British BIDs™
Leading the BID industry

TownandPlace.AI

Q2 AUGUST 2021

QUARTERLY BID BAROMETER

Business Improvement Districts in the British Isles

Featuring footfall analysis of 39 Coastal Town BIDs

Based on figures from 1st April – 30th June 2021

EXECUTIVE SUMMARY

1

The total active BID community in the British Isles totals 322, the same as the last quarter **but seven less than last year.**

2

Six new BIDs were successful in their ballots during the pandemic.

3

The number of BIDs at the development stage is an important measure, as it gives a sense of the supply chain and growth of the sector. **There are currently 57, two more than the last quarter.**

4

The total levy money invested by BIDs is £132,751,503 per annum, a small increase of £667,476 on Q2 last year.

5

There are currently 126,529 business hereditaments paying their BID levies and investing in their business communities.

6

The average for levy rates is now 1.45%.

7

The average levy payment across the British Isles is £1,049.

8

There have been 65 ballots since the lockdown in March 2020.

9

61 out of 65 ballots have been successful and at least two BIDs have decided not to go forward because of the Covid-19 pandemic.

10

Ballot turnout in the pandemic was on average 39.6% and the ballot results by rateable value were 80.4% and by number 81.8%. This is a better performance than normal; with an average improvement of some 6.6 percentage points in RV and 7.8 percentage points in number compared to the normal pre pandemic results. Turnout was however less, but surprisingly only by 6.2 percentage points.

11

The time series data show a growth of BIDs since 2010, with a growth in both income and hereditaments.

12

Tourist visitor numbers grow by 36.83% for Coastal BID town centres in June.

INTRODUCTION

Early in 2020, as the Covid pandemic started, there was a concern across the BID industry that the pandemic would cause major problems with ballots, levy collection, enforcement, events, and the delivery of projects; we were concerned about the BID industry being transformed negatively by the pandemic, whilst never doubting the necessity of BIDs in managing its impacts, and in planning for recovery.

In the last eighteen months almost all of these concerns have proved unfounded, with only four unsuccessful ballots, out of the 65 that have taken place.

There can be no doubt of the significance of the pandemic and its impact on the places that are the focus of our industry, and BIDs continue to be extremely successful during this pandemic, as demonstrated by both the national ballot results and levy collection rates.

The major industry change brought about by the pandemic has not just been about BIDs, ballots and the collection of the levy. It is the changes that towns, city centres and out of town trading estates will be undergoing as a very different economy emerges following the growth of online business, e-commerce, working from home and people's aspirations for a new way of working.

We have yet to see the full outcome of some of these changes, but many BIDs are already demonstrating voice and leadership in shaping what this future looks like, whilst delivering to the immediate challenges of reopening and recovery.

The purpose and uses of this, the BID Quarterly Barometer for June 2021, continue to be multiple. It allows a snapshot to be taken of the BID community in the British Isles for policy makers, both local and national; it allows chief executives and boards of BIDs to benchmark themselves against their peers and colleagues, and it allows new and developing BIDs to design their services and operations in the most effective fashion.

This Barometer continues to use the quantitative data from the Business Plans of each BID as it comes to ballot; the Bb team also scan BID websites, local papers and social media continually to make sure that our data are as up to date and accurate as possible.

The Covid-19 pandemic, and the Coronavirus Act 2020, meant that many BIDs were able to delay their ballots until March 2021 and similarly, many of the developing BIDs seem not to be coming to ballot until the future is clearer; although we have seen six new BIDs emerge during the Covid pandemic and its associated lockdowns.

Nonetheless, ballots are taking place, and successfully. There have been 65 ballots since the lockdown in March 2020 and we were concerned about both turnout and success rates; in fact, the ballot data has been extremely positive and only four out of 65 ballots have been failures. Two BIDs that we know of have decided not to go forward.

Thus, although the data in this Barometer reflect our continual fine tuning and updating, the changes quarter on quarter remain small.

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PLACE ANALYSIS

PLACE INFORMATICS HAVE ANALYSED THE HOME POSTCODE LOCATIONS OF TOWN CENTRE VISITORS TO 39 COASTAL BID TOWN CENTRES BETWEEN MAY 21 AND JUNE 21. CALCULATING THE TOTAL NUMBER OF UNIQUE VISITORS SEEN IN EACH TOWN CENTRE AND THE TOTAL NUMBER OF POSTCODES WHERE THE VISITORS ORIGINATED FROM, TO PROVIDE A DETAILED UNDERSTANDING OF HOW PEOPLE'S TRAVEL BEHAVIOURS ARE CHANGING POST COVID-19 RESTRICTIONS.

STRUCTURE OF THE BAROMETER

THE BAROMETER IS IN FIVE SECTIONS: **THE NATIONAL PICTURE** FOR BIDs, SHOWING TOTALS IN VARIOUS CATEGORIES; **THE AVERAGES OF DATA** FOR BIDs; **KEY BALLOT DATA** FOR BIDs; SOME **TIME SERIES DATA** ON BIDs FOR THE PAST TEN YEARS; **FOOTFALL ANALYSIS** FROM PLACE INFORMATICS.

THE NATIONAL PICTURE

KEY BALLOT DATA

FOOTFALL ANALYSIS

THE AVERAGES OF DATA

TIME SERIES DATA

THE NATIONAL PICTURE FOR BIDs

BY COUNTRY, REGION, TYPE, LEVY SPEND AND HEREDITAMENT

The total active BID community in Great Britain, Northern Ireland, and Ireland at the end of June 2021 totals 322, seven less than last year.

There is clearly a regional spread of BID, with the major cities having the highest proportion by levy income, but interestingly not necessarily the highest number of hereditaments. This is most plausibly a reflection of differing rateable values across the country.

1. BIDs by country and region, showing hereditaments and income

Region	Number of BIDs	Levy income	Number of hereditaments
East Midlands	10	£4,506,576	4,556
East of England	28	£9,795,652	11,173
Greater London	69	£46,591,141	17,490
Ireland	6	£5,447,732	8,291
North East England	6	£2,987,278	3,105
North West England	29	£8,900,792	10,765
Northern Ireland	8	£2,754,209	3,152
Scotland	34	£6,116,535	11,408
South East England	38	£13,580,081	17,094
South West England	33	£9,571,620	15,410
Wales	14	£3,129,770	3,661
West Midlands	30	£10,580,841	12,285
Yorkshire and the Humber	17	£8,789,276	8,139
TOTAL	**322**	**£132,751,503**	**126,529**

There is still much variety in the types of BID, with a continuing move away from the original 'crime and grime' retail-led high street BID to a more nuanced range of BID that reflect their different business communities, with industrial BID morphing into mixed area and commercial bodies.

2. BIDs by type, showing levy spend and hereditaments

BID type	Number of BIDs	Total Levy income	Total hereditaments
Area BID	3	£1,074,311	1,667
Business Park	8	£2,297,378	1,899
City Centre	26	£21,971,541	19,226
Commercial	4	£6,747,564	1,606
Destination	2	£1,570,482	1,354
Digital BID	1	£70,000	386
Flood Defence Project	1	£219,139	34
Food & Drink	1	£18,500	35
Industrial	16	£2,089,329	2,741
Industrial Park	6	£670,797	1,084
Leisure	2	£1,871,926	370
Mixed Area	14	£12,693,662	4,083
Property Owner	4	£6,979,779	268
Retail & Leisure	3	£5,215,010	1,633
Retail & Tourism	1	£107,000	245
Tourism	8	£2,550,030	4,632
Town Centre	219	£64,684,354	84,060
Town Centre/Tourism	2	£618,260	756
Cultural & Commercial	1	£1,302,441	450
TOTAL	**322**	**£132,751,503**	**126,529**

Developing BIDs

The number of BIDs at the development stage is an important measure, as it gives a sense of the supply chain and growth of the sector. There are currently 57, two more than the last quarter, although at least one of these is a BID that failed in ballot and is coming back again with a different business plan. Clearly some of these will await the full reopening and many may review their plans then.

We shall continue to monitor ballots for developing BID and update the industry through our weekly Ballot Watch.

3. Current developing BIDs by country and region

Country or Region	Number of Developing BIDs
East Midlands	1
East of England	4
Greater London	9
North West England	3
Scotland	13
South East England	9
South West England	6
Wales	4
West Midlands	4
Yorkshire and the Humber	4
TOTAL	**57**

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

THE AVERAGES OF DATA

FOR BIDs

The data for BIDs are shown here to allow BIDs to position themselves against sector benchmarks by way of levy, hereditaments, and income.

Levy % rates for BIDs by term

The average for levy rates is now at 1.45%, with a small spread between BID terms, possibly a reflection of early adopters coming from the higher rateable value areas.

4. Levy % rates of current BIDs by term, in % of RV

BIDs by term	Average of BID levy %	Maximum BID levy %	Minimum BID levy %
1st term	1.52	3.50	0.75
2nd term	1.41	2.50	0.52
3rd term	1.46	5.00	0.95
4th term	1.26	2.30	0.80
5th term	0.65	0.65	0.65
TOTAL	**1.45**	**5.00**	**0.52**

5. Levy % rates of current BIDs by type, in % of RV

Type	Average BID levy %	Maximum BID levy %	Minimum BID levy %
Area BID	1.13	1.25	1.00
Business Park	2.04	3.00	1.00
City Centre	1.40	5.00	1.00
Commercial	1.06	1.50	0.80
Destination	1.50	1.50	1.50
Industrial	1.36	3.00	1.00
Industrial Park	1.00	1.00	1.00
Leisure	1.00	1.00	1.00
Mixed Area	1.06	2.00	0.75
Property Owner	0.91	1.00	0.65
Retail & Leisure	1.25	1.60	0.65
Retail & Tourism	1.50	1.50	1.50
Tourism	1.59	1.95	1.00
Town Centre	1.48	3.50	0.52
Town Centre/Tourism	1.59	1.68	1.50
Cultural & Commercial	1.60	1.68	1.60
TOTAL	**1.45**	**5.00**	**0.52**

BID hereditaments by terms

Hereditaments are a useful analytical tool for a BID, with the average BID having 444, the smallest number at 29 and the largest at 3,000. Interestingly, as BIDs mature over their terms, they continue to grow larger, with an increase in their average number of hereditaments.

6. Numbers of Hereditaments in BIDs by term

BID Term	Number of BIDS	Total no. of hereditaments	Average no. of hereditaments	Max no. of hereditaments	Min no. of hereditaments
1st term	116	41,084	415	1,550	29
2nd term	116	45,001	433	1,000	42
3rd term	67	31,209	488	3,000	41
4th term	22	8,635	508	1,000	190
5th term	1	600	600	600	600
TOTAL	**322**	**126,529**	**444**	**3,000**	**29**

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

7. BID hereditaments by type of BID

BID type	Number of BIDs	Total number of hereditaments	Average number of hereditaments	Maximum number of hereditaments	Minimum number of hereditaments
Area Bid	3	1,667	834	1,000	667
Business Park	8	1,899	271	739	50
City Centre	26	19,226	769	3,000	379
Commercial	4	1,606	402	724	200
Destination	2	1,354	1,354	1,354	1,354
Digital BID	1	386	386	386	386
Flood Defence Project	1	34	34	34	34
Food & Drink	1	35	35	35	35
Industrial	16	2,741	211	380	41
Industrial Park	6	1,084	181	300	95
Leisure	2	370	185	199	171
Mixed Area	14	4,083	371	1,000	29
Property Owner	4	268	67	128	39
Retail & Leisure	3	1,633	544	678	355
Retail & Tourism	1	245	245	245	245
Tourism	8	4,632	579	1,200	103
Town Centre	219	84,060	438	1,550	66
Town Centre/ Tourism	2	756	378	420	336
Cultural & Commercial	1	450	450	450	450
TOTAL	**322**	**126,529**	**444**	**3,000**	**29**

Levy Income

Levy income and thus business investment 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 fourth or fifth terms showing higher average levy incomes and thus investment.

But again, many BIDs are small, with an average levy income of £416,149, and the smallest is £18,500.

8. Levy income for BIDs by term

Terms	Total levy income	Average BID levy income	Maximum BID levy income	Minimum BID levy income
1st term	£37,014,891	£321,869	£1,460,170	£18,500
2nd term	£47,284,823	£414,779	£3,728,544	£20,000
3rd term	£29,138,195	£434,898	£3,728,544	£42,395
4th term	£15,213,594	£691,527	£1,957,000	£124,600
5th term	£4,100,000	£4,100,000	£4,100,000	£4,100,000
TOTAL	**£132,751,503**	**£416,149**	**£4,100,000**	**£18,500**

Levy income and thus business investment is one of the most varied data sets for BIDs.

KEY BALLOT DATA

FOR BIDs

Ballot data are one of the most useful BID benchmarks, with the data suggesting both an improved turnout and better voting figures at each term, as BIDs become more experienced at satisfying their levy payers' needs.

During the current Covid-19 pandemic there were major concerns over ballots, which were in the end unfounded; 65 ballots resulted in 61 successful outcomes and four failures.

Six new BIDs were successful in their ballots during the pandemic.

Ballot data during the pandemic March 23rd, 2020 – June 30th, 2021

9. Ballot success data in the pandemic from March 23rd, 2020 - June 30th, 2021

BID term	Number of BIDs	Average % turnout	Average % in favour by number	Average % in favour by RV
1st term	6	41.12	82.13	80.55
2nd term	30	40.75	78.25	81.52
3rd term	12	40.01	83.16	83.54
4th term	12	38.73	88.32	88.32
5th term	1	44.00	99.50	99.70
Unsuccessful	4	23.25	49.37	48.13
TOTAL	**65**	**39.58**	**80.43**	**81.81**

Ballot turnout in the pandemic was on average 39.6% and the ballot results by rateable value were 80.4% and by number 81.8%.

This is a better performance than normal; with an average improvement of some 6.6 percentage points in RV and 7.8 percentage points in number compared to pre pandemic results. Turnout was however less, but surprisingly only by 6.2 percentage points.

Outcomes of all BID ballots

BIDs most certainly measure themselves by way of their ballot data, and rightly so. The mean is the most used data measure for each of the key indicators – the % turnout, the % of votes by number and the % of votes by RV. The data suggest on the whole an improvement at each term of a BID.

10. Ballot data for BIDs for their various terms

BID Term	Average % turnout	Average % in favour by number	Average % in favour by RV	Number of ballots
1st term	43.4	73.6	75.3	359
2nd term	48.2	75.5	79.7	215
3rd term	48.9	81.6	84.5	92
4th term	45.5	85.6	89.1	25
5th term	44.0	99.5	99.7	1
Unsuccessful	47.8	46.8	47.0	85
TOTAL	**45.8**	**72.6**	**75.2**	**777**

Maximum of data for BID Ballots

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

11. Maximum of data for BID Ballots

BID term	Maximum % turnout	Maximum % in favour by number	Maximum % in favour by RV	Number of ballots
1st term	88.0	98.0	99.0	359
2nd term	83.0	98.6	99.0	215
3rd term	79.0	98.5	99.9	92
4th term	65.0	96.2	99.0	25
5th term	44.0	99.5	99.7	1
TOTAL	**88.0**	**99.5**	**99.9**	**777**

Time series data since 2010 show a growth of BIDs since that year... until this pandemic year, when there was a reduction by 7 BIDs

TIME SERIES

2010 – 2020

The time series data since 2010 shows a steady growth of BIDs, with a growth of both income and hereditaments, until this pandemic year, when there was a reduction by 7 BIDs and a concomitant reduction in hereditaments, although interestingly not in total levy collected and invested, which has grown slightly by £258,217.

12. BID data 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	19,535	£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
2021 Q2	**322**	**£132,751,503**	**126,529**	**£1,049**

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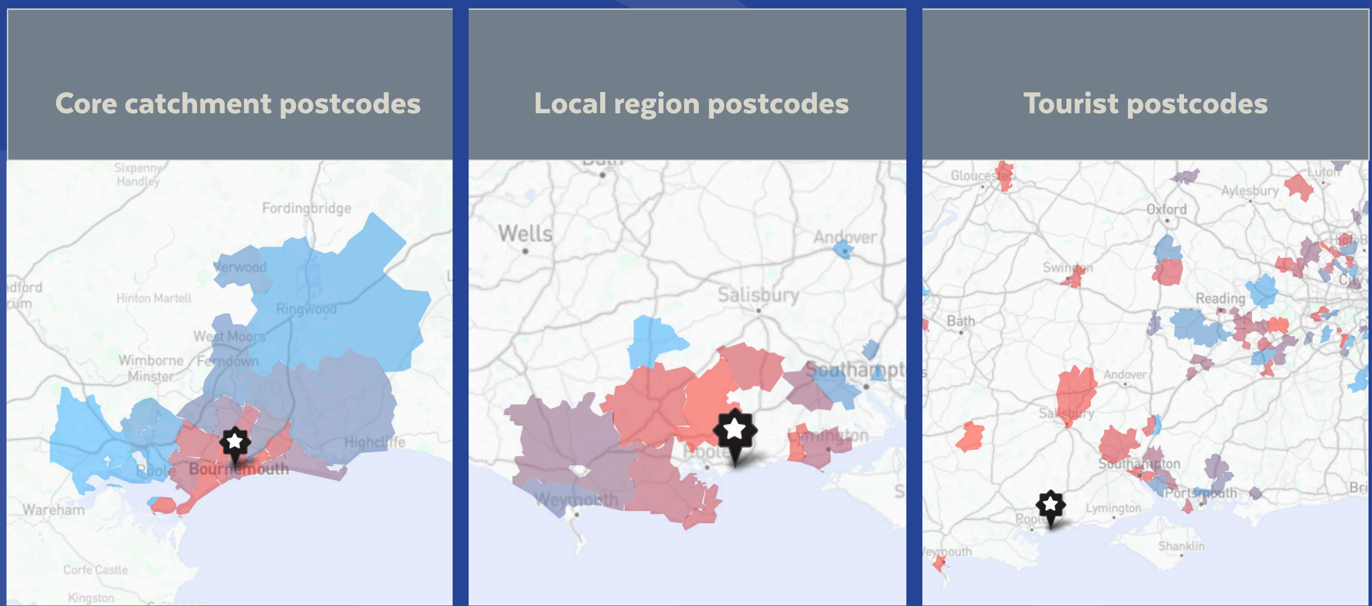
COASTAL BID TOWN CENTRES

As Covid-19 restrictions are relaxed/removed, footfall is returning to town centres, so this month here at TownandPlace.AI we are taking a look to see what type of town centre visitors are contributing to increased footfall in our Coastal BID town centres. Tourist visitor numbers grow by 36.83% for Coastal BID town centres in June.

We have analysed the home postcode locations of town centre visitors to 39 coastal BID town centres between May 21 and June 21. Calculating the total number of unique visitors seen in each town centre and the total number of postcodes where the visitors originated from, to provide a detailed understanding of how people's travel behaviours are changing post covid restrictions.

We have split town centre visitor origins into three catchment visitor groups:

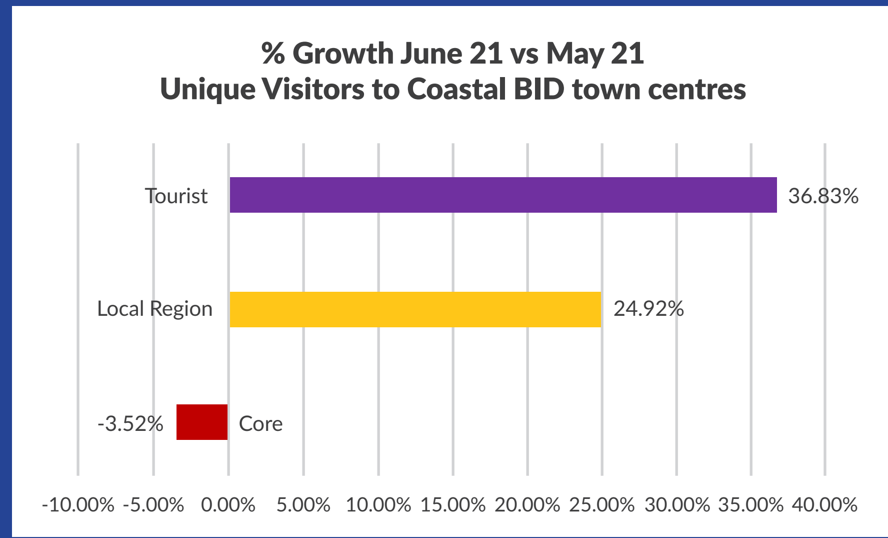
- **Core** – people who use the town centre on a daily or weekly basis.
- **Local Region** – people who use the town centre each month or who come for a specific event.
- **Tourist** – visitors from the wider region or from across the UK.



Example: Bournemouth town centre visitor catchment maps June 21

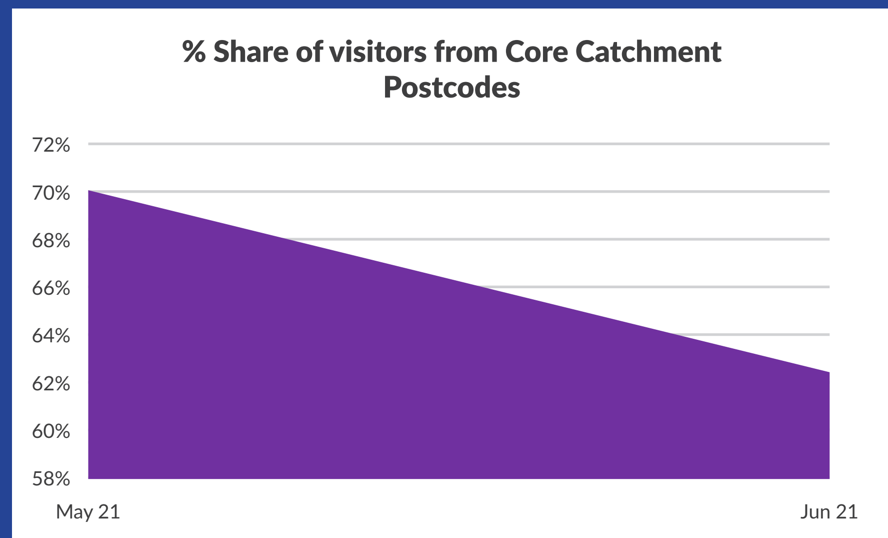
Growth in local region and tourist unique visitors

Comparing June 21 and May 21 the total number of unique visitors to coastal town centres has increased by 7%, however this does not tell the whole story, as can be seen in the graph below. Both Tourist and Local Region visitors' numbers have benefited from significant growth 36.83% and 24.92% respectively, however core catchment visitors have actually seen a decline of 3.52%.



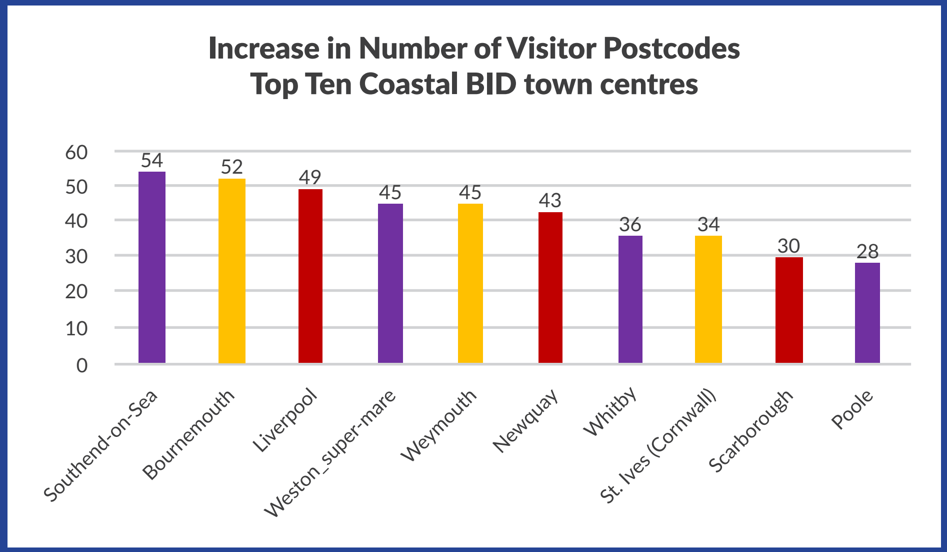
Coastal BID towns become less reliant on core catchment visitors

In May 21, seventy percent (70%) of all visitors to coastal BID towns originated from the core postcode catchment area for each coastal town centres. This reliance on core catchment has dropped to sixty-two and half per centre (62.5%) during June 21, an encouraging change, we are now starting to see town centre visitors who have travelled from outside the town's core catchment area.



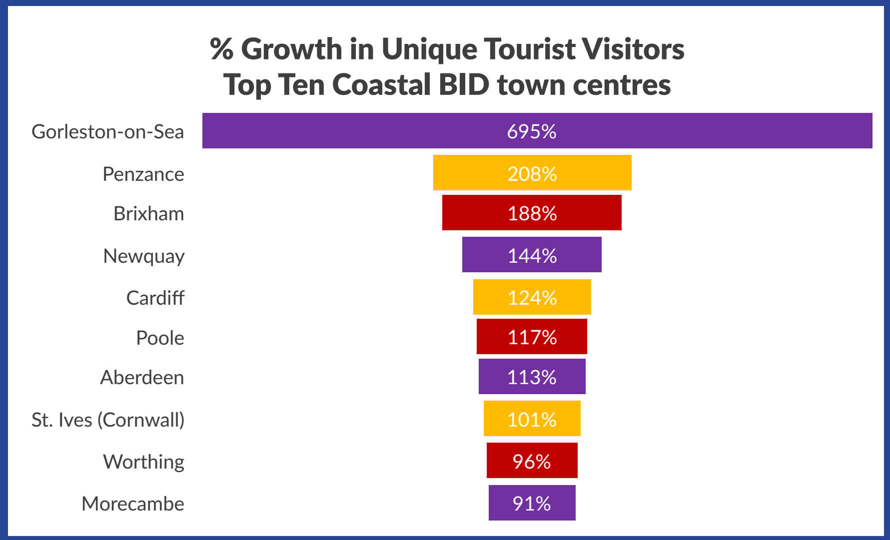
Growth in town centre visitor postcodes

Southend-on-Sea came out top for growth in the total number of postcodes from where town centre visitors originated from, with an increase of 54 postcodes between June 21 compared to May 21. The top ten performing coastal BID towns are included in the graph below.



Growth in town centre tourist visitors

Growth in tourist visitors i.e., not core catchment or local visitor catchment has been strongest in Gorleston-on-Sea which experienced a near 700% growth. Four out of the top ten town centres were in Devon and Cornwall!



Footfall and tourism town centre data

To view the latest July 21 footfall, tourism and visitor catchment data for your BID town centre, click on the link https://townandplace.ai/signup and register for your FREE 14-day access pass. TownandPlace.AI is a 'no hardware required' provider of footfall, visitor behaviour and tourism data for over 2,300 town centres across the UK.

If you have any questions regarding the available footfall, tourism and visitor behaviour data for your town centre please get in touch with:

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