

During September 2022, York city centre experienced a 16% reduction in footfall with respect to the previous month, and a 27% increase compared to September 2021. Visitor demographics are overall consistent with the previous month, but showing a slightly higher proportion of visitors aged over 55 and a reduction in 1-time visitors.

Footfall

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Footfall is measured by the number of visits detected by the presence sensor located in the city centre. This metric is presented at the monthly (Fig.1) and daily levels (Fig.2), together with location benchmarks (Fig.3).

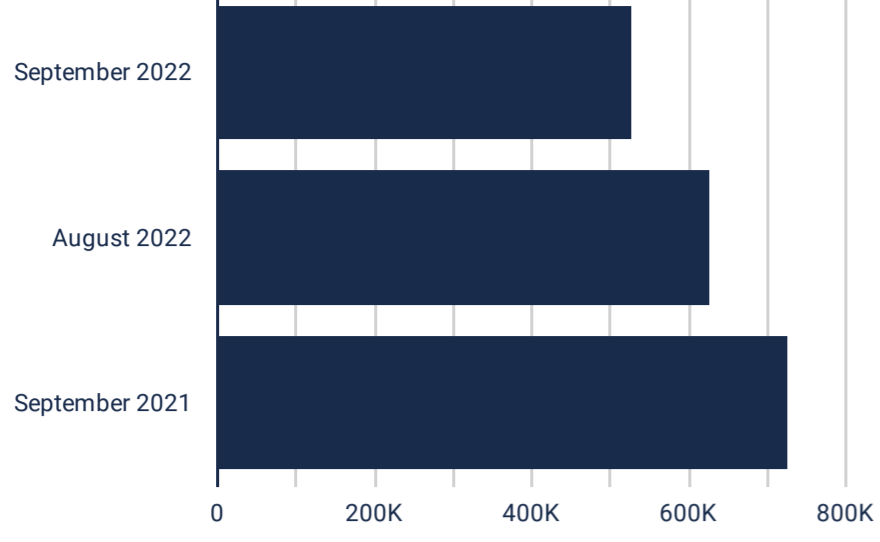


Fig.1. Number of monthly visits to the site.

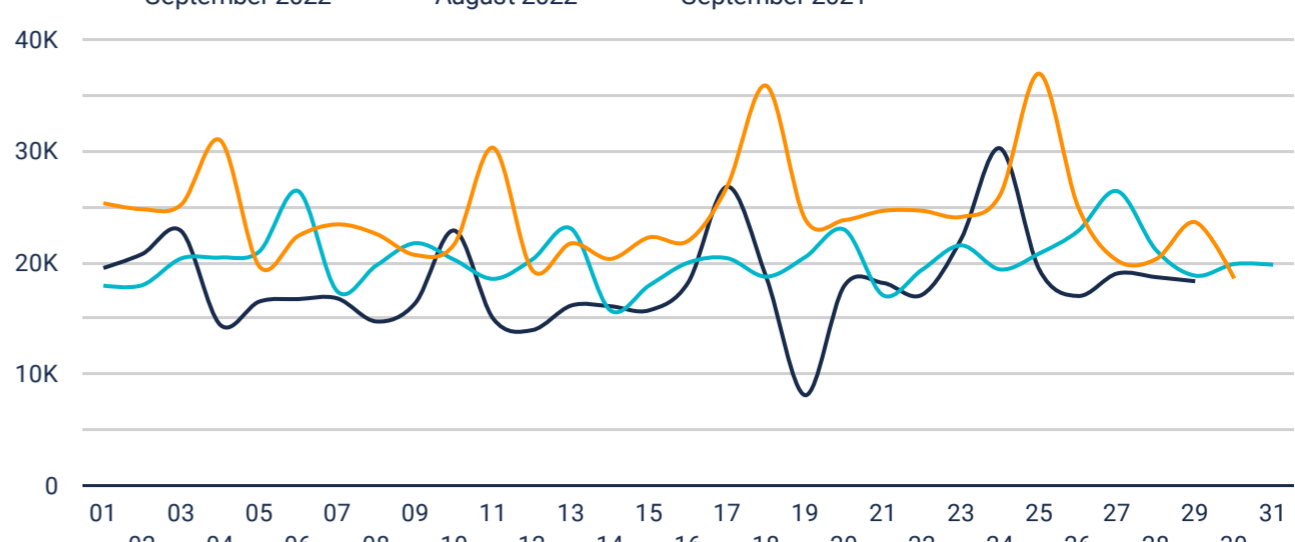


Fig.2. Number of daily visits to the site.

The monthly footfall in September has seen a 16% decrease in respect to the previous month.

The daily average number of visits per week remained in line with the "average client" pattern throughout the last 3 months.

Comparison of Average Visits

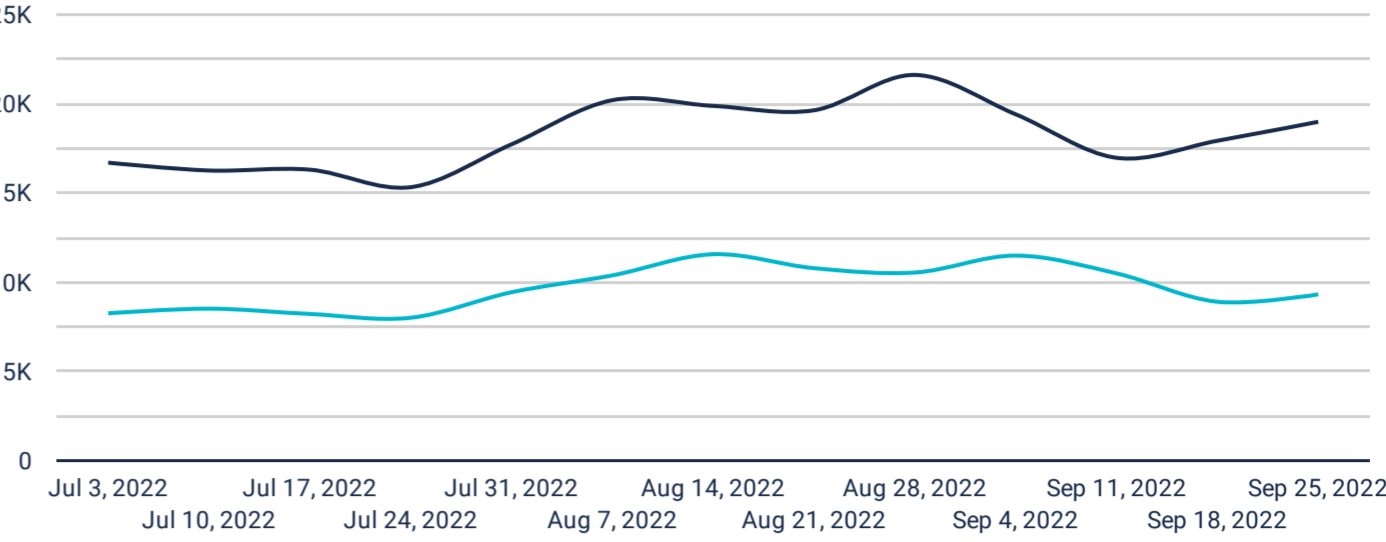


Fig.3. Daily average number of visits by week and city throughout the past 3 months.(1)

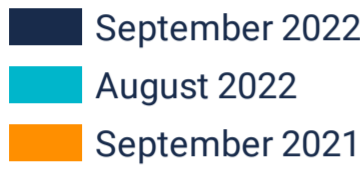
Visitors to the City Centre

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A number of features are understood for the users sighted by the presence sensor. Their distributions by month are presented here.

September 2022 presents no significant changes from the previous month. However, the following modest changes can be noted:

- A slight increase in the proportion of visitors aged over 55.
- An decrease in the proportion of 1-time visitors



Age

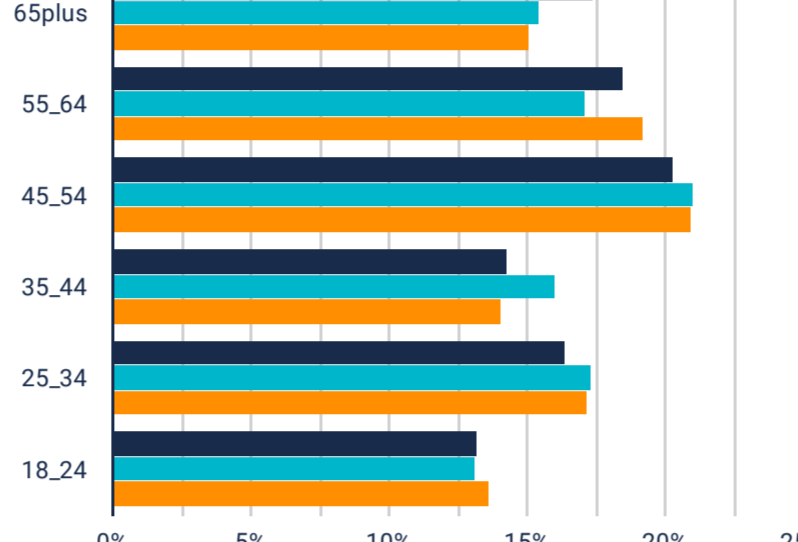


Fig.4. Age profile by month.

Spend Power

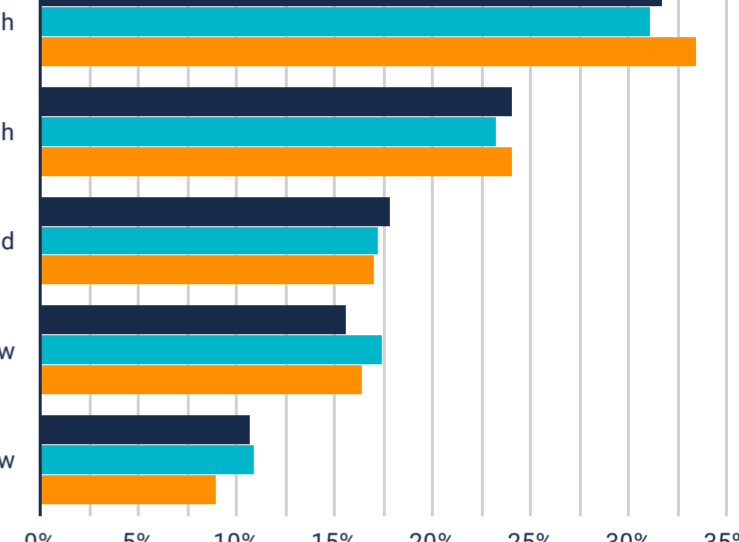


Fig.5. Spend Power profile by month. Spend power measures potential spend comparing to the regional score. (2)

Visit Frequency

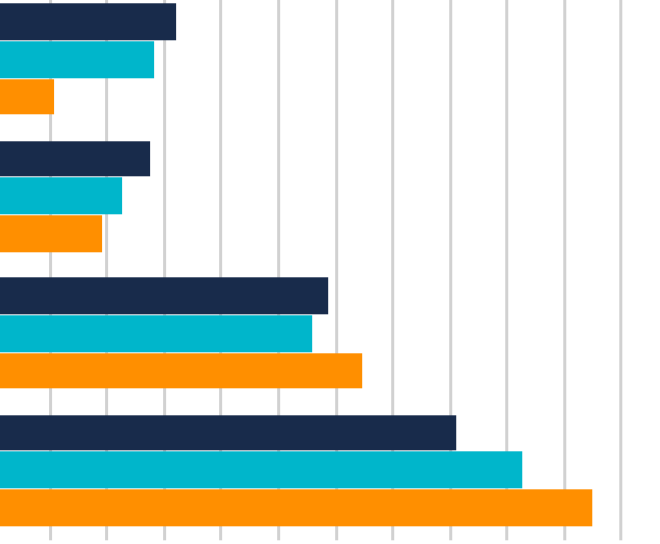


Fig.6. Visit Frequency profile by month. Visit frequency is defined as the number of unique days a person visits the vicinity of the presence sensor in a month.

Gender

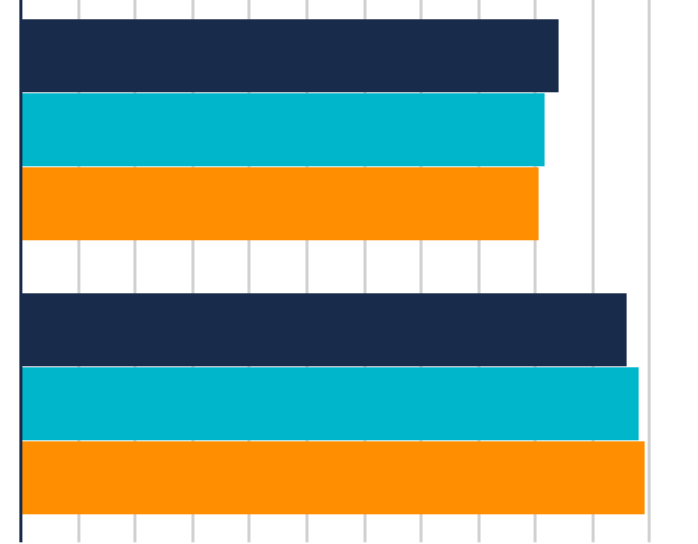


Fig.7. Gender profile by month.

Time of Arrival

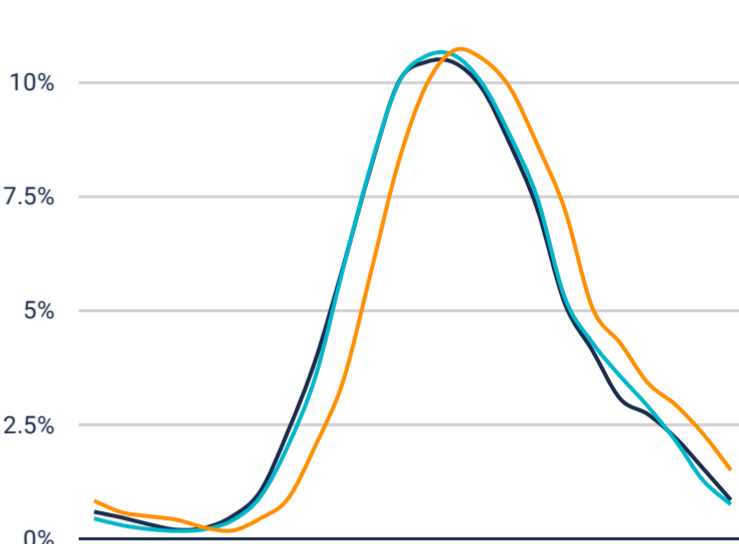


Fig.8. Time of arrival in the city centre for the month. Hour of day for first time sightings.

Where Do Visitors Come From?

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Mobile data allows us to understand where visitors to the city centre have come from. This is shown below at local authority level (Fig.9) and postcode sector level (Fig.11). A distribution by distance to the small cell displays in Fig.10.

The local authority of York gathered 37% of visits, while it represented 34% the previous month. 48% of the users sighted live within 0-10km to the site. Long distance visitors represented 35% of the distribution.

| Local Authority | 2022-09 | 2022-08 | 2022-07 |
|-------------------|---------|---------|---------|
| York | 37% | 34% | 39% |
| Selby | 5% | 5% | 5% |
| Hambleton | 4% | 4% | 4% |
| East Riding of... | 4% | 4% | 5% |
| Harrogate | 4% | 4% | 4% |
| Leeds | 3% | 3% | 3% |
| Ryedale | 2% | 2% | 2% |

Fig.9. Top home local authority catchment locations by month. Data sorted by latest month.

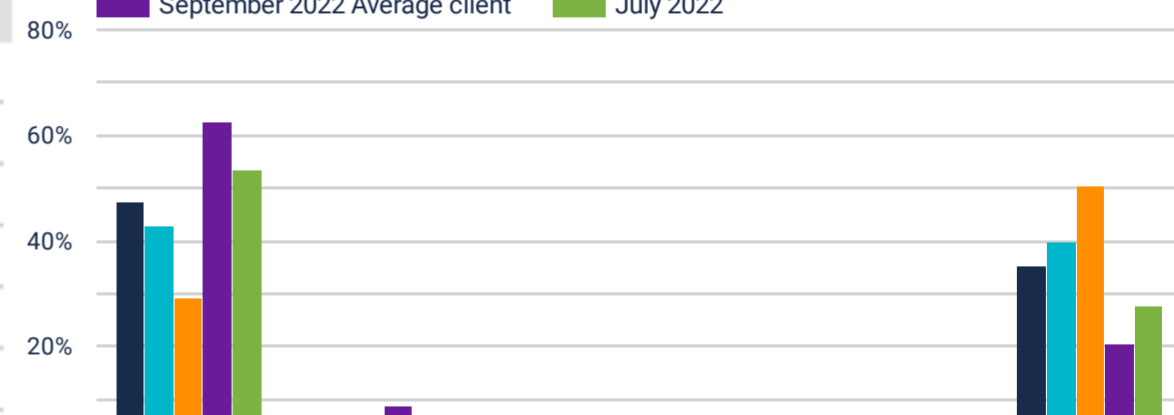


Fig.10. Distribution of distance to user's home location.

Visitor Home Locations

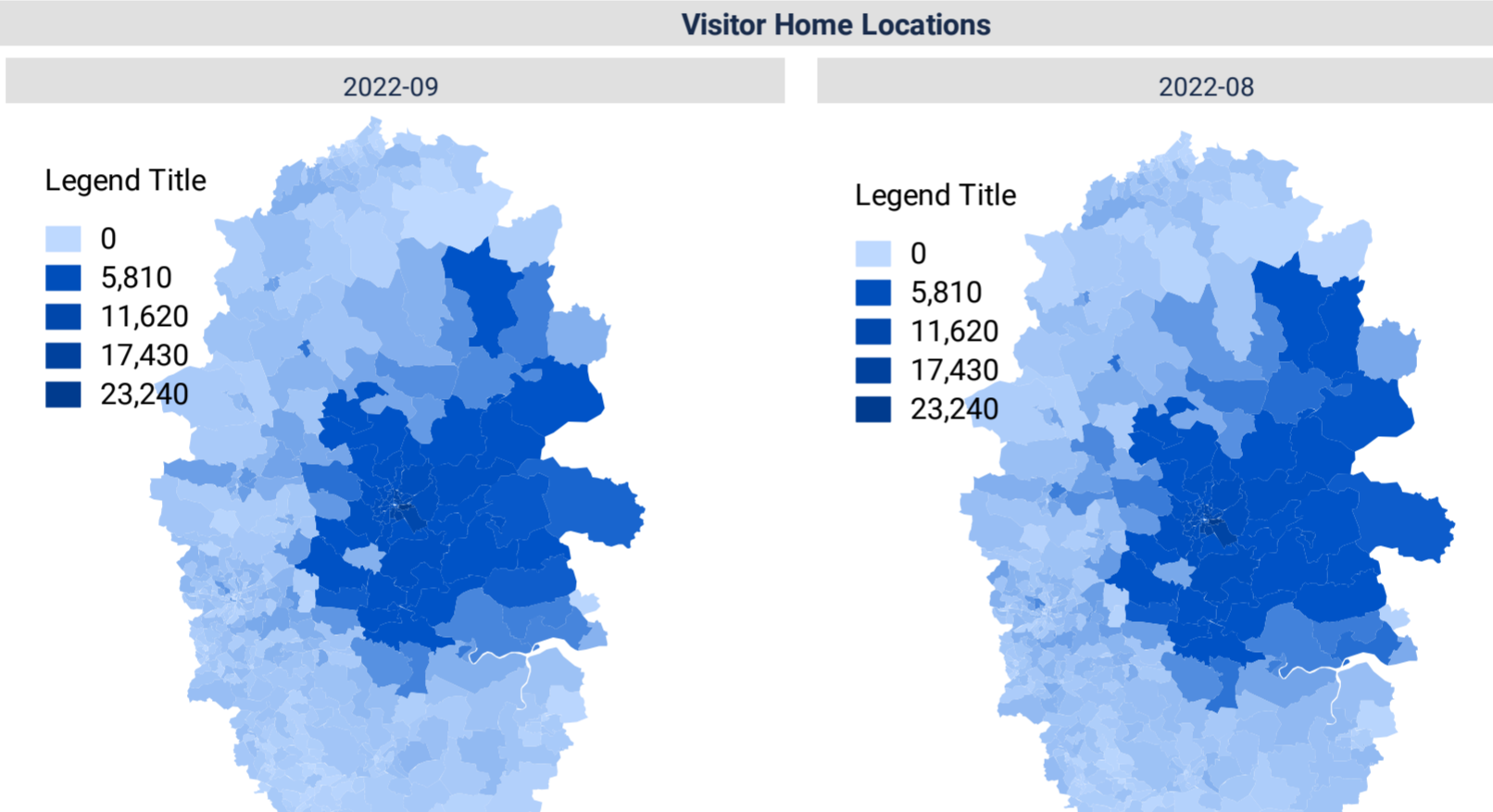


Fig.11. Number of users detected by the presence sensor by their inferred home location. (3)

Spend Data LAST UPDATED JUNE 2022

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The following totals represent spend with merchants and on VISA cards in the city centre. All the figures below refer to the postcode district YO1, except for Fig.16 and Fig.17, where insights refer to the post town of York. This data will only be updated on a quarterly basis as it is released by Visa.

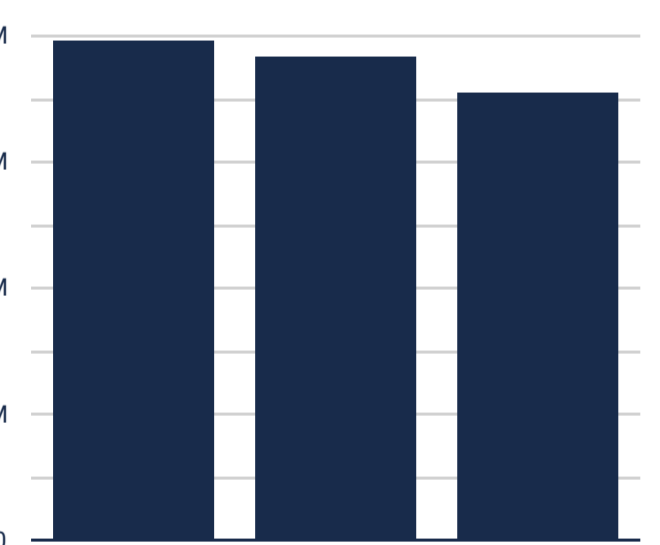


Fig.12. Total spend with city businesses in pounds by quarter.

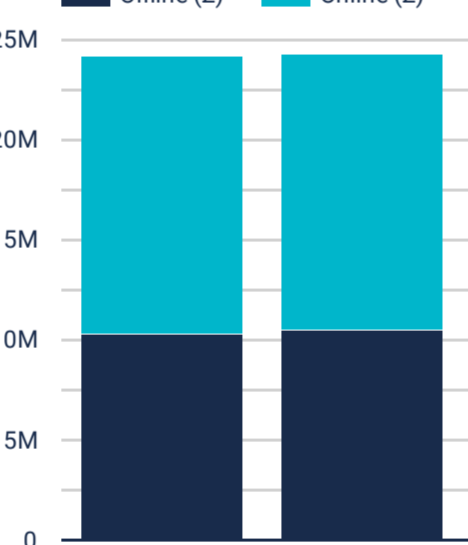


Fig.13. City resident spend with offline and online businesses by quarter.

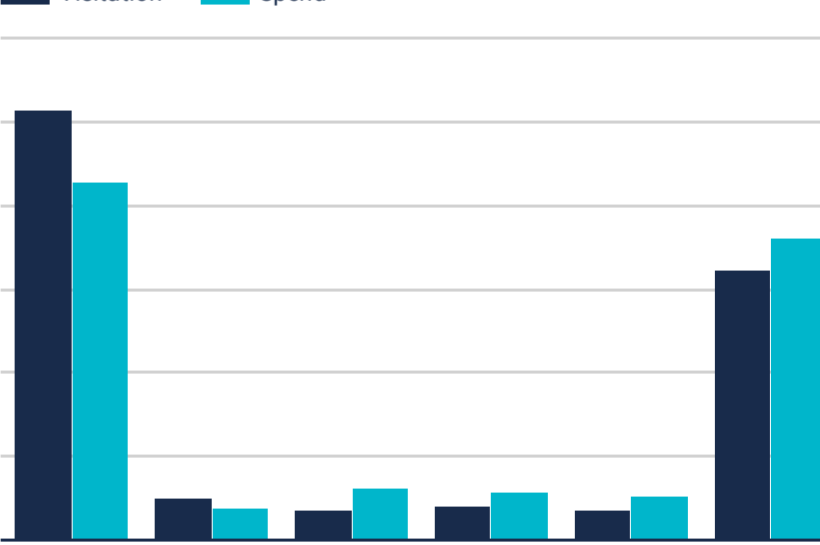


Fig.14. Visits and spend in the city centre by origin in last quarter. Visitation data is powered by o2.

| Category | Total Spend (£) | | | Average Spend (£) | | |
|---------------------|-----------------|-----------|-----------|-------------------|--------|--------|
| | 2022Q4 | 2022Q5 | 2022Q6 | 2022Q4 | 2022Q5 | 2022Q6 |
| Restaurants | 8,943,610 | 8,199,307 | 7,508,816 | 18.5 | 17.6 | 17.7 |
| Retail & High St | 3,274,225 | 3,371,418 | 3,274,396 | 29.9 | 32.1 | 31.5 |
| Clothing | 2,334,023 | 2,323,906 | 2,106,140 | 43.7 | 44.0 | 41.8 |
| Hotel/Accommodation | 949,273 | 992,216 | 940,413 | 64.2 | 65.7 | 64.1 |
| Food & Drink | 441,650 | 406,374 | 382,068 | 8.2 | 7.9 | 7.8 |
| Wholesale | 360,819 | 331,122 | 298,852 | 50.1 | 43.7 | 42.1 |
| Personal Services | 270,091 | 266,765 | 268,286 | 44.8 | 42.3 | 43.2 |

Fig.15. Total spend and average spend per transaction in city centre by top 7 categories. Table sorted by latest quarter.

Where Does Spend in the City Come From?

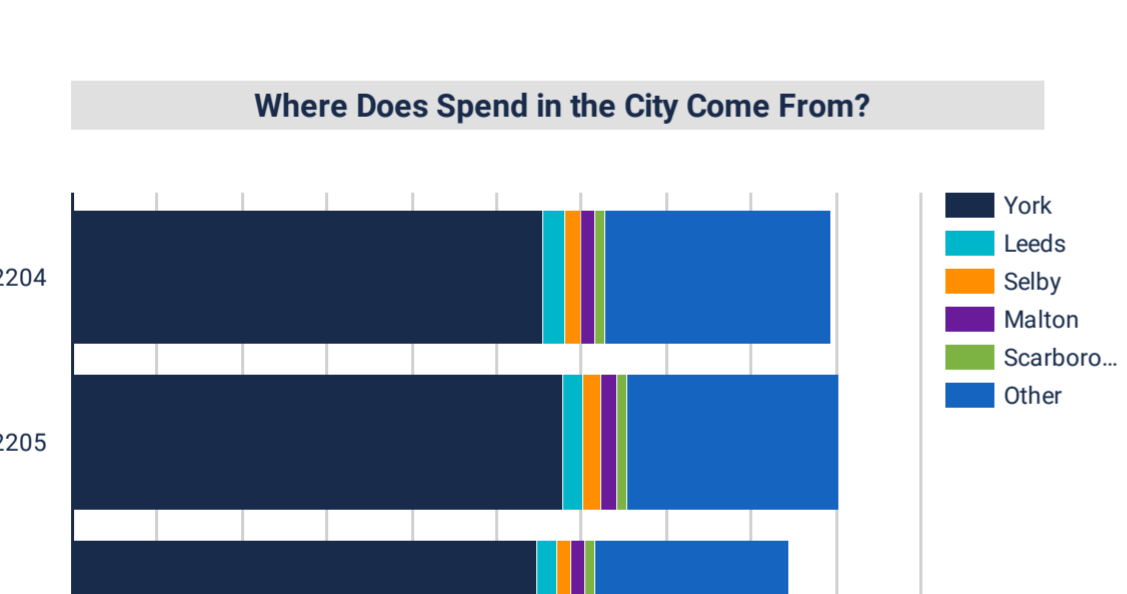


Fig.16. Visa spend in post town by origin. Only the top 5 origins by timeframe are shown.

Where Do City Residents Spend?

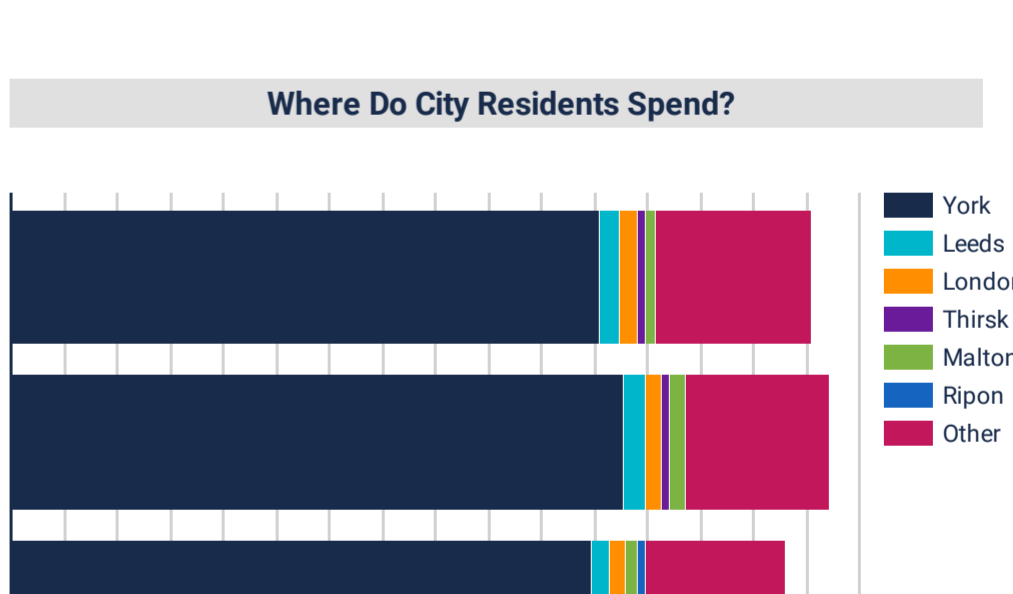


Fig.17. Visa spend from post town residents by destination of spend. Only the top 5 destinations by timeframe are shown.

Visitor Spend by Home Postcode

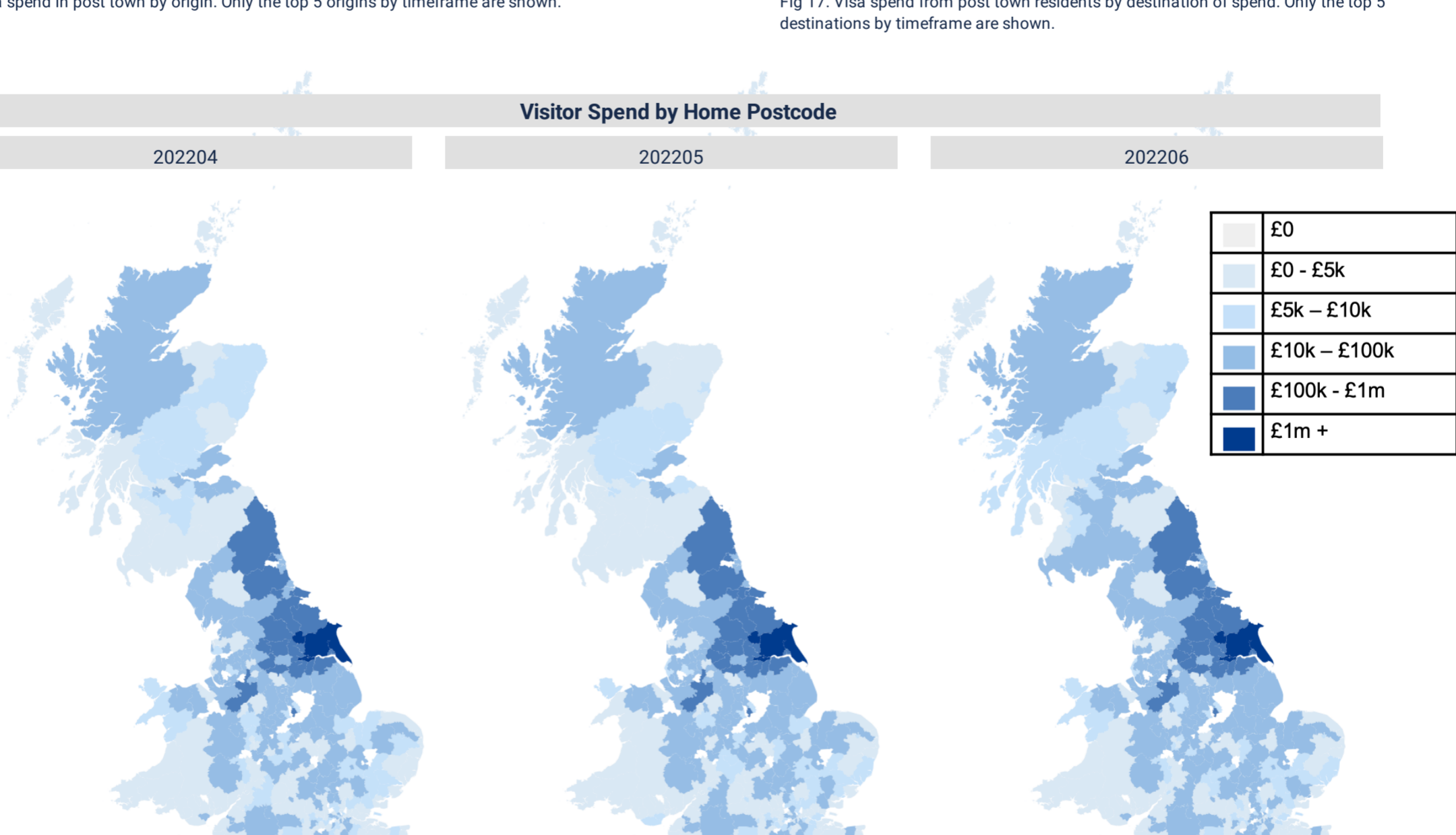


Fig.18. Spend in city centre by postcode district of origin.

Social Media

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Tweets related to the city are pulled and analysed. Fig.19 shows the volume of tweets by week for the last months together with their average positive/negative rating. This rating ranges between -1 (most negative) and 1 (most positive). Fig.20 shows a word map of the terms most frequently used in the last month.

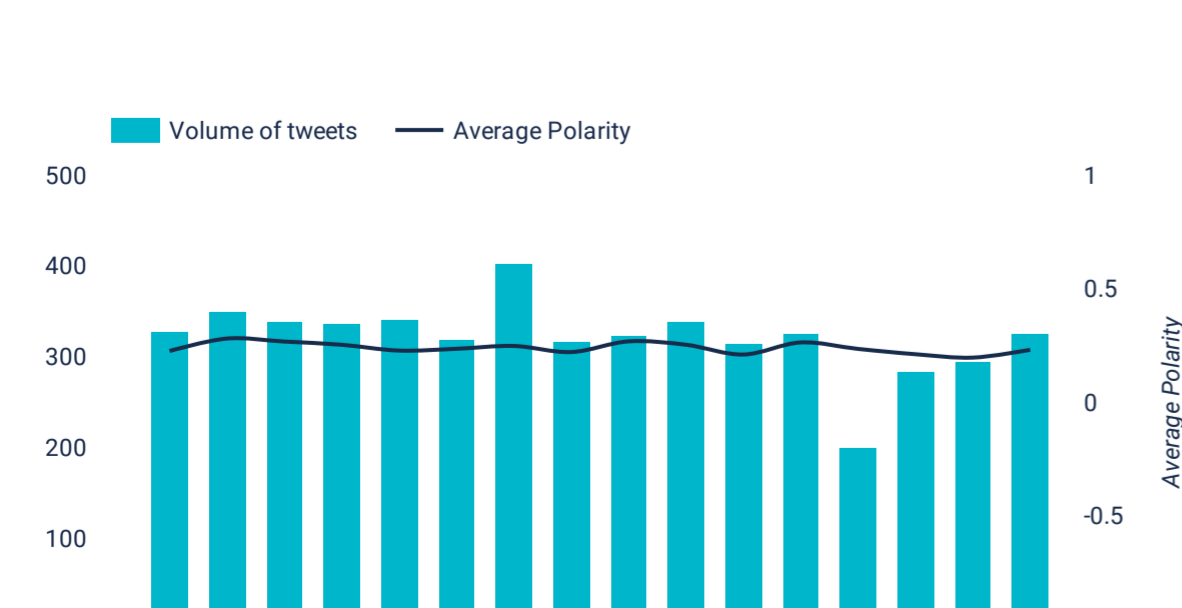


Fig.19. Weekly volume of tweets and their average positive/negative rating.

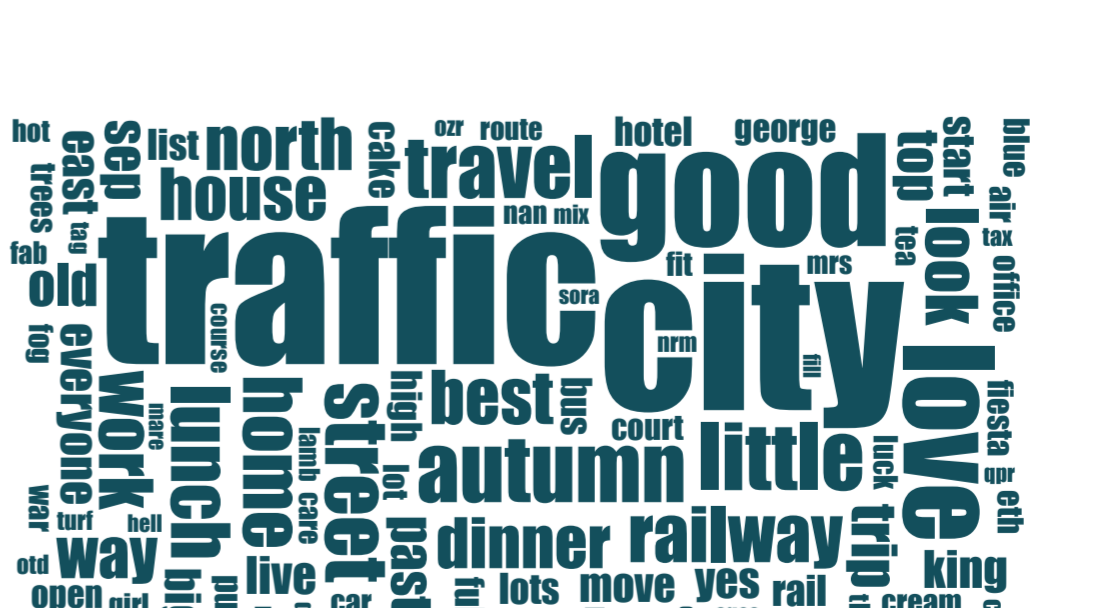


Fig.20. Word cloud for the month.

Background - About the Data and Limitations

The mobile phone device of o2 users establishes connection with the presence sensor when passing near it. In the process, the presence sensor identifies the device and O2 provides Movement Strategies (A GHD company) with anonymised, aggregated and GDPR compliant data of the visitors. Advanced modelling is applied to extrapolate volumes to all presence in the city, not just those on the O2 network. This is a novel dataset, currently in use by a limited number of BIDs in UK. It supplements traditional footfall information by understanding 'who is the visitor'.

1. The 'Average client' includes combined insights from presence sensors in Bath, Bristol, Belfast, Giant's Causeway, York, Manchester and Liverpool.
2. Spend power is derived through a combination of several measures (e.g. mobile device cost, frequency of upgrade, home postcode and a number of other behavioural inputs).
3. Due to privacy constraints, postcode sectors from which the visitation at the site is lower than 10 people are shown as 0.

Bespoke reports and further information are available to levy payers on request.