

32. As stated previously in the report, it is difficult to disaggregate the degree to which footfall and spend is driven by the Christmas Market itself, or by the core city centre shops, services and attractions. To arrive at an estimate of this, the BT Active footfall levels over the first week of the 2025 Market (Thursday 13th – Wednesday 19th November) have been compared to the levels for the week immediately prior to this (Thurs 6th November – Weds 12th November). This shows a 17.18% increase in footfall over the second week. Some of this increase will be a result of general uplift in city centre footfall in the pre-Christmas period with shopping activity increasing, and the popularity of the market as a factor will also likely increase in the run up to Christmas, but the rate is considered a reasonable estimate of the ‘impact’ of the Christmas Market on footfall in the absence of other data. Applied to the whole city centre

footfall from BT Active over the market period, this rate would attribute 787,000 individuals to the market's presence.

33. The table below presents the spend levels under the two appraisal methodologies (beauclair and visitor surveys) applied to this level of footfall, and generates the average blended rate across the two methodologies, expressed over the whole Christmas Market period, which is explored further below.

Footfall uplift	Spend (Beauclair)	Spend (Surveys)	Spend (blended)
786,850	£17.61m	£157.05m	£84.18m

34. Profiling this blended spend throughout the week in line with 2025 city centre footfall volumes generates the following data over the full period of the Christmas Market's operation:

Day of week	% Footfall	Resulting spend over Christmas Market period	Average spend per day
Mondays	10.79	£9.05m	£1.62m
Tuesdays	12.4	£10.42m	£1.87m
Wednesdays	12.9	£10.85m	£1.95m
Thursdays	12.27	£10.35m	£1.86m
Fridays	15.33	£12.95m	£2.32m
Saturdays	21.47	£18.06m	£3.24m
Sundays	14.85	£12.5m	£2.24m
TOTAL	100	£84.18m	

35. These figures allows for a high-level understanding of how spend is spread over the week, to allow consideration of the impact of a rest day for the Market. On the basis of this data, Mondays are the quietest day of the week where economic impacts may be reasonably assumed to smallest. However, Mondays have an important relationship with overnight stays, with many extending visits over the weekend and into a Monday, generating spend within the hospitality trade and supporting the sector. Mondays also see some closures or shortened operating hours amongst independent food and beverage outlets, cultural attractions, and banks, reducing the positive accessibility benefits that might flow from a rest day, in terms of ability to best use the city centre.

36. Tuesdays and Thursdays are the next quietest days of the week, with a similar estimated spend of £10.42m and £10.35m respectively. There is expected to be a degree of displacement of activity from the rest day, to other days of the week when the market operates - if a Thursday were selected as the rest day, it might be expected that a significant proportion of this would displace to a Friday, adjacent to the weekend. This is an already busy weekday, when transport network congestion is heightened. On this basis and their broadly equivalent modelled economic impact, a Tuesday rest day would be preferential to a Thursday. This option is explored in more detail below.

37. It is difficult to establish the degree to which that element of footfall and spend which is generated just by the Christmas Market on the rest day would simply 'switch' to an alternative day of the week on which the market is operating (and therefore spend would be retained overall in the city centre). Sensitivity analysis has been undertaken and is summarised below to illustrate a range of scenarios in this respect. In terms of the degree of 'switching' of this footfall and spend to alternative days of the week rates of 25%, 50% and 75% have been modelled.

		Resulting loss of spend (financial and as % of total Christmas Market period estimated spend)
% market users displaced to alternative days from the rest day	25%	£7.82m 5.62%
	50%	£5.21m 3.75%
	75%	£2.6m 1.87%

38. This analysis shows an impact in the worst modelled scenario (where only 25% of those who would usually visit on a Tuesday decide to visit the city on an alternative day of the week), £7.82m of spend would be lost in the city centre over the market period (or 5.62% of the total City Centre Spend). These figures also don't allow for any uplift in general spend by residents etc in permanent

establishments, that would be generated by increased patronage of the city centre on rest days, which may be significant.

39. In terms of broader economic factors, it is important to note as well that the impact of the rest day option is anticipated to include the displacement of some trips to alternative days of the week. These additional trips on other weekdays would result in increased traffic volumes, with an impact on network operations, and an economic cost of delay (though accepting that the network operates at or over capacity already for much of the Christmas Market period). It is not possible to assess and monetise this impact at this time, but as part of the trial nature of the recommended rest day, this could be assessed over the operation of the 2026 event.

40. The assessed range of economic impact is not insignificant, in both percentage and monetary terms, and would be felt across the city centre economy where pressures are already being felt by businesses as a result of macro-economic conditions, rises in labour and fixed costs through factors including inflation and National Insurance changes, and impacted consumer demand. These are important factors that should be weighed when making a decision, against the benefits to residents, visitors and those with accessibility needs that will flow from any change.

41. As well as purely economic considerations, there are a range of wider factors too that must be taken into account in making a decision. There is a need to ensure that any changes to the hours of operation are very well communicated to guard against potential reputational damage to the city from visitors being unaware of rest days and visiting the city with the expectation that the market is operating. Make it York have a communication budget which can be deployed to this activity, and close working with the Council's Communications team would be proposed to maximise reach and impact. With the city centre reverting to a 'Business as Usual' mode during the rest days, there would be a slight increase in operational staffing requirements for Hostile Vehicle Measures etc, these requirements are achievable and financial costs noted in the financial strategy section. The change would have an impact on the direct income generated by the event, and Make it York have indicated that whilst this is manageable, there may need to be some reduction in services such as Visitor Information on rest days to accommodate this pressure.

Financial Strategy Implications

42. The presented options and scenarios to amend the operating hours or days of the Christmas Market would have limited direct financial impact on the Council. Parking income could be impacted in some of the options presented, though council operated car parks already operate at capacity at key times over the Christmas period, and as noted in the report, the direct impact that the Christmas Market plays in driving activity at an already busy time of year is not readily determinable.
43. The Christmas Market plays an important function in the overall commercial performance of the City Centre. Maintaining a vibrant trading environment in the city is critical to attracting and sustaining city-centre businesses. A failure to effectively support city centre events could lead to a decline in York's high street.
44. The recommended option will increase the accessibility of the city centre. There is also a likelihood that displaced market visitors will visit the market on days when it is open, increasing the footfall and spend on those days. There would be additional operational staffing costs associated with the option, of around £1,000, which would be managed from existing budgets.

Consultation Analysis

45. Previous public consultation on Blue Badge access to the city centre received over 3,000 responses. The findings of this consultation were re-presented at Annex C of the October 2025 Executive report on Christmas Market. Further engagement has been undertaken since this time, with two specific engagement meetings in January 2026 (involving both York Disability Rights Forum and York Access Forum) at which the options to explore operating hours of the market in more detail were raised. Additional ongoing dialogue and conversations with key stakeholders, organisations and individuals has taken place to inform this report.
46. The rest day approach has been shared with York Access Forum and York Disability Rights Forum, who both broadly support the proposal for the rest day. Formal consultation on the proposed permanent ATTRO is also currently being undertaken and will be reported to Executive in due course. Engagement has been

undertaken with business representative organisations, and would be continued as proposals are worked up in more detail. Concerns have been flagged by some of these groups around the economic impact of changes, and the need for effective communications to avoid abortive visits on rest days.

Organisational Impact and Implications

47. These are set out below.

- Financial

As set out in the body of the report, the potential direct financial impact to the Council is limited to the Council's car park income and staffing costs associated with running the markets, which are recharged to event operators where possible. A trial run of the preferred approach for 2026 will allow for an analysis of the impact on the Council ahead of the permanent decision.

- Human Resources

There are no HR Implications contained within this report

- Legal

It is understood that the proposals align with footstreet hours under the permanent Traffic Regulation Order (TRO) for the area. In the event of any amendments to any existing TRO being required they would need to be effected in accordance with the Road Traffic Regulation Act 1984 and any other relevant statutory procedures.

- Procurement

Whilst there are no direct procurement implications relating to the report itself, procurement may be a tool used to deliver any priorities that arise. All works and/or services must be procured via a compliant, open, transparent, and fair process in accordance with the council's Contract Procedure Rules and where applicable, the Procurement Act 2023. Further advice regarding the procurement process and development of procurement strategies

must be sought from the Commercial Procurement team. For any modifications to existing contracts, both Commercial Procurement and Legal Services must be consulted to follow the formal variation process set out within the contracts held.

- Health and Wellbeing

Public Health support the recommendations within the report. Noting that any large gathering (especially in winter months) where people are in close quarters warrants messaging about 'catch it, bin it, kill it' and to promote the provision of hand sanitiser by stall holders for the use of visitors to the Christmas Market.

- Environment and Climate action

No climate change impacts have been identified

- Affordability

Improved access to the City centre will allow access to banks and other facilities for support and information.

- Equalities and Human Rights

The Council needs to take into account the Public Sector Equality Duty under Section 149 of the Equality Act 2010. This is a duty to have due regard to the need to eliminate discrimination, harassment, victimisation and any other prohibited conduct; advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it and foster good relations between persons who share a relevant protected characteristic and persons who do not share it in the exercise of a public authority's function.

An Human Rights & Equality Assessment (HREA) has been carried out and is annexed to this report at Annex A. The recommendation of the assessment is there be no major change to the proposal.

- Data Protection and Privacy

The data protection impact assessment (DPIAs) screening questions were completed for the recommendations and options in this report and as there is no personal, special categories or criminal offence data being processed to set these out, there is no requirement to complete a DPIA at this time. However, this will be reviewed following the approved recommendations and options from this report and a DPIA completed if required.

- Communications

This is an issue of significant local community and media interest and any changes to the operation of the market will require coordinated communications activity. As set out in the report, additional funding to help us reach key audiences will support a clear message to the community about access times outside the operating hours of the market.

- Economy

The Christmas Market generates significant footfall and spend as summarised in this report, helping to sustain the city centre economy and key sectors. The impacts of changing the operating hours of the market are complex, and reduction in the days of operation will impact on footfall and spend, with a net reduction anticipated. The report seeks to quantify this across a variety of datasets, to establish a range of impact. The range identified is between £2.6m and £7.82m, this is a significant impact, particularly in the context of broader pressures on businesses operating in affected sectors. Spend levels over the period are significant though at over £100m, and it is expected that as well as Christmas Market users still visiting on non-rest days, a degree of compensatory uplift in the baseline resident spending in the city centre will take place on the rest days. The economic impacts and risks of the approach should be weighed against the benefits that will result from the proposals.

Risks and Mitigations

Risk	Mitigation
Rest days to the Christmas Market could result in more significant revenue losses for traders than assessed.	Analysis has taken place to apportion visitor spend against visitor numbers during the market period. A day has been chosen that is deemed to have the least impact on trade in the city.
Visitors to the city may be unaware of the rest day, causing negative publicity for the Council.	A communications and marketing strategy, in partnership with Make It York, is recommended ahead of time to ensure that visitors are aware of the changes.
Vehicle restriction measures may still be required to be in place, even during the rest day of the market.	This would only be in exceptional circumstances such as in relation to specific known intelligence, and is an underlying 'condition' of the city centre at all times of year. Close dialogue with security advisors and protocols around management of events to be maintained.
Risk of terrorism attack – whilst partners will provide advice on the approach to the Council, ultimately it is the Council who are the decision maker and have responsibility.	Close collaborative working relationship with partners, robust risk analysis and mitigation approach.

Wards Impacted

Whilst city centre events and the protected area are hosted within specific wards, they are used by residents of all wards.

Contact details

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Annexes

- Annex A: Human Rights Equity Assessment (HREAT)