



QUARTERLY TOURISM DASHBOARD

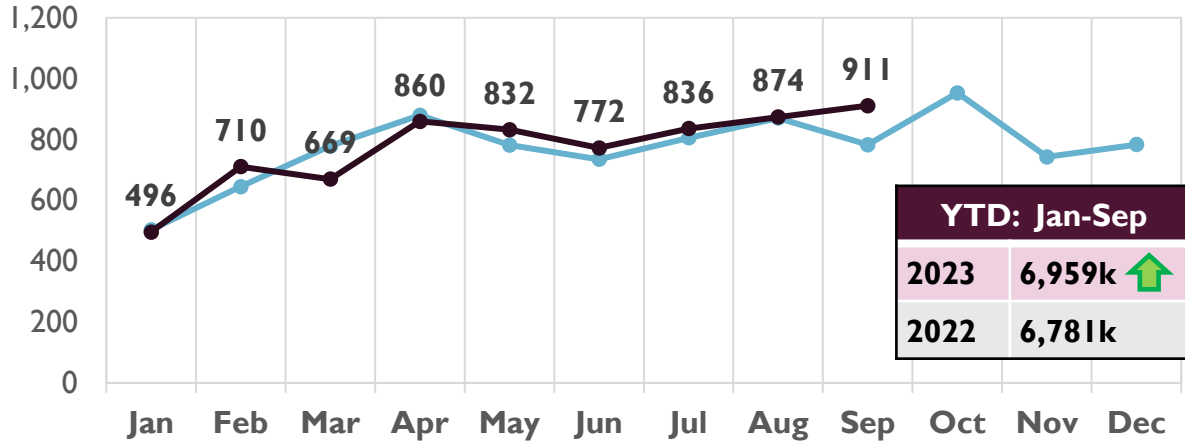
JULY TO SEPTEMBER
2023

| Indicator | This year: Jul-Sep 2023 | vs. last year: Jul-Sep 2022 | vs. pre-Covid: July-Sep 2019 | Summary |
|---|----------------------------|--------------------------------|---------------------------------|---|
| <i>City Centre Footfall (Source: Springboard data via City of York Council)</i> | | | | |
| Total Footfall: Parliament Street & Micklegate | 2,620,154 | +7% | -12% | <ul style="list-style-type: none"> Over 2.6 million footfall counts were recorded on Micklegate and Parliament Street during July to September of this year, an increase of 7% vs. last year. However, current footfall performance is still down 12% compared to 2019 September was the busiest month on Parliament Street, possibly driven by the higher than average temperatures Micklegate footfall has also increased compared to last year, with August the busiest month |
| Total Parliament Street Footfall | 1,989,218 | +6% | -13% | |
| Total Micklegate Footfall | 630,936 | +7% | -9% | |
| <i>VIC (Source: Visit York)</i> | | | | |
| VIC Footfall | 36,772 | -36% | -64% | <ul style="list-style-type: none"> Footfall is down 36% compared to July to September last year, though issues with the footfall trackers has resulted in recorded figures for this year being lower than actual figures. New footfall trackers are due to be installed. |

* City centre footfall data is not based on the British Retail Consortium Calendar, so varies slightly from the Footfall Reviews produced by Springboard

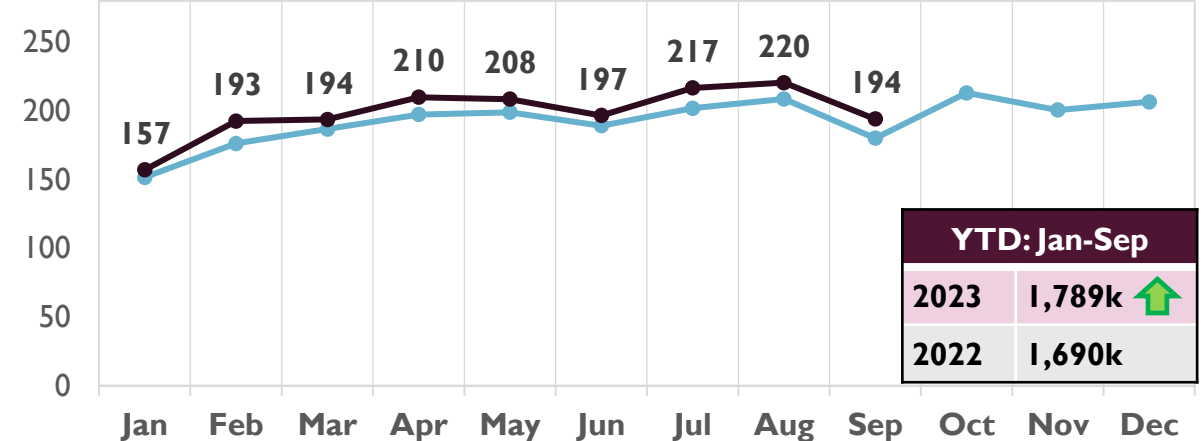
Total City Centre Footfall (000s)

— 2022 — 2023



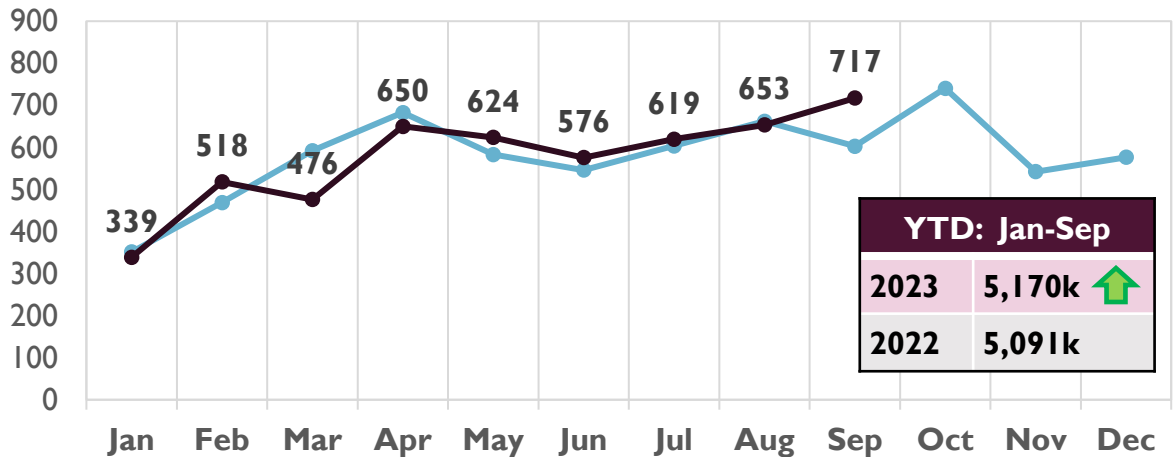
Micklegate Footfall (000s)

— 2022 — 2023



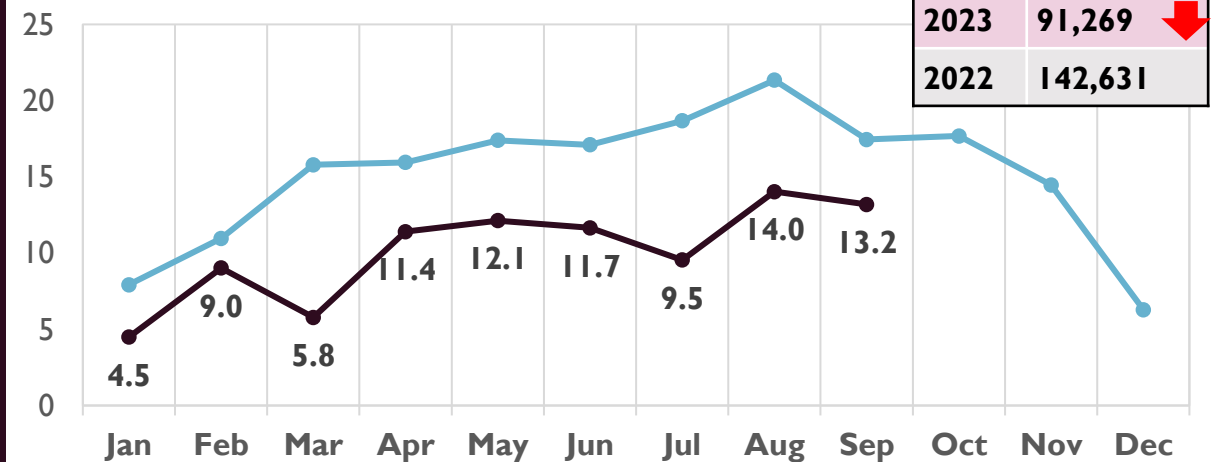
Parliament St. Footfall (000s)

— 2022 — 2023



VIC Footfall (000s)†

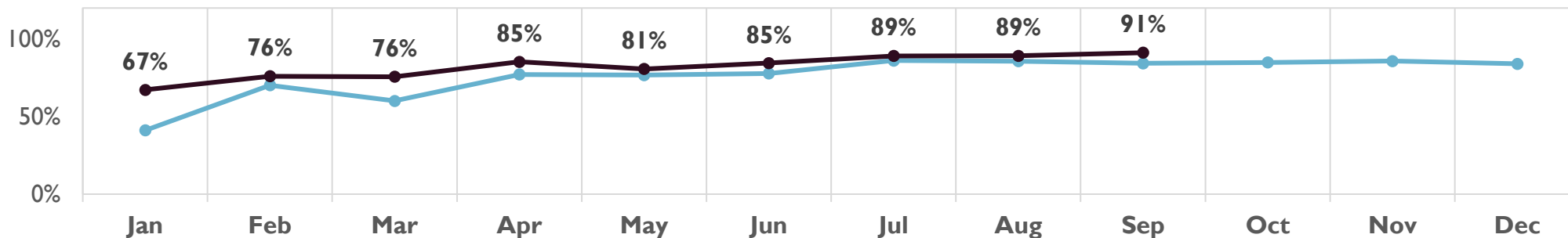
— 2022 — 2023



†Footfall counter issues have negatively impacted counts

| Indicator | This year: Jul-Sep 2023 | vs. last year: Jul-Sep 2022 | vs. pre-Covid: July-Sep 2019 | Summary |
|--|----------------------------|--------------------------------|---------------------------------|--|
| Hotel Accommodation (Source: STR data via Hospitality Association York (HAY)) | | | | |
| Average Occupancy | 90% | +5% | -3% | <ul style="list-style-type: none"> Average hotel occupancy rose to 90% for July to September, only slightly below the average of 92% recorded in 2019 ADR increased by an average of £8 compared to summer 2022, while RevPAR increased by an average of £11 vs. last year Both ADR and RevPAR have increased by at least 25% vs. 2019 |
| Average Daily Rate (ADR) | £115 | +7% | +28% | |
| Average Revenue Per Available Room | £103 | +11% | +25% | |
| Self-Catering Accommodation (Source: AirDNA data via T-Stats) | | | | |
| Average Occupancy | 80% | +3% | +3% | <ul style="list-style-type: none"> Average Airbnb occupancy rose to 80% for the period July to September 2023, compared to vs. 78% in both 2022 and 2019 Although ADR is largely unchanged, increased occupancy has resulted in a 15% increase in monthly revenue per available room compared to July to September last year Both ADR and Monthly RevPAR are significantly higher than in 2019 The number of active listings reached their highest level in August, but then dropped back slightly in September to 2,138. Overall, active listings have grown by 28% since 2019, an increase of almost 500 properties listed on Airbnb |
| Average Daily Rate (ADR) | £141 | -1% | +37% | |
| Monthly Revenue Per Available Room | £4,040 | +15% | +64% | |
| Average No. of Active Listings | 2,161 | +3% | +28% | |

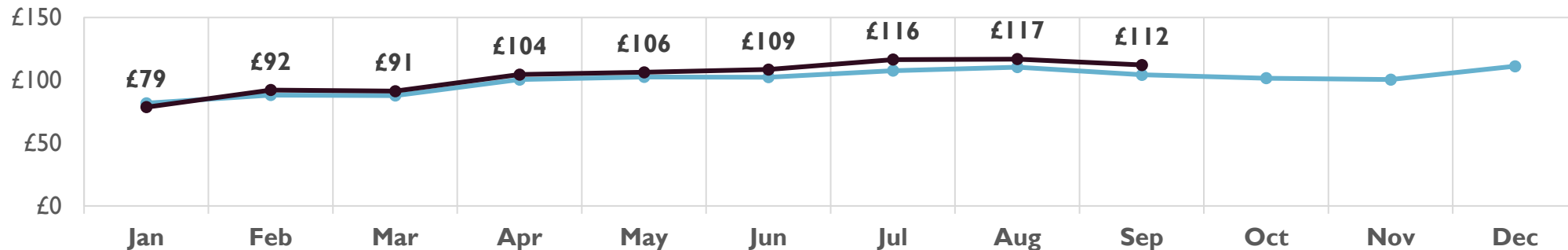
Average hotel room occupancy



| YTD: Jan-Sep | | |
|--------------|-----|---|
| 2023 | 82% | ↑ |
| 2022 | 73% | |

● 2022 ● 2023

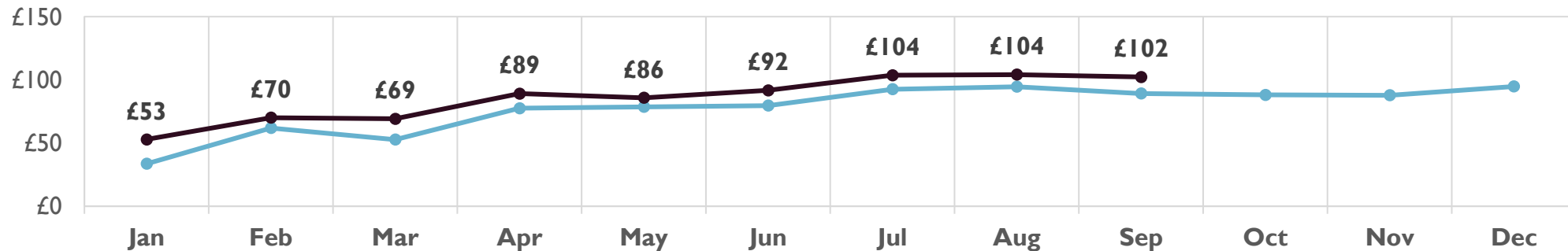
Average hotel daily rate per room (ADR)



| YTD: Jan-Sep | | |
|--------------|------|---|
| 2023 | £103 | ↑ |
| 2022 | £98 | |

● 2022 ● 2023

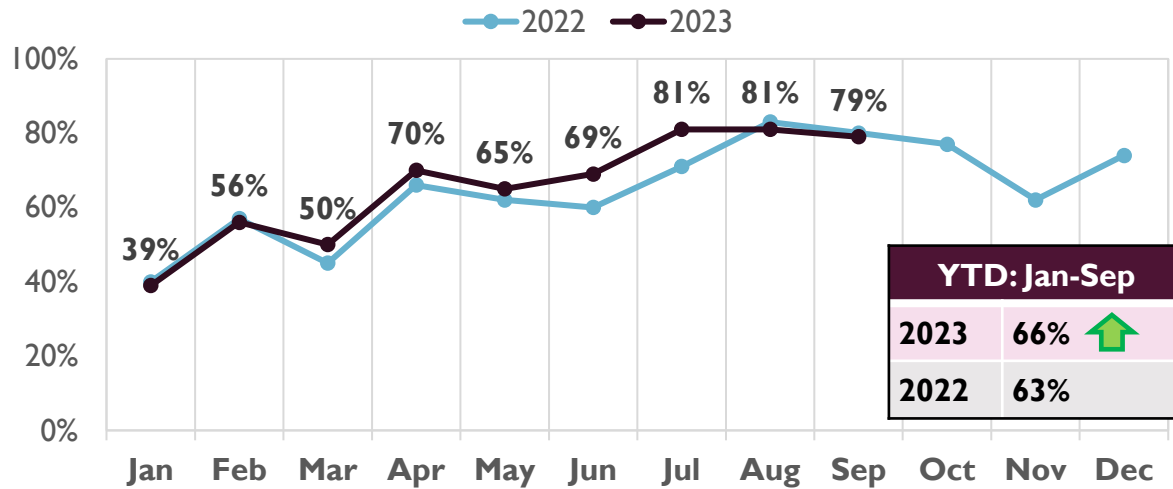
Average hotel daily revenue per available room (RevPAR)



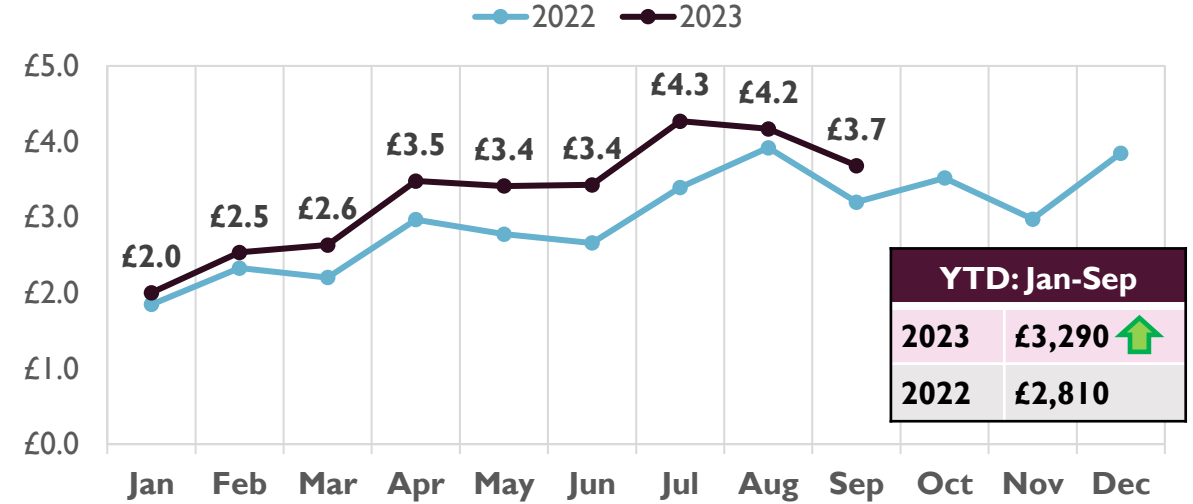
| YTD: Jan-Sep | | |
|--------------|-----|---|
| 2023 | £85 | ↑ |
| 2022 | £73 | |

● 2022 ● 2023

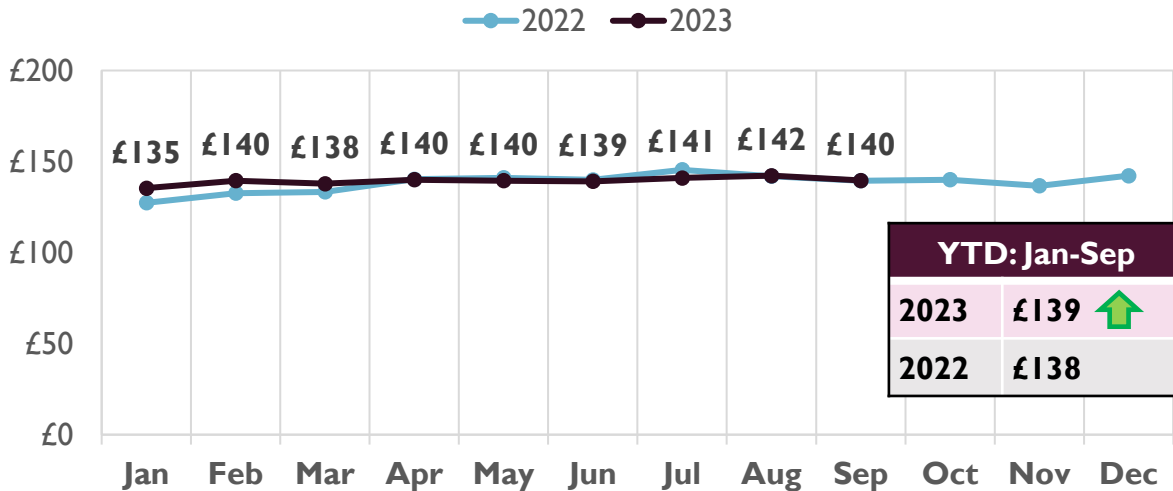
Average Airbnb occupancy (%)



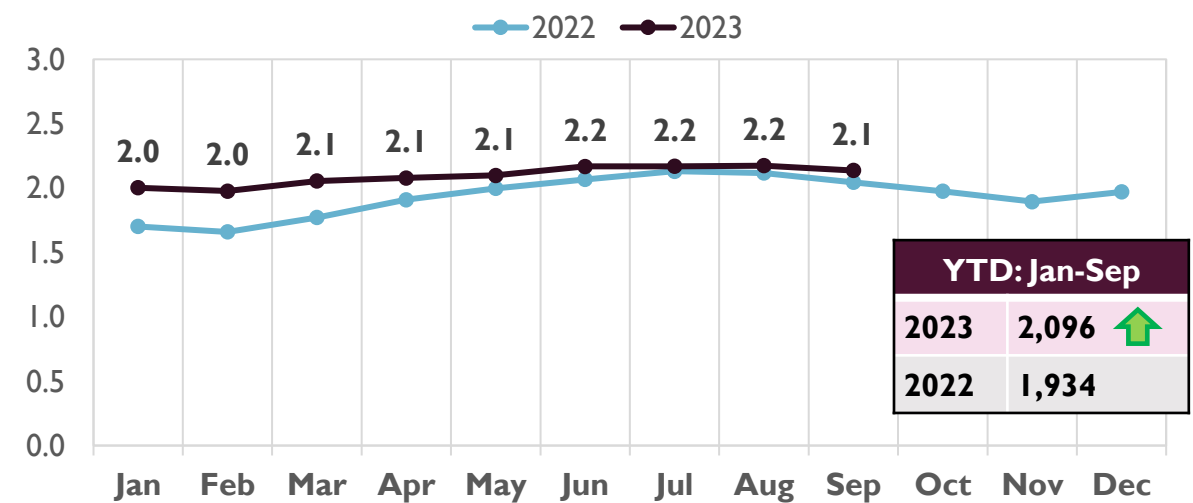
Average Airbnb Monthly RevPAR (£ thousands)



Average Airbnb ADR (£)



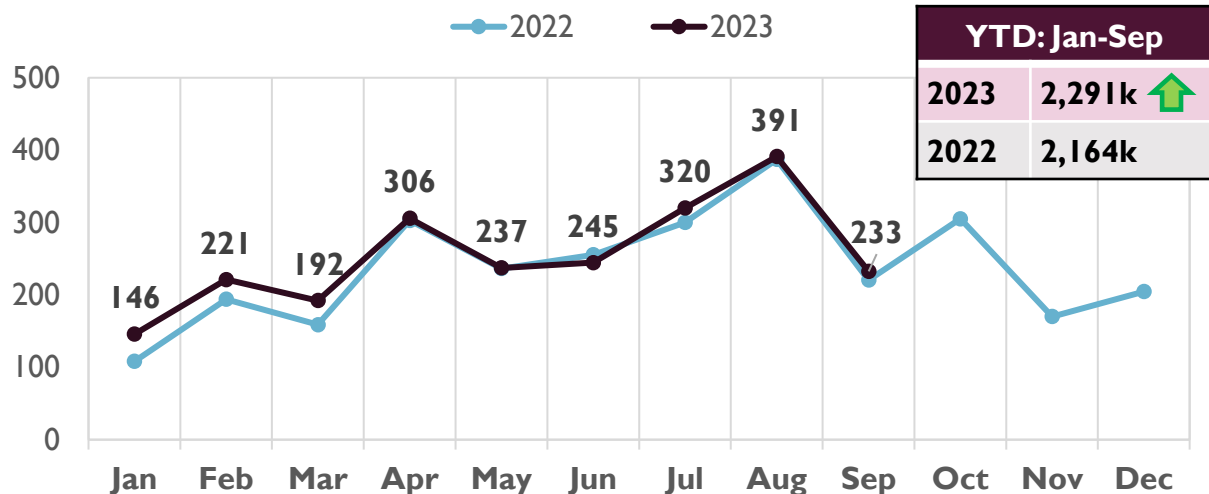
Average Airbnb listings (thousands)



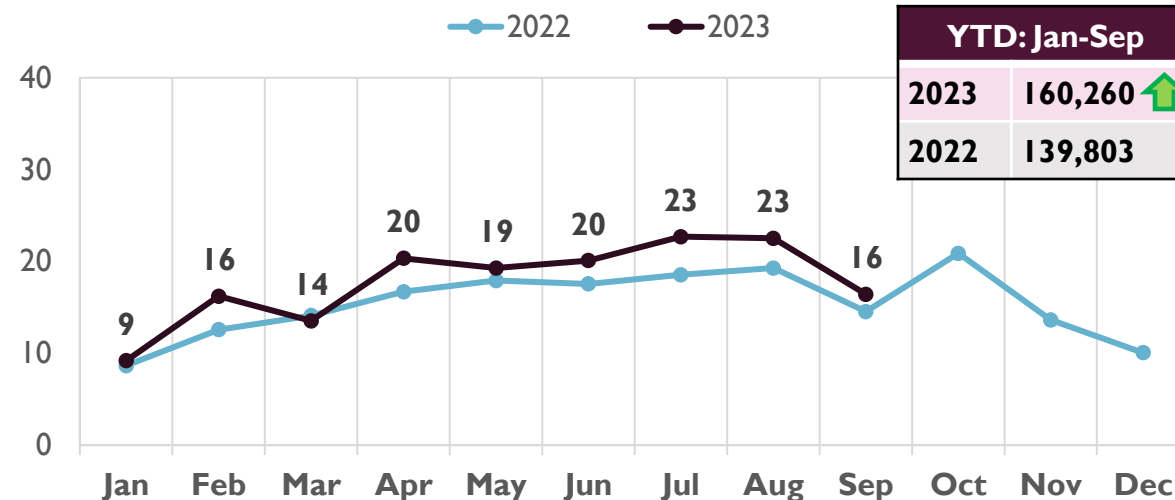
| Indicator | This year: Jul-Sep 2023 | vs. last year: Jul-Sep 2022 | vs. pre-Covid: July-Sep 2019 | Summary |
|--|----------------------------|--------------------------------|---------------------------------|--|
| <i>Attraction Visits (Source: 23 York based visitor attractions)</i> | | | | |
| Total Visits to Big Attractions (n=12) | 882,169 | +3% | -10% | <ul style="list-style-type: none"> • Visits to big attractions in York during July to September have increased slightly since last year, due to increased visits in July and September. August was by far the busiest month, in line with 2022 • Small attractions have seen the biggest percentage increase in visitor numbers since last year, but are still performing below 2019 levels. Most attracted the most visitors in August, though attractions popular with school groups had more visits in July • Overall, there were almost one million visits to attractions in York between July and September, almost 90% of the visits seen in 2019 |
| Total Visits to Small Attractions (n=11) | 61,634 | +18% | -27% | |
| Total Visits to York Attractions (n=23) | 943,803 | +4% | -11% | |
| <i>York Pass (Source: Visit York)</i> | | | | |
| Visits to attractions using a York Pass | 15,454 | -31% | -52% | <ul style="list-style-type: none"> • York Pass use has fallen by almost a third compared to July to September last year, and by half since 2019 |

* Small attraction figures are unlikely to recover fully as changes to the visitor flow at NT properties have reduced the target for visitor numbers by half

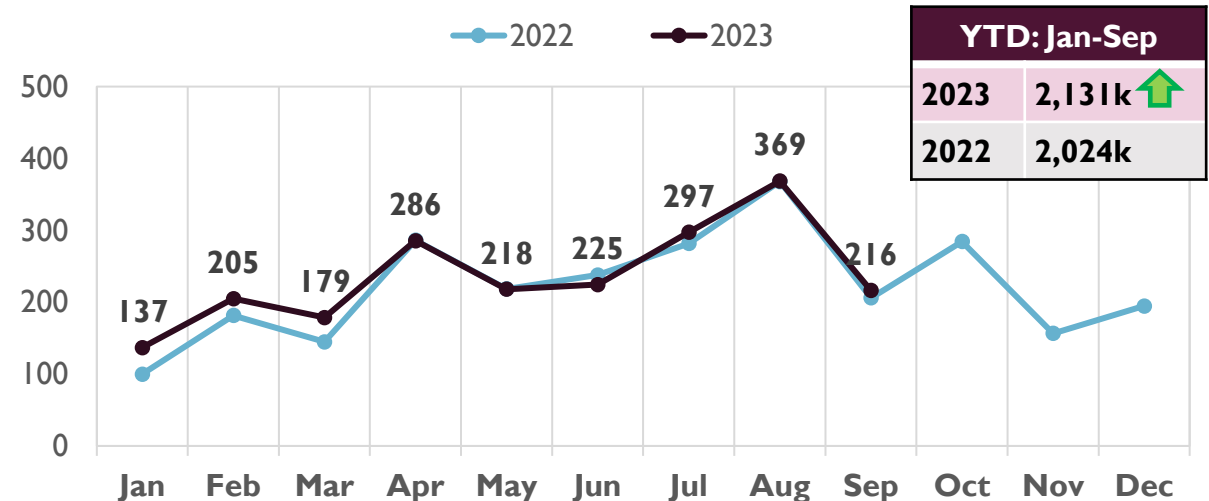
Visits to all 23 York Attractions (000s)



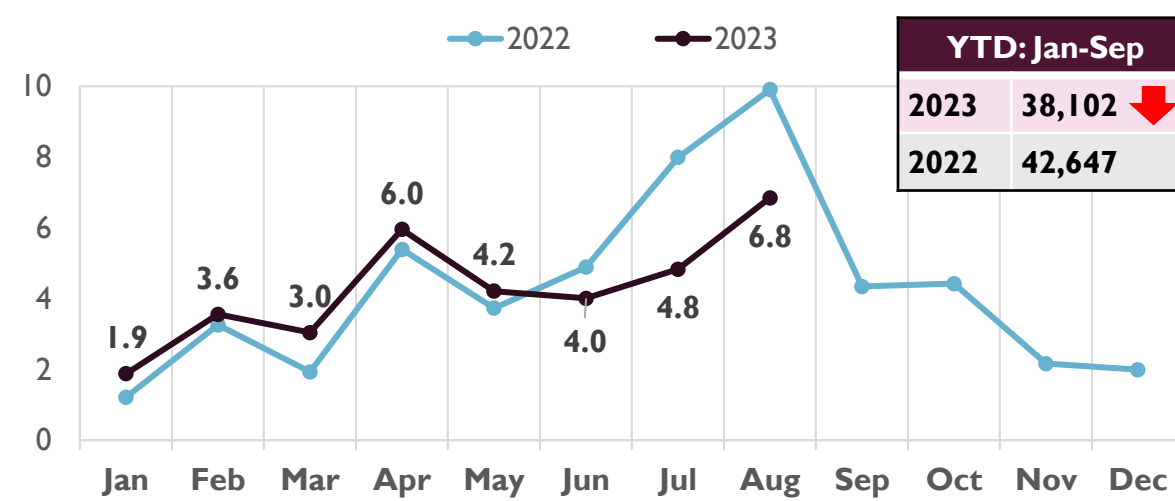
Visits to 11 York Small Attractions (000s)



Visits to 12 York Big Attractions (000s)



Visits to attractions using a York Pass* (000s)



*Some attractions may not yet have submitted their York Pass figures