



VisitEngland 

## The Evening & Night-Time Economy:

Realising the potential for  
Destination Organisations

**The Evening & Night-Time Economy: Realising the Potential for Destination Organisations**

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## The Evening & Night-Time Economy and its value to Destination Management

VisitEngland and the Association of Town Centre Management (ATCM) seek to explore the links between evening & night-time economy management, and the benefits of this, within the context of destination management and the visitor experience.



### What is the Evening & Night Time Economy (NTE), and what are the benefits of sound NTE Management?

UK town & city centres after dark have long been a place of contention, often places to control and condemn rather than to shape and encourage. It is true that the NTE, the time period between 18:00pm-06:00am, presents the unique challenges of; reducing crime and disorder, limiting the effects of alcohol on health, and changing operator, worker, resident and visitor perceptions. However, increasingly, key stakeholders are seeing the NTE as a huge opportunity rather than solely as a threat, and we examine this position in this paper.

The NTE covers a wide range of activity in town and city centres, including; pubs and bars, cafes, restaurants, cinemas, theatres, events, retail etc., which combine to create a centre offer 'after dark', manifesting an economy that has its own unique qualities and is distinct from the 'day-time'.

The current economic situation aside, improvement of the NTE comes through sound management without exception. The NTE, has for the majority, been a thing to fear and regulate- resulting in a 'dealing with' mentality rather than actively managing this side of the industry. There are exceptions, however for the majority the concept of NTE management as a separate consideration from the day time has only recently become apparent.

The NTE has become much more significant for a number of reasons - research from the Civic Trust, the ATCM & the British Council of Shopping Centres (BCSC), TBR Ltd & MAKE Associates Ltd, and Springboard Ltd & ATCM has revealed that the NTE is an integral part of town and city centre economies, providing employment opportunities and wealth creation. As a result it deserves to be taken seriously.

The recognition by the coalition Government that the NTE in our towns & cities is an opportunity for economic and social development - as expressed through the new National Planning Policy Framework (town centre uses), the Government's Alcohol Strategy, and the response to The Portas Review – should spur all stakeholders to cooperatively explore and exploit avenues for NTE development, management and marketing.

Economists TBR and NTE specialists MAKE Associates estimated the value of the UK NTE at £66bn in 2009, accounting for up to 27% of town and city centre turnover and between 5-10% of most locations' overall employment figure<sup>2</sup>. Recent work for the city of Sydney shows that the annual principal costs of managing the NTE (not all of which are negative) are hugely outweighed by the turnover of businesses at the heart of the city - \$127m and \$2.7bn dollars respectively<sup>3</sup>.

Springboard, the UK town/city centre monitoring service provider, highlights that footfall across a variety of types of centres including historic and costal centres has outperformed figures captured during the day, a month-on-month increase in NTE related footfall since January 2010, showing the strength and potential of this side of the industry<sup>4</sup>.

Given the positive statistics reported, the improved management of, and engagement with, the NTE should be a focus for all place management professionals. Presently the NTE is managed by a range of individuals and organisations, making partnership, engagement and consultation pre-requisites.

The ATCM and the BCSC have identified, along with sector partners, a growing trend towards the strategic management & measurement of NTE experiences by dedicated professionals, and a clear desire by centre partnerships to manage centres better in future - leveraging assets in order to generate both economic and social capital<sup>5</sup>. The benefits of a functioning NTE can only be realised when the management of it is sound and it is integral for destination managers to become part of, or input into, place management partnerships that impact directly or indirectly on the NTE. Yet, the tourism/destination management relationship to the NTE has not been sufficiently considered in the majority of centres. Researchers, trade bodies and practitioners have identified that this needs to change.

The changing global economy and the creation of new markets and positive exchange rates against sterling has caused increased numbers of potential visitors to consider England and the wider UK as a destination. There is certainly an opportunity for destination managers to input into the development and management of the NTE for the benefit of consumers and local/regional centres. VisitEngland research (2011) indicates that 50% of visitors to cities said that a good range of shopping opportunities were extremely or very important to the satisfaction of their visit and 75% of visitors across all destination types stated good quality food, drink and dining were also extremely or very important. The Great Britain Day Visits survey (2011) shows that the out of 1.5 billion day visits last year nearly 300 million visits were either mainly for a meal out or going on a night out – representing 21% of the £52billion spend in the UK on day visits. Ensuring these visitors have a positive experience is critical to retaining these customers, particularly those from emerging markets for whom recent or impending travel may be their first experience of England. More information on these surveys can be found at [www.visitengland.org/insight-statistics](http://www.visitengland.org/insight-statistics)



<sup>2</sup> TBR Ltd & MAKE Associates Ltd (2009), Night Mix Index

<sup>3</sup> TBR Ltd, MAKE Associates Ltd, Longview Partners & Philip Hadfield Consulting (2011), Sydney Night Time Economy: Cost Benefit Analysis

<sup>4</sup> Springboard Ltd & the Association of Town Centre Management (2011), Night-Time Economy Index

<sup>5</sup> Association of Town Centre Management & British Council of Shopping Centres (2010), Better Town Centres at Night

NTE strategies are beginning to evolve within the tourism sector but take-up has been slow. Centres like Derry-Londonderry, Belfast, and Durham are writing considerations and provisions for the NTE into tourism and regeneration plans to establish action for the NTE, regarding it as a key ‘pillar’ for future tourism development. This is apparent in Derry-Londonderry, which hosts the Turner Prize in 2012 and is the European Capital of Culture in 2013.

- Belfast City Council have been driving the development of its NTE for a number of years and claim that the city’s private sector, government and a variety of public agencies have it marked as a continuing key development area. Citing the Civic Trust’s NightVision research<sup>6</sup> outlining the benefits of the NTE, Belfast clearly realises that the benefits of NTE management relate to an increased vibrancy in the city through increased access to businesses, services and entertainment by residents and visitors. The centre reports that average weekly total estimated spend in the city, between 5 and 10pm, equates to approximately £7.1m<sup>7</sup>. The development and diversification of offer in the centre encourages not only increased spend but also a more diverse crowd after dark, which impacts not only footfall, but crime & anti-social behaviour and perceptions statistics, unveiling a critical relationship.

- The improvement of the visitor experience after dark in Newcastle Gateshead also focused on this relationship through their trial of extended retail opening hours linked to ATCMs ‘Alive After Five’ project; eating and drinking promotions with businesses, quality urban design, festivals, and culture & arts activities, in addition to typical initiatives linked to regulation, licensing and policing. Results indicated a revenue increase of £53m over a six month period in the city<sup>8</sup>, which makes a real business case for the blurring of the day and evening economy.



- Liverpool’s delivery of the ‘Light Night’ initiative, an event that sees the whole city centre opened late into the evening; including museums, theatres, shops, restaurants and bars. Liverpool’s Light Night (2012) attracted 25,118 visits with an estimated economic impact of £335,000<sup>9</sup>.

Research from Open Culture<sup>10</sup> indicated that 62% of Liverpool’s respondents visited a venue they had never been to before and 90% said they’d been inspired to visit participating venues again. Successfully concentrating attention on the centre’s cultural assets helped to spur people with low engagement in the arts into visiting new cultural venues. It is this kind of activity that builds a platform on which the accessibility of town and city centres to new and “missing” audiences can be achieved over the longer term.



*“Liverpool’s night time offer is legendary and a key draw for visitors from all over the world. Ensuring conference delegates and leisure visitors can wander around the city at night in a safe and welcoming environment is vitally important. We estimate that approx £216m per annum is spent by visitors in the night time economy including restaurants, bars and evening entertainment. Visit Liverpool has been keen to work with the Purple Flag Partnership to champion this initiative under the banner of ‘It’s Liverpool after dark’,*

Pam Wilsher, Liverpool City Region LEP

- The district centre of Bury also experienced tremendous results from their Light Night project in 2011, where the event encouraged 10,000 people out onto the streets, boosting business income and civic pride. Angela Warrington, who works at Bury Tourist Information Centre, commented: “...we thought it would either be really flat or really mad and it just went mad.”<sup>11</sup> This is vindication for a centre’s desire to offer something different for the public to experience and supports further initiatives like the ‘Museums at Night’ initiative which can play a large role in wider NTE events programmes in future.

These are a few of the wide variety of initiatives/activities that centres can deliver to improve their NTE, impacting on local economic growth and visitor experiences. The value of these results and the improvement of visitor experiences plays directly into the hands of Place Marketers and Destination Managers and provide a fertile source for marketing and promotion. It is evident that whether Destination Managers become involved in delivering NTE schemes directly, contribute to them, or have access to partnerships with NTE accreditations and are subsequently charged with their promotion, the evening economy is an opportunity to portray difference.

<sup>6</sup> Civic Trust (2006), Night Vision: Town Centres For All

<sup>7</sup> Belfast City Centre Management (2011) Belfast Purple Flag Entry Documentation

<sup>8</sup> [www.gazettelive.co.uk](http://www.gazettelive.co.uk), 10.07.11, ‘Late opening hours worth an extra £53m to Newcastle’

<sup>9</sup> Open Culture (2012), Liverpool Light Night Report

<sup>10</sup> Open Culture (2012), Late Nights Report

<sup>11</sup> [www.mancunianmatters.co.uk](http://www.mancunianmatters.co.uk) (17.10.11), ‘Estimated 10,00

## Case Study: Museums at Night

Museums at Night<sup>1</sup>, run by Culture24<sup>2</sup> and primarily funded by Arts Council England, is the UK's annual after-hours festival of culture and heritage, bursting into life over one weekend in May. It is a showcase campaign for the arts and museum sector, giving venues the opportunity to do something different to attract audiences.

In 2012 537 events took place at 416 venues in 216 places across the UK from Caithness on the north coast of Scotland to Jersey in the Channel Islands. The campaign is particularly strong in London, Liverpool and Newcastle with each city hosting more than 50 events in 2012. This year's festival was the biggest yet: 121,000 visits were made, 93% of visitors rated their experience at 7 out of 10 or higher and it attracted £3.4m AVE<sup>3</sup>.



The festival is a particularly attractive proposition to visitors when venues within close proximity combine together on a joint event and marketing offer to form a cluster. In 2012 Culture24 helped to set up two new clusters in North Norfolk and North Lincolnshire, with the support of the Heritage Lottery Fund (HLF). Seven existing clusters re-formed, including large established clusters in Liverpool (Light Night) and Newcastle (Late Shows) and smaller clusters in Bath and Dorchester. Two additional clusters also appeared in Oxford and Scarborough. The evidence is that these clusters work particularly well in stimulating the NTE in the cities, towns and villages they form in. The villages of Cromer, Sheringham and Well-next-the-Sea that formed the North Norfolk cluster were transformed by Museums at Night, so much so that a sixth of the combined population (3,000 out of 17,000) attended events. In 2010 the four council-run venues in Great Yarmouth created a new cluster and attracted 2,231 visitors, one third of their total event attendance figures for the year. Evaluation showed that 90% of the visitors were local and 75% had not been to a museum before<sup>4</sup>.

<sup>1</sup> [www.museumsatnight.org.uk](http://www.museumsatnight.org.uk)

<sup>2</sup> [www.weareculture24.org.uk](http://www.weareculture24.org.uk)

<sup>3</sup> Advertising Value Equivalent audited by Durrants

<sup>4</sup> Open Culture (2012), Liverpool Light Night Report

The Newcastle Late Show offer for Museums at Night attracted 30,000 visits in 2012 many visitors sporting branded glow-sticks identifying them as attendees. This brilliant marketing device also works to foster a festival atmosphere. If enough people in a place are taking part in a coherent experience a tipping-point is created and the town becomes the scene of a positive mass-participation event. Rachel Coles Marketing Manager at Dorset County Museum in Dorchester says, “on the evening itself there is a fantastic buzz in the town with large numbers of family groups and friends strolling between each location, knowing they are free to visit as many of the museums as they wish with nothing more to pay.”

The Museums at Night festival brings culture, fun and plenty of people on to the streets of all kinds of British cities. It's a fine example of how town centres can be transformed into places of wonder and joy after dark.



## How can centres make the NTE work and leverage its benefits to achieve a positive visitor experience?

One major intervention aimed at supporting the NTE launched by ATCM, is Purple Flag. Purple Flag is the national accreditation scheme recognising excellence in the management of town & city centres ‘after dark’, providing significant recognition for people, businesses and organisations who deliver the NTE effectively and successfully. The programme is positive, forward-looking and practical, and is designed to benefit all stakeholders who are involved. At Purple Flag’s heart is a partnership made up of national and local stakeholder groups, and it is supported by central government, local authorities, trade professions and industry, all of whom are seeking to catalyse a renaissance in the UK’s NTE offer.

The aim of Purple Flag is to raise the standard and broaden the appeal of town & city centres at night, changing perceptions surrounding the NTE resulting in a better night out for all. It is a very rigorous and holistic framework and one that all place management organisations, including those involved in tourism, can use to assess the position and performance of their NTE (see figure 1).

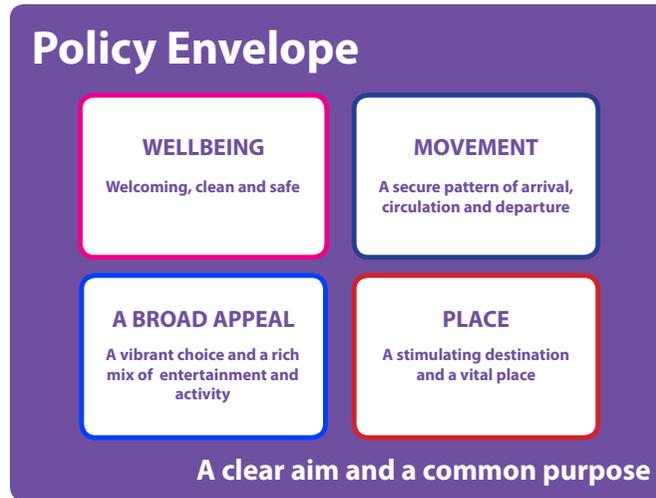


Figure 1

Purple Flag is, critically, a partnership. There are unsung heroes at work keeping town centres alive and safe at night: street pastors, restaurateurs, cinema operators, bar and nightclub managers, security staff, police, town centre managers, licensing officers, cleansing, destination managers and many more. The results are seen from the consumer’s viewpoint – is it safe and well managed, can I get home afterwards, are there things to see and do, is it a place I am happy to spend time in? It is from this perspective that the true value of the accreditation programme can be appreciated by destination managers.

Since the launch of Purple Flag in October 2009 twenty five centres have been awarded flags (including Derry-Londonderry, Belfast, Liverpool, Manchester, Halifax, Stockton Heath, Torquay, Nottingham, Preston, and Covent Garden)<sup>12</sup> and there are another twenty or so in the pipeline. It is generating a message that local champions and innovative organisations can take action, get involved and do something practical to raise the standard and broaden the appeal of town centres at night.

Sylvia Oates, BID Manager - We Are Nottingham, tells us about Nottingham’s ‘Purple Flag Week’ aimed at celebrating the successful retention of Purple Flag status and generating a buzz in the city centre;

“We [the partnership] installed a VIP ‘Purple Carpet’ event at the independent cinema, The Broadway, where guests were treated to purple cocktails, canapés and a selection of short films produced or made by Nottingham film makers. The week was topped off by a Purple Flag twilight walk, with residents and visitors showing up to demonstrate their support for the city. The walk took in Nottingham city centre and along the way participants were treated to an array of entertainment including a gospel choir, jugglers, stilt walkers, samba drummers and carnival queens. Throughout the week, night time businesses put on special offers and events, and various buildings were lit up purple in honour of the Purple Flag award.”

*“Purple Flag Week highlighted the diversity of the night time offer within Nottingham, and was an important reminder as to why this city is great for a night out. The week was an excellent example of partnership working, bringing together key stakeholders and influencers across the city.*

*The rich cultural offer here means that visitors to the city have plenty of options in the evening, from independent cinema to live music and comedy to art exhibitions and theatre. A strong night time offer is important when it comes to increasing the number of overnight stays in the city, in order to grow the visitor economy.”*

Jennifer Spencer, CEO,  
Experience Nottinghamshire

<sup>12</sup> [www.purpleflag.org.uk](http://www.purpleflag.org.uk)

<sup>13</sup> We Are Nottingham (2011), Evaluation of Purple Flag Week

Nottingham's subsequent evaluation of the Advertising Value Equivalent (AVE) for each piece of media exposure relating to Purple Flag Week, discovered that regional broadcasting (£11,040), regional<sup>13</sup> print (£54,684) and online coverage (£8,400) totalled £74,124 in comparative like-for-like terms – and presented a real boost for the centre

This type of partnership can deliver a range of activities and services in their centres to benefit all NTE stakeholders, including; events, information and transport provision, cleanliness and safety, in addition to business development. These activities benefit all stakeholders involved in the delivery of the NTE and have contributed towards attracting a more diverse crowd (and a greater number of people) out onto the streets at night, inspiring confidence in residents & visitors, and improving business mix.  
Nick Carter, Enforcement & Regulatory Services Manager for Bristol comments;

*“One of the most significant achievements for Bristol is realising Purple Flag’s catalytic nature, and its ability to enhance partnership work around the management of the NTE. Night-time self-assessments, using the Purple Flag methodology, are now a permanent fixture and have proved invaluable for addressing issues and identifying new opportunities to improve the NTE offer to both residents and visitors. In a time of diminishing public sector funding this partnership pooling of resources is probably the only sustainable way to ensure that standards in the night-time economy are maintained and developed, and therefore, in many ways, Purple Flag is more relevant than ever.”*

The award has proved a popular business growth & development opportunity. Dan McGlynn, General Manager of Squires in Preston, is currently utilising Purple Flag accreditation in his marketing activities to reach wider clientele in neighbouring Lancaster, Leyland and Chorley – aiming to draw new clientele into the centre and benefit from Preston’s improved public image. Mr McGlynn comments;

*“I think Preston has a huge amount to offer to a lot of different types of people when you look at the variety of clubs, pubs and bars there are, not to mention the number of new restaurants which have opened and the shows at places like 53 Degrees and the Guildhall... I think Purple Flag is something which everyone can get behind and be positive about...”*

These proactive approaches allow businesses and licensees to get to work with Local Authorities, regulators, Destination Managers and community members etc., under the partnership umbrella, bringing all elements of NTE management together to pledge a commitment towards making centres more attractive and marketable after dark. Research from The Spirit Marketing Group (2011) indicated that the Purple Flag programme had a galvanising effect on partnerships allowing them to deliver key actions on the ground, initiating a call to action for destination organisations to review their relationship with key NTE partnerships.

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## How can a Destination Manager measure NTE performance?

Despite the endless debate and publicity surrounding the NTE, it is surprising how little ‘hard data’ actually exists to define it - even where data exists it has existed in isolation and has been difficult to collate, interpret and apply to specific places.

ATCM is currently preparing 7 NTE Key Performance Indicators (KPIs) as part of its Purple Flag NTE Metrics Group consisting of commercial companies, consultants, and public bodies, which will allow organisations to create appropriate benchmarks and triangulate data specifically for the NTE, collecting information against indicators such as; Crime & Anti-social Behaviour, Alcohol & Health, Perceptions, Composition, Patronage, and Volume & Value. This toolkit will support local management and allow partnerships to use information, and undertake or commission evaluations, to improve the offering in their centres and inform marketing and promotion campaigns.



Destination Managers in the main focus on visitor surveys to capture the experience of visitors in their centres although different organisations will use different approaches with different questions. There is no definitive template, although [British Destinations](#) provide guidance on an approach to members; as a result comparison and benchmarks may be difficult to establish. There is an opportunity for tourism organisations to modify current KPI capture practices and ensure they are ‘NTE-proofed’ to increase the value of the research exercise to their organisations – this action could open up interesting insights into the NTE.

In terms of specific analysis for individual campaigns or initiatives, Return on Investment (ROI) has been raised as a potential measure by centres. However, it is extremely difficult, given the concept of the NTE and the range of factors and stakeholders that contribute to it, to measure this specific statistic and isolate the data, without conducting multicomponent evaluation over a period of time.

It becomes a question of how important it is to evidence positive change in an area, and if it is important to what lengths, in terms of resource allocation and effort, do centres go to? Are crime and ASB statistics enough or would data relating to centre composition, and volume & value help centre strategy development considerably? For many centres the measurement of the NTE in a meaningful way involves going back to year zero and a redefinition of indicators and reselection of sources. It is ATCM’s opinion that triangulation of information utilising a variety of KPIs will be critical for centres to review the health of their evening and night-time economy.

## Summary

It is clear that the evening and night-time economy can be an opportunity for economic and social development for those who manage and promote our town & city centres. However, the benefits of a functioning NTE can only be realised when the management of it is sound. It is critical that Destination Managers become part of, or contribute to, place management partnerships that impact directly, or indirectly, on the NTE to help shape the future for our centres and convey the message.

A clear understanding of the role of the NTE in individual locations and areas is essential, and it is from this point that Destination Management Organisations and Tourism Managers can begin to promote the evening and night-time economy as a integral part of the offer to visitor, impacting local economic growth and the overall visitor experience.

For more information or support in developing the night time economy in your destination contact the Association of Town Centre Management – see next page for the range of materials and support available. Alternatively take a look at the VisitEngland’s Destination Management resources, which includes a range of material on developing tourism locally ([www.visitengland.org/destinations](http://www.visitengland.org/destinations)).

There is also a list of destinations who have a Purple Flag at the time of publication – you could consider talking to your counterparts to learn more about the benefits they have gained.

## Want to know more about Purple Flag?

Please contact Daniel McGrath: [daniel.mcgrath@atcm.org](mailto:daniel.mcgrath@atcm.org) (0)300 330 0980 or visit [www.purpleflag.org.uk](http://www.purpleflag.org.uk)

### What does the Purple Flag Programme offer?

- Expertise in the management of town and city centres, crime reduction, cultural programmes, public realm, business engagement, and partnership development.
- Management of the scheme, judging, and overall accreditation.
- Trained Purple Flag Assessors, who are industry experts in evening & night-time economy operations and best practice.
- A roster of location assessment & development programme modules for all manner of centres to improve their evening & night-time economies.

### The wider Purple Flag Programme:

- Purple Flag Kickstart Workshops  
Kickstart workshops provide partnerships with an insight into the performance of their centre, advice on how to use Purple Flag to raise standards, and guidance on how to make a strong Purple Flag entry. These are advised for those seriously considering Purple Flag as a solution in their location.
- Purple Flag Development Programme  
The Development Programme is aimed at those centres who wish to address evening & night-time economy issues that may be barriers to reaching Purple Flag standards at a later date. This is a comprehensive and in-depth assessment of your location that aims to set partnerships on the way toward achieving Purple Flag.



### Development Programme Modules

1. Vision and Baseline Review: A sound basis for partnership and policy development
2. Outline Management Plan: An organisational framework for partner and stakeholder involvement.
3. Night Time Performance Audit: A “reality check” using the Purple Flag methodology
4. Priorities for Action: Identification of key actions needed to attain Purple Flag standards
5. Stakeholders Seminar: Increase support for improvements, leading to a strong Purple Flag entry
6. Outline Action Plan: Typically, a one to three year improvement programme to get ready for Purple Flag.
7. Implementation Support and Advice: On-going support, drawing on good practice from Purple Flag holders

## Purple Flag Destinations in England

Purple Flag Accredited Centre	Purple Flag lead organisation	Destination Organisation
AYLESBURY	Aylesbury Vale District Council	
BATH	Bath and North East Somerset Council	Bath Tourism Plus
BIRMINGHAM	Birmingham City Centre Management	Marketing Birmingham
BOURNEMOUTH	Bournemouth Borough Council/ Town Watch	Bournemouth Tourism
BRISTOL	Bristol City Council	Destination Bristol
CANTERBURY	Canterbury City Council	Visit Kent
CLERKENWELL, ISLINGTON, LONDON	Islington Council	London & Partners
COVENT GARDEN, WESTMINSTER	Capital & Counties Group	London & Partners
HALIFAX	Community Safety Partnership	Welcome to Yorkshire
HIGH WYCOMBE	High Wycombe Town Centre Partnership	
IPSWICH	Ipswich Borough Council	
KINGSTON UPON THAMES	Kingston Town Centre Management Ltd	London & Partners

Purple Flag Accredited Centre	Purple Flag lead organisation	Destination Organisation
LEICESTER SQUARE, WESTMINSTER	Westminster City Council	London & Partners
LINCOLN	West Lincolnshire Community Safety Partnership	Visit Lincoln Partnership
LIVERPOOL	Liverpool City Centre Management	The Liverpool City Region LEP
MANCHESTER	City Co.	Visit Manchester
NOTTINGHAM	Nottingham City Council	Experience Nottinghamshire
OXFORD	Oxford City Council	Visit Oxfordshire
PRESTON	Preston City Centre Business Improvement District	Marketing Lancashire
SHEFFIELD	Sheffield City Council	Marketing Sheffield
SOUTHEND	Southend Together Partnership	Visit Essex
STOCKTON HEATH – WARRINGTON	Warrington Borough Council	Marketing Cheshire
TORQUAY	Torbay Town Centres Company	English Riviera
VICTORIA - WESTMINSTER	Victoria Business Improvement District	London & Partners
WATFORD	Watford Borough Council	
WINCHESTER	Winchester City Council	

