



Business Improvement Districts in the British Isles 2020

Annual Survey and Report

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Introduction

This 14th Business Improvement District [BID] report, written in the autumn of 2020, during the Covid-19 pandemic, is undertaken primarily on behalf of the BID industry, that is the organisations or companies that are either running BIDs or planning to run them. The previous reports, from 2010 onward, are available on the British BIDs [Bb] website.¹ At the same time, we are conscious that key industry players such as Revo, Boots, Nationwide Building Society, the British Retail Consortium (BRC), British Property Federation (BPF) and The Association of Convenience Stores (ACS), make use of the data, as do the Ministry of Housing, Communities and Local Government [MHCLG], individual national levy payers and many Local Authorities.

The 2020 report differs slightly from previous years, because British BIDs (Bb) has introduced a new quarterly BID Barometer², which provides the technical data on BIDs across the countries of the British Isles. The Barometer uses the quantitative data from the Business Plans of each BID as it comes to ballot. The Bb team scan BID websites, online and offline press, and social media continually to make sure that our data are as up to date and accurate as possible. We regularly add further details in response to members' feedback and continue to do so. This annual report brings a set of that data together, focusing often on comparative time series from 2010.

The survey section of this report is interested in more current issues for BIDs: Covid-19 and our responses, the resilience of BIDs, and the future narrative of BIDs, as we respond to the new normal.

In addition, Bb tries to ensure the widest possible reach across the whole BID industry. Thus, this survey covers all BIDs across England, Scotland, Wales, Northern Ireland, and Ireland.

It was undertaken at an awful time in UK politics, with the Covid-19 pandemic in full flood, wide ranging local and national lockdowns being brought in some six months after the initial national lockdown, and nearly 50,000 deaths.

At the same time, the Brexit negotiations are still taking place, and there are very major and increasing concerns over the future of the high street. These concerns, raised in the survey last year, are now becoming more intense with the pressure of the Covid-19 pandemic. It has been an exceedingly active year for policy matters relating to the high street.

1 <https://britishbids.info/services/national-bid-survey>

2 https://cdn.britishbids.info/publications/Bb_Q2-BID-Barometer_2020.pdf?mtime=20200716102931

Business Improvement Districts in the British Isles

The purpose of the annual report

The purpose and uses of this report are multiple. The annual report, and the associated quarterly BID Barometer, allow a regular series of snapshots 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 and developing BIDs to design their services and operations in the most effective fashion. It is designed to be used by different audiences for different needs; to be dipped into when needed, rather than a continuous piece of text.

The data sources for the annual report 2020

There are two distinct elements to this report, each with its own section: the core data for the whole BID industry and a sample of the BID industry looking at how BIDs have been operating during the pandemic.

The core data for the whole BID industry

The core data for all BIDs across the British Isles are gathered throughout the year by way of detailed online searching, social media and literature searching, which is used to produce the weekly *British BIDs Ballot Watch*. These are then collated and made available via the Bb Index on the British BIDs website. For BIDs coming up to ballot, the business plans are also collected and analysed to ensure the data are as accurate as possible. These data have been gathered consistently since this survey began, and the total population is now 764 individual records of BIDs and each of their ballots, both successful and otherwise.

The data are now published quarterly in the *British BIDs BID Barometer* and summated here in this annual report.

These data sets change regularly, as ballots take place every week, and information is then uploaded as it becomes available, and sometimes older information is eventually found, but this report brings together as much available data as possible in November 2020.

We continue to bring together some of the data from the earlier published surveys, from 2011 onward, where this is useful for analysis. This use of the previous data sets will increase over future report and allows us to provide more in-depth analysis for individual BIDs, Local Authorities and levy payers. Indeed, much of the increased data provision is a response to enquiries over the year.

In past years, for the purposes of the data analysis and presentation, industrial BIDs were presented separately in their own chapter. In this report we have ceased to do so. Bb has set up an Industrial BIDs group, with a Chair on the Advisory Board. The Bb database allows more detailed reporting on a needs basis, and the blurring of lines between industrial BIDs, commercial BIDs, and regional BIDs meant that separating them becomes less useful.

The British BIDs pandemic survey

There was also an individual questionnaire, collecting more detailed and qualitative data from BIDs, using an online survey platform. This was issued by personal email in October 2020 to the 272 Managers or Chief Executives of the 329 BIDs in the British Isles with useable contact details. BIDs were contacted by email and telephone during the survey to remind them of the deadlines and the value of the survey. 95 [35%] BIDs provided these further data by responding to this online questionnaire, although response rates vary slightly in each of the various sections, as BIDs for a variety of reasons, primarily pressure of work, were more or less able to provide clear, accurate or appropriate data.

The analysis

The report is very consciously data focused, showing the averages and distributions of key data sets, providing histograms and pie charts of the relevant data so that the distributions can be seen easily and clearly.

Some protocols

This report is both an audit or census, which involves analysing as far as possible the totality of existing data, and at the same time a service evaluation, undertaken to benefit those who use and manage BIDs. It is designed and conducted solely to define or measure current BID services across the UK and Ireland. Our participants are entirely BID staff, the data are aggregated and anonymous. It is not possible to identify individuals from any resulting report and use of the data will not cause substantial damage and distress. All data are either provided by each BID through the online questionnaire, or through a phone call to the BID, or by way of publicly available validated sources from each BID by way of their business plans or websites. This final report is anonymised.

Numbers of active BIDs in the British Isles

The active BID community in Great Britain, Northern Ireland, and Ireland totalled 329 at the end of September 2020. Clearly BIDs are national and regional, reflecting the needs, aspirations and numbers of their local business communities. Nonetheless, it is useful to see some key distributions across the British Isles, and the percentages in different countries and regions for active BIDs. Similarly, the more detailed regional data gives some sense of the wide geographical spread of BIDs.

Table 1

The regions and countries of active BID across the British Isles as at September 2020

Regions and Countries	Number of BIDs	Total Spend	Total Hereditaments	% by Region	% by Income	% by Hereditament
East Midlands	10	£4,459,071	5,422	3.0%	3.4%	4.1%
East of England	27	£9,682,432	10,927	8.2%	7.3%	8.2%
Greater London	69	£45,471,982	19,492	21.0%	34.3%	14.6%
Ireland	6	£5,374,468	8,554	1.8%	4.1%	6.4%
North East England	6	£2,987,278	3,105	1.8%	2.3%	2.3%
North West England	29	£8,616,178	12,189	8.8%	6.5%	9.2%
Northern Ireland	8	£3,054,540	3,592	2.4%	2.3%	2.7%
Scotland	38	£6,283,042	11,910	11.6%	4.7%	8.9%
South East England	37	£13,332,655	16,758	11.2%	10.1%	12.6%
South West England	33	£9,603,448	15,165	10.0%	7.2%	11.4%
Wales	16	£3,490,239	4,068	4.9%	2.6%	3.1%
West Midlands	32	£11,005,871	13,164	9.7%	8.3%	9.9%
Yorkshire and the Humber	18	£9,132,082	8,817	5.5%	6.9%	6.6%
Totals	329	£132,493,286	133,163			

BID types

There continues to be an increasing differentiation in the types of BID, as different communities and groups of business respond to a changing environment. New BIDs in tourism, food and drink, flood defences, an area wide BID, and a capital investment BID now exist.

Table 2

BIDs by type across the British Isles

Types of BID	Number of BIDs	Total Levy Spend	Total Hereditaments	% Levy	% Hereditaments
Area BID	3	£1,074,311	1,667	1%	1%
Business Park	8	£2,203,885	1,874	2%	1%
City Centre	24	£21,029,868	18,295	16%	14%
Commercial	5	£7,467,564	2,096	6%	2%
Destination	2	£1,570,482	1,354	1%	1%
Digital BID	1	£70,000	386	0%	0%
Flood Defence Project	1	£219,139	34	0%	0%
Food & Drink	1	£18,500	35	0%	0%
Industrial	18	£2,429,550	3,264	2%	2%
Industrial Park	6	£670,797	1,084	1%	1%
Leisure	2	£1,871,926	370	1%	0%
Mixed Area	13	£11,695,348	4,115	9%	3%
Property Owner	4	£6,059,779	268	5%	0%
Retail & Leisure	3	£5,214,340	1,633	4%	1%
Retail & Tourism	1	£107,000	245	0%	0%
Tourism	7	£2,270,770	4,174	2%	3%
Town Centre	228	£67,901,767	91,513	51%	69%
Town Centre/Tourism	2	£618,260	756	0%	1%
Grand Total	329	£132,493,286	133,163		

Annual increase in BID numbers, levy income and hereditaments

The emergence of new BIDs has been impressive since the first BID became operational in 2005.

In the past 10 years new BIDs have come into existence each year, albeit with a slightly varied annual growth rate, and the data is presented here both as a table and a graph.

Table 3

Growth of BIDs by number 2010–2020

Survey year	Number of BIDs	Total Levy Income	Total Hereditaments	Income per Hereditament
2010	102	£23,483,888		
2011	112	£22,085,567	19,353	£1,141
2012	129	£39,883,454	54,110	£737
2013	150	£51,847,486	64,150	£808
2014	179	£63,000,000	59,771	£1,054
2015	203	£80,124,969	71,703	£1,117
2016	227	£78,659,124	78,549	£1,001
2017	283	£99,971,741	10,6262	£941
2018	305	£110,575,380	120,735	£916
2019	321	£125,205,608	128,785	£972
2020	329	£132,493,286	133,163	£994

Although some of this will be down to the Covid-19 pandemic, it appears that the pace of growth is slowing, and there is an interesting question of whether or when we might reach 'peak BID'.

Table 4

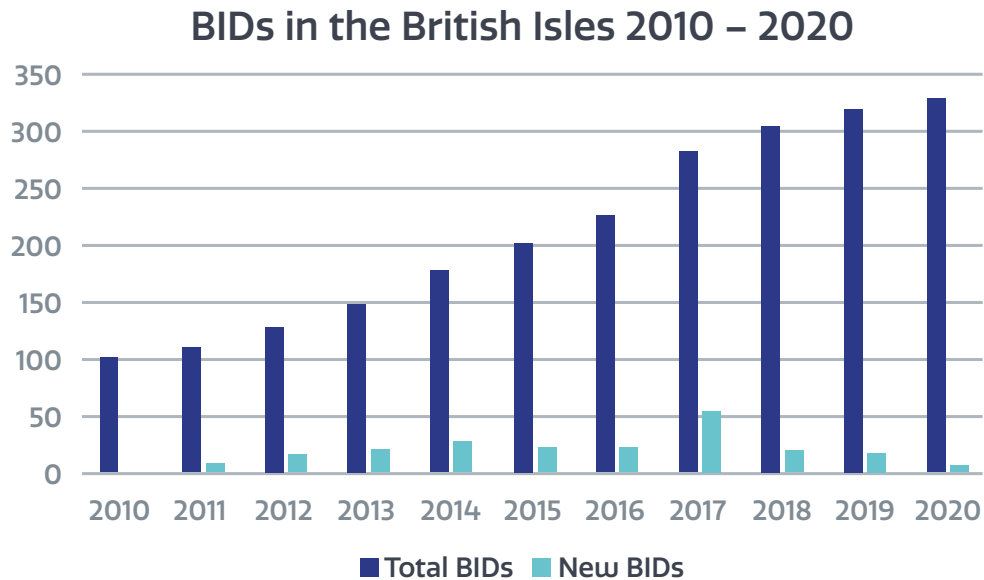
Growth in BID numbers since 2010

	Total BIDs	New BID Ballots
2010	102	
2011	112	10
2012	129	17
2013	150	21
2014	179	29
2015	203	28
2016	227	37
2017	283	26
2018	305	29
2019	321	18
2020	329	6

BIDs are able to start at various dates after their first ballot; hence the variation in numbers of new BID ballots and total BIDs in each of the years, along with variations on the survey date over the years.

Figure 1

Total and new BID growth 2010–2020



Developing BIDs

The number of BIDs at the development stage area is an important measure, as it gives a sense of the supply chain and growth of the sector.

The numbers have grown slightly, although it is clear this past year that a number of BIDs have moved their ballot date or have put their development on hold until after the Covid-19 pandemic. We shall continue to monitor ballots for developing BIDs and update the industry through our weekly Ballot Watch.

Table 5

Developing BIDs by region or country

County or region	Number of BIDs
East Midlands	1
East of England	5
Greater London	2
North West England	2
Scotland	12
South East England	10
South West England	7
Wales	6
West Midlands	3
Yorkshire and the Humber	5
Gibraltar*	1
Grand Total	54

*We have included the Gibraltar BID for interest.

The Ministry of Housing, Communities and Local Government (MHCLG) Loan Fund

The BID Loan Fund is an initiative funded by The Ministry of Housing, Communities and Local Government, established in 2013, to assist with the development of new BIDs in town and city centres in England. The Loan Fund has been managed by British BIDs from the beginning, but in 2020 it was agreed that the time had come for another organisation to take over the work, and a new tender is being drawn up.

The number of loans that have been awarded thus far is 33 and the amount of loans granted is £1,086,635 in total. The scheme is administered on behalf of MHCLG by British BIDs through the British BIDs Advisory Board. Funding methods are also available in Scotland, Wales and Northern Ireland, under different funding mechanisms.

Upon a successful ballot outcome loans are repaid from levy receipts and, as repayments are made, further tranches of loans can be made available. Thus, over the past few years 11 tranches have been allocated.

Ballots 2004 – 2020

The data on ballots and their outcomes are always complex to map, but since the legislation in 2004, the data suggests that there have been 764 ballots, as some BIDs have gone to ballot at least once, and some several times, as their terms extend. Some have not come to fruition and some have ceased mid-term.

The data for current BIDs, showing levy payers turnout, average majority and average majority by Rateable Value [RV] for the 329 current BIDs over the past ten years suggests that thus far for each successive term, the turnout, and both majorities have improved.

Table 6

Averages for all BID ballots 2004–2020

BID outcomes	Numbers of BIDs	Average % turnout	Average % in favour by number	Average % in favour by RV
1st term	352	43.4	73.5	75.2
2nd term	189	49.0	75.1	79.5
3 rd term	84	50.3	81.4	95.2
4 th term	13	51.7	82.9	89.9
Alteration Ballot	1			
Ceased end of 1st term	8	39.3	69.0	70.3
Ceased end of 2nd term	1	46.0	76.0	63.0
Ceased end of 3 year term	1	60.0	87.0	93.0
Ceased in 1st Term	8	34.0	64.6	72.6
Ceased In 2nd Term	1	55.0	80.0	86.0
Challenge Upheld	1	31.0	68.0	90.0
Challenged and a re-ballot held	1		51.0	55.0
Unsuccessful	86	47.7	47.1	46.9
Upcoming Ballots	18			
Grand Total	764	46.0	71.7	75.6

Ballots during the past twelve months

46 BIDs have come to ballot since the last annual survey in the summer of 2019, either new or at various stages of their term, giving a sense of the workload of the national head office levy payers who cast their votes.

Table 7

BIDs which have come to ballot in the past twelve months

Type of BID	Number of BIDs	Average of turnout %	Average in favour by number %	Average in favour by RV %
Area BID	1	35.8	65.8	60.0
Business Park	2		70.0	79.5
City Centre	7	49.9	80.3	80.6
Commercial	2		93.0	97.0
Digital BID	1	35.2	60.0	75.0
Industrial	1	38.0	66.0	79.0
Mixed Area	5	42.0	91.9	94.9
Property Owner	3		97.3	
Tourism	3	48.5	69.5	70.9
Town Centre	21	41.1	72.3	77.6
Grand Total	46	43.3	77.0	80.0

Maxima of data for BID Ballots

BIDs are always interested in who has been the 'best' in their ballot. So, the maxima of each of the measures by BID term are also given here, purely for interest.

Table 8

The 'best' ballot data for a BID by each criterion

BID Terms	Maximum BID turnout	Maximum % in favour by number	Maximum % in favour by RV
1st term	73.6	98.0	98.0
2nd term	83.0	99.0	99.0
3rd term	79.0	96.0	98.0
4 th term	65.0	92.0	97.0
Average of the best of all BIDs	83.0	99.0	99.0

Levy rates for BIDs in 2020

The BID levy rate is, most usually, the multiplier of the non-domestic rateable value by which the levy amount chargeable is worked out and is therefore an important issue for BIDs and their members. The Industry BID Criteria suggest that up to 1.5% is the expected norm, with some allowances made for up to 2% in exceptional circumstances and smaller locations where rateable values are lower and therefore require a higher multiplier to achieve a viable budget.

Levy Rates for BIDs by Term

The average for levy rates is still at 1.4%, with a small spread between BID terms, possibly a reflection of early adopters coming from the higher rateable value areas. The larger levy rates tend to come from the Industrial BIDs, which have fewer hereditaments.

Table 9

% Levy rates of current BIDs

BID Term	Average BID levy	Maximum BID levy
1st term	1.5	3.5
2nd term	1.4	2.5
3rd term	1.5	5
4th term	1.1	2
Average Levy all BIDs	1.4	5

There was a concentration in previous years at the 1% levy rate, but this is now less common. There is also a number who use a banded system, with 38 BIDs having banded levies, and a very few who use some different system such as employee number [1 BID], or a multiple rate [5 BIDs]. The business community traditionally has not generally supported this approach, as it can be viewed as a way of concealing the actual levy multiplier, but it is well accepted in the Industrial BID community.

Hereditaments

Hereditaments are a useful analytical tool for a BID, with half of all BIDs having 445 or less, the smallest number at 35 and the largest at 3000. Interestingly, as BIDs mature over their terms, they grow larger, with an increase in their average number of hereditaments.

Table 10

Numbers of hereditaments in a BID

BID term	Number of Hereditaments	Average of Hereditaments	Maximum Hereditaments	Minimum number of Hereditaments
1st term	51,292	427	1550	34
2nd term	43,746	433	970	42
3rd term	31,109	471	3000	41
4 th term	7,016	584	1000	199
Average for all BIDs	133,163	445	3000	34

Again, the variety of BIDs is shown by a spread of hereditaments across the different types, with some specialist BIDs such as Food and Drink and Industrial showing some interesting numbers and the smallest traditional retail BID having 66 levy payers.

Table 11

Distribution of hereditaments across different types of BIDs

Types of BID	Total number of Hereditaments	Average number of Hereditaments	Minimum number of Hereditaments	Maximum number of Hereditaments
Area BID	1,667	834	667	1,000
Business Park	1,874	268	50	739
City Centre	18,295	795	367	3,000
Commercial	2,096	524	200	890
Destination	1,354	1,354	1,354	1,354
Digital BID	386	386	386	386
Flood Defence Project	34	34	34	34
Food & Drink	35	35	35	35
Industrial	3,264	204	41	380
Industrial Park	1,084	181	95	300
Leisure	370	185	171	199
Mixed Area	4,115	412	96	1,000
Property Owner	268	67	39	128
Retail & Leisure	1,633	544	355	678
Retail & Tourism	245	245	245	245
Tourism	4,174	596	103	1,013
Town Centre	91,513	440	66	1,550
Town Centre/Tourism	756	378	336	420
Grand Total	133,163	445	34	3,000

Although the number of hereditaments in a BID range from 35 to 3000, the median is 440; most BIDs are still not large, although 13 have over 1000 hereditaments.

Table 12

Annual growth of hereditaments 2016–2020

Survey year	Numbers of Hereditaments	Annual growth
2016	78,549	
2017	106,262	35.28%
2018	120,735	13.62%
2019	128,785	6.67%
2020	133,163	3.29%

Levy Income

Levy income is one of the most varied data sets for BIDs, with the early adopters, primarily in the higher rateable value towns and cities, now into their third or fourth terms showing higher mean levy incomes.

But again, most BIDs are small, with an average levy income of £405,178, with the smallest at £18,500.

Table 13

Measures of BID annual levy £ amongst 329 active BIDs

BID Term	Number of BIDs	Total Levy income	Average Levy income	Maximum Levy income	Minimum Levy income
1st term	145	£48,812,644	£341,347	£3,180,000	£18,500
2nd term	104	£40,938,053	£393,635	£2,521,000	£20,000
3rd term	67	£28,796,877	£429,804	£3,728,544	£47,000
4th term	13	£13,945,712	£1,072,747	£4,099,330	£285,691
Grand Total	329	£132,493,286	£405,178	£4,099,330	£18,500

The BID levy income – which is then invested in the local community – is the income collected directly via the mandatory BID levy and does not include any additional income.

On the other hand, there are 21 BIDs with levy incomes over £1million; all are in the key cities, where rateable values and thus income is higher.

Mean levy per hereditament

Although it is a slightly hypothetical figure, from the data it is possible to identify the average levy per hereditament in the survey; with 133,163 hereditaments raising £132,493,286, the average income is £994 per hereditament, slightly more than the £972 per hereditament the previous year, although minor data collection variations may account for some of that.

Hereditaments and income over past decade

There has been a clear and steady growth in the numbers of BIDs over the past ten years, with a concomitant increase in hereditaments and in the total levy income.

Table 14

Hereditaments and income over past ten years

Survey year	Number of BIDs	Total Levy Income	Total Hereditaments	Income per Hereditament
2010	102	£23,483,888		
2011	112	£22,085,567	19,353	£1,141
2012	129	£39,883,454	54,110	£737
2013	150	£51,847,486	64,150	£808
2014	179	£63,000,000	59,771	£1,054
2015	203	£80,124,969	71,703	£1,117
2016	227	£78,659,124	78,549	£1,001
2017	283	£99,971,741	106,262	£941
2018	305	£110,575,380	120,735	£916
2019	321	£125,205,608	128,785	£972
2020	329	£132,493,286	133,163	£994

English government funding and support for the high street

The story of the English government funding for developing town centres and the high street is complex³, with originally three separate funding streams: Towns Fund⁴, Future High Streets Fund⁵ and the Heritage Action Zone⁶; worth in total some £3.6 billion, and some overlap in terminology and indeed money⁷. This was then augmented by another £50m of EU funding to respond to Covid-19.

This is a vital new and very large source of innovation and growth in our high streets and following the latest government announcement⁸ the time seems right to try and produce a clearer picture. The Scottish, Irish and Welsh administrations are dealing with these matters differently, and for Scotland particularly the Scotland Improvement Districts⁹ is providing data.

The database that Bb is developing for these projects suggests that there are potentially around 283 projects, with 221 high streets, town, or city centres involved in one or other of the funding streams, and thus far, 102 of the projects have some BID involvement. We will be monitoring as best we can the outcomes of these projects, as they clearly will be the key drivers of our town and city centres in the 'new normal'.

Regions	Projects
East Midlands	23
East of England	30
Greater London	7
North East England	5
North West England	40
South East England	17
South West England	35
West Midlands	35
Yorkshire and the Humber	29
Grand Total	221

The survey data suggests that around half of all BIDs are engaged in one or other of these project lines

3 Soutl, Graham. <https://www.cannyinsights.com/2020/01/08/explainer-high-streets-task-force-versus-future-high-streets-fund-and-towns-fund/>

4 <https://www.gov.uk/government/publications/towns-fund-further-guidance>

5 <https://www.gov.uk/government/news/1-billion-future-high-streets-fund-expanded-to-50-more-areas>

6 <https://www.gov.uk/government/news/95-million-to-revive-historic-high-streets>

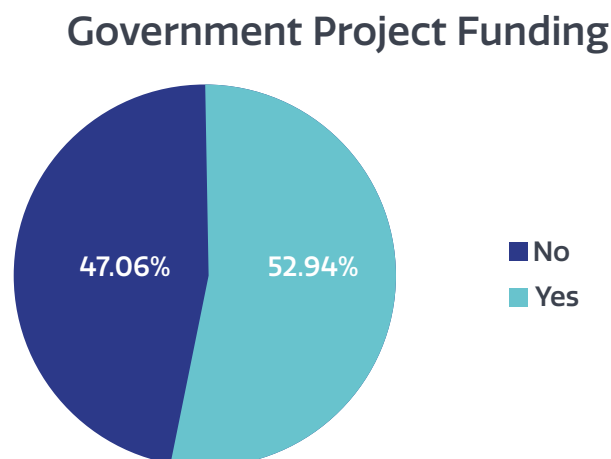
7 <https://www.channel4.com/news/factcheck/factcheck-johnson-on-new-3-6bn-towns-fund>

8 <https://www.gov.uk/government/publications/towns-fund-further-guidance>

9 <https://improvementdistricts.scot/>

Figure 2

BID involvement in Government regeneration funding



BIDs during the Covid-19 pandemic

The industry is now facing its biggest challenge to date. The crisis afflicting the UK's retail sector which is symptomatic in the decline of many of our high streets, was already in evidence before the pandemic (a record net 2481 stores disappeared from the main 500 high streets in GB during 2018). However, its effects have now been accelerated by Covid-19. BIDs and their membership bodies have again demonstrated their resilience and agility in responding with agility to the initial emergency phase of the pandemic and the ensuing lockdown, during which no BID has had to stop operating.

As towns and cities across the country begin to come out of lockdown and work out what a "new normal" looks like, BIDs are adapting once again in order to be instrumental in the recovery of local economies and a new-look civil society, whilst taking an active role in the work in many locations to "reinvent the high street."¹⁰

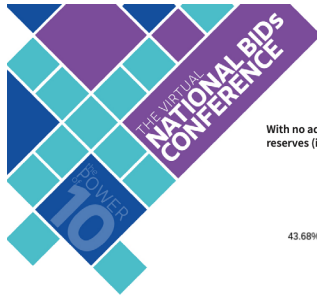
Detailed data from the online survey

The survey section of this report is focused on the current issues for BIDs: Covid-19 and our responses, the resilience of BIDs, and the future narrative of BIDs, as we respond to the "new normal".

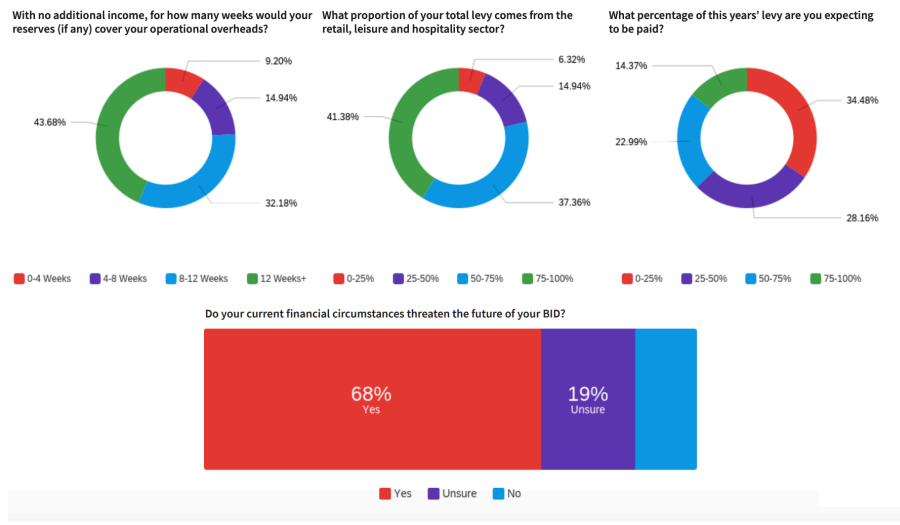
BID survival in the first lockdown

In a joint survey that we undertook with ATCM and The BID Foundation back in March when the Pandemic first impacted in the initial lockdown 68% of BIDs felt that their futures were threatened, and 56.32% felt that they might not last more than 12 weeks.

At the time some BIDs had reserves, ranging from over 121% of their levy to a negative figure of -27.3%. Things were looking dire and there were concerns over the future of the sector.



WHAT WE THOUGHT WE MIGHT GET BACK IN APRIL



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BID reserves

Table 15

BID reserves in selected sample of British BIDs March 2020

Measure of reserves	Level of reserves	Levy income	% Reserves as % of levy
Lowest	-£95,474	£164,904	-27.30%
Lower quartile	£24,147	£299,285	3.52%
Median	£93,982	£458,790	21.58%
Upper quartile	£185,977	£639,800	39.51%
Highest	£2,575,805	£3,700,000	121.54%

After the first lockdown

In the months after the first lockdown a number of factors came into play. Firstly, many Local Authorities were supportive of BIDs, and some supported BIDs with loans, secondly the MHCLG gave a 5% grant toward operational costs, and many levy payers recognised the key role BIDs were playing and paid their levies.

Many nationals, after initially suggesting that they could not or would not pay started to pay and this impacted on BID confidence.

Levy collection

We were interested in the % of levy income that BIDs had collected on October 1st and the figure of an average of 55.4% seems credible; we know some have collected less but this figure is mirrored by the attitudes toward survival, which have much improved in the intervening months.

One of the unknowns at the survey date was how far Local Authorities, and the billing authority, were prepared to go on the legal enforcement of BID levy debt collection. Operating statements generally make clear the need to go to court to collect debts, but many are unhappy at enforcement, when business rates have been put on hold for a year for the retail, leisure and hospitality businesses with a rateable value less than £51k.

Some 61% of BIDs collect their levy payments in March and April, so would be due for court action over the summer. This is on hold in almost every BID and results in most BIDs unsure of the remainder of their income for the year.

Table 16

% of levy collected

BIDs by country	What percentage of your levy do you think you collected by October 1st?
England	56.2%
Ireland	90.0%
Northern Ireland	57.0%
Scotland	0.0%
Wales	41.3%
Grand Total	55.4%

Survival until next levy collection date

Nonetheless, some 10% of BIDs do not think they will be able to survive until their next levy collection day, and a further 13% are not sure. We thus have some 24% of BIDs uncertain of their future, but this is a major advance on the 56% earlier in the year.

However, it is already clear that some BIDs are planning to not go to ballot when their current term finishes; some are planning to start again as a new BID after the pandemic and a suitable lull in their operations.

Table 17

BID survival until the next levy collection date

Do you think this will allow you to survive until the next Levy collection date?	
No	10.2%
Really not sure	13.6%
Yes	76.1%

Project reductions

BIDs have taken over 30% out of their budgets as a sensible response to these budget reductions. The data makes clear that most BIDs have stopped almost all event work, as the Covid-19 rules preclude all crowd-based activities and most local Public Health teams have banned them.

Table 18

How much, in pounds, have you had to take out of your total budget this year

	How much, in pounds, have you had to take out of your total budget this year, because of reduced levy income during the Covid-19 pandemic?	What % of your BID levy income is this?
England	£158,580.78	31.70%
Northern Ireland	£135,000.00	30.00%
Scotland	£120,000.00	50.00%
Wales	£220,000.00	57.00%
Grand Total	£158,146.56	32.53%

Business plan changes

The discussions taking place at open Zoom meetings during the pandemic as part of this research, in the New Economic Foundation [NEF] research project in the summer and as a response to this survey all suggest that some BIDs are already planning their new business plans post-Covid-19.

Clearly, a reduction in retail in the high street, an increase in residential provision, increased working from home, increased hot-desk office provision, and an increase in public sector anchor tenants will make the traditional retail funded BID model less certain. Thus, an increase in more traditional 'janitorial' BIDs, Community BIDs, or very different boutique BIDs will become more evident.

Table 19

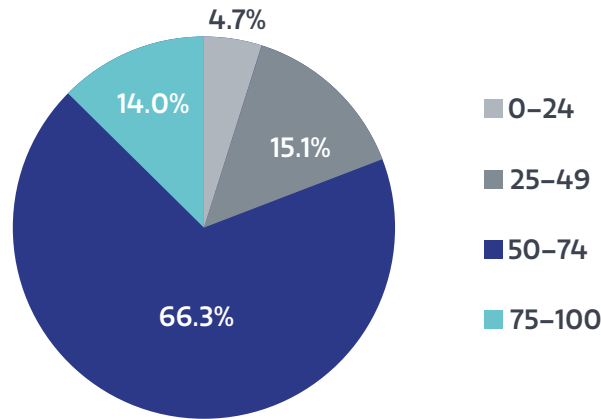
BIDs thinking of making major changes in their business plan

Are you thinking of making major changes in your business plan for your next ballot, following Covid-19	
Not really	60.5%
Yes	39.5%

Ballot confidence

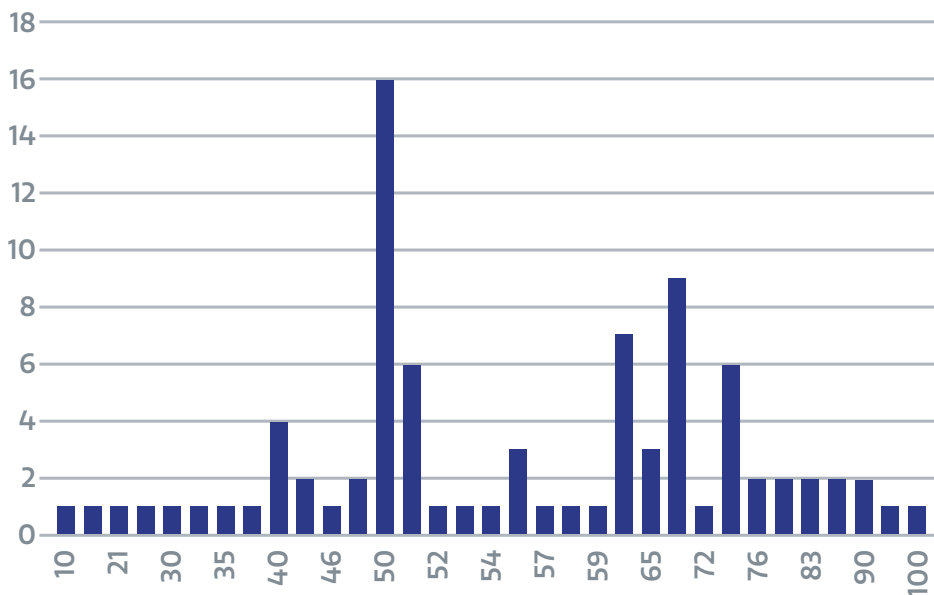
The first lockdown followed more recently by a wave of further regional lockdowns has meant that many BIDs have been nervous about going to ballot. On a 1-100 scale of confidence, 66% of BIDs had a confidence level between 50-75, which is more positive than many might have expected.

Figure 3
Ballot Confidence



When the data is shown along the 1-100 scale of BIDs ranking their confidence, there are clear variations in confidence, which will be born out as the next year progresses.

Figure 4
Ballot confidence



Role of the Board

Boards clearly had a key role to play in the first lockdown; and continue to do so, as lockdowns and the pandemic continue on a regional basis. It is good to note the high level of confidence in BID Boards from the BID Manager or CEO.

Table 20

Role of the Board

Has your Board been able to fulfil their leadership and governance role during this time?	
Absolutely	39.08%
As best they could	24.14%
Not really	4.60%
Pretty reasonably	20.69%
Somewhat	11.49%

Local Authorities

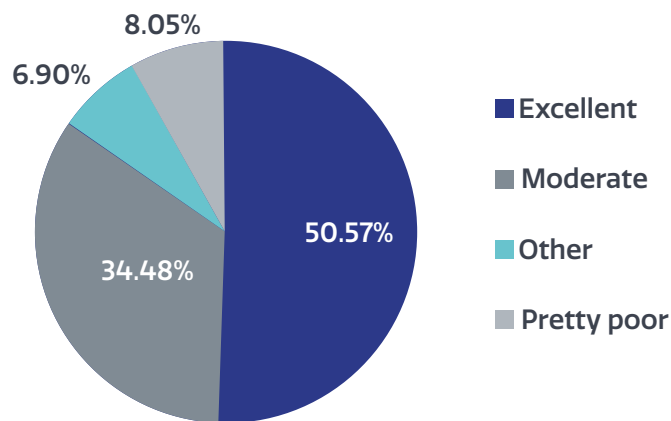
The relationships between BIDs and their Local Authorities has been very critical in the pandemic, and this is again reflected in the data, with over 50% of BIDs reckoning that relations have been *excellent*.

However, with some notable exceptions, local government is still not particularly good at engaging with BIDs. There is a predominant sentiment in too many areas that they will tolerate BIDs so long as they do not interfere with the business as usual and 'impede progress'. This attitude needs to be challenged and changed.

There is some way to go before local government can be fully acknowledged for its recognition, and embracing the potential of BIDs as serious and effective partners, key deliverers of economic development, place makers and a broker of cross sectoral alliances.

Figure 5

Relations with Local Authorities



Relations with local and national levy payers

One key trend that has emerged during the pandemic has been an increased recognition of the key role that relationships have been with all stakeholders. With both levy payers in general, and the national retailers in particular, these relations have been generally good or excellent.

Figure 6

Relations with all levy payers

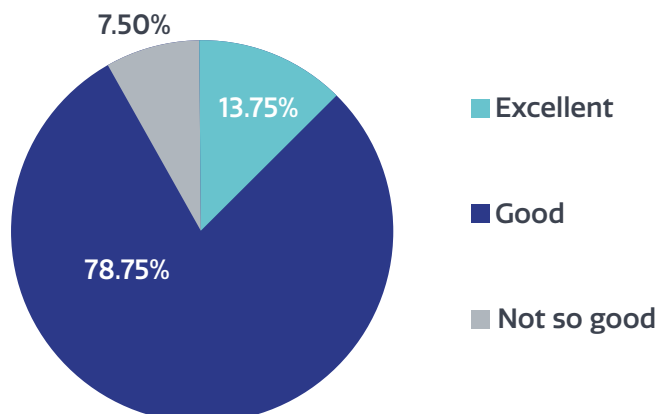
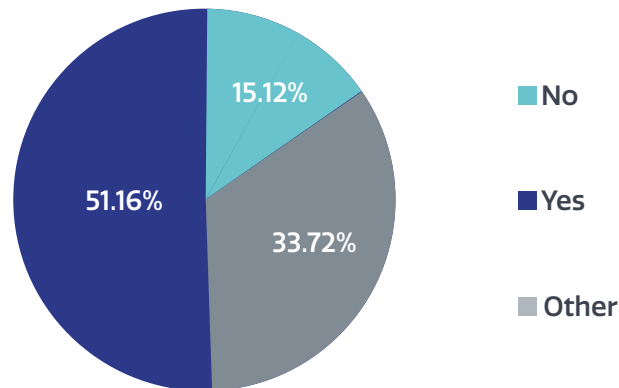


Figure 7

Relationships with national levy payers

Have National Levy payer relationships been satisfactory



Future Plans

As we have seen, BIDs are already planning for the future, with 39.5% looking to change their business plans [Table 19].

The key elements in the feedback were around Property Owner BIDs, Permitted Development Rights & planning and Business Crime Reduction Partnerships.

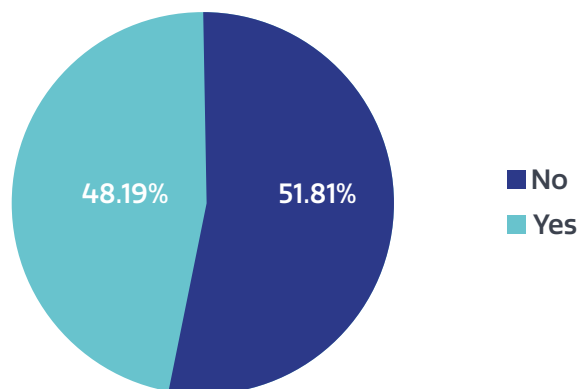
Property Owner BIDs

The view was clear from a number of BIDs [48%] that the introduction of Property Owner BIDs is welcome in terms of its potential as a mechanism to engage owners in the future of their areas within which their properties (investments) are located, but the government needs to go further to bring property owners alongside BIDs. There needs to be a much more robust process for identifying and registering property owners. Generally, a visit will swiftly reveal the identity of property tenants, but BIDs experience real difficulties in identifying absentee landlords. This is a real obstruction to fostering true collaborative action to curate vital places e.g. around strategies for bringing vacant units back into use, which are often unsightly and undermine commercial confidence in locations.

Figure 8

BIDs with an interest in property owner BIDs

Are you interested in Property Owner BIDs?



Permitted Development Rights and planning changes

Many BIDs [33%], particularly Industrial BIDs, are concerned about the changes in planning and Permitted Development Rights [PDR].

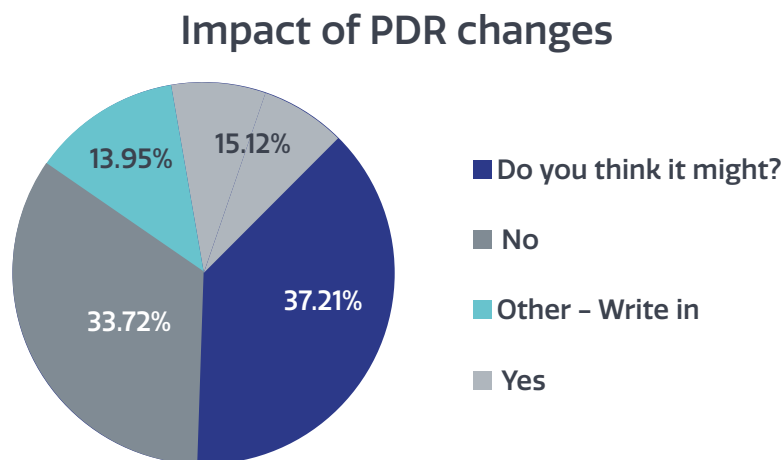
Flexibilities in the planning system present challenges in terms of the ability of BIDs, and other partners, to curate places; reducing control over the mix of uses and potentially enabling incompatible uses.

It was felt that flexibilities to convert B class uses to residential will be particularly problematic, with the associated propensity for residential to displace, or sit uncomfortably alongside business. Careful consideration needs to be given to how increased residential use can be accommodated within town and city centres in particular, in order to ensure a good balance of uses and that the 'right type' of residential is introduced i.e. government pressure to increase housing stock should not inhibit the careful curation of places.

This is beginning to present in some areas in an over-emphasis on small, studio units. It was felt that greater Permitted Development latitude is likely to be problematic. Although some BIDs may have Article 4 direction in place at the moment, it is unclear how long this can protect business locations.

Figure 9

BID concerns on the impact of Permitted Development Rights



Business Crime Reduction

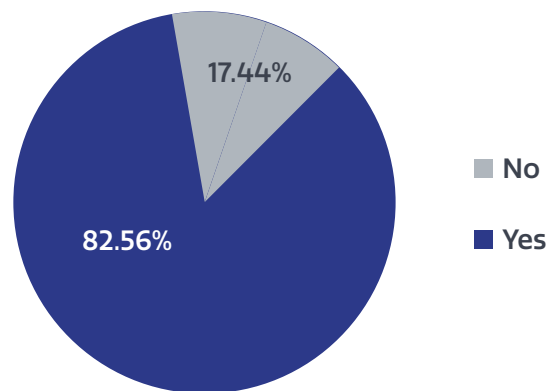
There was a strong view [82%] that Business Crime Reduction Partnerships work well and demonstrate how pooling resources can create real impact in tackling local issues. BID resources have been instrumental in expanding the area of focus of some Business Crime Reduction Partnership areas, enabling support to be afforded to more businesses – this has been effective not only in tackling crime, but in making the case for potential BID expansion.

The National Business Crime Solutions is seen as an important source of insight into criminal activity and how to tackle it.

BID Wi-Fi and smart phone data helped the Police to identify hot spot areas; enabling the dispersal of crowds, but also pinpointing optimal signage and messaging locations. On the other hand, there was a concern that disconnections between the Police and the Crown Prosecution Service and the prevalence of widely differing approaches, systems and tools significantly inhibit the effectiveness of all parties involved in tackling crime. More cohesion and consistency of practice are required.

Figure 10

Importance of Business Crime Reduction



Other future planning

The survey asked BIDs to identify other things that were of interest of concern and a whole range of differing responses emerged that will be reflected in some of the training and development and policy activity of Bb.

A word cloud of the outcomes shows the dominant issues. Most of these – Community Improvement Districts, national government lobbying, BID regulations, engaging with the head offices of national businesses, and working with the other BID representative agencies, Bb will be taking forward as part of their national representation, BID support and lobbying role.



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