

Nationwide **BID** Business Improvement Districts SURVEY 2016



Produced by **BritishBIDs**™



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Supporting organisations:



EXECUTIVE SUMMARY



The scale of change impacting on our town centres and the remodelling required is unprecedented. Many town centres require re-shaping, with change being driven by the impact of the recession, the over-supply of retail floor space, and shifts in consumer behaviour. It is within this environment that the increased focus on town centres should be viewed. They deliver a wide range of benefits to communities, both in terms of jobs and growth and by strengthening social cohesion. Economic benefits include; development regeneration, business start-ups, investment in new facilities, strengthened

footfall and trade, increased employment and greater revenue through business rates. In addition, social environmental impact strengthens local identity, creates greater distinction, develops pride and ownership, changes behaviour (for instance through reducing crime) and improves community engagement, health and the skills base of the local population. Recent research has highlighted the importance of urban centres, identifying them as home to one in three jobs and one in four companies. Town centres matter!

The challenge looking forward is to provide the framework and support necessary to oversee and manage the pace of change being experienced by our urban centres. At best, Business Improvement Districts (BIDs) make an invaluable contribution, facilitating sustainable business engagement and providing strong leadership at local level, however their quality is mixed. Chairing a BID myself I know how challenging it is to maintain high levels of business engagement; however with turnouts in excess of 70% and support above 90% Heart of London BID has established a clear and consistent mandate from its members through three terms of delivery. Strong and on-going levels of business engagement is a 'must have' not a 'nice to achieve'. Looking forward, BID transparency, governance and review processes need to be strengthened both nationally and locally if business support and trust in BIDs is to be maintained.

The retail sector once again welcomes the Nationwide BID Survey, recognising its role in providing both invaluable information, and the opportunity to gain an insight into how BID models are evolving and developing across the UK.

Andy Godfrey
Public Policy Manager Boots UK

INTRODUCTION



This 10th 2016 Nationwide Business Improvement District [BID] Survey was undertaken on behalf of key industry partners: Revo, Association of Convenience Stores (ACS), British Property Federation (BPF) and British Retail Consortium (BRC). In addition, for the first time, this year's survey is being undertaken in conjunction with the Association of Town and City Management (ATCM) to ensure the widest possible reach across the whole BID industry. The survey covers all BIDs across the UK and Ireland irrespective of membership of either British BIDs or ATCM.

It was undertaken at an interesting time in UK political history, with the referendum to leave the European Union taking place toward the end of the Survey, following a new government the previous year and newly elected in Mayors in some key cities, including London. It also took place at a time of some change in the British BIDs environment. After some years of growth British BIDs, as part of CMS, becomes primarily a service provider organisation and the membership elements move to the ATCM, who become joint sponsors of this Nationwide BID Survey.

BIDs are very much a worldwide phenomenon, with research and critical evaluations emerging in various centres of excellence. The Furman Centre New York University has produced a policy paper on the benefits of BIDs in New York¹ and a major collection of papers was published in 2008, which allows a strategic overview on some of the major issues². Recent papers by Magalhaes³ on the role of BIDs in the recession in the UK, and Coca-Stefaniak on the role of town centre management in Europe⁴ offer new insights into the growth and value of BIDs.

Nationwide surveys of this nature are an important part of the development and strategy of an emerging industry, that bring together all the key actors in town and city centre development. The future depends increasingly on the interactions of retail, professional and hospitality services, the public and the private sectors and this survey evidences that in so many ways. We are reliant on each of the BIDs across the sector to provide both time and data to allow this survey to happen; we now have a decade of data and will look to provide an increasing amount of analysis in future editions. Our grateful thanks go to all of those who were able to help us in so many fashions; we appreciate it enormously.

Professor Chris Turner, University of Winchester
Winchester BID

1. Furman Centre for real estate and urban policy. *The benefits of Business Improvement Districts: evidence from New York city*. <http://furmancenter.org/files/publications/FurmanCenterBIDsBrief.pdf>
2. *Business Improvement Districts: research, theories, and controversies*. Taylor&Francis, 2008.
3. De Magalhaes, C. (2012) *Business Improvement Districts and the recession: Implications for public realm governance and management in England*. *Progress In Planning*, 77 pp. 143-177. 10.1016/j.progress.2012.03.002.
4. Jose Andrés Coca-Stefaniak and others. *Town centre management models: A European perspective*. *Cities*. Volume 26, Issue 2, April 2009, Pages 74-80

THANK YOU

We are delighted to be able to present the 2016 Nationwide BID Survey, presented in a new easier-read format.

This year, we have spoken to more BIDs and gathered more data than ever before. Therefore, it is the most comprehensive assessment of our industry to date and an especially important document, not only for BIDs, but also for local authorities and central government.

The role of British BIDs has been to fund the costs of the study and the production of this report. For this, we would like to thank our subscribers whose contributions make the work possible. The Survey would also not have been possible without the support of others. This year, we are especially grateful to our sponsors, Alliance Boots, and to the ATCM who will be making the findings available to their members for the first time. Thanks to Charlotte-Daisy Ziff and Emily Richards for their research efforts.

Finally, we also take this opportunity to thank Professor Chris Turner who has analysed the data and authored the report. Many of you will know Chris as the former Chief Executive of the Winchester BID, prior to which he was Pro-Vice Chancellor of the City's University.

We hope that you enjoy this year's new-style report.

The British BIDs Team

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Photo: Camden

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BID SURVEY

THE DATA

A questionnaire, using Google Forms, was issued by email and newsletter on Tuesday 10th May 2016 to BID Managers or Chief Executives of all the BIDs in the United Kingdom and Ireland, with a response deadline of Friday 10th June 2016. This data was based in the 2015-16 financial year. BIDs were also engaged in online and telephone research during the month following the survey and further data was gathered by way of the British BIDs Ballot Watch information. These data sets are fluid, as ballots take place and new data is uploaded when British BIDs become aware of it, but the survey has tried to bring together as much relevant data as possible.

The total number of BIDs able to provide data was 216 BIDs, of whom 140 (64%) responded directly to the survey, and a further 76 (35%) BIDs were researched online and by telephone during the month following the survey. Of the total of 216, 192 were Town Centre BIDs and 24 were Industrial BIDs.

A further 11 BIDs were too new to be included in the survey, were not able to provide data or could not be contacted, and are therefore excluded from the final data sets.

For the purposes of the data analysis and presentation, Industrial BIDs have been excluded from most of the sections and are presented separately in their own chapter in this report. They are often smaller and more specialised, with their own needs.

Response rates vary slightly in each of the various sections, as BIDs were more or less able to provide clear, accurate or appropriate data, and this is made clear in the text.

THE ANALYSIS

The report is very consciously statistically focused, showing the means and medians of key data sets, providing histograms and pie charts of the relevant data so that the material can be seen easily and clearly. For many of the data sets the median – the position mid-way along the data distribution and thus representing the level below which half of all BIDs are positioned - is often the most useful.

THE PURPOSE

The purpose and uses of this national survey are multiple. It allows an annual snapshot to be taken of the BID community in the UK and Ireland for policy makers, both local and national; it allows chief executives of BIDs to benchmark themselves against their peers and colleagues; it allows Boards of BIDs to both benchmark and identify key performance indicators for their BIDs; it allows levy payers and members of BIDs to ensure that they are getting all the services that they should, and it allows new developing BIDs to design their services and operations in the most effective fashion.

THE UNITED KINGDOM & IRELAND BID COMMUNITY IN 2016

The United Kingdom and Ireland BID community totalled 279 in August 2016, of which 227 were active, 33 were developing, 4 were going to ballot in the year and 15 were either inactive or yet to ballot.

TABLE 1: Types of BID across the British Isles from the BB Website

Type of BID	1st Term	2nd Term	3rd Term	Developing	Balloting	Grand Total
Commercial	1	3	1			5
Developing				33		33
Food & Drink	1					1
Industrial	8	19	2			29
Leisure	1		1			2
Mixed Area			2			2
Property Owner	3					3
Tourism	3					3
Town Centre	128	51	18		4	201
Grand Total	145	73	24	33	4	279

Accurate at time of research.

UK & IRELAND BID COMMUNITY

Clearly BIDs are regional, reflecting the needs and aspirations of their local business communities. Nonetheless, it is useful to see some key distributions across the British Isles, and the percentages in different areas for both active and developing BIDs.

TABLE 2: Some regional data for active and developing BIDs

Region	Number of BIDs	Percentage of BIDs
London	56	23.0%
Scotland	40	16.5%
Wales	13	5.3%
Birmingham	11	4.5%
Ireland	6	2.5%

NEW BID DEVELOPMENT

The development of BIDs has been impressive since inception of the first BID in 2005. In the past five years new BIDs have come into existence each year:

TABLE 3: 2012-16 Development of BIDs over the past five years

Year	Town BID	Industrial BID	Total
2012	32		32
2013	25	1	26
2014	16	2	18
2015	18	2	20
2016	31	1	32

BID LEVY RATES 2016 TOWN CENTRE BIDS

The BID levy rate is the multiplier of the Non-Domestic rateable value by which the levy amount chargeable is calculated, and is therefore an important issue for many BIDs and their members. The Industry Criteria states that up to 1% is the expected norm, with some allowances made for up to 2% in exceptional circumstances; smaller locations where rateable values are lower and therefore require a higher multiplier to achieve a viable budget. It is the rate that the BID starts with in year one of its current term and quotes in its BID Proposal.

The total sample from Town Centre BIDs for the base levy rate was 187.

Photo: Edinburgh

New BIDs coming in to being in 2016

31 new BIDs came into being in 2015-2016, and there are some ballots still to come. Sadly Torbay and Runcorn failed this time around and this year has also seen an increased number of challenged ballot outcomes.

Developing BIDs

There are also currently 33 BIDs that are in the development stage, with ballots coming up in the next year or so. The Welsh government are providing £203k funding to support the development of 10 BID proposals in Wales.

Second term Renewals

There have been 18 successful second term renewal ballots, and two unsuccessful ones – Derby St Peters, which was only 1 vote away from success, and Beeston.

Third term Renewals

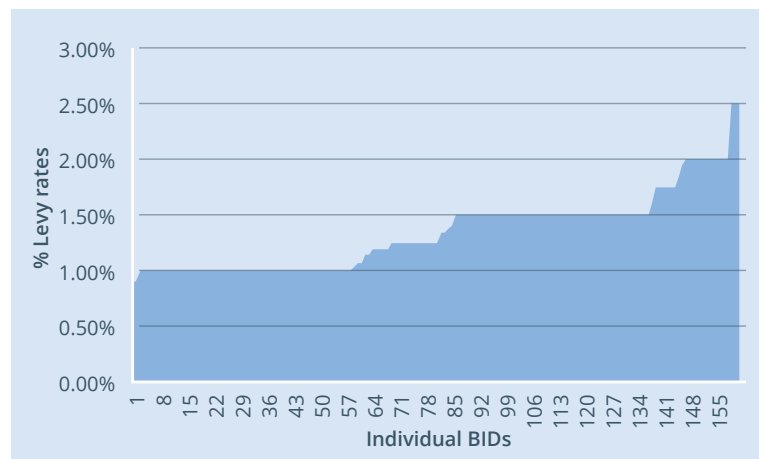
There were 22 successful third term renewals in 2016, with no failures.

TABLE 4: Levy rates for town centre BIDs

Base Levy Rate	Number of BIDs	% of sample
< 1%	1	0.53%
1%	57	30%
<1.5%	27	14%
1.5%	51	27%
<2%	9	5%
2%	12	6%
>2%	3	1.6%
Banded	23	12%
Fixed	2	1%

The highest concentration still remains on the 1% levy rate with 57 (30%) of the total sample; but 1.5% is becoming increasingly popular, with 51 (27%) this year compared to 40 in 2015 and a total of 68% of BIDs operate with a levy rate of greater than 1%, up from 64% last year.

FIGURE 1: Levy rates for individual BIDs



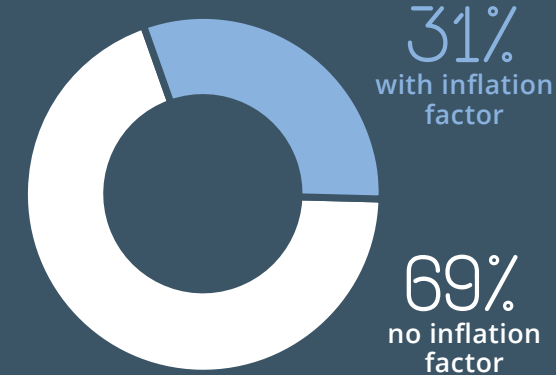
There is also a smaller number that charge using a banded system, particularly in Scotland, with 13 of the 40 (33%) Scottish BIDs having banded levies. The business community traditionally has not generally supported this approach, as it can be viewed as a way of concealing the actual levy multiplier.

There are three BIDs that have a levy rate above 2%, including Birmingham Acocks Green and Clacksfirst, both at 2.5%.



Photo: Acocks Green

FIGURE 2: BIDs using an annual inflation factor for the Levy



ANNUAL INFLATION FACTOR

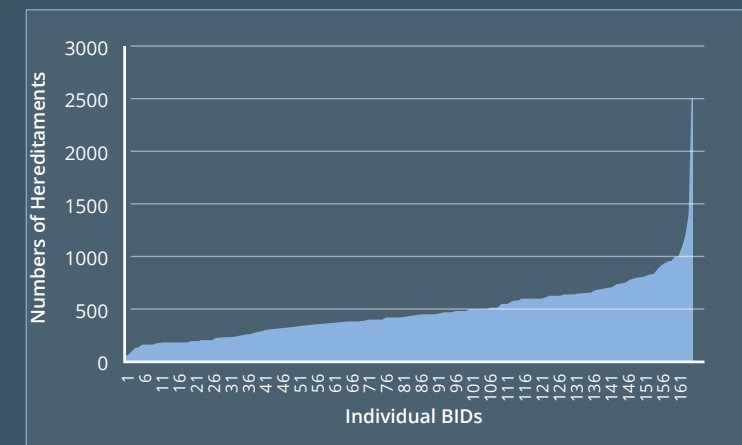
Some BIDs apply an annual inflation factor to the levy multiplier to ensure their income grows each year as their costs grow. Of the 186 responding to this question, there are 58 BIDs (31%) that apply inflation to their base levy rate and 128 (69%) that do not apply an inflation factor. Of those that do; 42 (72%) use 3% or less per annum. Six specify the RPI or CPI, whilst Derby Cathedral uses 3.5%.

BID HEREDITAMENTS

The number of hereditaments represents the number of properties of business levy payers or voters within the BID area, based on rateable business properties on the Non-Domestic rating list.

The distribution of hereditaments for the 164 BIDs responding to this question is shown. The majority of BIDs have below 500 hereditaments; most of the remainder are between 500 and 1000: and the median, that is the BID that is midway in the distribution, has 433 hereditaments.

FIGURE 3: Number of hereditaments in individual BIDs



From the sample the typical number of hereditaments falls between 300 and 600, with twelve BIDs falling above 800 and five with over 1000 hereditaments.

TABLE 5: Numbers of hereditaments grouped by frequency

Hereditaments by size group	Numbers of BIDs
Under 200	23
Up to 400	48
Up to 600	44
Up to 800	32
Up to 1000	12
Up to 2500	5

TABLE 6: Some measures of hereditaments across the UK

Measures	Nos of Hereditaments
Median	433
Mean	479
Lower quartile	299
Upper quartile	2,500
Total number of hereditaments in the survey	78,549

Thus the total number of hereditaments across all BIDs (excluding industrial) in the survey is 78,549.

TABLE 7: The top 5 BIDs by hereditament

BIDs	Number of Hereditaments
Belfast One BID	1000
The York BID	1087
Greater Yarmouth TBID	1,200
Newcastle NE1 BID	1,400
Dublin City Centre BID	2,500

BID TERM

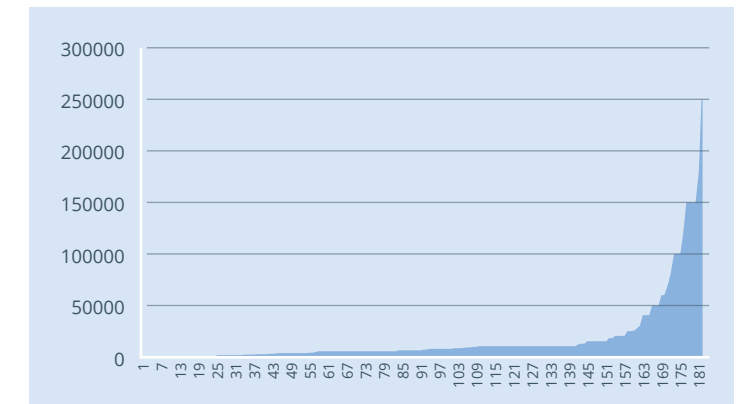
BID legislation allows a maximum term of five years and from 197 responses all these BIDs now operate on a five-year term.

BID THRESHOLDS

A threshold is a rateable value level below which hereditaments are not charged a levy. The main purpose of a threshold is to prevent very small businesses being required to pay small sums of money; and therefore exempting them from the levy whilst still ensuring they benefit from the services. This also ensures that no levy payment is less than the cost of collection.

From the sample of 183 Town Centre BIDs the distribution of thresholds is fairly flat, mirroring the various collection costs across the sector, with 25 having no threshold, the lower quartile being £3000, the median figure being £6250 and then peaks for the larger BIDs.

FIGURE 4: Levy thresholds for individual BIDs



Thus, the median and the bottom and top quartiles – the figures used by the bottom 25% and the top 25% of the sample are:

TABLE 8: Threshold variances

Measure	Amount
Median	£6250
First Quartile	£3000
Fourth Quartile	£250,000

At the top end, three **London BIDs** have a threshold of £100,000; **Birmingham Southside** is at £120,000; four **London BIDs** are at £150,000 and the **New West End Company** has a threshold of £250,000.

Photo: York

BID LEVY DISCOUNTS: CHARITIES

Some BIDs opt to give charities a discount on their levy, although this is becoming less prevalent, especially in relation to discounts on trading charity shops.

Of the 151 responses, 65 (43%) provide no discount of any kind; the others provide some level of discount. 13 BIDs (9% of the total sample) specify that charity shops – that is those acting as retail outlets – are excluded from their discount rule.

TABLE 9: Charity Discounts

Type of Levy discount	Number of BIDs	% of total BIDs
No discount for charities	65	43.0%
100 % Discount for Non-trading charities	24	15.9%
100% Discount for all charities	24	15.9%
Some lesser discount for charities	22	14.6%
Some other formula	19	12.6%

BID LEVY DISCOUNTS: SHOPPING CENTRES

Similarly, some BIDs give a discount to levy payers who are located in a shopping centre or mall, on the grounds that they are often also paying their Landlord a service charge for marketing, security or cleaning. Of the relevant sample of 162 BIDs who have a shopping centre in their area, 129 (80%) do not give a discount to tenants in a shopping centre.

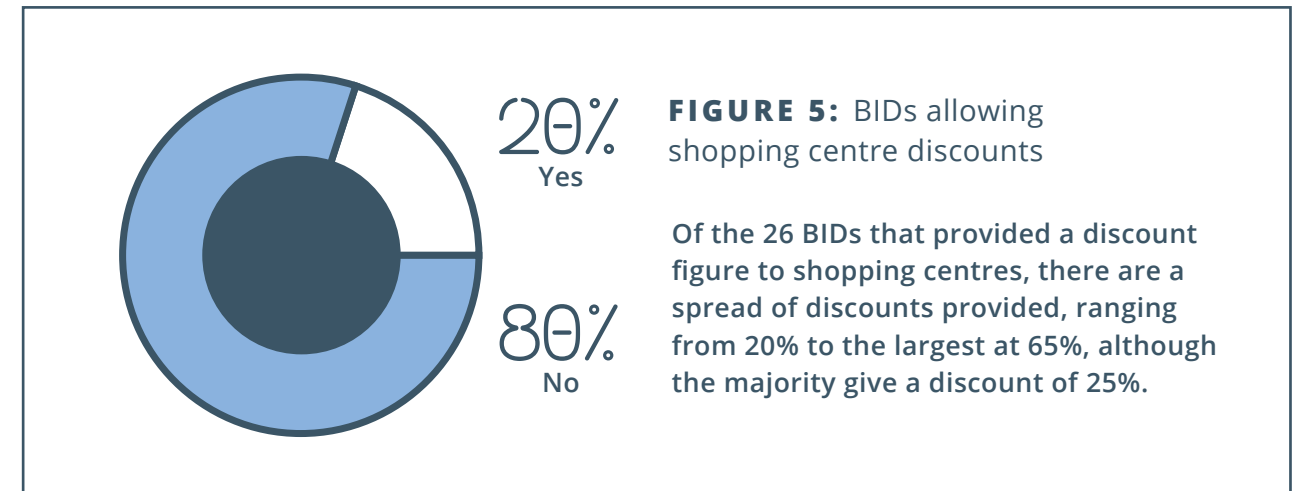


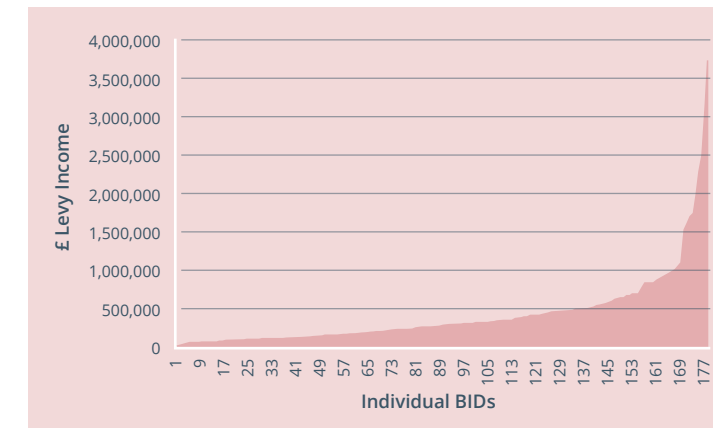
TABLE 10: Shopping centre discount % rates

% Discount rate applied	Number of BIDs	% percentage of BIDs
≤20%	4	15.38%
25%	11	42.31%
50%	8	30.77%
>50%	3	11.54%
	26	

03 BID FINANCES

LEVY INCOME

FIGURE 6: BID annual levy income



The BID Levy income is the income collected directly via the mandatory BID levy and does not include any additional income. From the sample of 178 town centre BIDs providing data, the total BID levy income chargeable across the UK as at the survey date of 10 June 2016 is £75,579,270, although it is clear how varied the BID income is:

TABLE 11: The 10 smallest BIDs by income

BID	Annual levy income £
New Addington BID	£20,356
Giffnock Village BID	£25,825
Kirkwall BID	£44,000
KIPPA BID LTD	£50,000
Bristol Gloucester Road BID	£60,788
Linlithgow Town Centre BID	£62,684
Carlisle BID	£64,000
E11BID Company	£67,000

The ten smallest BIDs across the country are able provide a high quality service with the minimum of income.

Photo: Kirkwall



Whilst the measures of the various income levels of BIDs shows a wide range:

Measures	Amount in UK £
Mean	£427,002
Median	£290,000
Lower quartile	£140,000
Upper quartile	£3,730,000
Total	£75,579,271

TABLE 12:
The average incomes of BIDs

The incomes of BIDs can be usefully grouped for comparison:

Income range in £	Number of BIDs	Percentage of BIDs
£<100k	23	13%
£<250k	56	32%
£250-500k	56	32%
£500-900	25	14%
£>900	17	10%
Total	177	

TABLE 13:
Levy income of BIDs in £ grouped

There are 13 BIDs with incomes over £1million; all are in the key cities:

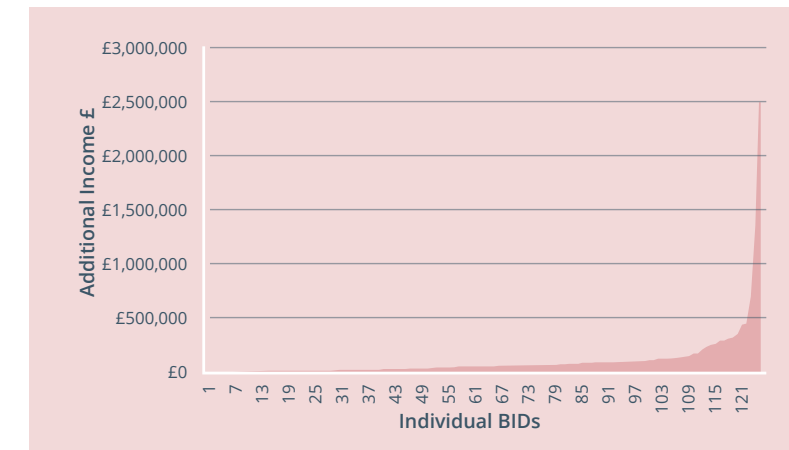
BID	Annual Levy Income £
Belfast One BID	£1,000,000
Essential Edinburgh	£1,016,714
Baker Street	£1,049,100
Croydon BID	£1,100,000
Victoria BID	£1,528,597
Better Bankside	£1,617,808
Team London Bridge	£1,700,000
Northbank BID	£1,742,000
Newcastle NE1 BID	£1,986,623
Inmidtown	£2,280,000
Leeds BID	£2,487,000
Dublin City Centre BID	£3,160,640
New West End Company	£3,730,000

TABLE 14:
BIDs with income over £1m

ADDITIONAL INCOME

BIDs were asked to identify any additional income, that is a contribution made to the BID over and above the levy income. The data asked for was the amount in £s received into the BID bank account in 2015/16 over and above the BID levy. 127 BIDs recorded additional income and the amounts are shown on the graph and the table. Most were small amounts but there are a few very large amounts.

FIGURE 7: Additional Income across all BIDs



The lowest additional income is £250 and the highest £2.5m; the total additional income is £13.58m; amounting to 17.87% of total BID income across the country.

TABLE 15: Additional funding for BIDs

Measure of additional funding	Amount £
Lowest	£250
Highest	£2,500,000
Mean	£107,826
Median	£50,000
Lower quartile	£19,250
Upper quartile	£93,809
Total	£13,586,025

TABLE 16: BIDs with over 250k additional income

BIDs with over 250k additional income	£ Amount
Essential Edinburgh	£259,345
Sunderland BID	£290,000
Salisbury BID	£293,249
Rugby First	£309,500
Camden Town Unlimited	£315,000
Better Bankside	£351,546
Plymouth Waterfront BID	£437,000
Croydon BID	£446,000
Aberdeen Inspired	£700,000
New West End Company	£1,357,500
Inmidtown	£2,500,000

There are 29 BIDs from the survey that show more than £100,000 per annum additional income, and 11 who received over £250,000.

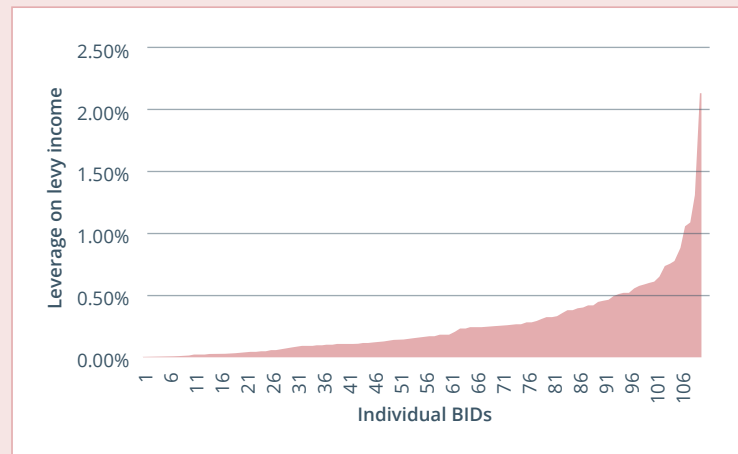


Photo: Bankside

LEVERAGE LEVELS

Leverage is the amount by which a BID manages to increase its own levy income by gaining extra funding from other sources; this level of direct additional income compared to actual levy income shows four BIDs achieving a leverage ratio of more than 1:1 (Kirkcaldy 4 All, Inmidtown, Otley BID and Plymouth Waterfront BID).

FIGURE 8: Leverage levels of BIDs



Beyond that, there are a further eight BIDs showing a leverage ratio of between 0.6 and 1.0 and they are shown in the table.

TABLE 17: Leverage levels

BID	Levy income	Additional income	Leverage
Wimborne BID	£96,000	£57,275	0.60
Mansfield BID	£280,000	£170,000	0.61
Giffnock Village BID	£25,825	£16,000	0.62
Linlithgow Town Centre BID	£62,683.79	£41,301	0.66
Great Yarmouth Business Improvement District	£119,036	£88,500	0.74
Salisbury BID	£385,000	£293,249	0.76
The Big Heart of Merthyr Tydfil	£132,000	£103,445	0.78
Aberdeen Inspired	£785,000	£700,000	0.89
Kirkcaldy 4 All	£160,000	£170,000	1.06
Inmidtown	£2,280,000	£2,500,000	1.10
Otley BID	£71,429.70	£94,078	1.32
Plymouth Waterfront BID	£205,000	£437,000	2.13

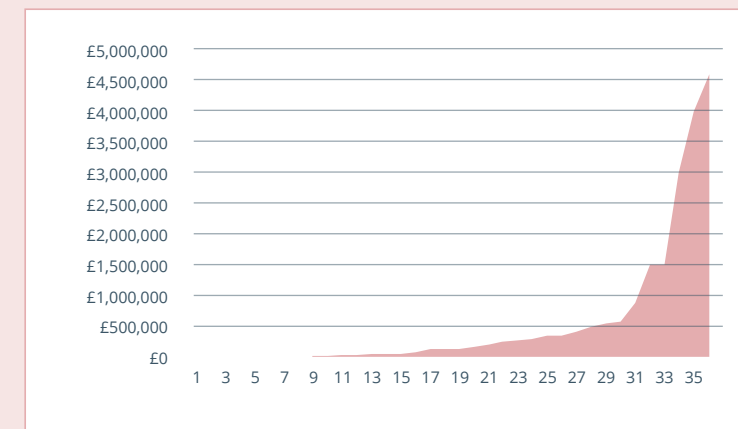
In terms of additional funding, most BIDs show two to three sources and their respective Local Authority is often still one of those.

INVESTMENT INCOME

Beyond the direct additional income, BIDs are invited to report on investment income, which is financial investment in their location that did not go directly through their bank account but is as a direct result of catalytic activity of the BID.

A total of 47 BIDs reported investment income as a direct result of their BID activity, although others recognised investment has been achieved but is very difficult to quantify.

FIGURE 9: Amounts of inward investment income into individual BID



The total investment income is £20,376,357.

TABLE 18: Largest investment incomes

BID	Investment income
Better Bankside	£1,498,500
Croydon BID	£1,500,000
Camden Town Unlimited	£3,000,000
Plymouth BID	£4,000,000
Colmore Business District	£4,600,000

IN-KIND SUPPORT

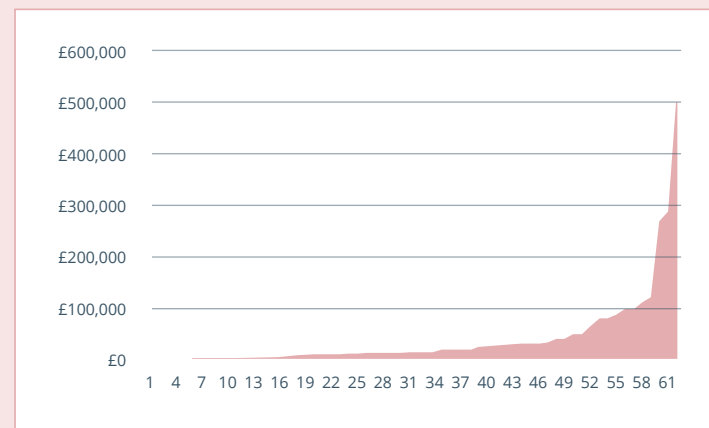
The matched funding reported by BIDs is the value of support through various means that does not come via direct cash but instead pro bono support, or in-kind support, such as free office space or venues; staff support from secondments, staff volunteers; marketing, design and events support; advertising value; free accounting and legal support; and levy collection service provided free of charge.

Again this amounts to an important input into many BIDs, with 62 BIDs receiving in-kind support of some sort, and 7 BIDs receiving more than £100,000 in-kind contribution. The total of matched funding reported in the survey this year was £2,594,858 from across the 62 BIDs.

TABLE 19: In-kind support by £ - the top 7 BIDs

BID	£ Contribution in kind
Birkenhead First	£100,000
The Bath Business Improvement Company Limited	£100,000
Wimborne BID	£112,000
Aberdeen Inspired	£121,576
Dublin City Cente BID	£269,017
angel.london	£287,000
Commercial District BID	£500,000

FIGURE 10: In-kind support in BIDs



TOTAL TOWN CENTRE BID FUNDING

Summating the totality of BID levy funding, additional funding, investment and in-kind funding gives a figure of £112,136,511 as the total UK contribution from town centre BIDs, with a leverage factor of 1.48, that is BIDs in total increased the income into their community above their own levy income by 48%.

TABLE 20: Measures of UK town centre BID funding

	Levy income	Additional income	Inward Investment	In-kind contributions	Totals
Mean	£419,885	£89,974	£566,010	£41,853	£572,125
Median	£280,000	£30,330	£140,000	£15,000	£324,178
Lower quartile	£134,250	£7,372	£28,837	£6,125	£138,863
Upper quartile	£3,730,000	£2,500,000	£4,600,000	£500,000	£5,451,965
Total	£75,579,270	£13,586,025	£20,376,357	£2,594,858	£112,136,510



Photo: Liverpool

04

BID LEVY COLLECTION

LEVY COLLECTION CHARGES

The levy collection charge is the sum of money charged by the local authority to the BID for the service of collecting the BID levy. The BID Regulations allow for a reasonable administration charge to be made for this service and the details of this service should be set out in an operating agreement between the two parties.

The sample size for this data set is 148 BIDs and of those, 32 (21%) have no collection charge made by their local authority. Of the remainder, the levy collection cost can be presented as three different figures for each BID – the total costs, the cost per hereditament and the costs as a % of income.

For each of these three ways of analysing the data some measures of variation and distribution are shown.

TOTAL COST OF COLLECTION

The figure for the total cost of collection is the least useful, but is shown here for completeness. The total cost of collecting the BID levy across the country, for 148 BIDs is £1,431,208, with a mean of £9,120 and a median of £6,992 per BID. This amounts to 1.89% of total sector income.

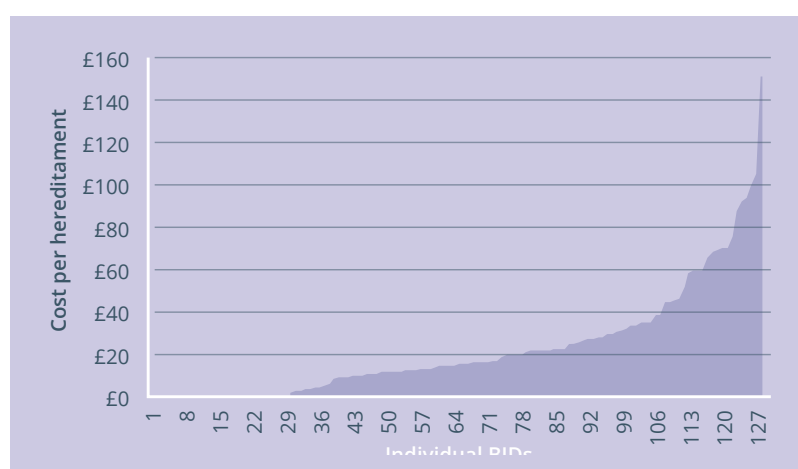
TABLE 21: Collection costs for BIDs by total cost of collection

Measure across the sector per BID	£ total annual cost
Mean	£9,120
Median	£6,992
Lower quartile	£1,500
Upper quartile	£57,985
Total	£1,431,208



Photo: Bankside

FIGURE 11: Levy collection costs per hereditament



The median figure – that which 50% of BIDs are under – is £15 per hereditament.

TABLE 22: Levy collection costs per hereditament

Measure by hereditament	Amount per hereditament
Mean	£22
Median	£15
Lower quartile	£0
Upper quartile	£152

COST PER HEREDITAMENT

However, a more useful method for comparing collection charges is by calculating the unit cost per hereditament. Thus the levy cost is divided by the number of hereditaments in each BID, to give a figure currently ranging from £0 to £152 per hereditament, for the 129 BIDs with data.

13 BIDs have levy collection costs of over the £60 per hereditament, but eleven of those were in London where costs for most supplies and services are, on the whole, much higher.

TABLE 23: Levy collection costs per hereditament above £60

BID	Collection cost per hereditament
Hammersmith London	£60.5
Liverpool BID Company Ltd	£66.0
Bexleyheath BID	£69.3
Better Bankside	£70.1
This is Clapham	£70.4
Commercial District BID	£70.7
South Bank BID	£76.2
Heart of London Business Alliance: Piccadilly & St James's Property Owner BID	£88.1
Heart of London Business Alliance: Piccadilly & St James's Occupier BID	£93.3
Heart of London Business Alliance: Leicester Square-Piccadilly Circus Property Owner BID	£94.4
Heart of London Business Alliance: Leicester Square-Piccadilly Circus Occupier BID	£100.0
Baker Street	£105.6
Victoria BID	£151.5

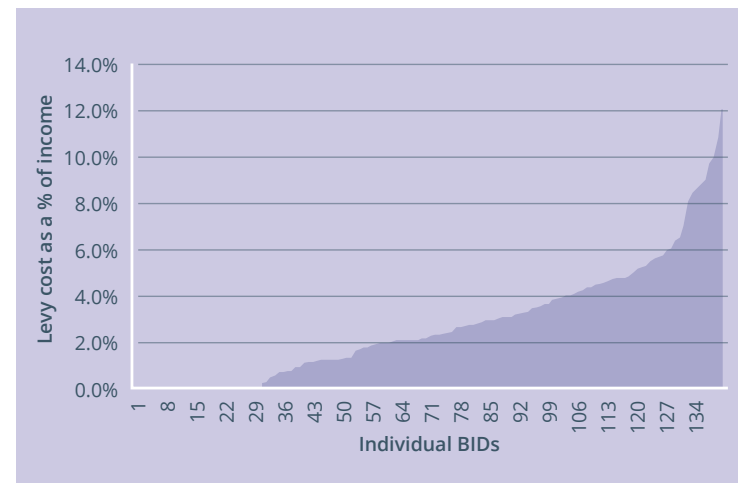
COLLECTION COST AS A % OF LEVY INCOME

TABLE 24: Levy collection costs as % of levy income

Measure	%
Mean	2.77%
Median	2%
Lower quartile	1%
Upper quartile	12%

A final method of comparison shows the collection cost as a % of the levy income collected. Some BIDs are indeed charged by their local authorities in this fashion. The data suggests that 50% of all BIDs have costs of less than 2% of their levy income to collect their levy, but 54 BIDs are above the Industry Criteria guidance, with levy collection costs over 3%; 20 BIDs pay over 5% and 2 BIDs pay over 10% of their levy income to collect that income.

FIGURE 12: Collection costs as a % of levy income



REVALUATION OF BUSINESS RATES

The next business rates revaluation will come into effect on 1st April 2017 and will re-assess all business properties in England and Wales based on rental value as at 1st April 2015. It has been a full seven years since business rates were last assessed, increasing the difficulty in predicting individual bills, and thus planning BID income from these new valuations. The Valuation Office Agency (VOA) is sending out statutory questionnaires to ratepayers seeking information about businesses during 2016. Some BIDs have been planning for this, others have been awaiting the new data; some will use the new data whilst others will remain with the old lists until their renewal ballot and new business plans.

TABLE 25: New Business rate Revaluation

Impact of the new 2017 RV		
No plans yet	123	65%
Remain with 2010 lists	38	20%
Looking at 2017 Lists	12	6%



05

BID BALLOTS

BID BALLOTS

BIDs are established by ballot; each BID must gain a majority of the votes cast, as well as a majority of the Rateable Values of all those businesses on the Non-Domestic rates list for each BID area. The relevant local authority, or its nominated agent, runs the ballot neutrally; in order to continue beyond each term, a renewal ballot is also required.

As at the survey date of June 2016, the success rate for all ballots across the UK and Ireland from inception was running at 84.5% from the total number of ballots held of 438.

The data collected by British BIDs and now updated by Ballot Watch, showing ballot turnout, average majority and average majority by RV for 243 BIDs over the decade suggests that, thus far at each ballot, the turnout, and both majorities have improved.

TABLE 26: Ballot results for British Isles BIDs 2010-2016

	No of BIDs	Average of Turnout %	Average of Majority by number	Average of RV Majority by RV
1st Term	146	45	75	77
2nd Term	73	50	75	78
3rd Term	24	51	82	83
Grand Total	243	47	75	78

FAILED BALLOTS

However, the number of 'no' votes is still fluid with 6 failed ballots thus far in 2015/16:

TABLE 27: Ballot failures over time

Year	Failed Ballots
2011/12	11
2012/13	6
2013/14	5
2014/15	3
2015/16	6

06

BID MANAGEMENT
AND GOVERNANCE

BID MANAGEMENT TEAMS

STAFFING

The staffing levels of BIDs vary enormously, as one would expect from organisations so varied in income and service provision.

From the data from 107 BIDs, the staff employed totals 528 full time and part time individuals; 24 BIDs employed apprentices in a range of roles, primarily administrative, and 39 BIDs used consultants in a whole range of roles and indeed some BIDs were managed entirely by non-salaried consultants.

TABLE 28: Types of Staffing in BIDs

Type of staff	Total Numbers of Staff in all BIDs	Numbers of BIDs
Full time	356	
Part time	172	
Apprentices		24
Consultants		39

A total of 55 (51%) BIDs operate with three or fewer staff, either full or part time.

TABLE 29: Staffing levels in BIDs

Levels of Staffing	Numbers of BIDs	% of BIDs
Fewer than 3	55	51.4%
More than 3 fewer than 5	14	13.1%
More than 5 fewer than 10	12	11.2%
More than 10	14	13.1%

At the other end of the spectrum there are 14 BIDs that operate with 10 or more in the staff team, made up of full or part time salaried staff, and there are eight that operate with 15 or more. These figures, made up from full time and part time staff and some BIDs, will be including a Ranger service in their figures because they are employed in-house, whilst others who outsource their Rangers may not be including these.

TABLE 30: Measures of staffing numbers in BIDs

Measures	Numbers of staff in the BID
Mean	5
Median	3
Lower quartile	2
Upper quartile	35

Consultants, including staff permanently working for the BID but not on payroll, are used by 39 BIDs (36%); this includes staff working in security, marketing, and general operational activities; and 24 (24%) have employed Apprentices.

MANAGERS OR EXECUTIVES

As BIDs have become more strategic the nomenclature for senior staff has started to change, with some Managers becoming Chief Executives, Executive Directors or Directors.

TABLE 31: Title of executive head

Title of Head	Numbers of BIDs
Executive	30
Manager	113

TABLE 32: Board compositions

Numbers of	Directors	Observers	Total size
Median	12	3	12
Lowest quartile	10	2	6
Upper Quartile	26	18	26
Total members	1843	222	2065

SIZES OF BOARDS

Whilst the majority of BIDs have a board size of 12 or over, including Directors and Observers, there are 3 BIDs with 5 or fewer Directors and there are 15 BIDs with 20 or more Directors.

TABLE 33: Sizes of BID Boards

Board size	Numbers of BIDs
Under 5	3
5 to 10	29
10 to 15	67
15 to 20	37
20 or over	15

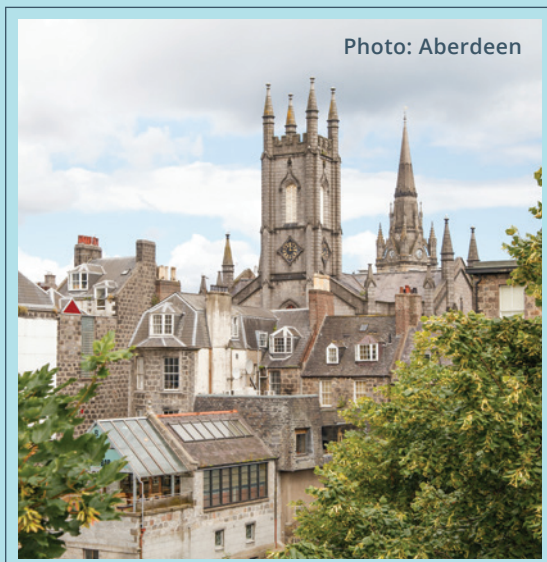


Photo: Aberdeen

BID BOARDS

BID boards are becoming an increasingly vital part of the BID world as issues of governance and transparency rightly come to the fore, and governance matters are key parts of the Industry Guidelines.⁵ The data shows that there are 2065 members of BID boards across the country, whose task is to ensure that each BID is governed according to the normal rules of good corporate governance.

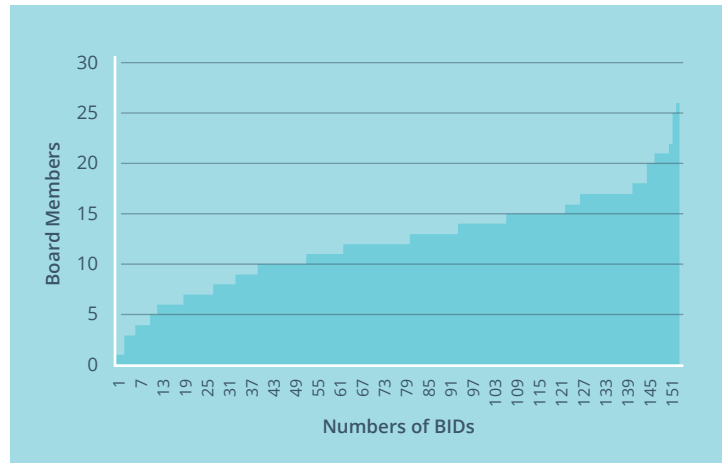
⁵ Industry criteria and guidance notes for BIDs, British BIDs, 2015



Photo: Dublin

COMPOSITION

From the data from 152 BIDs it is evident that there is a wide spread of BID Board size and composition, with no typical size. The balance between Directors and Observers varies across BIDs, with most having 12 directors and 2 observers, whilst some have up to 18 observers on their boards.



Of the 140 BIDs responding to this question, only 18 reported no local authority representation on the Board; 122 (87%) of BIDs had local authority representation on their Boards.

FIGURE 13: Membership of BID Boards

LOCAL AUTHORITIES

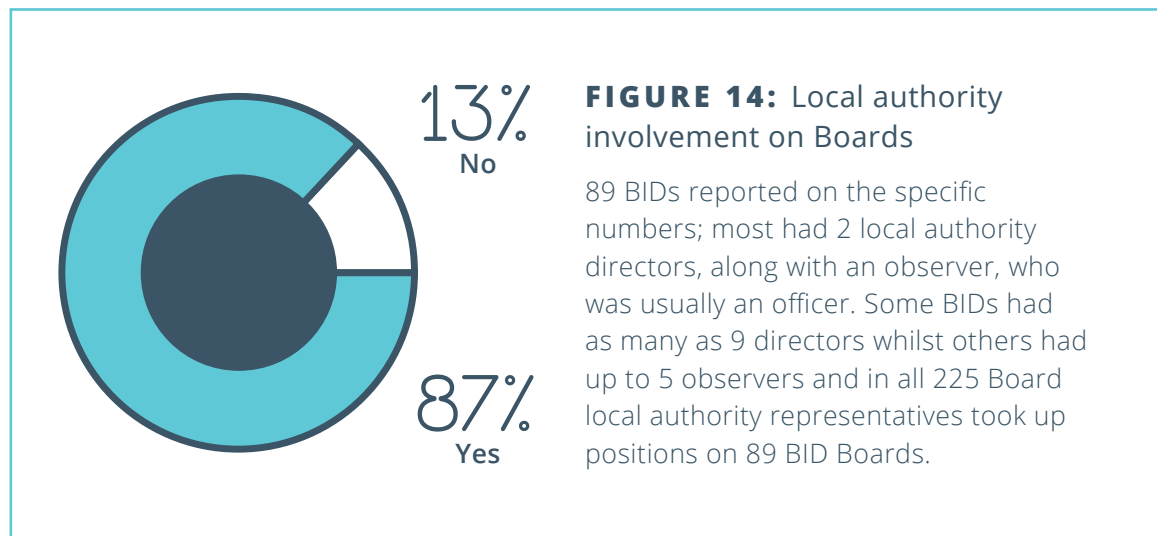
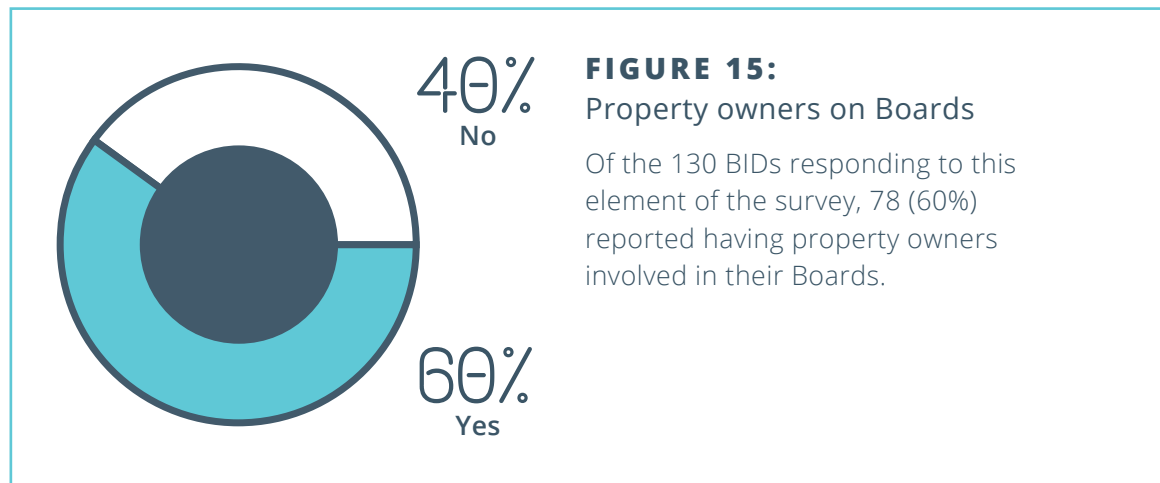


TABLE 34: Measures of local authority representation

Measure	Number of Local authority representatives		Total
	Director	Observer	
Median	2	1	
Lowest quartile	1	1	
Upper Quartile	9	5	
Total members	153	72	225
Number of BIDs	89		



PROPERTY OWNERS



The figure is probably higher than the data suggests; some BIDs include their shopping centre representatives as owners but others don't, and some Board members own their business properties, similarly local authority representatives are not often recognised as property owners.

The median number of property owners on boards was 2; thus of the 78 Boards

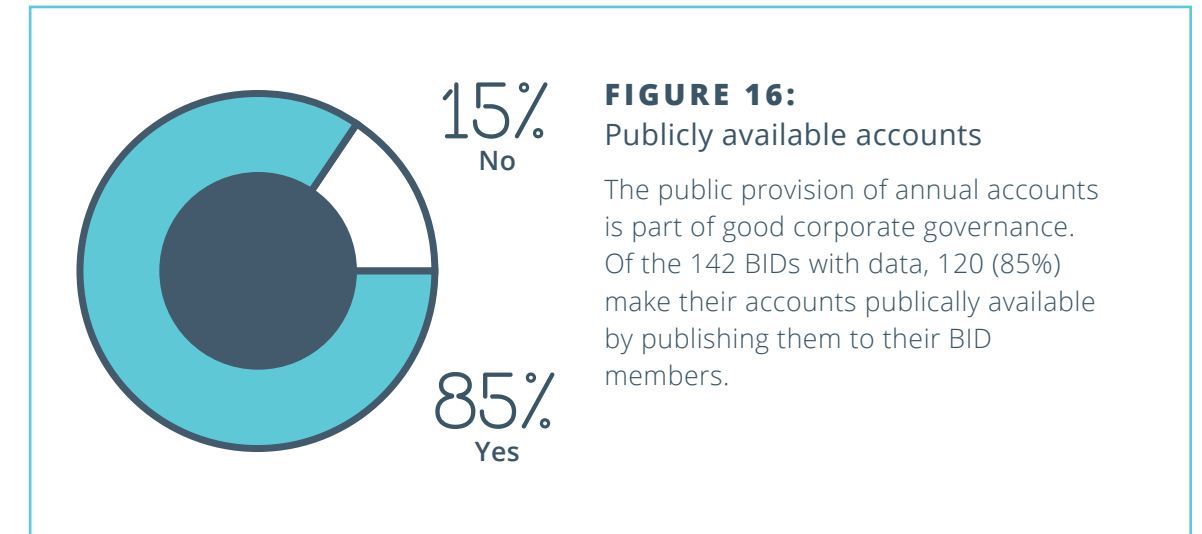
reporting the data, over 50% had 2 property representatives.

There were 172 property owners on Boards as directors and 5 as observers, and the highest number on any Board was 11 and there were 8 BIDs with 5 or more Property owners on their Boards. The total of 177 amounts to 8.5% of Board members across the country.

TABLE 35: BIDs with more than 5 or more property owner Board members

BID	Board members
Alloa Town Centre BID	5
Durham BID	5
Heart of London Business Alliance: Leicester Square-Piccadilly Circus Occupier BID	11
Heart of London Business Alliance: Leicester Square-Piccadilly Circus Property Owner BID	11
Heart of London Business Alliance: Piccadilly & St James's Occupier BID	11
Heart of London Business Alliance: Piccadilly & St James's Property Owner BID	11
New West End Company	5
South Bank BID	5

ANNUAL ACCOUNTS



07

BID POLICY MATTERS

BID POLICY MATTERS

There are a number of policy matters with BIDs involvement and the survey focused on five of them: baseline services, the transfer of services from local authorities, late night levies, the role of Tourism BIDs and the growing importance of Neighbourhood plans.

BASELINE SERVICES AND STATEMENTS

Most BIDs develop agreements with their local authorities and other public services such as the police in order to ensure levels of service, which the BID will then augment rather than replace. These baseline statements are generally vital pieces of the BID ballot process. 106 (88%) BIDs in this section had such statements, but 15 did not.

FIGURE 17: BIDs with Baseline statements

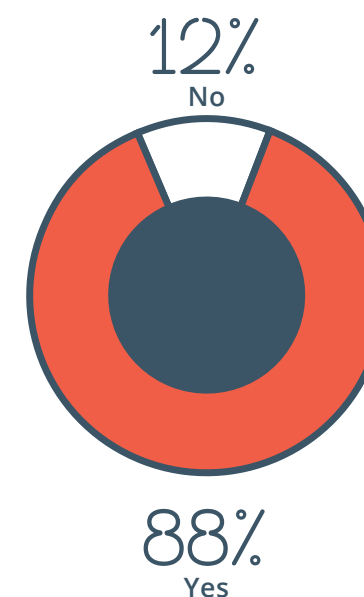
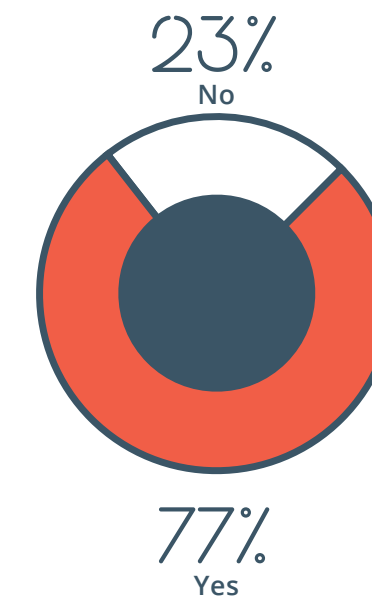


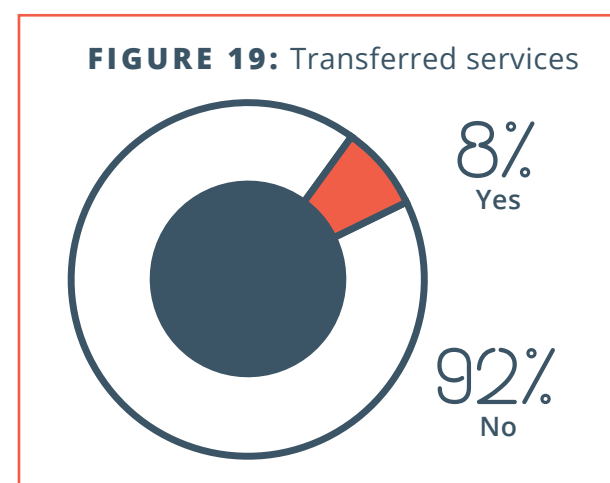
FIGURE 18: Baseline adherence



On the matter of adherence, there was a sense of 'slippage' with 21 (23%) BIDs feeling that baseline statements were not being adhered to out of population of 107.

TRANSFERRED SERVICES

In recent years, as public sector finances reduce and BIDs are becoming recognised delivery models, there has been increasing discussion about both the pressure on baseline agreements and the possibility of transferring services from the public sector to BIDs. On the matter of transferring services, 10 (8%) BIDs out of 118, have already taken on transferred services.



Most of the responses involve taking responsibility for some elements of Christmas lights and hanging baskets, street cleaning, public toilets, and marketing and events and Purple Flag.

TABLE 36: BIDs Considering service transfers

Actively considering some service transfer		
Yes	23	19.3%
No	96	80.7%
	119	100.0%

On whether they are considering taking on transferred services going forward, a total of 23 BIDs (19.3%) from 119 confirmed they were considering some type of service transfer.

Four BIDs refer specifically to contractual and funding arrangements in relation to delivery of transferred services:

Aberdeen Inspired

Provide Event Management contract of £150K and City Centre Manager Post.

High Wycombe BID

Provide Public Space and Promotional Infrastructure Management; the BID pays a ground rent and takes commercial risk of the return on investment.

Lincoln BIG

Provide the city Visitor Information since 2010 on a contract of circa £150,000.

Wimborne BID

Provide the management of their town Square events space.

OF THESE RESPONSES, 23 BIDS EXPRESSED AN INTEREST IN RUNNING SERVICES IN:

- CLOSED CIRCUIT TV
- LIBRARIES
- CLEANSING
- ENFORCEMENT & LICENSING
- STREET TRADING & MARKETS
- PARKS
- PLANTING
- OPEN SPACES
- TOURISM
- EVENTS
- CHRISTMAS
- ACTIVITIES

LATE NIGHT LEVY

Late night levies have been a concern for BIDs and clearly they are having an impact but only in a few places; 7 already exist and 5 are being considered.

TABLE 37: Late night levy impact

Late night levy being considered		
Yes	5	4.0%
No	114	90.5%
Already Exists	7	5.6%
Number of BIDs	126	100.0%

TOURISM BIDS

As we said last year, the term 'Tourism BID' or 'TBID' was coined back in 2010 when the then Tourism Minister identified the opportunity of using the existing BID legislation to fund gaps in tourism services around the country. There was concern at that time that a TBID model might overlap with an existing town or city BID and expect businesses to pay both levies.

However, since then there has been limited activity in terms of implementation and the three that style themselves as tourism BIDs - Bournemouth Coastal, Greater Yarmouth and Scotland Loch Ness & Inverness appear to be normal BIDs which have a tourism agenda and do not overlap with any existing BIDs.



Photo: Nottingham

NEIGHBOURHOOD PLANNING

The National Neighbourhood Planning Framework was published by Government in 2012 following the Localism Act 2011 and introduced the concept of Neighbourhood Planning.

The legislation proposes “Neighbourhood planning provides a powerful set of tools for local people to ensure that they get the right types of development for their community where the ambition of the neighbourhood is aligned with the strategic needs and priorities of the wider local area.”⁶

Thus far, across the country, more than 335,000 people have voted in 200 neighbourhood-planning referenda, primarily in smaller rural residential communities.

BIDs are already considered an appropriate qualifying body and the British Property Federation (BPF) supported the concept of BIDs leading

Neighbourhood Plans (NP) and provides a website to aid the process.⁷ A group of pilot areas picked four years ago to trial business-led neighbourhood planning have made little ground, with experts citing scale and complexity for their slow progress. The first business-led referendum was successful in central Milton Keynes last year and there is an advice note on the process.⁸

Due to the gradual take-up of this concept across the UK, the survey introduced a question around Neighbourhood Planning last year and asked again this year for any activity happening in relation to Neighbourhood Plans in their areas. It is clear that interest and involvement is increasing.

From the survey responses of 122, a total of 27 reported some involvement in Neighbourhood Planning within their area.

TABLE 38: Neighbourhood Plans and BIDs

Are Neighbourhood Plans being developed	No of BIDs	% of BIDs
Yes	27	22.1%
No	95	77.9%
Total	122	100.0%

Some of the Neighbourhood Plans were consortia at an early stage but several were clearly well defined Plans that were moving to the approval and indeed referendum stages; these Plans were now spreading across the country and will clearly have an impact on BIDs.



6 <http://planningguidance.communities.gov.uk/blog/guidance/neighbourhood-planning/what-is-neighbourhood-planning/>
 7 <http://www.neighbourhoodplanning.biz/>
 8 <http://www.pas.gov.uk/documents/332612/1099329/Getting+Down+Updatev2/ac70cf9e-0f9e-4cd8-98a8-fdcd5c5ebb3f>

08 INDUSTRIAL BIDS

GROWTH RATE OF INDUSTRIAL BIDS

Despite a strong growth of industrial BIDs in the early years, the growth in recent years continues to slow, with only 1 new BID this year.

TABLE 39: Growth of Industrial BIDs 2013-16

Year	New BIDs	
2013-14	3	Sheffield Lower Don Valley; Cornwall Newham; Manor Royal
2014-15	2	Marlow Globe Park, Ferndown and Uddens
2015-16	1	Beddington

This leaves the current cohort of industrial BIDs at 29.

TERM OF INDUSTRIAL BIDS

All 22 industrial BIDs providing data for the survey have a term of five years, apart from the Vale of Leven BID, which is for 3 years.

LEVY RATE OF INDUSTRIAL BIDS

Levy rates for industrial BIDs range from 1-3%, although the mean and upper quartile are higher than town centre BIDs. Within the sample of 13 industrial BIDs, there are four that operate with a banded system and one location (Sheffield Lower Don Valley) has a variable rate charging two different levels of levy within their area.

FIGURE 20: Levy rates in Industrial BIDs

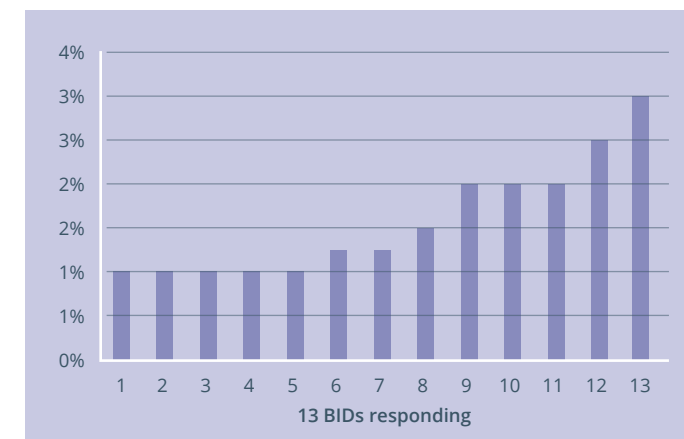


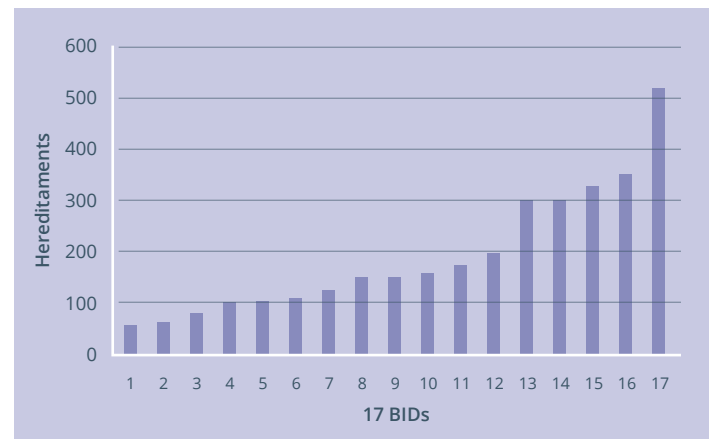
TABLE 40: Measures for Industrial BID levy rates

levy rates for industrial BIDs	
Median	1.3%
Mean	1.6%
Upper quartile	3.0%

HEREDITAMENTS OF INDUSTRIAL BIDS

Industrial BIDs by their very nature are smaller, with the number of hereditaments or units ranging from 56-520 within the 17 industrial BIDs in the survey.

FIGURE 21: Numbers of Units in Industrial BIDs

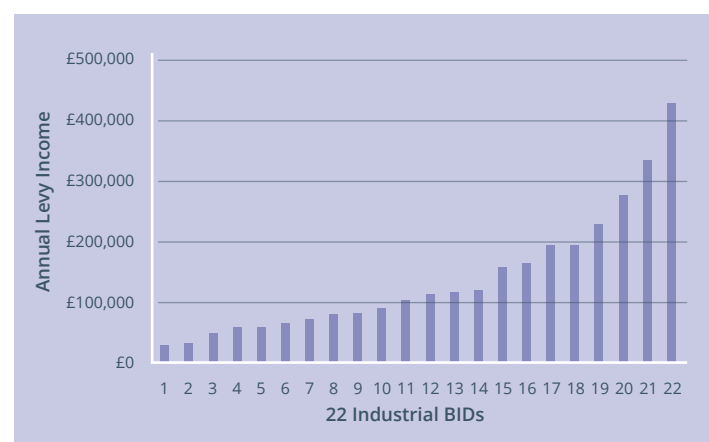


The total number of hereditaments across the sample of 17 industrial BIDs is 3,267.

LEVY INCOME OF INDUSTRIAL BIDS

From the sample of 22 industrial BIDs the total annual levy income is £ 3,079,853. The smallest levy income is £34,000 at the Vale of Leven and the largest is £430,117 at Manor Royal.

FIGURE 22: Industrial BID Levy Income



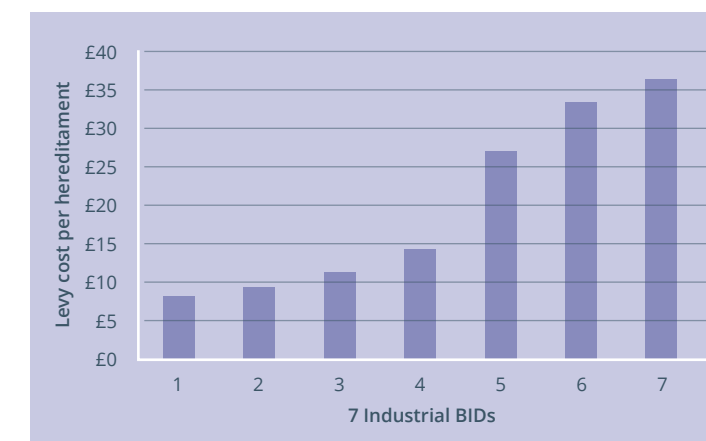
ADDITIONAL INCOME OF INDUSTRIAL BIDS

Of the sample of 20 industrial BIDs with data, 11 received direct additional income beyond the BID levy. The total additional income across all the industrial BIDs when investment income and in-kind is also taken into account amounts to £1,482,341 the majority of which comes from their respective local authorities.

LEVY COLLECTION CHARGE OF INDUSTRIAL BIDS

From the sample of 14 BIDs with respect to levy collection, 7 pay no collection charge and a further 7 have collection costs ranging from £ 8/unit (Newham) to £35/unit (Hainault), with a median gross collection charge of £350.

FIGURE 23: Levy collection costs per unit in seven Industrial BIDs



FINANCIAL REPORTS

Of the 17 industrial BIDs that were able to provide data, 10 published public annual financial reports for their members and 7 did not.

MANAGEMENT & GOVERNANCE OF INDUSTRIAL BIDS

STAFFING

Of the 13 BIDs responding to the survey, 9 of them operate with only part time staff, and overall a total of 17 staff are working across those locations in a combination of full or part time employed and consultants.

BOARDS

The size of Boards across the industrial sector is variable, ranging from a median size of 5 to an upper size of 11. From a local authority perspective, 9 of the BIDs have local authority representation on their Boards, of whom 6 are directors and 7 are observers. 6 BIDs had property owners on their Boards.

TABLE 41: Industrial BID Boards

Industrial BID Boards	Directors	Observers	Local authority representation	Director or Observer	Property owners
Total individuals	89	22	9	6	6
Median	5			7	
Upper quartile	11				
Lower quartile	5				

TABLE 42: Industrial BID and Baseline statements

Baseline statements	
Total	14
Yes	12
No	2

POLICY MATTERS IN INDUSTRIAL BIDS

BASELINE STATEMENTS

From the survey data, 14 industrial BIDs had produced baseline statements, and all but 2 made use of them.

TRANSFERRED SERVICE

No industrial BID mentioned the issue of transfer of local authority services.

NEIGHBOURHOOD PLANS

Newham BID and Winsford BID have been involved with Neighbourhood plans, and these are now going through due process.



TOWN CENTRE BIDS

Aberdeen Inspired	Byres Road and Lanes BID	Enterprising Bathgate	Inswindon BID Co Ltd	Town Centre BID	Sutton Coldfield Town Centre
Acocks Green Village BID Co Ltd	Cambridge BID	Erdington	Inverness BID	Northbank BID	Swansea
Alloa Town Centre BID	Camden Town Unlimited	Essential Edinburgh	Ipswich Central Management Ltd	Northfield TownCentre BID Ltd	Team London Bridge
Angel.london	Canterbury Connected	Euston Town	Kendal BID Ltd	Northwich BID	The Bath Business Improvement Company Limited
Baker Street	Carluke BID	Exeter BID	Kingston First BID	Norwich BID	The Big Heart of Merthyr Tydfil
Ballymena BID	Cheapside BID	Experience Guildford	KIPPA BID LTD	Nottingham BID	The Fitzrovia Partnership Business Improvement District Limited
Basingstoke Together	Cheltenham	Falkirk BID	Kirkcaldy 4 All	Orpington1st	The York BID
Bedford BID	Chester BID	Falmouth BID	Kirkwall BID	Otley BID	This is Clapham
Bedminster	Chichester BID	Giffnock Village BID	Lancaster BID	Our Bury St Edmunds	Totally Truro
Belfast One BID	Chippenham BID	Great Yarmouth Business Improvement District	Largs Matters BID	Paddington BID	Try Twickenham
Better Bankside	City of Elgin BID	Greater Grassmarket BID	Leamington BID	Paisley BID	Tavistock BID
Bexleyheath BID	Clacksfirst Limited	Greater Yarmouth TBID	Leeds BID	Penrith BID	Ulverston BID
BID Camborne	Clifton Village BID	Hamilton Our Town	Letchworth BID	Plymouth BID	Vauxhall BID
BID Huntingdon	Collectively Camberley Ltd	HammersmithLondon	Lincoln BIG	Plymouth Waterfront BID	Victoria BID
BID4Oban	Colmore Business District	Harrow Town Centre	Linlithgow Town Centre BID	Poole BID	Visit Inverness Loch Ness Tourism BID
Birkenhead First	Commercial District BID	Heart of London Business Alliance: Leicester Square-Piccadilly Circus Occupier BID	Litchfield BID	Preston BID	Watford BID Ltd
Birmingham Jewelry Quarter	Coventry BID	Heart of London Business Alliance: Leicester Square-Piccadilly Circus Property Owner BID	Liverpool BID Company Ltd	Purley BID	WeAreWaterloo
Birmingham Kings Heath BID	Crieff Succeeds	Heart of London Business Alliance: Leicester Square-Piccadilly Circus Property Owner BID	Living Lerwick Ltd	Reading BID	Wellingborough BID
Birmingham Retail BID	Croydon BID	Heart of London Business Alliance: Piccadilly & St James's Occupier BID	Love Loughborough BID	Royston First BID	West Bromwich BID
Birmingham Soho Road	Derby Cathedral Quarter	Heart of London Business Alliance: Piccadilly & St James's Occupier BID	Love Wimbledon	Rugby First	West Ealing BID (In West Ealing)
Birmingham Southside BID	Derby St Peters	Heart of London Business Alliance: Piccadilly & St James's Property Owner BID	Lowestoft Vision	Salisbury BID	Weston BID
Blackburn Town Centre BID	Destination CQ BID Ltd	Heart of London Business Alliance: Piccadilly & St James's Property Owner BID	Luton BID	Sheffield BID	Westside BID
Blackpool BID	Discover Dunblane BID	Heart of London Business Alliance: Piccadilly & St James's Property Owner BID	Manchester BID	Shrewsbury BID	Weymouth BID Limited
Blue Bermondsey	Distinct Darlington Ltd	Hereford	Mansfield BID	Skipton BID Ltd	Wimborne BID
Bournemouth Coastal BID	Dorchester BID	Hinckley BID	Melton BID	Solihull BID	Winchester
Bournemouth Town Centre BID	Dublin City Center BID	Hitchin BID	Milngavie BID	South Bank BID	Wolverhampton BID
Brilliant Brighton	Dun Loaghaire BID	Hull BID	Neath Inspired	South Queensferry BID	Worcester BID
Bristol Gloucester Road BID	Dundalk BID	HWBIDCo Ltd	New Addington BID	Southend BID	Worthing
Bristol Broadmead	Dunfermline Delivers BID	I Love Clarkston	New West End Company	Southport BID	Ymlaen Llanelli
Brixton BID	Dunoon Presents	Ilford BID	Newbury BID	St Ives BID	Your Bromley
	Durham BID	Inmidtown	Newcastle NE1 BID	St. Andrews BID	Your Pontypridd
	E11BID Company		Newcastle Under Lyme	St. Austell	
	Ealing Broadway BID (& Make it Ealing)		Newport Now BID	Stratford	
	Eastleigh BID		Newquay BID	Successful Sutton	
	Edinburgh West End BID		Northampton	Sunderland BID	

INDUSTRIAL BIDS

Argall BID
Astmoor BID
Brackmills Industrial Estate
Cowpen BID
Ferndown and Uddens Business Park BID
Gadbrook Park BID 2
Garratt Business Park industrial BID
Globe Business Park
Hainault Business Park Ltd
Hartlepool - Longhill & Sandgate
Lancing Business Park
Langthwaite BID
Linlithgow Mill Road BID
London Riverside (BID) Ltd
Manor Royal BID
Newham BID
Segensworth
Sheffield Lower Don Valley BID
Vale of Leven - Volie
Willow BID Ltd
Winsford Industrial Estate BID 3
Witham BID

DEVELOPING BIDS

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