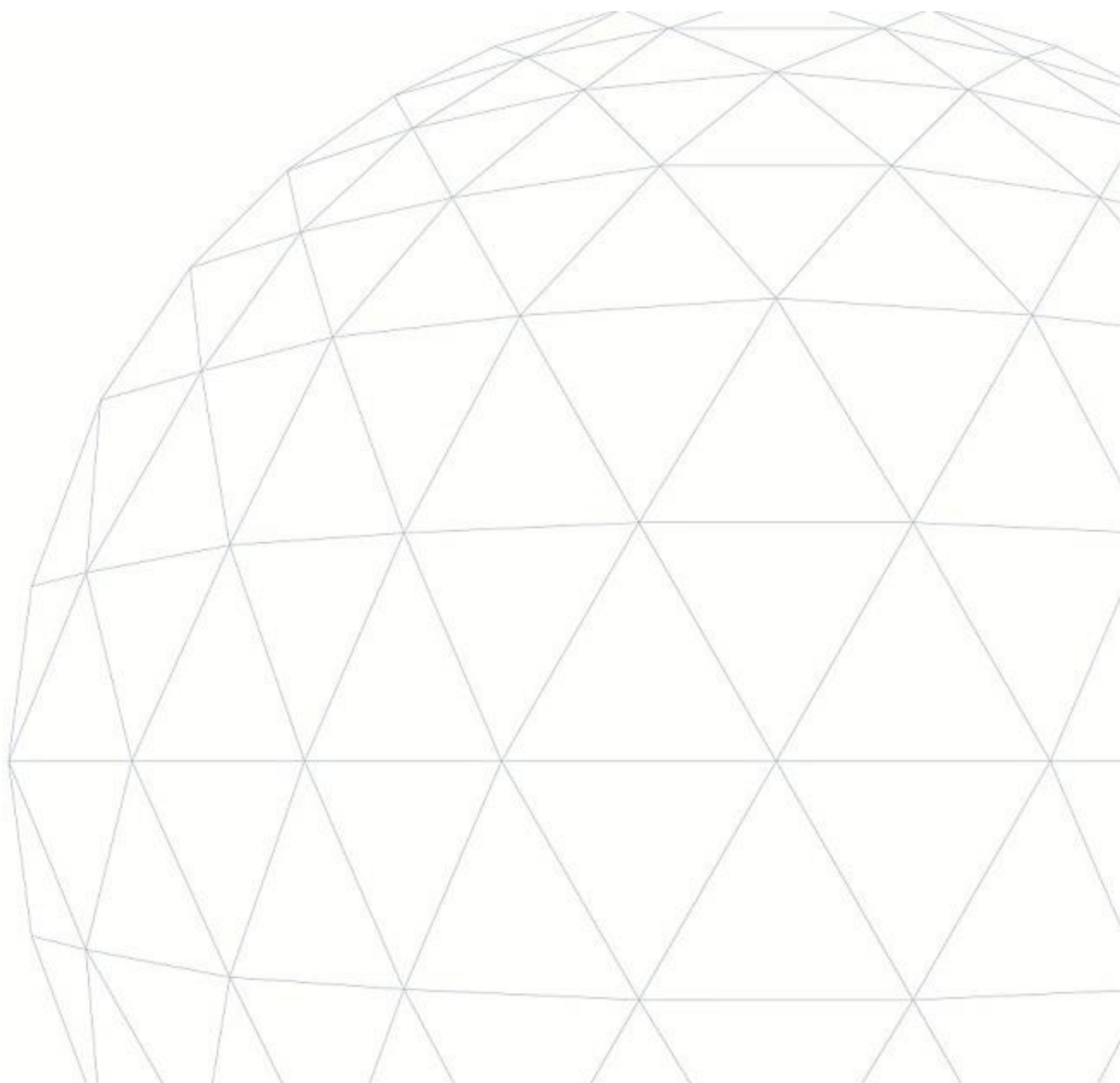




## **The economic and social impacts of England's cathedrals**

A report to the Association of English Cathedrals

September 2014



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# Executive Summary

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- 1 The purpose of this research is to update the assessment of the economic and social impacts of England's cathedrals provided by a 2004 study. The framework used to assess economic impacts is focused on estimating the flows of expenditure associated with the day-to-day operation of cathedrals and the local spending of cathedral visitors. The assessment of social impacts was based on evidence related to worship, volunteering, learning and community engagement. Evidence was collected using a survey of all 42 cathedrals within the scope of this study and a series of case studies.

## What are the economic impacts of cathedrals?

- 2 **Attracting visitors** – it is estimated that **cathedrals attracted over 8.2 million tourist/leisure visitors** in 2013. For the purposes of the economic impact assessment, this figure excludes worshippers and those taking part in formal educational activity. This **additional expenditure generated by these visitors is estimated to be in the order of £125 million** in the local economies concerned.
- 3 **Supporting local businesses and economies** – in total, cathedrals are estimated to generate a net additional **contribution of around £220 million in local spending** per annum (summing direct, visitor-related and multiplier effects).
- 4 **Creating local jobs** - expressing this impact in terms of employment, suggests that **cathedrals support a total of over 5,500 jobs in their local economies**.

## What are the social impacts of cathedrals?

- 5 **Engaging with the community** - in addition to a programme of regular and special services, cathedrals provide a **wide range of pastoral care and outreach activity as part of their role in supporting the local community**. Cathedrals are also used as a venue for numerous events, concerts, ceremonies and other activities.
- 6 **Opportunities for volunteers** - cathedrals benefit from the time and skills of **over 14,000 volunteers**, who fulfil a range of roles including welcoming visitors and assisting at services. The total number of volunteers has **increased significantly** over time. Volunteers provide an estimated total of 1.96 million hours of input per year, **equivalent to over 1,000 full-time employees**.
- 7 **Opportunities for learning** - cathedrals also provide **numerous opportunities for both formal and informal learning** and it is estimated that **over 320,000 learners participated in organised educational activities in 2013**. Most commonly visits are made by primary school groups and material covers a range of curriculum subjects.

# 1.0 Introduction

1 Ecorys is pleased to present this report to the Association of English Cathedrals (AEC). This work was commissioned in June 2014 and completed in September of that year.

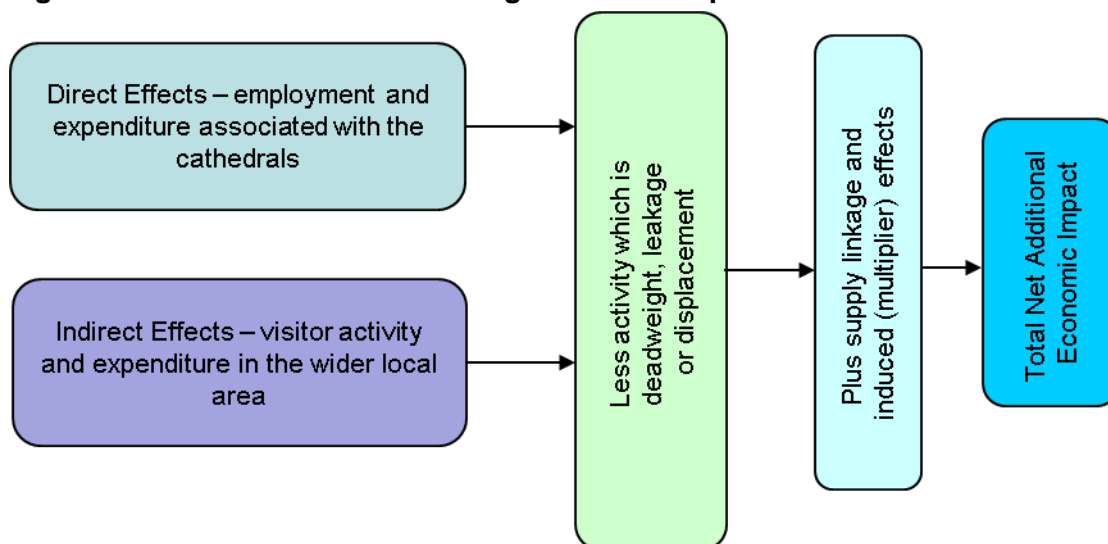
## 1.1 Purpose of the research

2 The purpose of this study is to **update the assessment provided in a 2004 ECOTEC/Ecorys<sup>1</sup> study** which was jointly commissioned by English Heritage and the AEC<sup>2</sup>. It was noted that cathedrals had made extensive use of the findings of this earlier study as a way to demonstrate their value in economic and social terms but were conscious of the age of this earlier assessment and the fact that, for some, much had changed in the intervening time. Therefore it was considered that there would be value in repeating the exercise to provide a more up-to-date assessment.

## 1.2 Methodology and analytical framework

3 As before, the study has made use of a standard analytical framework which is focused on the **flows of expenditure associated with the cathedrals, primarily their day-to-day operations and visitor-related activity, and how this works through the local economies concerned, generating economic activity and employment in the process.** The model has been adapted to more robustly consider the extent to which this impact is additional (i.e. would not have taken place in the absence of the cathedrals), taking an approach which is consistent with the principles of current guidance in this field.

**Figure 1.1 Framework for estimating economic impacts**



<sup>1</sup> In October 2010, ECOTEC Research and Consulting changed its name to Ecorys UK.

<sup>2</sup> The Economic and Social Impacts of Cathedrals in England (ECOTEC Research and Consulting, June 2004).

4 Estimating the economic benefits of cathedrals requires consideration of a number of issues, in particular the extent to which the presence of a cathedral is able to generate **additional benefits** within the surrounding area, taking account of:

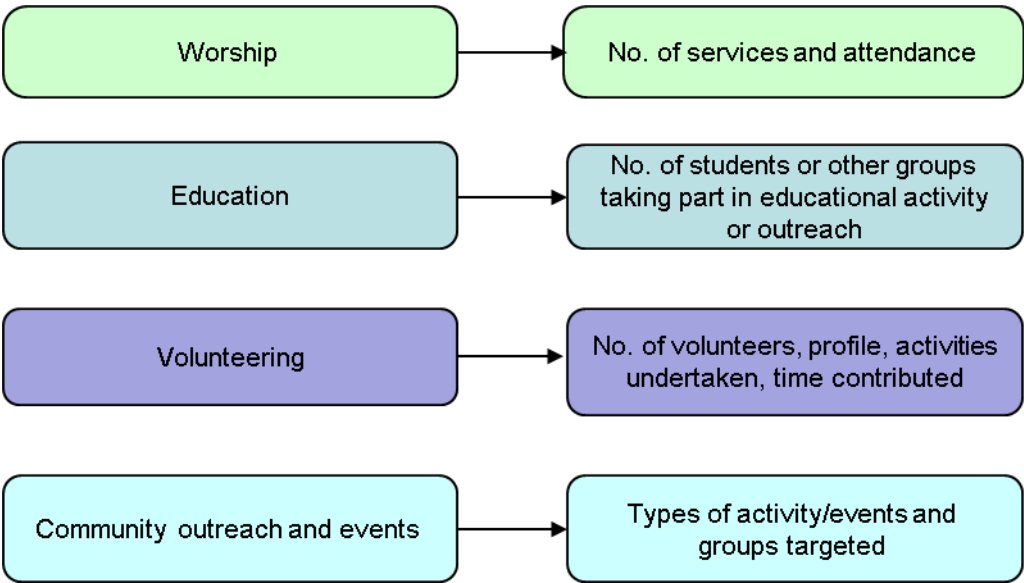
- Deadweight – the benefits which would be expected to occur anyway, regardless of the presence of a cathedral (for example as a result of visitors who would have come to the area anyway).
- Displacement - the extent to which the cathedral generates economic benefits at the expense of other areas or attractions (for example, as a result of people who, as a result of the cathedrals, decide to spend time in the city centre rather than visiting an attraction in a neighbouring area).
- Multiplier effects – spill-over effects to the wider local economy as a result of the cathedral’s purchases of inputs from local businesses and the local expenditure of those who derive incomes as a result of the cathedral and its activities (for example, those employed by the cathedral will typically spend a proportion of their wages/salaries locally).

5 Accounting for the factors presented above results in an estimate of net additional effects which is represented by the following equation:

$$Net\ additional\ effects = gross\ (observed)\ effects * (1 - deadweight) * (1 - leakage) * (1 - displacement) * multiplier\ effects$$

6 It should be noted that economic impacts represent only part of the total ‘package’ of economic benefits associated with cathedrals. These also include the value of the benefits derived by users and visitors themselves and benefits to non-users, including passers-by, those who derive benefits from the existence of cathedrals and those who value the option to make a future visit.

7 Cathedrals also generate a range of **social impacts** to which it is impracticable to attach values. For this study we have chosen to focus on presenting the evidence relating to the following aspects:



8 Evidence to inform the impact assessment was collected using a survey of all 42 cathedrals within the scope of this study and a series of case studies.

9 The survey questionnaire was based on the one used for the 2004 study, which was reviewed to improve its clarity and relevance. A review of the questions revealed some duplication between this

study and the information which is now collected by the Church of England Research and Statistics Department through an annual statistical return. As a result, these areas of the questionnaire were pre-populated before distribution using data from the 2013 annual returns for confirmation, avoiding staff having to provide this information twice. The questionnaire was distributed by email to a representative from each cathedral in early July 2014 and a 100% response rate was achieved.

- 10 Information on visitor characteristics and motivations was a key gap in the previous study. However, relevant research on this issue has been commissioned by the AEC in the interim<sup>3</sup> and a number of individual cathedrals have also explored this issue themselves enabling us to improve the economic impact estimates.
- 11 Information was also collected through a series of eight case studies chosen to provide evidence from different types of cathedral (see section 2.1). The case studies have allowed a more in-depth exploration of the key areas of interest to the study to build up a more qualitative picture of activities and their associated impacts.

### **1.3 Structure of the report**

- 12 The remainder of this report is structured as follows:
  - Section 2 sets out the background and context for this study.
  - Section 3 provides an assessment of economic impacts.
  - Section 4 presents evidence regarding social impacts.
  - Section 5 contains a summary of key findings from the research.
  - Short case study reports are provided as an annex along with a copy of the survey used to collect information from cathedrals.

<sup>3</sup> AEC Visitor Survey (ORB, 2009) (unpublished).

## 2.0 Study background and context

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### 2.1 Cathedrals in England

- 13 The population of interest remains the **42 Anglican cathedrals in England**, which also formed the subject of the previous study. The cathedral is the mother church of a diocese and the location of the bishop's seat or cathedra.
- 14 Cathedrals have a diverse history, and their number increased as the population of England grew. To the nine medieval cathedrals, Henry VIII added a further 13. All were governed by a Dean and Chapter formed of clergy (residentiary canons). In the 19<sup>th</sup> and early 20<sup>th</sup> century, 20 new cathedrals were created. With two exceptions where new cathedrals were built, what were parish churches were consecrated as cathedrals, governed by a Cathedral Council, and retaining their parishes. Since the passing of new legislation in 1999, all cathedrals have had the same governance structure, but they continue to be influenced by their histories.
- 15 Recognising that the **impacts generated by cathedrals would be expected to vary according to a range of factors including location, size and profile**, the typology set out in the 2004 study was formed of five categories designed to facilitate the analysis of information. However, it was acknowledged that some cathedrals do not necessarily fit neatly into this framework (including those which could have been classified into more than one of the categories chosen).
- 16 This study provided an opportunity to review the typology from the earlier work (see Table 2.1). However, after some discussion it was decided that the typology (and associated classification) would remain the same to allow some comparability of the findings.
- 17 As in the previous study, the typology was also used to inform case study selection. In order to achieve representation of the different categories, the following subjects were selected:
  - Birmingham (urban)
  - Blackburn (parish church)
  - Exeter (medium-sized, historic)
  - Norwich (medium-sized, historic)
  - Salisbury (large, international importance)
  - Sheffield (parish church)
  - St Paul's (large, international importance)
  - Truro (medium-sized, modern)

**Table 2.1 Cathedral typology**

Category		Category	
Large, international importance	Canterbury Durham St Paul's Salisbury Winchester York	Urban	Birmingham Bristol Liverpool Manchester Southwark
		Medium-sized, modern	Guildford Truro
Medium-sized, historic	Carlisle Chester Chichester Ely Exeter Gloucester Hereford Lichfield Lincoln Norwich Oxford Peterborough Ripon Rochester St Albans Southwell Wells Worcester	Parish church	Blackburn Bradford Chelmsford Coventry Derby Leicester Newcastle Portsmouth St Edmundsbury Sheffield Wakefield

## 2.2 Evidence of impact

- 18 The 2004 research concluded that cathedrals generate a range of positive impacts on their local economies. Application of the analytical framework to the available data suggested that the direct visitor-related impact of cathedrals amounted to an additional local spend of around £91 million per year, with a total impact on spend in the region of £150 million per year. Overall, the estimated total employment impact amounted to 5,450 full-time equivalent (FTE) posts. This included the direct employment at the cathedrals themselves, employment supported by visitor spend, as well as employment associated with indirect and induced effects (as explained in Section 1.2).
- 19 In recent years there has been a continuing flow of research to assess the economic impact of heritage assets, although no further studies relating to cathedrals appear to have been published in this time. Various guidance documents published over the past 10 years have resulted in a more systematic approach to the assessment of additionality; however, the bottom up approach and broad analytical framework used in the 2004 study remain the most common approach to assessing the impact of specific assets.
- 20 Since the publication of the 2004 impact study, the **evidence base regarding the impact of cathedrals has been expanded**, notably as a result of the Spiritual Capital report<sup>4</sup> and the work of the Church Growth project<sup>5</sup>. As noted, the Church of England also conducts an annual survey which

<sup>4</sup> Spiritual Capital: the Present and Future of English Cathedrals (Theos, 2012).

<sup>5</sup> Cathedrals, Greater Churches and the Growth of the Church. Church Growth Research Project Strand 3A (Holmes and Kautzer, 2014).



provides statistics on key aspects of activity associated with cathedrals. In addition, the AEC commissioned detailed visitor research which explored issues of relevance to an impact study and it is known that a number of individual cathedrals (such as Canterbury and Lichfield) have also commissioned their own work in this area.

### 2.2.1 Tourism

- 21 Cathedrals play an **important role in tourism and are a key feature of the nation's cultural heritage**. According to the Spiritual Capital report, in 2012 it was estimated that 27% of England's adult population (which equates to roughly 11 million people) had been to a cathedral in the last 12 months.<sup>6</sup> Cathedrals seem to appeal to a diverse and wide demographic; one-fifth of 18-34 year olds had visited a cathedral between 2011 and 2012, as had one-fifth of people classed as being in a lower socio-economic group.
- 22 A report compiled on behalf of English Heritage in 2012<sup>7</sup> presents evidence from a survey of visitor attractions. According to this data, there were on average 145,000 visits to each of the places of worship (which includes cathedrals, churches, chapels and other attractions that are still in use as places of worship) in the sample in 2012, a 2% decrease from 2011. Of these visitors, it was estimated that 34% were overseas visitors, 40% were local (day trip visitors) and 26% were visitors from the rest of the UK.
- 23 In 2009, the AEC commissioned a survey which interviewed a total of 5,842 people, 50% whom were visiting a cathedral that day and 50% who were not. Quotas were set to ensure the visitor/non-visitor split, and for age and gender. The survey found that 55% of all respondents had visited a cathedral within the last 2 years. Of those visiting a cathedral that day the highest proportion (43%) lived within 25 miles of the cathedral, whilst the second highest proportion (32%) lived over 50 miles away. Approximately one in ten of those who were not visiting a cathedral that day claimed that they had 'never set foot' in a cathedral, nor were they likely to do so.
- 24 The AEC survey also found that the main reasons for visiting a cathedral were its historic attraction (53%), for the architecture/works of art (39%) and for a moment of reflection (21%). 18% of visitors predominantly decided to visit the city in which the cathedral was located, and then chose to visit the cathedral once there.

### 2.2.2 Serving the community

- 25 In addition to their role as a place of worship, the 2004 study found that cathedrals also make a substantial contribution to society through the provision of opportunities for education and volunteering and in supporting the community (for example, through the setting up of initiatives designed to address the needs of the most vulnerable members of a community and in hosting events which are open to all).
- 26 Cathedrals **serve a wide community**; not only are they places of spirituality and worship, they are famed for their architecture, their place in history and their aesthetic appeal.<sup>8</sup> As a sacred space, the Spiritual Capital report found that one third of people see cathedrals as 'easy places to get in touch with the spiritual', whereas only one sixth of people did not.

<sup>6</sup> <http://www.theosthinktank.co.uk/files/files/Reports/Spiritual%20Capital%2064pp%20-%20FINAL.pdf>

<sup>7</sup> <http://hc.english-heritage.org.uk/content/pub/2013/visitor-attractions-trends-england-2012.pdf>

<sup>8</sup> <http://www.theosthinktank.co.uk/publications/2012/10/12/spiritual-capital-the-present-and-future-of-english-cathedrals>

27 **Teaching** is a big part of a cathedral's mission<sup>9</sup>; most offer lectures on Christian themes, study groups, guided tours and opportunities for volunteers to participate and develop skills<sup>10</sup>, whilst some offer additional learning experiences. Cathedrals also offer opportunities for child learning and are well equipped for visits from schools. In 2012, 297,000 visits were made to the places of worship in the survey sample by school children through school visits, showing that cathedrals and churches continue to have a place in modern education.<sup>11</sup> For many cathedrals, education is a growing area of activity and some employ specialist education officers who work to provide tours and workshops to young learners covering not just religion but also history and other subjects.<sup>12</sup>

## 2.3 Ongoing need for support

28 Like all historic buildings, cathedrals are costly to maintain and often require extensive work to restore or repair their fabric.

29 In 1991, English Heritage set up a dedicated grant scheme to support repairs to cathedrals listed Grade I or II\* or located in a conservation area, and targeted at those judged to be in most need of public funds. This dedicated scheme came to an end in 2010 having provided grants for repairs totalling just over £52 million in its 19 year history.<sup>13</sup>

30 However, cathedrals are still eligible to apply for general grants from English Heritage which can be used to fund repair work, although the amount of funding available has been decreasing year on year for some time. Although the Heritage Lottery Fund has a funding programme which supplies grants for Places of Worship which are listed at Grade I, II\* or II and need urgent structural repairs, cathedrals are specifically excluded from applying. Cathedrals can, however, apply to the Heritage Lottery Fund's general development funds, and many successful projects have been funded that way. Until 2013, a Cathedral Grants Fund was run by ChurchCare, funded by the Wolfson Foundation and the Pilgrim Trust, awarding an average of £350,000 per year. Cathedrals have been successful in accessing the available grants, with, for example, Birmingham Cathedral recently securing a £98,000 Heritage Lottery Fund grant to support the programme of activities planned for the 300<sup>th</sup> anniversary of its building in 2015, and Canterbury Cathedral securing a £12 million grant from the same source for its The Canterbury Journey project.

31 English Heritage has undertaken multiple surveys to assess the fabric of England's cathedrals. The first survey in 1991 informed the decision to offer a dedicated programme of grant aid and the second survey in 2001 informed its development. The most recent fabric condition survey was completed in 2009<sup>14</sup> and found that cathedrals had spent in excess of £250 million on repairs between 1991 and 2009, which equates to almost £230,000 per cathedral per year. Although the most critical work was thought to have been completed during this time, it was estimated that between 2009 and 2019, cathedrals will need to spend £100 million more on repairs. In addition, it was anticipated that another £100 million will need to be spent on maintenance and a further £75 million on new developments.

<sup>9</sup> [http://www.churchgrowthresearch.org.uk/UserFiles/File/Reports/Publication\\_edition\\_Strand\\_3a.pdf](http://www.churchgrowthresearch.org.uk/UserFiles/File/Reports/Publication_edition_Strand_3a.pdf)

<sup>10</sup> <http://www.englishcathedrals.co.uk/cathedrals/about-cathedrals/what-is-a-cathedral/>

<sup>11</sup> <http://hc.english-heritage.org.uk/content/pub/2013/visitor-attractions-trends-england-2012.pdf>

<sup>12</sup> <http://www.englishcathedrals.co.uk/cathedrals/about-cathedrals/what-is-a-cathedral/>

<sup>13</sup> <http://www.english-heritage.org.uk/about/news/eh-support-cathedrals/>

<sup>14</sup> <http://www.english-heritage.org.uk/about/news/englands-cathedrals-success-story/>

32 A new £20 million fund for repairs to cathedrals spanning two years was announced in the March 2014 Budget delivered by the Chancellor of the Exchequer. The AEC reported that the Church of England predicts a £87 million funding shortfall for repairs over the next five years and the new fund will help to meet the cost of urgent repairs.<sup>15</sup> Any listed Anglican or Catholic cathedral in England may apply for the grants, which will be assessed according to 'necessity of the repair and consideration of the further damage which might be caused by delay, the heritage significance of the listed building and financial need'. The minimum grant size is £10,000 and there is no upper limit<sup>16</sup>.

<sup>15</sup> <http://www.englishcathedrals.co.uk/news/2014/03/aec-welcomes-20m-budget-urgent-cathedral-repairs/>

<sup>16</sup> <http://www.churchcare.co.uk/cathedrals/funding-and-grants/fabric-repair-grants-cathedrals#sthash.X1YBI4.dpuf>

## 3.0 Economic impacts

33 This section presents evidence from the survey and case study research regarding economic effects before presenting the results of the application of the economic impact model set out in Section 1.2.

### 3.1 Direct impacts

34 Direct effects are generated through:

- Employment by cathedrals, including jobs associated with ancillary functions such as catering and bookshops;
- Procurement spend by cathedrals within the local economy – a key component of this is expenditure on repairs and refurbishment.

#### 3.1.1 How many people do cathedrals employ?

35 Table 3.1 sets out average employment numbers for clergy, lay staff and contractors (or indirect employment), expressed in terms of full-time equivalent (FTE). This is followed by Table 3.2 which sets out total figures for each grouping and overall<sup>17</sup>. As might be expected, large internationally important cathedrals employ, on average, the greatest numbers of people, the majority of whom are lay staff; while parish church cathedrals employ, on average, only around 15% as many staff. The overall **total employment figure of 1,870 FTE** is very similar to the total of 1,885 FTE workers estimated in the 2004 study.

**Table 3.1 Average employment per cathedral, respondents only (FTE)**

	Clergy	Lay staff	Indirect	Total
Large international	3	118	6	127
Medium historic	4	35	5	44
Medium modern	3	24	4	32
Urban	4	16	9	28
Parish church	3	15	2	21
All	4	37	5	45

Source: Ecorys analysis.

**Table 3.2 Total employment, all cathedrals (FTE)**

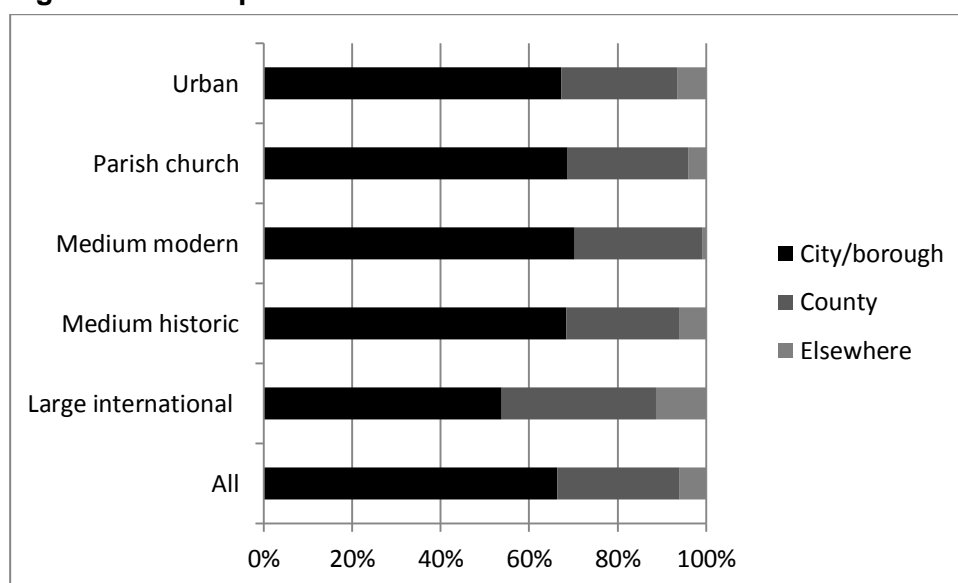
	Clergy	Lay staff	Indirect	Total
Large international	21	705	25	751
Medium historic	69	636	80	785
Medium modern	7	49	9	64
Urban	21	78	26	125
Parish church	36	164	26	226
All	154	1,551	165	1,870

Source: Ecorys analysis.

<sup>17</sup> Please note that this table provides a total of clergy and lay staff for all 42 cathedrals based on the averages presented in Tables 3.1 (only 41 cathedrals provided this information in the survey). Only 36 cathedrals provided data on indirect employment; however, it has been assumed that this figure was zero for the remaining 6 locations and a total has been derived on this basis (as a result of this assumption the total employment figure may be slightly understated).

36 Cathedrals were also asked to report the place of residence of staff. Overall, it was estimated that, on average, two-thirds of staff (67%) lived in the immediate local area, with most of the remainder living elsewhere in the county (28%) and only a minority living further afield. However, there was some variation by type of cathedrals with large, internally important sites most likely to source their staff from a wider catchment area (just under half came from beyond the immediate local area), while those in the urban grouping were most likely to source their staff from the local area (72%), perhaps as a result of the higher density of population/available labour force in major urban areas. The place of residence of staff by type of cathedral is illustrated in the following chart.

**Figure 3.1 Staff place of residence**



Source: Ecorys analysis.

37 Cathedrals were also asked to report spending on wages and salaries in 2013 for their own staff (i.e. excluding indirect employees). As would be expected given the preceding data on employment, the large international grouping spends on average four times more on wages and salaries than the next highest spenders (the medium historic grouping). Overall, **cathedrals spend around £42 million per annum on wages and salaries**, suggesting a total wage bill of around 60% higher than that estimated in 2004 (£26 million).

**Table 3.3 Spending on wages and salaries, average and total (2013)**

	Average <sup>18</sup>	Total <sup>19</sup>
Large international	£3.28m	£19.7m
Medium historic	£0.81m	£14.5m
Medium modern	£0.54m	£1.1m
Urban	£0.61m	£3.1m
Parish church	£0.35m	£3.8m
All	£1.0m	£42.4m

Source: Ecorys analysis.

<sup>18</sup> This is based on the data provided by the 41 cathedrals that responded to this question.

<sup>19</sup> This is based on the use of the group level averages to provide a total for all 42 cathedrals.

### 3.1.2 How much do cathedrals spend?

38 The survey also collected information on expenditure on procurement of goods and services (including routine maintenance/upkeep, restoration work, utility services, insurance and cathedral operations) in the most recent year for which data was available. As might be expected given their size, large cathedrals reported the highest levels of spend, on average around twice that of those of medium size.

**Table 3.4 Spending on goods and services, average and total (most recent)**

	Average <sup>20</sup>	Total <sup>21</sup>
Large international	£2.4m	£14.6m
Medium historic	£1.2m	£21.6m
Medium modern	£1.3m	£2.6m
Urban	£1.1m	£5.6m
Parish church	£0.60m	£6.6m
All	£1.2m	£52.0m

Source: Ecorys analysis.

39 Expenditure on routine maintenance and repairs/restoration are included in the totals provided above; however, this is a significant area of spending which is also shown separately in Table 3.5.

**Table 3.5 Spending on maintenance and restoration, average and total (most recent)**

	Maintenance		Restoration	
	Average	Total	Average	Total
Large international	£0.41m	£2.5m	£1.0m	£6.2m
Medium historic	£0.26m	£4.6m	£0.21m	£3.7m
Medium modern	£0.23m	£0.46m	£0.22m	£0.44m
Urban	£0.12m	£0.59m	£0.61m	£3.1m
Parish church	£0.10m	£1.1m	£0.37m	£4.0m
All	£0.22m	£9.3m	£0.43m	£17.9m

Source: Ecorys analysis.

40 Many of the cathedrals highlighted items of expenditure which were atypical including items such as urgent repairs, decorating, upgrade of IT equipment, purchase of new boilers and major restoration projects. However, in reality, given the nature of the cathedral fabric and operating context, it is likely that atypical items of expenditure are incurred in any given year to some degree.

41 The analysis shows that total spending on maintenance and repairs/restoration, along with total procurement expenditure, has increased significantly since the previous study was undertaken<sup>22</sup>, although it is acknowledged that part of this increase will be due to changes in the price level/inflation rate over this period. This figure will also be influenced by the major capital development projects which are known to be underway at some cathedrals.

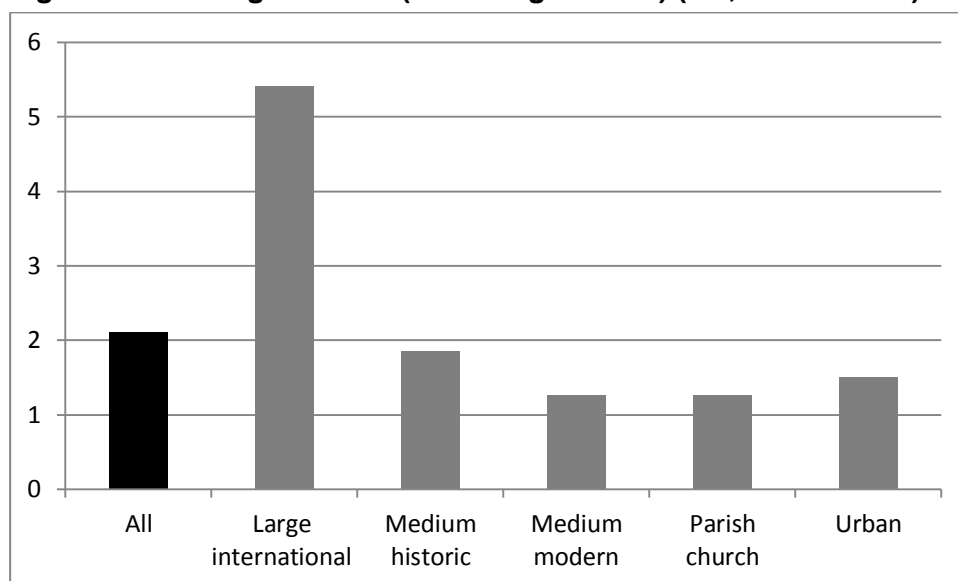
<sup>20</sup> This is based on the data provided by the cathedrals that responded to this question.

<sup>21</sup> This is based on the use of the group level averages to provide a total for all 42 cathedrals.

<sup>22</sup> The estimated total spend is significantly higher than the figure reported in the 2004 study although is not directly comparable as the previous study asked respondents to remove the cost of any major projects.

42 Figure 3.2 shows that average (non-visitor related) income was £2.1 million, ranging from £5.4 million for large and £1.3 million for medium-sized modern cathedrals. Grants and giving are important sources of income although this total can fluctuate widely year-by-year and 13 cathedrals reporting having received a significant grant (for example from the Heritage Lottery Fund) in the most recent year while a further nine mentioned unexpected or atypical legacies. Other sources of income include property, investments and events. However, for two cathedrals income generation opportunities were limited as a result of major repair/restoration work being carried out during this time.

**Figure 3.2 Average income (excluding visitors) (£m, most recent)**



Source: Ecorys analysis.

### Case study example

Norwich Cathedral supports local businesses wherever possible, but uses a competitive tendering process to ensure good value for money. Local contractors were chosen for the recent construction of the refectory and hostry. Local contractors are also used for the ongoing maintenance of the cathedral and the cathedral close. In addition, the cathedral sources some of its produce locally for use in the refectory, including cheeses, meats and wines. It has also appointed a local firm to develop the new cathedral website (this work is planned to take place in 2015).

## 3.2 How many people visit cathedrals?

43 Visitor figures for 2013 (excluding those attending services and educational events) are presented in Table 3.6. This shows that cathedrals attracted **over 8.2 million (tourist or leisure) visitors<sup>23</sup>** in 2013; this is slightly lower than the total of 8.8 million estimated in the 2004 study although this may be due to improved precision in recording visitors at some sites (which means that cathedrals are better able to isolate tourist/leisure visitor numbers from worshippers and education groups), and

<sup>23</sup> The reason for attempting to separate tourist and leisure visitors is to better isolate the additional spend in the local area associated with cathedral visitors. This is based on the assumption that whilst worshippers may well spend money locally when they visit the cathedral, little of this spend is likely to be additional to what they would spend locally in any event. However, it is recognised that a proportion of worshippers could well be tourists and for this reason the figures presented are likely to be an underestimate of the overall total.

also to the introduction of charging by an increased number of cathedrals which is thought to have the effect of reducing visitor numbers but increasing dwell time. The Spiritual Capital report estimated that 11.3 million people had visited a Church of England cathedral in the last 12 months, although this figure is not directly comparable as it includes visits for worship and educational purposes.

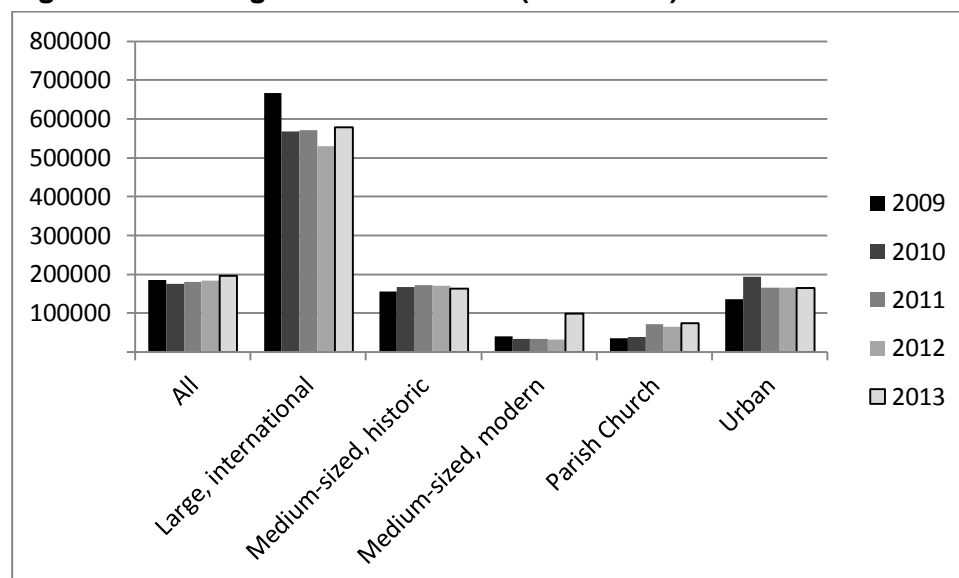
**Table 3.6 Visitor numbers, average and total (2013, rounded to nearest '000)**

	Average	Total
Large international	579,000	3,472,000
Medium historic	163,000	2,943,000
Medium modern	99,000	199,000
Urban	165,000	824,000
Parish church	74,000	812,000
All	196,000	8,250,000

Source: Ecorys analysis.

- 44 A variety of different methods are used to record visitor numbers, with a fairly even split between use of manual counts and electronic counters at sites. Where an entry fee is in place then this provides a record of admissions. Other methods used to estimate visitor numbers include sampling, observations and records of donations or candles lit. The use of manual counts in particular is felt to result in underestimates due to issues of covering multiple entry points and all opening times.
- 45 Overall there **appears to have been a slight uplift in visitor numbers in 2013 compared to 2012**. However, it is considered that, in general, trend data should be treated with caution, particularly due to changes in methods for recording visitor numbers over this period.

**Figure 3.3 Average visitor numbers (2009-2013)**



Source: Ecorys analysis.

- 46 Around two-thirds of cathedrals reported having a designated visitor officer, including all of those in the large, international grouping.



- 47 Visitors provide a significant source of income for cathedrals, primarily as a result of their on-site spending in catering and retail outlets but also as a result of admission fees (including to specific areas or exhibitions) and donations. As would be expected given the findings on visitor numbers, large international cathedrals generate the most turnover from visitor activity, almost four times as much on average as the next largest beneficiaries of visitor activity (medium historic).

**Table 3.7 Turnover from visitor activity, average and total (most recent)**

	Average	Total
Large international	£3.4m	£20.5m
Medium historic	£0.93m	£16.7m
Medium modern	£0.19m	£0.38m
Urban	£0.37m	£1.9m
Parish church	£0.16m	£1.8m
All	£0.95m	£40.0m

Source: *Ecorys analysis.*

- 48 All survey respondents reported that they used their website to promote the cathedral to visitors, while nine-tenths used advertising and slightly fewer worked in partnership with local tourism agencies. Almost two-thirds reported using other means of promotion with the most common being PR and social media.
- 49 Evidence on visitor characteristics and motivations is provided by research undertaken on behalf of the AEC in 2009 at 37 of the cathedrals covered by this study<sup>24</sup>. This found that across the sample of locations, 71% of the visitors interviewed indicated that they regarded themselves as belonging to a particular religion and 60% of this group indicated their religion as being Church of England, although many other religions were also represented suggesting that visitors come from a range of different faiths, along with a significant proportion who do not consider themselves to be religious.
- 50 The most common age group of those visitors interviewed was 55 to 64 years (23%) and around four-fifths of respondents (81%) reported that they did not have any children under 18 living in their household. Additionally, 87% said that they did not have any children in their party on the day of the visit, which appears to suggest that cathedrals are not generally viewed as a destination for a family day out, although it should be noted that the survey took place during term time. There was a fairly even gender split amongst those interviewed (53% female; 47% male), although the vast majority reported their ethnicity as white (95%) and one-tenth of the sample reported having a long-standing illness or disability.
- 51 Around two-thirds (66%) of cathedral visitors interviewed described the main purpose of their visit as tourism (going to a free or paying attraction), while the remaining 34% classified themselves as leisure visitors.
- 52 Around one-third of visitors lived within a distance of 15 miles from the cathedral at which they were interviewed at, while 32% lived more than 50 miles away (but still in Britain) and around 15% came from overseas.
- 53 **Cathedrals were often referenced as the motivation for visiting the city that day, with 47% of visitors noting that this was the main reason for their visit.**

<sup>24</sup> The total population for this study was 38 cathedrals as it also included Westminster Abbey.

- 54 More recent visitor research has been undertaken by a number of individual cathedrals. The available evidence suggests that those in the large, international grouping attract a higher proportion of overseas visitors (with available estimates ranging from 39% to 75%). The visitor and volunteer team at St Pauls offer a total of 22 different languages to welcome visitors from overseas, while some cathedrals report receiving significant numbers of visitors from specific countries such as the German visitors who visit Truro and/or Exeter cathedrals as part of their literary tours of the South West of England.
- 55 For other types of cathedral the proportion of visitors from the local area varies (with estimates ranging from 10% to 35%), likely to be influenced, at least in part, by the profile of the city as a visitor destination and the extent to which the cathedral is on the 'tourist trail'. Where visitors have been asked about the reasons for their visit, it appears that around 35-40% of visitors could be considered additional (i.e. have come specifically to visit the cathedral).

#### Case study example

Visitors to Exeter Cathedral are known to travel from a range of countries; this includes a relatively large number of German tourists who visit the cathedral as part of a tour of locations that feature in the novels of Rosamunde Pilcher. The cathedral also attracts many Chinese students who visit whilst they are studying at a nearby language school. The students particularly enjoy visiting the cathedral shop to buy gifts for their families.

### 3.3 What other economic benefits do cathedrals bring?

- 56 There is limited evidence of the wider economic benefits resulting from cathedrals, although cathedrals often represent a powerful and iconic image of a city and there are examples of this image being extensively used on tourism websites and other destination branding materials. Therefore the tourism impact of cathedrals is likely to extend beyond the number of visitors who come through the doors as the image could help to draw people to the area, some of whom may decide to view the cathedral only from the outside, but this nonetheless helps to increase footfall in a city with resulting benefits for the local economy.
- 57 Cathedrals can form an important part of the visitor offer in an area, in some cases helping to increase the critical mass of attractions and playing a part in increasing the amount of time that visitors are prepared to spend in an area. Many cathedrals work with their local tourism promotion agencies to further this aim.
- 58 The Spiritual Capital Report notes that cathedrals can play an important role in the regeneration of an area; a current example of this is the Blackburn Cathedral Quarter scheme. Many cathedrals occupy central locations and the buildings and precincts add to the value of the public realm, helping to improve the quality of life for those who live and work in the area which can further support regeneration and local economic development. Some cathedrals are working hard to develop links with the local business community, including staff at Birmingham, Salisbury and Truro who have developed relationship with their local Business Improvement Districts.

#### Case study example

Birmingham Cathedral works closely with the Colmore Business Improvement District (BID) and is a member of the BID's safe and sound working group which aims to reduce crime and anti-social behaviour in the area. The area is mainly commercial premises but the BID hopes to attract more visitors and feels that working with the cathedral and the nearby museum and art gallery will help them to achieve this aim.

### 3.4 Economic impact assessment

59 This sub-section draws on the information set out above to present an assessment of the net additional effects of cathedrals in England, taking account of deadweight, leakage, displacement and multiplier effects (see Section 1.2 for description). This assessment has been undertaken at the level of the local economies concerned<sup>25</sup>.

#### 3.4.1 Direct effects

60 Section 3.1.1 presents the estimated employment associated with cathedrals. It is assumed that all of these jobs are additional (i.e. would not exist in the absence of the cathedral) and that the existence of employment related to the cathedral has not displaced any employment from elsewhere. However, when assessing the impact on the local economy, analysis of the place of residence of staff shows some leakage with a proportion of staff living outside of the locality concerned. The resulting estimates of net additional employment effects (excluding multipliers) are set out in Table 3.8.

**Table 3.8 Local employment effects (adjusted, FTE)**

	Gross emp.	Deadweight	Displacement	Leakage	Adj. emp.
Large international	751	0	0	0.49	383
Medium historic	785	0	0	0.33	526
Medium modern	65	0	0	0.29	46
Urban	125	0	0	0.28	90
Parish church	226	0	0	0.30	158

Source: Ecorys analysis.

61 Section 3.1.2 provides estimates of procurement spend by type of cathedral. It is assumed that all procurement spend is additional and that no displacement has been caused. However, some leakage will occur as not all of the spend will accrue to businesses in the local area. The level of leakage is likely to vary from cathedral to cathedral depending on the nature of goods/services purchased and the ability of the local economy to supply these products. As a result, the level of leakage applied is that sourced from research undertaken by English Partnerships which recommends application of a factor of 25% to indicate, on average, a medium level of leakage (defined as being a situation where a reasonably high proportion of the benefits will be retained within the target area)<sup>26</sup>. The latest available data<sup>27</sup> suggests that across the UK economy (non-financial sectors), the ratio of employment to turnover is one job for every £155,000. This ratio has been applied to convert the estimates of spending into an estimate of employment (see Table 3.9)<sup>28</sup>.

<sup>25</sup> Defined as the local authority area.

<sup>26</sup> Additionality Guide (Homes and Communities Agency, 2014).

<sup>27</sup> Annual Business Survey, 2012 provisional results (ONS, November 2013).

<sup>28</sup> Note that this represents only the 'first round' effect.

**Table 3.9 Local procurement effects (adjusted)**

	Gross exp.	Deadweight	Displacement	Leakage	Adj. exp	Related emp.
Large international	£14.6m	0	0	0.25	£10.97m	71
Medium historic	£21.6m	0	0	0.25	£16.2m	104
Medium modern	£2.6m	0	0	0.25	£1.96m	13
Urban	£5.6m	0	0	0.25	£4.17m	27
Parish church	£6.6m	0	0	0.25	£4.92m	32

Source: Ecorys analysis.

### 3.4.2 Visitor-related effects

62 Section 3.2 contains estimates of the number of visitors to cathedrals and also presents available evidence on the profile and motivations of these visitors. The estimate of visitor numbers excludes, as far as possible, worshippers as we have assumed – conservatively - that no significant additional economic impact will result from local expenditure outside of the cathedral in the course of visits made for this purpose.

63 In order to assess the impact of visitor activity it is possible to segment the overall figure into four different visitor types:

- Those who originate from the immediate local area and are likely to shop/spend money in the town/city centre anyway (and so are excluded from the remainder of the analysis).
- Individuals who are visiting the area as part of a day trip originating from home.
- People who are on holiday in the area (i.e. staying away from home) and originate from elsewhere in the UK.
- Those who are on holiday and originate from overseas.

64 The numbers of visitors from any of these categories is, of course, likely to vary by cathedral (even within the typologies used for the analysis) and also to depend on the profile and reputation of the cathedral as an attraction and the area in which it is located more generally. In the absence of specific evidence on the profile and motivations of visitors to each cathedral it has been necessary to make some assumptions based on the available evidence; these assumptions aim to give a conservative estimate of the likely visitor impacts in keeping with the principles of relevant guidance for calculating economic impacts.

**Table 3.10 Visitor types**

	Local	Day trip	Holiday	Overseas
Large international	5% 174,000	25% 868,000	20% 694,000	50% 1,736,000
Medium historic	20% 589,000	35% 1,030,000	30% 883,000	15% 441,000
Medium modern	20% 40,000	35% 70,000	30% 60,000	15% 30,000
Urban	20% 165,000	35% 289,000	30% 247,000	15% 124,000
Parish church	40% 325,000	35% 284,000	15% 122,000	10% 81,000

Source: Ecorys analysis.

- 65 As noted above, we have assumed that any impacts associated with local visitors are deadweight (i.e. would have taken place anyway). The additionality of impacts associated with other visitor types depends on the extent to which the cathedral was the main reason for their visit to the area. The AEC visitor research found that 47% of visitors interviewed stated that the cathedral was the main reason for their visit to the area (across all visitor types). Unfortunately it has not been possible to break this figure down by cathedral/cathedral type or visitor type. Available estimates and anecdotal evidence from individual sites suggests a slightly lower figure, perhaps around 35%. Intuitively it would seem likely that the large internationally recognised cathedrals will exert a higher influence over their visitors while the smaller parish church and urban types may attract a smaller proportion of those who have come to the area for that specific reason. The assumed level of additionality for each grouping is shown in Table 3.11<sup>29</sup>.
- 66 Displacement is a potential issue in that visitors spend a finite amount of time in the area and therefore a decision to visit a cathedral may displace a visit to another nearby attraction. However, anecdotal evidence suggests that cathedrals are a recognised part of the local visitor offer and by working together with local partners they help to strengthen the position of the area to attract visitors and encourage them to stay longer, potentially visiting a greater range of attractions. Therefore we have assumed that no significant displacement of visitor activity occurs. Leakage is not relevant in this context as we are focusing only on the time (and money) spent by visitors in the local area.

**Table 3.11 Visitor numbers (adjusted)**

	Day trip	Holiday	Overseas
Large international (assumed 45% additional)	391,000	312,000	781,000
Medium historic (assumed 40% additional)	412,000	353,000	177,000
Medium modern (assumed 35% additional)	24,000	21,000	10,000
Urban (assumed 25% additional)	72,000	62,000	31,000
Parish church (assumed 20% additional)	57,000	24,000	16,000

Source: *Ecorys analysis*.

- 67 The value of visitors to the local economy can be measured in terms of the amount of money they spend in the local area. A recent survey of day visitors in England suggests an average spend of £33 per visit<sup>30</sup>, while holiday visits are estimated to spend in the region of £63 per night<sup>31</sup>. The most recent survey of international visitors suggests that on average they spend a total of £85 per day<sup>32</sup>. As these figures include any admission fees and associated spend at attractions, it has been decided to reduce all average spend figures by a total of £15 to allow for any on-site spend (which has already been accounted for in section 3.4.1 above). As no information is available on the average

<sup>29</sup> In the absence of more detailed evidence, it has been assumed that the proportion motivated by the presence of the cathedral is the same for all visitor types, although in reality there may be some variation.

<sup>30</sup> GB Day Visits Survey 2012 (VisitEngland, 2013).

<sup>31</sup> GB Tourism Survey 2012 (VisitEngland, 2013)

<sup>32</sup> International Passenger Survey 2013 (ONS, 2014).

length of stay we have conservatively assumed this to be one night<sup>33</sup>. Using this data, estimated additional local visitor spend is set out in Table 3.12.

**Table 3.12 Additional local visitor spend**

	Day trip	Holiday	Overseas
Large international	£7.03m	£14.99m	£54.68m
Medium historic	£7.42m	£16.95m	£12.36m
Medium modern	£0.44m	£1.00m	£0.73m
Urban	£1.30m	£2.97m	£2.16m
Parish church	£1.02m	£1.17m	£1.14m

Source: Ecorys analysis.

68 Summing the estimated visitor spend across all cathedrals results in a **total of over £125 million of additional spending in the local economies concerned** (compared to a total of £91 million in the 2004 study).

69 Recent data suggests that the ratio of turnover to employment for tourism-related activity is in the region of £40,000<sup>34</sup>. Applying this figure to the estimates of visitor spend produces the employment figures set out in Table 3.13.

**Table 3.13 Local visitor-related employment**

	Jobs supported
Large international	1,900
Medium historic	920
Medium modern	55
Urban	160
Parish church	85
Total	3,100

Source: Ecorys analysis.

### 3.4.3 Multiplier effects

70 Two types of multiplier (or downstream effects) also need to be taken into account in the analysis:

- Indirect effects down the supply chain associated with both the procurement and visitor spend;
- Induced effects associated with the local spend of those who derive incomes through the other mechanisms.

71 The extent of such local multiplier effects will depend on the strength of local supply chains and the composition of the local economy (and therefore its ability to provide the goods and services required by businesses and employees). Assuming average linkages/multiplier effects, available research in this area suggests that a composite multiplier of 1.1 is appropriate for analysis of effects at the neighbourhood (very local) level while a figure of 1.5 should be used at the regional level<sup>35</sup>. For

<sup>33</sup> This implicitly assumed that the overnight stay will take place in the local area.

<sup>34</sup> Annual Business Survey, 2012 provisional results (ONS, November 2013). It is recognised that tourism-related activity does not fit neatly into one sector of activity as defined by SIC codes, therefore data for section I (accommodation and food service activities) has been used as a proxy.

<sup>35</sup> Additionality Guide (English Partnerships, 2008).

analysis of the local economic impacts a figure slightly higher than that recommended for the neighbourhood level is likely to be appropriate, although given the variation in the nature of the economies being considered we have elected to use a value of 1.2.

### 3.5 What is the economic impact?

72 The following table summarises the estimated total employment effects of the different cathedral groupings and in total (after accounting for deadweight, displacement and leakage as appropriate and applying a composite multiplier of 1.2).

**Table 3.14 Estimated local employment impact**

	Cathedral-related effects	Visitor-related effects	Total
Large international	550	2,300	2,850
Medium historic	760	1,100	1,860
Medium modern	70	65	135
Urban	140	190	330
Parish church	230	100	330
Total	1,740	3,770	5,510

Source: Ecorys analysis.

73 The **total employment estimate of 5,510** is very close to the estimate of 5,450 which resulted from the 2004 study<sup>36</sup>. It is further estimated that **cathedrals generate spend of over £220 million** in their local economies (a significant increase compared to the approximately £150 million estimated in the 2004 study)<sup>37</sup>.

74 It should be noted that the analysis has been designed to estimate impact at the local level. It is likely that a substantial proportion of these impacts are likely to represent displacement at the wider, national level. Conversely, worshippers, visitors and the general population will secure a range of welfare benefits which are not taken into account in this assessment. The estimates also take no account of the contribution made by cathedrals to the public realm of image of their localities which has potential to influence wider investment or visitor decisions.

<sup>36</sup> Comparisons should be treated as indicative due to methodological differences between the two studies.

<sup>37</sup> This total is based on estimated local wages and salaries, procurement and visitor-related spend, plus application of a composite multiplier of 1.2.



## 4.0 Social impacts

75 This section sets out both quantitative and qualitative evidence collected through the survey and case study research regarding the social impacts of cathedrals.

### 4.1 Opportunities for worship

76 Each cathedral has a programme of regular services. Table 4.1 sets out the average number of services which take place in a typical week (excluding any special services or events). **The number of services on a Sunday ranged from 2 to 6 and on other days from 5 to 40.** The 2004 study reported that the number of regular services ranged from 15 to 33 (total for the entire week) which suggests that the number of services has increased in at least some cathedrals. Analysis using the typology shows that, on average, large, international cathedrals have the highest number of services on Sunday (5) and also during the week (21 along with medium, historically important cathedrals).

**Table 4.1 Average number of services (2013)**

	Sunday	Midweek
Large international	5	21
Medium historic	4	21
Medium modern	3	15
Urban	3	15
Parish church	4	18
All	4	19

Source: Ecorys analysis.

77 The annual returns collected by the Church of England capture information on attendance at all services in an average week (with no special events or services). Only a small number of cathedrals provided updates to this data, which shows that large, internationally important cathedrals attract much the highest attendances on Sundays (for both children and adults) and midweek (adults). Attendance figures collected as part of the 2004 study were in a different format so are not comparable to this more recent data.

**Table 4.2 Average attendance at all services (2013)**

	Sunday		Midweek	
	Children	Adults	Children	Adults
Large international	125	999	56	1,575
Medium historic	50	293	179	238
Medium modern	41	267	80	158
Urban	48	277	23	129
Parish church	37	243	38	160
All	57	377	102	363

Source: Ecorys analysis.

78 Attendance at services during the festivals of Easter and Christmas in 2012 follows a similar pattern with large, internationally important cathedrals attracting the highest numbers on average, followed by medium-sized, historic types.



- 79 **Reported trends in congregation size are mixed** with around half reporting some degree of growth over the past five and even ten years. The next most common response was that congregations have been stable and only a minority (around 20%) have experienced some form of decline in attendance (although this often relates to attendance on specific days or for specific services). In terms of the profile of the congregation, some cathedrals noted an increasing number of young families attending services and others reported a more diverse or inclusive congregation including those from migrant communities.
- 80 The most common type of occasional service was a baptism, followed by funerals, marriages and memorial services. Prayer and dedication following a civil marriage and child thanksgiving services were less common with an average of less than one of these services taking place per cathedral per year.

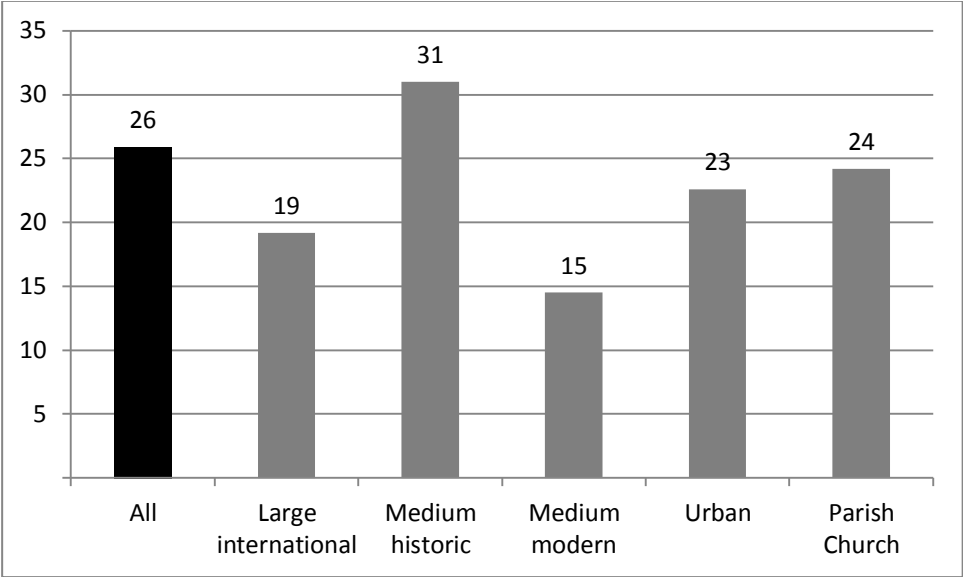
**Table 4.3 Average number of special services, per year (2013)**

	Baptisms	Marriages	Funerals	Memorial services
Large international	33	13	6	4
Medium historic	15	8	9	3
Medium modern	18	3	10	4
Urban	28	4	2	2
Parish church	12	4	7	1
All	19	7	7	2

Source: Ecorys analysis.

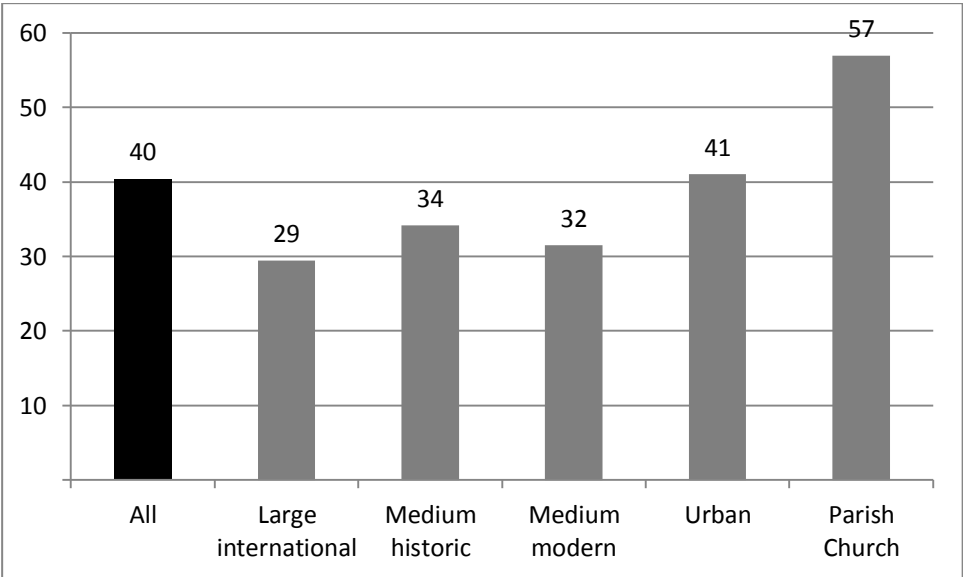
- 81 Case study research indicated an **increasing number of requests for special services**, for example services to commemorate significant anniversaries or events, but information on the number of such services has not been systematically collected.
- 82 The following charts show the number of children and young people who attend Sunday School (Figure 4.1) and are involved in serving the cathedral (Figure 4.2). The highest Sunday School attendance can be observed at medium sized historic type cathedrals followed by parish church and urban types. Parish church cathedrals reported significantly higher numbers of young people being involved in serving the cathedral, followed by urban and medium sized historic. These findings are perhaps indicative of parish church, urban and medium cathedral types having stronger links with the local community, particularly families.

**Figure 4.1 Average Sunday School attendance (2013)**



Source: Ecorys analysis.

**Figure 4.2 Average number of children and young people involved in serving the cathedral (2013)**



Source: Ecorys analysis.

83 Comments regarding use of the cathedral suggest limited change in the number or type of services in recent years but an **increased use of the cathedral building and other spaces for other purposes such as concerts, exhibitions, events and filming** (see Section 4.5).

## 4.2 Opportunities for volunteering

84 The number of individuals who serve in a voluntary capacity ranged from 126 to 780 per cathedral, with an average of around 350. The **total number of volunteers has increased significantly** compared to that recorded in the 2004 study (12,700). Large internationally important cathedrals attracted the greatest number of volunteers. Around two-thirds of cathedrals reported that they have a designated volunteer officer (in some cases this was also a voluntary post).

**Table 4.4 Number of people volunteering, average and total (2013)**

	Number of volunteers	
	Average	Total
Large international	561	3,364
Medium historic	383	6,888
Medium modern	262	524
Urban	261	1,303
Parish church	244	2,681
All	351	14,760

Source: Ecorys analysis.

85 **This increase in the number of volunteers supporting cathedrals contrasts with data on general trends in volunteering in England** presented by the Cabinet Office<sup>38</sup> which suggests that the proportion of people undertaking regular volunteering has declined slightly over the past 10 years. This suggests that cathedrals have done well to attract such a high number of volunteers, particularly given the wide range of other organisations effectively competing for volunteers' time. Research has shown that volunteering can lead to a range of positive outcomes both for the individuals involved and the wider community/society<sup>39</sup> which suggests that the cathedrals are generating important social benefits as a result of providing a focal point for volunteering.

86 The average number of hours per volunteer during the course of the year was estimated at 133 (or 2-3 hours per week), giving an estimated total of 1.96 million hours<sup>40</sup>, **equivalent to over 1,000 full-time employees**, which is twice the figure estimated in the 2004 study (equivalent to over 500 full-time workers).

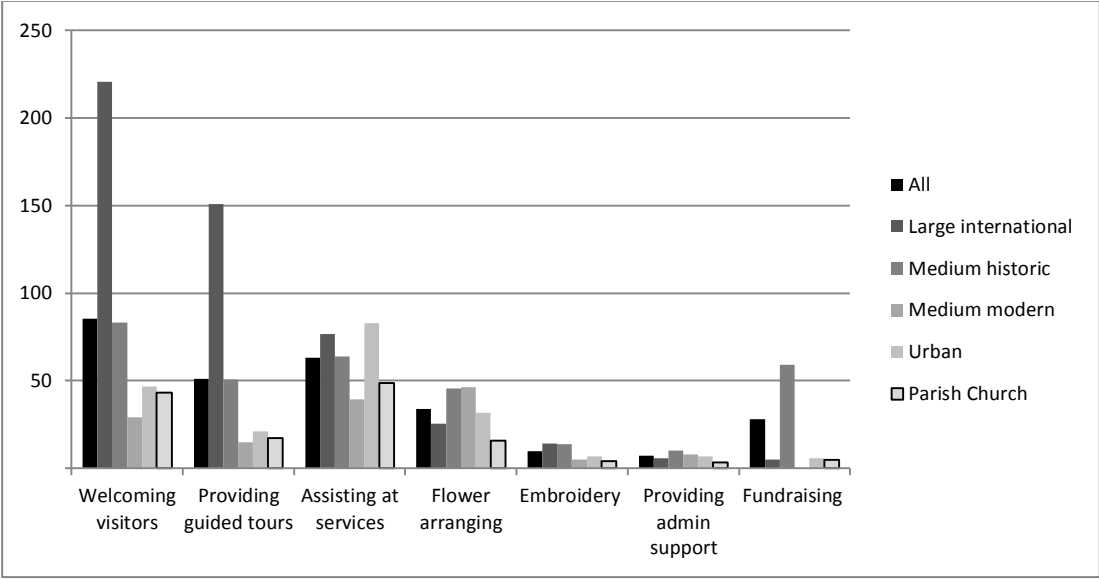
87 The majority of volunteers were reported to live in the local area, ranging from 70% (medium sized modern) to 59% (large international importance). Volunteers were most commonly tasked with **welcoming visitors, assisting at services and providing guided tours** as shown in the following chart. Those in the urban category most commonly use volunteers to assist at services while those in the medium-sized historic type make extensive use of volunteers for fundraising activities.

<sup>38</sup> Since 2012/13, data on volunteering in England has been provided by the annual Community Life survey. Historical data (from 2001 to 2010/11) was provided by the Citizenship Survey.

<sup>39</sup> See, for example, the Institute for Volunteering Research's Evidence Bank: <http://www.ivr.org.uk/ivr-evidence-bank>

<sup>40</sup> This is calculated by applying the average of 133 hours (based on data from 34 cathedrals) to the entire population of 42 cathedrals.

**Figure 4.3 Volunteer tasks (average number of volunteers)**



Source: Ecorys analysis.

88 Volunteers were also reported to assist with a wide range of other tasks including Sunday School, outreach/community activities, event stewarding and bell ringing.

**Case study example**

Over 500 volunteers give their time and skills in support of Norwich Cathedral. As well as cathedral welcomers and guides, there are also volunteers that work in the refectory, shop, education department, and library. Some volunteers are also involved in community outreach. All volunteers are offered relevant training and, once a year, are invited to a special service to thank them for their commitment and contribution to the cathedral.

89 Recent data from VisitEngland confirms the relatively high reliance and increasing importance of volunteers for places of worship more generally.<sup>41</sup> Of the places of worship taking part in the research, 96% reported use of unpaid volunteers (compared to 82% for all attractions) and 27% of this group reported that use of volunteers had increased in 2013 compared to 2012 (with only 3% reporting a decrease), while 14% felt that volunteer numbers would increase further in 2014 (compared to 4% who predicted a decrease).

**4.3 Opportunities for learning**

90 **Over 320,000 students participated in educational events organised by cathedrals in 2013.** The most common level is primary school, followed by secondary. Large internationally important cathedrals accommodate the highest numbers of students on average, more than twice as many primary school age pupils as those in the urban category. This total is lower than the figure of almost 362,000 reported in the 2004 study. However, it should be noted that two cathedrals reported that numbers were lower than average in 2013 due to building work leaving areas of the cathedral closed for part of the year.

<sup>41</sup> Visitor Attraction Trends in England 2013 (VisitEngland, 2014).

- 91 All but four cathedrals reported that they had a designated education officer (in some cases this was a voluntary post).
- 92 A number of cathedrals reported that they had seen recent changes in demand for educational activities (including a trend for fewer visits but larger groups) due to changes in budgets in schools, challenges in fitting visits into busy timetables and difficulties in meeting transport costs. However, around 15% of the cathedrals reported that they were seeing increasing numbers of children/students attending organised educational events, while some reported that demand currently exceeded their capacity to accommodate this type of visit. In some locations it was noted that school groups often combined a visit to the cathedral with a trip to another nearby attraction such as a museum. A number of cathedrals mentioned that Heritage Lottery Fund grants had helped to expand/develop educational provision. Others noted an increase in visits by children from other faiths (reflecting the multi-cultural population of many large cities) while some reported an increase in groups from outside of the immediate local area (again possibly connected to spending part of the day at another nearby attraction).

#### Case study example

The education department at St Paul's Cathedral provides a wide offering for schools, with tours available for every Key Stage, all linking to the curriculum with a number of themes such as the Great Fire of London. Alongside the paid tours offered, the cathedral also undertakes some outreach work: for example the music department recently undertook a music session with children in a Hackney school, and a new outreach organ scholar has been appointed to take organ lessons in London schools.

**Table 4.5 Participation in organised educational events, average and total (2013)**

	Nursery/KS1		Primary/KS2		Secondary/KS 3-4		16-18 years		Over 18	
	Av.	Total	Av.	Total	Av.	Total	Av.	Total	Av.	Total
Large international	2,760	16,565	7,030	42,185	7,214	43,285	1,330	7,982	1,913	11,476
Medium historic	860	15,478	3,012	54,209	1,997	35,948	258	4,644	683	12,297
Medium modern	940	1,880	1,194	2,388	206	412	144	287	814	1,627
Urban	592	2,962	3,134	15,673	869	4,344	119	594	54	268
Parish church	598	6,583	1,711	18,818	1,042	11,468	193	2,123	750	8,254
All	1,035	43,468	3,173	133,273	2,273	95,457	372	15,630	808	33,922

Source: Ecorys analysis.

#### Case study example

Truro Cathedral first employed an education officer five years ago as part of a Heritage Lottery Fund project. The post was so successful that it is now covered by the cathedral's mainstream budget and has been expanded to an education assistant role. The education department caters for children and young people of all ages from early years to university across the whole of Cornwall. Formal tours delivered to primary school children tend to be the most popular and a range of curriculum focused tours are delivered to 4,000 children a year. The education department also provides a range of informal activities such as trails and guided craft activities three times a week during the summer holidays with an extra session this year to make poppies for a World War I commemoration event in November.

## 4.4 Engaging with the community

93 It is clear that cathedrals engage with the wider community in a multitude of different ways. Many provided details of specific projects or initiatives to provide support to particular sections of the community. Examples include:

- Lunch clubs for older people and other vulnerable groups
- Work with children and families, including mother and baby/toddler groups
- Pastoral support for those visiting the cathedral
- Support for migrants and asylum seekers
- Support to offenders and ex-offenders
- Collections for local food banks
- Support for the homeless
- Work experience and placements
- Outreach activity in schools, residential homes.

94 Some of these initiatives were led by the cathedrals while others involved providing support to other providers (for example providing space in the cathedral for others to run groups/activities).

### Case study example

As part of its outreach work, Exeter Cathedral takes part in 'Supper on the Run' involving five local churches, which form the Soup Kitchen Network, taking turns to provide hot food in the city centre each evening. The cathedral is responsible for Wednesday evenings and feeds up to 70 people each week.

### Case study example

The Cathedral Archer Project (CAP) works with homeless and vulnerable people in Sheffield. CAP started 25 years ago as a congregational outreach initiative to support people seeking shelter in the cathedral and provides a comprehensive day service for homeless and vulnerable people. CAP adds to the cathedral's richness and civic interaction. It now operates as charity organisation and has some funding from the City Council and Big Lottery Fund. The project provides onsite services including food (e.g. breakfast club), showers, laundry and access to medical services and alcohol and drug support. It works in partnership with wide range of organisations such as Turning Point (Sheffield Rough Sleepers Service), DACT (drugs, alcohol and domestic abuse) and the local probation service. The Big Issue is also based at the cathedral and operate all their services there.

### Case study example

Blackburn Cathedral has a Dialogue Development Officer who was employed to give a more proactive approach to interfaith work. Her role is to look at better ways of working together, mainly through bringing people together for dialogues and discussions of topical issues, promoting the cathedral as a safe independent space. There have been lots of discussions, often covering controversial topics (e.g. radicalisation, hate crime) as well as more educational themes on the respective religions and exhibitions (e.g. Anne Frank). These events have been attended by thousands of people over the years, helping the staff to develop good knowledge of ways of involving people in education and dialogue.

95 All cathedrals have a website and almost all reported making some use of social media with Twitter and Facebook the platforms most commonly mentioned. The main reason for using social media was to disseminate news and information (including details of events and other activities). Around two-thirds of cathedrals were able to provide some information on use of their website, revealing significant virtual visitor numbers.

96 All but three cathedrals reported having an associated friends group, trust or similar with the aim of these groups generally being to support and/or help maintain the cathedral, including by undertaking fundraising and making grant applications. Involvement in such groups ranged from less than ten to more than 3,000 people, reflecting differences in the remit and nature of these groups.

#### 4.5 What other events do cathedrals support?

97 Data collected by the survey shows that **cathedrals are well-used for a range of events and activities**. There is wide variation in the numbers and attendance, as would be expected given the variation in size/space available for this type of activity with conferences being most popular (particularly for those in the urban grouping perhaps reflecting the increased demand for such events in urban areas). Exhibitions were much fewer in number although attracted relatively higher audiences, for example recent exhibitions at Salisbury Cathedral, such as Sanctuary by John Maine, have attracted a great deal of interest. Like conferences, exhibitions offer significant opportunities for revenue generation although it is recognised that not all cathedrals have space to hold major paid events.

**Table 4.6 Average numbers of other uses of cathedral buildings and precincts (2013) (average attendance)**

	Concerts	Lectures/talks	Exhibitions	Conferences	Ceremonies
Large international	29 (535)	27 (244)	3 (2,563)	36 (447)	10 (1,293)
Medium historic	39 (1,318)	20 (172)	7 (8,930)	78 (2,125)	5 (974)
Medium modern	31 (425)	25 (25)	9 (4,000)	15 (40)	12 (675)
Urban	42 (491)	10 (60)	6 (n/a)	187 (30)	13 (771)
Parish church	39 (204)	10 (54)	5 (346)	8 (150)	4 (493)
All	38 (1,126)	17 (135)	6 (3,965)	68 (1,055)	7 (1,368)

Source: Ecorys analysis.

98 Numerous other uses of the cathedrals were reported, some of which attracted significant attendances. Examples include dinners, corporate events, festivals and filming by television companies. It is also recognised that cathedrals have a civic role and provide a venue for a wide variety of civic events and services.

99 Cathedrals reported **working in partnership with various local organisations**, including the local authority, area-based partnerships (including those focused on culture/heritage and tourism), schools, colleges and universities, local charities and voluntary organisations. These contributions take the form of staff time and/or financial support.

#### Case study example

As part of the celebrations of the 800<sup>th</sup> anniversary of the Magna Carta in 2015, Salisbury Cathedral has placed a strong emphasis on community outreach activities. The cathedral will work with the local community and engage new audiences. This will include an extensive schools programme; work with various agencies involved with young and adult offenders in a range of creative projects; partnership projects with the English Speaking Union, Salisbury Playhouse, Salisbury Museum, Sarum College, and the Diocesan Board of Education. There will also be collaborations with Salisbury City Council and the Trussell Trust.

### Case study example

Birmingham Cathedral will celebrate the 300th anniversary of its building in 2015 with a series of special events, pilgrimages and mass participation arts activities. The 300<sup>th</sup> anniversary celebrations will comprise four workstreams: arts, heritage, special services and pilgrimage. The heritage strand involves exploring the archives at Birmingham University and outputs will include a documentary film and new guidebook detailing how the town became a city and the church became a cathedral. Every deanery is being invited to make a pilgrimage to the cathedral and three concerts will be held in the city at different venues, each linked to one of the three centuries of the cathedral's existence.



# 5.0 Conclusions

## 5.1 What are the economic impacts of cathedrals?

- 100 The study has found clear evidence that **cathedrals make a significant contribution to their local economies**. These findings are consistent with those resulting from a similar study in 2004.
- 101 Economic impacts are generated directly as a result of the **employment of staff and the procurement of goods and services** (both procurement in support of everyday operations and that related to major restoration or capital development projects). Significant impacts are also generated as a result of the **local spending of cathedral visitors**; this **additional visitor-related impact alone is estimated to be in the order of £125 million**.
- 102 Further impact is generated by the multiplier effects of this direct and visitor-related spend. **In total, cathedrals are estimated to generate total net additional local spending of around £220 million** per annum. Expressing this impact in terms of employment, suggests that **cathedrals support a total of over 5,500 jobs in the local economies** concerned (see Table 5.1).

**Table 5.1 Estimated local employment impact**

	Cathedral-related effects	Visitor-related effects	Total
Large international	550	2,300	2,850
Medium historic	760	1,100	1,860
Medium modern	70	65	135
Urban	140	190	330
Parish church	230	100	330
Total	1,740	3,770	5,510

Source: Ecorys analysis.

## 5.2 What are the social impacts of cathedrals?

- 103 There is also considerable evidence that **the activity of cathedrals results in a range of social benefits** which would be expected to impact positively on the wellbeing of participants and of society in general.
- 104 In addition to a programme of regular and special **services**, cathedrals provide a wide range of **pastoral care and outreach activity** as part of their role in supporting the local community. Cathedrals are also used for **numerous events, concerts, ceremonies and other activities**, both those organised by the cathedrals themselves and those arranged by other groups that make use of these spaces.
- 105 Cathedrals **benefit from the time and skills of over 14,000 volunteers**, who fulfil a range of roles including welcoming visitors and assisting at services. Cathedrals also provide numerous **opportunities for both formal and informal learning** and it is estimated that **over 320,000 learners participated in organised educational activities in 2013**.

### 5.3 Recommendations for future research

- 106 The earlier visitor survey research commissioned by the AEC has provided important evidence for the impact assessment. If this survey is repeated it is recommended that revisions are made to the questions asked in order to provide a more detailed exploration of visitor profile, motivations and behaviour (including where people stay and what they spend locally). It is also recommended that an attempt is made to break these findings down by type of cathedral (using the typology presented in this report or similar) and type of visitor (day, staying, overseas).

## **Annex One: Case study reports**

# Birmingham Cathedral Case Study

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## Background

- 1 Birmingham Cathedral was built as a parish church in 1715. The world renowned Burne-Jones windows were added in the 1880s and portray four significant themes within the Christian faith (nativity, ascension, crucifixion and the Last Judgement).
- 2 Due to the growth of the city as a major industrial centre, the Diocese of Birmingham was established in 1905 led by Bishop Charles Gore who decided to adopt an existing church as the cathedral allowing the money which would have been spent on a new building to instead be used to help alleviate the poverty and other social issues faced by the city's population at that time.



- 3 Birmingham Cathedral celebrates the 300th anniversary of its building in 2015 with a series of special events, pilgrimages and mass participation arts activities.

- 4 In preparation for this year of celebration, 2014 will be a year of improvement in which the cathedral is undergoing major exterior repairs, including an overhaul of the weather vane and cupola.

- 5 As a legacy of the anniversary celebrations, the cathedral aims to become embedded in the city's arts, culture and community scene and will undergo a programme of interior renovations and adaptations during 2016 in order to become a 'cathedral for the future'.

*Photo credit: Birmingham Cathedral*

## Economic Impact

- 6 The cathedral provides employment for an increasing number of staff, including the creation of three new posts in 2014. The majority of staff live in the city and the surrounding area.
- 7 A wide range of people visit the cathedral, including those taking part in guided tours, foreign student groups and coach trips, as well as independent visitors. It is viewed as part of the visitor offer of the city, with a proportion known to come specifically to see the Burne-Jones windows. Visitors are also attracted by religious events such as ordinations and major services. Many visitors would have not

otherwise have come into the city but often visit shops, coffee shops, bars or restaurants as well, resulting in benefits for local businesses.

- 8 The cathedral strongly believes in working in partnership for the common good and works closely with the Colmore Business Improvement District (BID), neighbouring businesses and also local charities. Work with the BID is also thought to have helped the cathedral to develop a closer relationship with the local police as well as BID member businesses. The first interaction between the BID and the cathedral related to issues of anti-social behaviour in the cathedral and its grounds; the BID was able to help address this issue by providing funding for an increased police presence in the area. The cathedral is now a member of the BID's safe and sound working group which aims to reduce crime and anti-social behaviour in the area. The area is mainly commercial premises but the BID hopes to attract more visitors and feels that working with the cathedral and the nearby museum and art gallery will help to achieve this aim. The recent opening of a number of independent coffee shops and bars in the area provides a sign that visitor numbers are already increasing.
- 9 The cathedral provides a venue for an increasing number of events, both inside the building and outside in the square, including those organised by the BID. Figures show that 187 events, meetings or tours were held in 2013, around twice as many as the number recorded in 2008 (94). A charge is levied on events which take place inside the cathedral to cover the expenses incurred while those hosting events outside in the square are asked to make a donation. In general, the cathedral has limited opportunities to generate revenue as there is no space for a café, a shop or the hosting of large conferences.



Photo credit: Birmingham Cathedral

- 10 The cathedral also hosts national events including the worship for the national Church of England liturgy conference in 2013. The welcome and hospitality of the cathedral was a key factor in Birmingham hosting this conference. Delegates stayed at Aston University and many other local businesses are likely to have benefited from additional revenue as a result of the spending undertaken by those attending the event.
- 11 The cathedral's management of the square and maintenance of the building has created a safe place in the heart of the city centre which enhances quality of life and adds to the attraction of the area as a location for a range of businesses.

## **Social Impact**

- 12 The cathedral has a long history of good relations with the people of the city, dating back to when it was decided to use the existing church as a cathedral instead of spending money on a new building. There is a desire for this relationship to continue and it is hoped that going forward the cathedral will be seen as a hub or centre of the community. The cathedral and its grounds provide a sacred space which can be used by everyone, contributing to the quality of life and sense of wellbeing of those who live and work in the city.
- 13 On weekdays, the early service has been timed so that people can go to work afterwards. The congregation often includes visitors to the city and on Sundays the regular congregation includes a number of people who are known to travel from the surrounding area (Shropshire for example).
- 14 The cathedral receives an increasing number of requests for special services, for example in 2012 services were provided for Jamaican and US athletes staying in the city and in 2014 a service was held to commemorate the anniversary of World War I. A total of 68 special services were provided in 2013.
- 15 The 300th anniversary celebrations will comprise four workstreams: arts, heritage, special services and pilgrimage. The heritage strand involves exploring the archives at Birmingham University and outputs will include a documentary film and new guidebook detailing how the town became a city and the church became a cathedral. Every deanery is being invited to make a pilgrimage to the cathedral and three concerts will be held in the city at different venues, each linked to one of the three centuries of the cathedral's existence.
- 16 Pastoral work is mainly focused on the congregation and the choir. In addition, a brochure has been compiled detailing the help available in the city for homelessness and other issues. The cathedral works to support the work of local charities and initiatives, including the Night Shelter project for the homeless to which the cathedral made a financial contribution and provided volunteers. The community committee helps to decide which charities receive support. The cathedral raises significant amounts for local charities and also helps to raise the profile of organisations and their campaigns.
- 17 The cathedral also provides a variety of opportunities for volunteers and actively recruits retired members of the clergy to act as visitor chaplains who are on hand to welcome visitors and provide spiritual guidance. Volunteers are also involved in the governance of the cathedrals (for example through the finance committee), although it was noted that recruitment of those with relevant professional skills has become easier as relationships with local businesses have been developed.



- 18 The education department is managed and staffed by a team of volunteers with a professional background in education. The team provides guided tours/activities for ages ranging from years 1 to 13 and also college and university students (including trainee teachers). Activities focus on two areas: the history of Birmingham and the role of the cathedral and the Christian story. Groups are mainly from secular schools but church schools have an opportunity to visit the cathedral for leavers' services and also participate in the annual advent pilgrimage from the nearby St Martin's Church. During term-time, on average one group visits the cathedral each week (and no more than two due to capacity). Demand for visits exceeds the amount that can be supplied so consideration is being given to employing a part-time education officer to develop this important area of work.

# Blackburn Cathedral Case Study

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## Background

- 1 The Cathedral Church of St. Mary the Virgin is located in the heart of Blackburn town centre. It is one of England's newest Anglican cathedrals, having become a cathedral in 1926 when the diocese of Blackburn was created, yet the site is reputedly one of the country's oldest places of Christian worship.

## Economic Impact



- 2 Blackburn is not a major tourist destination, but the cathedral does attract significant numbers of visitors, estimated at 18,700 in 2013, and is included as a local attraction in visitor information produced by Lancashire Tourism.
- 3 Blackburn Cathedral is currently engaged in a major redevelopment project as part of the Cathedral Quarter scheme to upgrade a large site in Blackburn town centre between the cathedral and the main railway station. The project is due for completion in Autumn 2015 and includes a new hotel, office blocks, public realm improvements and transport interchange, involving numerous public agencies and private sector partners, cathedral staff have played a key role since 2000 in driving, planning and delivering this project, with a subsidiary company, Blackburn Cathedral Development Co. (with members of staff represented on the board) managing the Cathedral Court element of the project with the support of professional design and project management contractors
- 4 The Cathedral Court element includes a library, refectory, conference room, hospitality suite, offices, Cloister Garth (garden), underground car park and accommodation (townhouses and apartments for clergy and lay staff and units for musical scholars). The project also includes a number of physical improvements to existing buildings. A total of £6.8 million will be invested in the cathedral, with the majority of funding coming from the Homes and Communities Agency and Blackburn with Darwen Borough Council (a large part of which is from the European Regional Development Fund). The remainder has been raised by the cathedral through the sale of leases on previously undeveloped land, contributions from the Cathedral Trust, extensive fundraising efforts and a bridging loan from CCLA.



- 5 The project represents a major improvement to the urban environment and is expected to increase the number of people visiting the cathedral by improving accessibility. It will also directly increase the numbers of people living in Blackburn town centre as a result of the new accommodation being built. The project will also increase the cathedral's capacity to host musical, education and community activities, further developing the cathedral's community outreach work.
- 6 In line with its policy of using local suppliers wherever possible, the cathedral decided at an early stage to use a local building firm to carry out the work, with the jobs and services benefitting the local economy by an estimated £7.8 million.
- 7 When complete, it is hoped that the Cathedral Court project will bring a range of financial benefits. For example, the cathedral will save an estimated £33,000 per year on accommodation, earn an additional £10,500 from the rental of office space (to the Adoption Agency) and between £15,000 and £20,000 by licensing or franchising refectory services. Overall, it is estimated that income will increase from the current £15,000 to around £25,000 per year as a result.
- 8 It is also anticipated that the project will boost revenue by increasing the cathedral's attractiveness as a venue for events. The cathedral already hosts a range of civic ceremonies, musical performances, art exhibitions and events, such as the recent Lancashire Tourism Awards which attracted 400 guests. The cathedral recently commissioned an events management consultancy to conduct a feasibility study on using the cathedral for corporate events and meetings, to better understand the revenue this could generate and the type of events that would be appropriate. The study concluded that there was already significant demand amongst businesses thanks to the cathedral's scale and architecture.

## Social Impact

- 9 Blackburn Cathedral places great emphasis on its role in the community and has developed strong links with public agencies and community organisations, including schools and a wide variety of religious, community groups and charities. This includes hosting a range of music outreach (e.g. choir school and musical education) and educational activities for local children. The Dean is a member of the Lancashire Fairness Commission exploring issues of inequality, health and welfare.
- 10 The surrounding community contains significant amounts of deprivation, including a large and growing Muslim population (25%-33% depending on the area defined) with community cohesion affected by separation of communities and the presence of extreme ideologies (both conservative/radical Islamic groups as well as strong support for BNP/EDL)
- 11 The cathedral's main way of achieving social impacts is through the exChange programme. After the 7/7 London bombings it was felt that the cathedral needed a much more proactive approach to interfaith work, a dedicated Dialogue Development Officer (the only Muslim member of staff employed by a cathedral). Her role was to look at better ways of working together, mainly through bringing people together for dialogues and discussions of topical issues, promoting the cathedral as a safe independent space. There have been lots of discussions, often covering controversial topics (e.g. radicalisation, hate crime) as well as more educational themes on the respective religions and exhibitions ( e.g. Anne Frank). These events have been attended by thousands of people over the years, helping the staff to develop good knowledge of ways of involving people in education and dialogue.

- 12 Around three years ago, the cathedral recruited a Community Canon, tasked to expand interfaith work and develop an explicitly outward focus. She has developed a comprehensive framework for the Cathedral's social programmes in the form of the For Life project, which has progressed from discussions to practical activities and even social enterprise development. The project has a number of individual strands and examples include:
- Arts – for example work with an acclaimed artist on Seven Works of Mercy, using the art works to provoke discussion on themes such as social responsibility and citizenship
  - Bread – using the symbolic meanings of bread for nourishment and status, exploring the foods of different cultures and planning to set up a community bakery
  - Business - work with college students on business and cultural ethics, in collaboration with Empire theatre marketing department
  - Construction – a planned self-build programme of 32 homes on 2.2 acre site in Blackburn
  - Environment - a recycling social enterprise
  - Sports – collaboration with Salford college sports department
- 13 While the curriculum / subject matter is explicitly (and unapologetically) religious, activities address universal themes and human values, in support of civic behaviour and human rights, mutual understanding and integration, supporting the ethical, spiritual and practical development of young people.
- 14 The Community Canon has a background in academia and regeneration, with a good understanding of the problems caused by social exclusion and poverty. The activities undertaken reflect a desire to make the church more relevant to people's lives and to fulfil its social/ pastoral mission through good works rather than theological discussions. The main approach is via partnership working with many public and private sector partners including councils and other public bodies, schools and other education institutions, women's groups, youth groups (e.g. Youth Zone), community groups, housing associations, police and probation service, and the Army / Territorial Army
- 15 While there has been a degree of resistance from certain local groups, it was felt that the subject matter is much more important than the fact that this is being led by the cathedral. The staff feel that Blackburn Cathedral is unique in its emphasis on social and community work and provides a powerful example of what a cathedral can achieve in its community. As highlighted above it was also felt that the Cathedral Court project when complete will allow them to do even more in this area.
- 16 The Community Canon has raised funding from a number of different sources and the cathedral has invested a significant amount of time and effort. They see it as a model that can be applied by others, with potential to package activities and charging for the (re) use of materials and methods so that the cathedral can then subsidise other activities. In addition, the cathedral is currently in the process of establishing five social enterprises, working with Bootstrap on business planning, funding and revenue generation.

# Exeter Cathedral Case Study

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## Background

- 1 Exeter Cathedral is a Gothic cathedral, situated close to the centre of the city. It attracts an average weekly attendance at Sunday and mid week services of just over 500 people, including children, but with much large congregations at Easter and Christmas.
- 2 The cathedral has recently set out a development plan for 2014-19. A central part of the plan is the Cloisters Plus project which plans to excavate the ruins of Roman Baths in the cathedral's grounds. It is anticipated that the project will attract new visitors with an interest in archaeology and history, as well as being of interest to some of those who already visit the cathedral.



*Photo credit: Exeter Cathedral*

## Economic Impact

- 3 Exeter Cathedral attracts an estimated 120,000 visitors per year. Visitors travel from a range of countries; however, this includes a relatively large number of German tourists who visit the cathedral as part of a tour of locations that feature in the novels of Rosamunde Pilcher. The cathedral also attracts many Chinese students who visit whilst they are studying at a nearby language school. The students particularly enjoy visiting the cathedral shop to buy gifts for their family. The shop's stock has been tailored to include items favoured by the students, such as small tea caddies
- 4 Staff work closely with the local tourist board which signposts tourists to the cathedral. Although it is not possible to ascertain whether visitors visit the city solely to see the cathedral, some comments on the cathedral's facebook page suggest that people do make trips to the area see the cathedral. It is also clear that the cathedral provides a tourist attraction for rainy days when many of the city's other tourist attractions are unsuitable as they are open air such as Exeter's Quayside.

- 5 The cathedral is also proactively encouraging more local visitors. In 2013, Exeter Cathedral launched a residents' card which enabled local residents to visit the cathedral for free. Alongside the card, the cathedral promoted their 'friend of the cathedral' scheme to local people that were not eligible for the card. This was judged to be a huge success and led to an increase of 900 new friends in 2013.
- 6 Exeter Cathedral also benefits the local area by providing employment for local people. The cathedral has a staff team of 84 including 5 clergy. Over half of staff live either in or close to the city.

## Social Impact

- 7 Exeter Cathedral is often viewed as a focal point for community events and the cathedral welcomes opportunities to support local community and charitable events through allowing use of the building free of charge. Often this focuses on the green at the front of the cathedral which hosts a variety of events including a craft fair. The inside of the cathedral has hosted a variety of community events including a schools art exhibition.



*Photo credit: Exeter Cathedral*

- 8 The cathedral also has an education department that offers a range of programmes for schools during the term time but also encourages children and young people to visit and learn about the cathedral through a varied summer programme of themed activities such as 'A World of Animals' week which included meeting owls on the green and following the 'owl trail' to the chapel housing owl murals. Children are also encouraged to learn by borrowing one of the themed education rucksacks from the front of the cathedral and using its content to explore the building. The department is also about to extend its programme to teenagers through the Extreme Imagination activities being delivered in the Autumn 2014 half term.
- 9 Exeter Cathedral's 500 strong group of volunteers undertake a range of roles including over 100 stewards and tour guides. The volunteers play a key role in the running of the cathedral and supporting visitors through imparting information about the cathedral and signposting people to specialist support where this is needed such as the local homeless shelters. One volunteer viewed their role as "A chance to engage with people about the wonder of this place". Pastoral support for the volunteers is very important and senior staff operate an open door policy for volunteers to ensure that they feel able to speak to them about any concerns. The Cathedral is also exploring the potential to support the volunteers further by providing a dedicated volunteer space as part of the Cloisters Plus project.



- 10 As part of its outreach work, the cathedral takes part in 'Supper on the Run' involving five local churches, which form the Soup Kitchen Network, taking turns to provide hot food in the city centre each evening. The cathedral is responsible for Wednesday evenings and feeds up to 70 people each week. This is viewed as being easily accessible as it is held outside and there is no obligation for people to engage with the volunteers or other guests. However, if people do want more social interaction they are signposted to the cathedral's night café.
- 11 The cathedral has run its weekly Friday night café for homeless and vulnerable people for over three years. The cafe attracts between 30 and 50 people each week. Some guests attend regularly whilst others come and go due to the transient nature of the group. The café is supported by 18 volunteers working on a fortnightly rota which includes members of the cathedral's congregation and students from Exeter University's Labour Society. In addition to volunteers that help to serve food there is a group of "listeners", older congregation members who sit and listen to the guests. The café is focused on "...creating a community space where people can come and be treated as if they are in a commercial café...we offer a place of absolute acceptance and dignity".
- 12 When the café first began, guests would come and eat but would not stop to chat but over time the sense of community the Cathedral hoped for has developed with regular guests waiting for the café to open and offering help to bring in the food. Guests have even bought cake for a volunteer's birthday. The 'family feel' extends to the guests affectionately nicknaming one of the older volunteers as 'Grandma'. Guests have also requested informal memorial services at the café when other guests have passed away. For some guests the café is the only human contact they have each week and they enjoy the opportunity to sit and chat with others. For one guest, the café also provides the opportunity for him to help others as well as benefiting himself.
- 13 The café has also enabled the cathedral to connect with the Devon and Cornwall Food Association which distributes waste food from a range of supermarkets in the city. The cathedral is pleased that they can support this project through the café.
- 14 The cathedral is also engaged in the retail and commercial life of the city through the City Centre Chaplaincy which is supported by Christians Together Across Exeter<sup>42</sup>. The aim of the chaplaincy is to offer a pastoral presence in the city's shops. It primarily offers support for retail staff but has also supported a small number of shoppers. There are 15 trained volunteer chaplains that provide support on a variety of matters including bereavement. The City Centre Chaplaincy has been running for a year and has been well received by Exeter's retail sector.

<sup>42</sup> <http://ctax.moonfruit.com/#/agm-2013/4571661348>

# Norwich Cathedral Case Study

## Background

- 1 Norwich Cathedral was built between 1096 and 1145 and is one of the 'Norwich 12' heritage sites (an initiative of Norwich Heritage, Economic and Regeneration Trust). The cathedral is located in the city centre and hosts one of the largest cloisters and cathedral close in Britain. It has an extensive property portfolio which includes all but one of the buildings within the cathedral close. The vast majority of the buildings in the close are Grade I or II listed, many of which are occupied by local businesses, residents and Norwich School.
- 2 The cathedral is led by three underpinning and inspiring Benedictine principles of worship, hospitality and learning. In 2009, the cathedral completed a £12million project to enhance both its hospitality and learning facilities, which included the development of a new refectory restaurant and a hostry visitor and education centre. Both of which have been built within the footprint and remaining walls of the original monastic refectory and hostry.

### Hostry



### Refectory



Photos credits: Book a Poet, Freeland Rees Roberts Architects and Norwich Cathedral

## Economic Impact

- 3 The cathedral supports local businesses wherever possible, but uses a competitive tendering process to ensure good value for money. For the construction of the refectory and hostry, it supported the local economy by choosing local contractors. Local contractors are also used for the ongoing maintenance of the cathedral and the cathedral close. The cathedral sources some of its produce locally for use in the refectory, including cheeses, meats and wines. It has also appointed a local firm to develop the new cathedral website (which is planned to take place in 2015).
- 4 Over the last 18 months, the cathedral has looked at how it can be more commercially aware and increase the income it generates from the refectory and the Weston room (conference facilities) to help the cathedral fund its mission and outreach activities. The cathedral uses its corporate events as an opportunity to get more visitors to come inside the cathedral, for example hospitality guests may be invited to come to Evensong before their dinner party or offered a tour of the cathedral.
- 5 The cathedral is used as a venue for six different breakfast clubs, which features guest speakers and networking opportunities for businesses. There is also the Dean's breakfast club, which brings together organisations from the public sector to the cathedral.

- The cathedral was recently approached by a major bank to develop a cathedral business group which is focused on business ethics. It also actively engages with stakeholders across the diocese and the county to raise awareness of the work of the cathedral, but also to inform the development of a 10-year strategic plan for the cathedral.

### Weston Room Conference Facilities



Photo credit: Norwich Cathedral

### Dragon Festival



Poster credit: HEART website

### Cathedral's marketing



Photo credit: Norwich Cathedral

- The cathedral has teamed up with Norwich's Heritage Economic and Regeneration Trust to host some events for the Norwich Dragon Trail Festival, which is a festival to celebrate the city's heritage, myths and legends through fun activities. The cathedral also plays a strong role in Visit Norwich and the Dean is a member of their management board.
- The cathedral's most recent marketing campaign is aimed to appeal to a wider audience and focus on the visitor experience. This campaign was based on evidence from a detailed potential visitor motivation and behaviour survey conducted in August 2013. The cathedral is also working in collaboration with the Forum (library and centre for information, arts, events and tourism) to create opportunities for joint publicity. The cathedral is also considering cross promotional activities with other attractions in the city such as Norwich Castle with the aim of attracting more visitors.
- The cathedral has seen a significant increase in visitor numbers in recent years and welcomed over 65,000 visitors in 2013, which coincided with a drive on digital marketing and social media activities. The cathedral's website had 225,000 visits, which an increase of 32% in comparison to the previous year. It has a growing social media following (5,000 twitter followers) and has used e-newsletters to attract more visitors. The cathedral uses both traditional printed material and electronic marketing and PR techniques.

### Social impact

- Over 600 volunteers give their time and skills to help the cathedral. As well as cathedral welcomers and guides, there are also volunteers that work in the refectory, shop, education department, and library. Some volunteers are also involved in community outreach. All volunteers are offered relevant training and once a year are invited to a special service to thank them for their commitment and contribution to the cathedral. The cathedral also has an apprentice and offers work experience placements to local students. A music intern spent a month placement in summer 2013.
- The cathedral's educational outreach activities are delivered by the schools team. More than 9,000 school pupils and students visit the cathedral every year. It aims to grow its outreach work and encourage all primary schoolchildren in Norfolk to visit the cathedral. This work is funded through

chapter funds, but the cathedral is currently looking for additional funding from charitable trusts to develop and expand its educational outreach work.

- 12 The cathedral was involved in Sing Up!, a government-backed scheme which enabled its choristers to go into local primary schools to provide singing tuition and for the children to then perform concerts with the choir in the cathedral. It has now secured further funding from a charitable trust for three years to work on a similar project with around a dozen schools each academic year. This project is run in conjunction with Norwich School. The cathedral is currently also looking at ways to encourage more visitors to come to Evensong.
- 13 Going forward, the Dean and Chapter would like to develop stronger relationships with the University of East Anglia, Norwich University of the Arts, and other research institutions at Norwich Research Park that are involved in research on the environment, food and genetics so that the cathedral can celebrate scientific discoveries, but also engage with the ethical dimension of this research.
- 14 Events such as exhibitions, heritage open days or the annual hostry festival bring a wide range of people into the cathedral. The cathedral is organising events to attract more families, such as 'catch the rainbow', which is a family event of arts and crafts, circus acts and a puppet theatre. The event saw a significant increase in bookings after an anonymous visitor posted a glowing review about the event on various websites.

### Catch the rainbow



Poster: from cathedral website. Photo credits: Paul Hurst

- 15 The cathedral is involved in a number of different charitable activities. It works with charities that run special services for vulnerable groups. For example, the Canon Pastor is heavily involved in the Matthew project (an alcohol and drug abuse initiative) and the Norwich Centre (counselling service) as a trustee of both of these charities. The Dean also actively supports a number of charities by attending their fundraising events, such as the Magdalene Group which reaches out to street based sex workers.
- 16 Going forward, the cathedral is looking to raise funding to replace the interior lighting (£1.7 million). Moreover, 2015 will mark the 100-year anniversary of Nurse Edith Cavell, who is buried at the cathedral and there will be events next year to commemorate her life. The cathedral's library and its collections will also celebrate their 10th anniversary of the Library extension, with some additional outreach activities being planned.



# Salisbury Cathedral Case Study

## Background

- 1 Salisbury Cathedral was built between 1220 and 1258 and is formally known as the Cathedral Church of the Blessed Virgin Mary. The cathedral has Britain's tallest spire and the best preserved copy of the Magna Carta. The cathedral also hosts the largest cloister and the largest cathedral close in Britain as well as the world's oldest working clock.
- 2 Ahead of its 2015 celebrations, marking the 800th anniversary of Magna Carta, the cathedral has completed a number of redevelopment projects, including the refurbishment of the refectory restaurant and the installation of purpose-designed building providing new toilet facilities and storage space in the Little Paradise, which is an area between the cathedral and the Chapter House.

### Salisbury Cathedral



Photo credit: Visit Wiltshire website

### Refectory



Photo credit: Salisbury Cathedral

### Little Paradise



Photo credit: Salisbury Cathedral

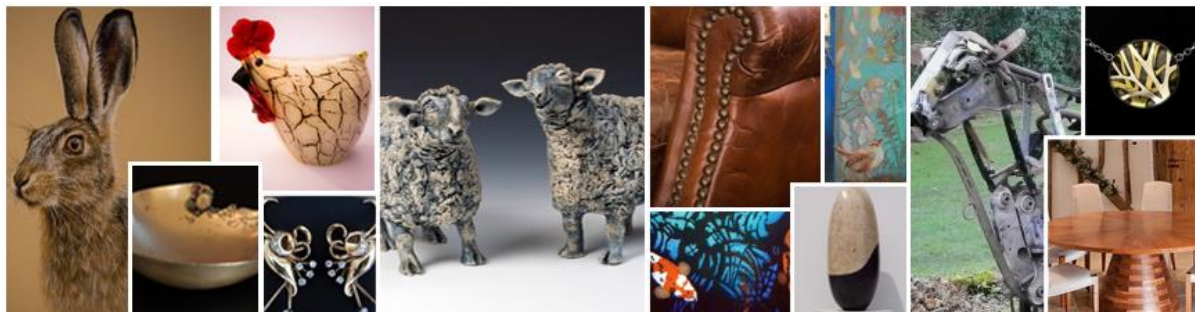
## Economic Impact

- 3 The cathedral welcomes over 250,000 visitors and pilgrims each year, as well as hosting over 1,000 services, concerts and events. The cathedral is expected to attract additional visitors in 2015, through a wide range of activities and events planned to celebrate the Magna Carta's 800th anniversary.
- 4 With the scale of visitors it attracts, the cathedral not only has a significant impact on tourism, but also has an active role in supporting Salisbury as a visitor destination. The cathedral has strong links with Visit Wiltshire (the local tourist board) and is one of its most active commercial partners having worked to develop an integrated programme of marketing, including national and international marketing campaigns. The cathedral's Marketing Director is a board member of Visit Wiltshire and is a chair of the tourism and travel trade sector group for the county. The cathedral works with other partners across the county (e. g. with Stonehenge, the National Trust, Longleat and hotel providers) to help grow Wiltshire's visitor offer for groups and travel trade.
- 5 'The cathedral is a key asset for us in terms of tourist attractions in the county.' Visit Wiltshire.
- 6 The cathedral predominately uses print marketing (such as promotional leaflets distributed to tourist information centres, hotels and B&Bs and visitor attractions), but is increasingly reaching out to wider audiences through online and digital marketing, , promotional videos, new mobile optimised website

and social media marketing (e.g. Twitter, Facebook, and Pinterest). Where possible it supports local businesses by using local suppliers, including printers.

- 7 Behind the scenes, the cathedral has a significant presence in a range of initiatives to support the civic community. Its canons and senior staff offer their expertise and support as board members of initiatives such as the local Business Improvement District and the Salisbury Vision (an advisory body facilitating and supporting the regeneration of Salisbury city centre).
- 8 The cathedral also works with Salisbury Museum. The museum relocated to the cathedral close with the aim of increasing its visitor numbers. Over recent years, there has been a growth in linked exhibitions, programmes, and other complementary activities which the museum regards as key to its sustainability. In 2011, the museum doubled its visitor numbers, when it hosted a joint exhibition on Constable and Salisbury, which featured John Constable's famous paintings of the cathedral. The museum will run a World War 1 schools project in the autumn jointly with the cathedral.
- 9 In September, the cathedral hosted the Salisbury Contemporary Craft and Heritage Skills Fayre in collaboration with the Salisbury Rotary Club. The UK's finest makers and designers showcased their contemporary crafts and a variety of heritage workshops were run which showcased the cathedral's highly skilled masons and glaziers alongside a range of local heritage practitioners. Other activities included heritage tours around Salisbury led by the cathedral, and a craft and heritage trail around the city centre including local craft shops and galleries. The cathedral building and Close are regularly used for a range of local and high profile concerts and events including elements of the Aegeas Salisbury International Arts Festival. The cloisters provides a unique environment for a variety of community activity from an all-age Paint-Off to a vintage afternoon as part of Salisbury Fashion Week.

### Salisbury Contemporary Craft and Heritage Skills Fayre



*Photo credits: Mums in the Know website*

- 10 The refectory restaurant and gift shop generates a substantial amount of income for the cathedral. It successfully attracts both visitors to the area and the local community as regular users (including parents and children from the cathedral school). The restaurant is also available for bookings for private and business events and has introduced set menus for pre-booked groups to improve customer service and to avoid lengthy queues, and promotions such as a free cup of coffee at the refectory when visitors park in the cathedral close.

- 11 The cathedral employs 95 individuals and 2 apprentices and regularly provides local students with work experience and internship opportunities. A recent initiative is working with HMP Rochester to provide a stonecarving placement as part of a rehabilitation programme. Over 600 volunteers give their time and skills to help the cathedral. There are over 20 different volunteering roles from floor and tower guides, stewards, flower arrangers, embroiderers to shop volunteers. Each volunteer receives a formal induction and there are also opportunities for training.

### Stone caving project



*Photo credits: Salisbury Cathedral*

### Social impact

- 12 In recent years, the cathedral has placed growing emphasis on the importance of outreach, which can be seen in the cathedral's strategy and programme for the period 2013 to 2017 which recognises that the cathedral is not only a place of worship, but that it also has an important role in reaching out to the community, promoting social justice and bringing different groups of people together. The Learning and Outreach department works with a broad spectrum of the community including families, children, young people, and local interest groups. The cathedral has a number of targeted outreach interventions, including stone carving, art and literacy projects, working with both disaffected young people and the local community.
- 13 The Magna Carta 800 programme will also have a strong emphasis on community outreach activities. The cathedral will work with the local community and engage new audiences. This will include an extensive schools programme; work with various agencies involved with young and adult offenders in a range of creative projects; partnership projects with the English Speaking Union, Salisbury Playhouse, Salisbury Museum, Sarum College, and the Diocesan Board of Education. There will also be collaborations with Salisbury City Council and the Trussell Trust. In addition 2015 will see the 'Magna Flora' flower festival in September, 'Magna Cantata' music project, lecture series, and a creative writing competition for children and adults. Parishes and communities throughout the Salisbury Diocese will undertake historical research into their communities in 1215<sup>43</sup>.

<sup>43</sup> <http://www.salisburycathedral.org.uk/news/magna-carta-programme-manager-arrives>



## Magna Carta 1215



Photo credits: Salisbury Cathedral

- 14 Many of these outreach activities are only made possible by obtaining external grants. However, the cathedral is in the early stages of looking at social enterprise models as a way to increase its outreach activities in the future.
- 15 In terms of charitable work, the cathedral supports the Trussell Trust, a national food bank agency based in Salisbury, through staff volunteering to help out and by providing weekly collections of food there and also to Alabare Christian Care. In addition, the cathedral supports numerous organisations such as the Sudan Link, Salisbury Women's Refuge and Churches Together night cafe. Rather than being involved in front line delivery, the cathedral provides support as a facilitator, as it recognises that there are many organisations such as Alabaré Christian Care Trust that are better placed to do outreach. However, it may look to employ a family worker to increase its targeted outreach work on the ground.
- 16 The cathedral's arts programme takes a cross-cutting approach which not only supports its spiritual aims, but also draws in visitors, and opens up learning and outreach opportunities. A wide variety of high quality art installations with a complementary programme of learning and engagement ensures there is incentive for local people to revisit. The cathedral is very keen to work with special need groups especially through the arts. During its John Maine exhibition 'Sanctuary', a group of young people from Mencap came to the cathedral to explore the pieces and respond to the stones through movement, discussion and art. The cathedral is also looking to set up a project for children with special educational needs to come to the cathedral to experience it as a multi-sensory space.

## John Maine's exhibition 'Sanctuary'



Photo credits: © Ash Mills and Salisbury Cathedral

# Sheffield Cathedral Case Study

## Background

- 1 Sheffield Cathedral was originally a parish church and only received its cathedral status in 1914 when the Church of England diocese of Sheffield was created. The cathedral is located in the city centre and is one of only two medieval buildings in the city. Unlike many other cathedrals, Sheffield has no historical endowment fund but is supported by the historic Church Burgesses Trust, established in 1554 for the support of the church and associated parishes. However the Burgesses are only able to support the historic elements of the Cathedral new sections of cathedral built in - built in the 1960's and between 2007 and 2013, such as the Community Resource Centre have to be financially self-sufficient. As a consequence the Cathedral has had to adopt a sound commercial approach but always seek to link this to its core mission and outreach.
- 2 The Gateway project, a major refurbishment of the Nave, Cathedral entrance and Cathedral Square, was completed in early 2014. This was funded by seven major partners including the Heritage Lottery Fund and the Church Burgesses Trust. This has resulted in significant improvements to the interior of building, including a more accessible and welcoming main entrance, better disabled access and improved energy efficiency of the building.

## Economic Impact

- 3 For the procurement of the Gateway project, contractors were selected who although specialists in heritage work are part of the local Yorkshire economy. Stone for new flooring was selected from a local quarry in Lancaster.
- 4 The cathedral's shop also sources local produce (e.g. the Sheffield Honey Company and Henderson's Relish) and gift items from local craft and jewellery makers to support local businesses. Sheffield Cathedral was also one of the first to join the Church of England's Energy Basket Initiative, a parish energy buying scheme.

### The shop's local produce



Photo credit: Ecorys

### Woolly Bikes Trail for Tour de France



Photo credit: Jess Rowbottom

### Conference & Hospitality Centre



Photo credit: Sheffield Cathedral

- 5 The cathedral has close ties with the Sheffield Chamber of Commerce, and the cathedral is used as a venue to host banquets for their members. It has worked alongside local organisations such as Sheffield University and Welcome to Yorkshire (tourist board) to host large scale events, such as the

UK Medical Research Council Symposium, Tour de France (The Woolly Bikes Trail), Sheffield Doc/Fest (Documentary Film Festival), a major youth music event, Tramlines, and other arts, heritage and cultural based initiatives and events.

- 6 Many of the cathedral's commercial activities are helping it to meet its outreach objectives by attracting more visitors. This in turn has had a wider economic and social benefit to the immediate surrounding area and businesses, as it has helped to attract additional footfall to the Church Street area.
- 7 The cathedral also has a number of different volunteer opportunities, for example retail volunteers, event steward volunteers and guide volunteers. It has over 100 volunteers and has recently attracted a growing number of volunteers from ethnically and culturally diverse backgrounds (including Asian, South American, and mixed ethnicity, asylum seekers and disabled volunteers) and young volunteers especially university students. The number of volunteers who are aged 25 and under is now almost the same as for those who are of working age or over 65.
- 8 In 2013, cathedral visitor numbers were estimated to be around 22,000; for most of this period the larger part of the cathedral was closed. As a part of the refurbishment the cathedral has installed an advanced automated people counting system, which will accurately track and monitor visitor numbers once in operation.

## Social Impact

- 9 The Cathedral Archer Project (CAP) works with homeless and vulnerable people in Sheffield. CAP started 25 years ago as a congregational outreach initiative to support people seeking shelter in the cathedral and provides a comprehensive day service for homeless and vulnerable people. CAP adds to the cathedral's richness and civic interaction. It now operates as a separate charitable organisation and is funded by major national and regional trusts, including the Big Lottery Fund. The project provides onsite services including food (e.g. breakfast club), showers, laundry and access to medical services and alcohol and drug support. It works in partnership with wide range of organisations such as Turning Point (Sheffield Rough Sleepers Service), DACT (drugs, alcohol and domestic abuse) and the local probation service. The Big Issue is also based at the cathedral and operates all their services there.

### Cathedral Archer Project



*Photo credits: Sheffield Cathedral*

- 10 Civic engagement is key aspect of the cathedral's wider work in the City. It has a high standing in the civic community, which the Dean has developed over the years. The Dean is currently leading the development of a whole city strategy for poverty, working with some thirty local and regional agencies and Sheffield City Council. He is also the Chair of Sheffield Money, an innovative new initiative to provide financial services and low-interest loans to the 50,000 customers of high-interest



lenders in the City. Partially because of the issues raised by the Occupy Movement in Sheffield, the Cathedral has come to be seen as a partner with leading agencies in the City advocating for the renewal of civic life and engagement.

- 11 The Gateway project has given the cathedral the opportunity to develop their local heritage profile, particularly with the cathedral's historic links with the Earls of Shrewsbury. It has also enabled them to employ a Heritage officer who is heavily involved in outreach work into local schools and bringing school groups into the cathedral. The cathedral is also developing a heritage interpretation area which is due to open in late September 2014.
- 12 The cathedral has seen an increase in the number bookings of school visits. It has also been able to organise more community events such as St George's Day activities, WW1 commemoration event, and children's theatre productions, all targeted at attracting families to the cathedral. There is also a very active toddler group run by the Bishop's wife, which is helping to bring in young families. A recent Heritage Open day received 2,500 visitors.
- 13 The cathedral is involved in Sing!, a choir outreach project to promote singing in schools and to recruit choir members to perform concerts in the cathedral. It was funded by the Department for Education (linked to Gareth Malone's initiatives) and now takes on a life of its own. The cathedral has since developed a partnership with the City Council through the Schools Initiative and is actively bidding for outsourced contract work with City Council to develop music work in schools. It is currently contracted to deliver the singing element of the City Council's Music Hub initiative.
- 14 The cathedral has also been used as a venue for the Children's Festival (linked to the cathedral's heritage work) and Music in the Round (local initiative for classical music). It is also host of Tramlines Festival (an inner-city music festival funded by the City Council). These events have a dual benefit to the cathedral not only through ticket sales, but also for drawing in a diverse range of people (including young people and university students) who would not normally come to the cathedral. It has increased the flow of casual visitors coming to visit or revisit the cathedral after hosting such events. These activities are helping the cathedral to be seen as a welcoming place for all people, especially for visitors that had never considered or had a good reason to come into the cathedral before.

### Sing!



Photo credit: Sheffield Cathedral

### Tramlines Festival



Photo credit: Simon Butler



Photo credit: Jamie Boynton

- 15 A key priority for the Cathedral Chapter is to ensure that the missional and spiritual life of the Cathedral is fully integrated with the Cathedral's commercial activities, such as hospitality.

# St Paul's Cathedral Case Study

## Background

1 St Paul's Cathedral is a world renowned cathedral situated in the heart of the City of London. The area's resident population of 10,000 is vastly outnumbered by the 300,000 people who work in the city. The balance of city workers to residents means that the cathedral has a small number of regular worshippers. Services at St Paul's Cathedral are attended by 1.2 million people annually; however, this mainly comprises mainly of visitors who will probably only attend a service once in their lifetime.



2 St Pauls' Cathedral has a large education team and, in 2002, the cathedral established the St Paul's Institute to engage people in the City of London and beyond in discussing and engaging with ethical issues. St Paul's Forum has developed alongside the Institute and is more focused on Christian perspectives relating to ethical issues and faith education.

Photo credit: Graham Lacdao

3 In 2013, the cathedral launched its strategic plan for 2013-18 which was based extensive consultation with its staff, volunteers and the wider City and Diocese of London. The plan sets out the cathedral's vision and values as well as a set of priorities which inform its work; these priorities include improving their visitor welcome, installing a permanent ramp at the North Transept to improve access for people with physical disabilities, and investing more resources in education.

## Economic Impact

4 St Paul's Cathedral is one of the most popular tourist attractions in the City of London area, along with the Tower of London; another popular attraction, Tate Modern, is located just across the river. Due to the relatively limited number of other tourist attractions in the City of London the bulk of the tourist visitors are believed to come to the area specifically for St Paul's Cathedral leading to benefits



for the surrounding eateries and tourist shops; however, the extent of this impact is difficult to measure.

- 5 On average, the cathedral receives 750,000 visitors annually; however, in 2013 there was a higher than average number of visitors (940,000). The majority of the cathedral's visitors are from outside the UK. The audio tour register indicates that 60% of visitors are from English speaking countries (or use English as a second language) with also a high number of German, Italian and Spanish-speaking visitors, which is considered to be a result of cheaper short haul flights in recent years. The visitor and volunteer team focus on providing a high quality experience which includes offering 22 languages between them to help answer visitors' questions. The cathedral works closely with Visit Britain and London & Partners, ensuring that these organisations are fully briefed on the cathedral's new events and attractions to help raise awareness of the cathedral overseas.
- 6 The cathedral employs 173 staff, including clergy, of whom 55% are London residents. For the lower paid roles such as cleaners the cathedral is signed up to the London Living Wage. In addition, as far as possible they try to source local and seasonal produce for the restaurant; 'local' is viewed as being within the Greater London area as there is little local produce in the immediate vicinity.

## Social Impact

- 7 St Paul's Cathedral's staff and clergy team are very conscious of their role in providing a welcome and pastoral support for visitors to the cathedral. This is such an important aspect of the cathedral's work that improving the cathedral's welcome is one of the main priorities outlined in the strategic plan. The quality of welcome is supported by the cathedral operating a rota system aiming have a member of clergy volunteering from the Diocese of London available in the cathedral to speak to anyone who requires this support. The cathedral is working towards improved disabled access to the building.
- 8 There is awareness that people with concerns and issues can be drawn to a cathedral. St Paul's takes a pragmatic and caring approach towards the homeless, including buying food and providing items of clothing where possible and ensuring that they make a referral to the city's rough sleepers team. Cathedral staff feel they play an important role in keeping an eye on rough sleepers and providing a place of safety during the day.
- 9 The education department provides a wide offering for schools, with tours available for every Key Stage, all linking to the curriculum with a number of themes such as the Great Fire of London. Alongside the paid tours offered, the cathedral also undertakes some outreach work: for example the music department recently undertook a music session with children in a Hackney school, and a new outreach organ scholar has been appointed to take organ lessons in London schools.
- 10 The St Paul's Institute tends to engage with city workers who would not necessarily visit the cathedral, as it is seen as distinct from the cathedral's worship and has a more secular focus. The Institute covers a wide range of topics which have included a talk by Al Gore on Sustainable Capitalism aimed at fund managers as well as a series of open events such as 'The City and the Common Good: What kind of city do we want?' with a survey of attendees' views of the type of city they wanted. Going forward, the Institute will be concentrating on particular themes over the next two to three years such as stewardship, the environment and women in leadership, as these are considered key topics for city workers. Events are designed to motivate attendees to get involved in promoting change. This has been further encouraged by the development of social media: tweeting was encouraged during the recent Women and Leadership event and led to a sizable social media

campaign with 200 people participating. The Institute is also about to start podcasting as a way to involve a greater number of people in the discussions. The cathedral has nearly 70,000 Facebook followers.

- 11 St Paul's has over 200 volunteers involved in a range of activities including tour guides, wandsmen (who help welcome to services) and members of the schools and families team. The volunteers on the cathedral floor have the opportunity to undertake an accredited training course to become a tour guide. Volunteer support has been strengthened over the years to ensure the volunteers are well supported including introducing volunteer meetings and team leader lunches for those who oversee a team of volunteers. One team leader fed back that he thoroughly enjoyed his role and *"I hope to enrich people's lives. Certainly meeting people from all over the world, they enrich mine."*



Photo credit: Graham Lacdao

- 12 St Paul's staff and clergy team view the community of St Paul's as covering the Diocese of London rather than just the City of London. The cathedral serves the Diocese of London through hosting a range of services such as primary school anniversary celebration services. The cathedral also looks favourably on requests to use the steps of the cathedral for events that are in keeping with its ethos: for example, the Salvation Army band has held informal concerts on the steps as has the London Gay Men's Choir.

- 13 There is also considered to be a wider, non-geographical community due to people living further afield but having strong ties to St Paul's. The cathedral is currently developing its website to allow more content to be stored including more of their collections, music broadcasts and virtual tours to enable them to 'stay in touch' with the cathedral's growing virtual community.

# Truro Cathedral Case Study

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## Background

- 1 Truro has a Neo-Gothic style Victorian cathedral built between 1880 and 1910, begun by architect John Loughborough Pearson and completed by his son Frank. Truro is Cornwall's only cathedral and employs 50 non-clergy staff. The current focus is the development of the cathedral's next strategic plan which will lay out the path for the organisation for the next 2 to 5 years.
- 2 Although a comparatively young Cathedral, restoration and building projects feature strongly in cathedral life. A key reason for this is that the decorative Bath stone, used in much of the architecture, has not stood up well to the Cornish climate.



- 3 The largest in the series of projects currently underway is 'Inspire Cornwall'. The first phase was completed in 2011 and saw the repair of the Victoria Tower, the cathedral's main spire. The second phase of the project is now underway and will see the complete renovation of the former cathedral school, ultimately transforming it into a community space with a focus on music, arts and education. At the time of writing, the work had received planning permission and was on track to commence in November 2014 and be completed by winter 2015.

*Photo credit: Truro Cathedral*

## Economic impact

- 4 Truro is the county capital of Cornwall and has a resident population of approximately 19,100. According to a recent study 'Cornwall Towns 2012: Tourism Volume and Value Estimates' by the South West Research Company, Truro attracts 52,000 staying visitor trips, 873,000 day visits and achieves £42.2 million in direct visitor spending.
- 5 Keen to enable access for all of its year-round local and tourist visitors, Truro Cathedral does not charge an entry fee. Whilst this is positive in ensuring that the cathedral can be experienced by all, it raises challenges in terms of tracking visitor numbers. There is a project underway to undertake



detailed counting and profiling of cathedral visitors. However, according to previous visitor research, visitor numbers range annually from 201,000 to 500,000<sup>44</sup>; approximately two-thirds of visitors were tourists and roughly half were first time visitors. Interestingly, 68% visitors surveyed in 2003 planned to go shopping whilst in the city and 38% planned to visit a café or bar which helps to illustrate the wider economic impact of these visitors.

- 6 The Cornwall Towns 2012 study reveals that 4,700 overseas visitors stay in Truro each year. Truro Cathedral is seeking to understand what percentage of these visitors come to the cathedral. It is anticipated that it may be quite high as the cathedral is on the route of the Rosamunde Pilcher tours favoured by German tourists so attracts many visitors from Germany, as well as a range of tourists from other countries.



- 7 The cathedral has strong links with Totally Truro<sup>45</sup>, a council funded initiative with the aim of raising the profile of Truro to support both local businesses and tourism. One activity that has been supported by Totally Truro has been the ice rink on the cathedral green which attracted 23,000 people over seven weeks in winter 2013 and similar numbers the previous year.

- 8 Although very aware of the high numbers of seasonal tourists who visit Cornwall, the cathedral also works hard to ensure it also provides for its local community and county-wide supporters and is continually trying new ways to engage the Cornish community. For example, in August 2014 the cathedral hosted its first Eucharist in the Cornish language. The service was well received and will continue on a regular basis with the next Cornish language service scheduled for October 2014.

*Photo credit: Truro Cathedral*

- 9 In general, it is difficult to assess the extent to which people visit Truro specifically to see the cathedral. However, there are a number of events that are known to bring additional people to the city. For instance, the cathedral hosts three to four graduation ceremonies each year which includes the graduation ceremonies for Exeter University's Truro campus. The ceremonies are attended by 2,500 to 3,000 people who may not otherwise visit Truro. Cathedral staff have received feedback from an owner of one of Truro's gift shops that takings increase on a graduation ceremony day. The cathedral has received more requests to host graduation ceremonies so the benefit to the local economy would be expected to increase as a result.
- 10 Another recent event that led to an increase in visitor numbers for the cathedral was the Cornish quilting exhibition. The exhibition received contributions from 30 individuals and quilting groups from across Cornwall. The exhibition was hosted in the cathedral for a fortnight and over that time there was a considerable increase in visitor numbers with coach-loads of people travelling across Cornwall

<sup>44</sup> Visitor Surveys were undertaken in 2001, 2002, 2003 and 2006

<sup>45</sup> Totally Truro is delivering Truro's Business Improvement District for more details see:

<http://www.enjoytruro.co.uk/about>

and from beyond to see the exhibition which was advertised extensively by the clubs, including via local radio.

- 11 The cathedral is committed to raising its profile further and attracting more people to Truro, and has recently appointed a marketing officer to drive this growth. This new role includes exploring ways to support the cathedral's social media presence such as maximising Twitter followers and the number of likes they receive on Facebook.
- 12 Truro Cathedral is keen to support local businesses and this is mainly achieved through sourcing local produce, which meets fair trade standards, for the restaurant and to some extent the shop (for example biscuits made in the area). In addition, approximately half of the cathedral's employees live in Truro with the rest travelling no more than 30 miles to work.

## Social Impact

- 13 Truro Cathedral first employed an education officer five years ago as part of a Heritage Lottery Fund project. The post was so successful that it is now covered by the cathedral's mainstream budget and has been expanded to an education assistant role. The education department caters for children and young people of all ages from early years to university across the whole of Cornwall. Formal tours delivered to primary school children tend to be the most popular and a range of curriculum focused tours are delivered to 4,000 children a year. Feedback received from schools suggests that the tours are well received:
  - 14 "The children were really enthused by their visit, especially when dressing up and parading around the cathedral, as this made their learning 'come alive' through the experience. I will definitely recommend your workshops to other teachers as they are so well planned, and expertly delivered."  
KS2 Class Teacher
  - 15 The education department's aim for 2014 was to encourage stronger links with secondary schools. The department has invited all Cornish secondary schools to participate in an exhibition on the theme of World War I. This is considered to have been a great success with 11 out of the 36 secondary schools in Cornwall invited to participate having produced work for the exhibition that will be on display in the cathedral until 11th November with a couple of other schools looking to add their contributions in September. The education officer currently visits a couple of secondary schools to undertake sessions with Year 9 pupils which has been praised by pupils and teachers:
    - 16 "I hope you will be able to come to all Y9 classes again next year. Truro Cathedral is having a big impact on our students." Head of R.E, a secondary school
  - 17 The education department also provides a range of informal activities such as trails and guided craft activities three times a week during the summer holidays with an extra session this year to make poppies for a World War I commemoration event in November.
  - 18 Alongside the large music concerts that people pay to attend, the cathedral also hosts a number of free concerts. The purpose of the concerts is to both allow small music organisations that could not afford to hire the cathedral the opportunity to play in a concert as well as to allow people who could not afford to attend a paid concert to attend a music concert in the cathedral. These concerts take place on a Saturday afternoon and reach audiences of between 50 and 200 people. This activity has grown over the years with 15 to 16 concerts being organised in the past year. This is considered to be a successful and worthwhile activity, primarily benefiting the local community and the cathedral plans to continue hosting these concerts in the future.

## **Annex Two: Survey Questionnaire**

## The Economic and Social Impacts of Cathedrals in England

Ecorys (formerly ECOTEC Research and Consulting) is an independent research company which has been commissioned by the Association of English Cathedrals to undertake research to improve and update the assessment of the economic and social impacts of England's cathedrals building, in particular, on the research undertaken in 2004<sup>46</sup>.

We would be very grateful if you could take the time to complete this survey and return it by email by 1<sup>st</sup> August 2014.

Your response to this survey will be an important component of the evidence base for the study. Boxes can be extended and additional rows added to tables as required. Where possible we have drawn upon existing information to pre-populate sections of this form – please review this information and correct any inaccuracies. In other sections, please provide as much information as you can and where no instances have occurred please enter '0', as an empty space will be treated as 'don't know/unknown' in the analysis.

If you have any questions about this questionnaire please contact Sophie Bratt on 01782 753235 or by email ([sophie.bratt@uk.ecorys.com](mailto:sophie.bratt@uk.ecorys.com)). If your questions relate to the survey more generally please contact Sarah King (AEC) on 020 8761 5130 or [sarah.king@englishcathedrals.co.uk](mailto:sarah.king@englishcathedrals.co.uk)

### Section 1: contact details<sup>47</sup>

Cathedral	
Contact name	
Email address	
Telephone number	

### Section 2: use of the cathedral

1 Please provide details of the total number of services taking place on a Sunday and midweek (Monday to Saturday), in a typical week (with no special services or events) in 2013.

	Sunday	Midweek
Average no. of services		

2 Please provide details of the total number of people attending all services on a Sunday and midweek (Monday to Saturday), in a typical week (with no special events or services) in 2013.

Average attendance <sup>48</sup>	Sunday	Midweek
Children (under 16)		
Adults (16 and over)		

<sup>46</sup> The economic and social impacts of cathedrals in England (ECOTEC, 2004).

<sup>47</sup> Information provided by AEC

<sup>48</sup> Sourced from the Church of England's Cathedral Statistics (2013)

3 Please provide details of the total numbers of people attending worship during the festivals of Easter and Christmas in 2013.

	Attendance <sup>49</sup>
Total no. attending worship at any service on Easter Day (including vigil services on Easter Eve)	
Total no. attending worship at any special service during Holy week (from Monday after Palm Sunday until Good Friday)	
Total no. attending worship at any service on Christmas Eve or Christmas Day	
Total no. attending special services for the congregation and community during advent (from Monday after advent Sunday until 23 <sup>rd</sup> December)	

4 Please provide details of the number of special services during 2013.

	Number <sup>50</sup>
No. of persons baptised	
No. of children for whom a thanksgiving service of the gift of a child was held	
No. of couples married	
No. of couples for whom a service was held (prayer and dedication following a civil marriage)	
No. of deceased for whom a funeral service was held in the cathedral church	
No. of deceased for whom a memorial service (but not a funeral) was conducted	

5 How many children and young people (aged 17 and under) attend Sunday School or are involved in serving the cathedral (singing, serving, etc.)?

	Number <sup>51</sup>
Attend Sunday School	
Serve the cathedral	

6 Please provide details of other uses of the cathedral buildings and precincts during 2013.

Use	Number in 2013	Average attendance
Concerts		
Lectures/talks		
Exhibitions		

<sup>49</sup> Sourced from the Church of England's Cathedral Statistics (2013)

<sup>50</sup> Sourced from the Church of England's Cathedral Statistics (2013)

<sup>51</sup> Sourced from the Church of England's Cathedral Statistics (2013)



Conferences/events		
Ceremonies (such a graduation days)		
Other (please write in)		

7 Please add any information or observations about recent use of the cathedral, for example:

- Has the size of your congregation been tending to grow or decline over the last 5 years? What about the last 10 years?
- Has the profile of your congregation (in terms of age, gender or other characteristics) changed significantly over the last 5 and 10 year periods?
- Has the number and/or type of services changed significantly over the last 5 and 10 year periods?
- Have there been any other significant changes in the frequency or pattern of use of the cathedral over these periods?

**Section 3: running the cathedral**

8 How many posts were directly associated with maintaining and running the cathedral during 2013? Please provide an average for the entire year in terms of the number of posts (the total of full-time, part-time and seasonal staff) and also an estimate of this figure expressed as full-time equivalents.

	Clergy	Non-clergy
Total no. of posts		
Full-time equivalent (FTE)		

9 Please provide information on the percentage of staff who live in the following areas (your responses should sum to 100):

Within the city/town/borough	
Elsewhere in the county (if applicable)	
Outside of the county	

10 Please tell us how much the cathedral spent on wages and salaries in 2013 for its own (direct) employees? Please exclude employer national insurance and pension contributions.

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11 On average, how many people were indirectly employed by the cathedral in 2013? (employment in contracted out services, for example cleaning, maintenance, catering – including services provide by self-employed people and in any retail outlets which are run by a third party)

Total number of posts	
Full-time equivalent (FTE)	

12 Please indicate the extent to which the cathedral benefits from the following sources of finance. Please use figures from the most recent financial year and exclude visitor income which is covered in section 4 below (the total given here plus the total turnover provided in section 4 should equal the total income set out in the most recent financial accounts).

	Income to nearest £'000
Grants (please list grants of over £100,000 by source along with the total of all smaller grants)	
Giving by the congregation, individual gifts and bequests	
Income from use of facilities	
Other (please specify, e.g. property or investment income)	
<b>Total</b>	

13 If the most recent year's income figures were atypical (for example a major grant or bequest/legacy was received) then please provide details in the following box.

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14 Please indicate the annual spend on goods and services using figures from the most recent financial year. Please exclude expenditure on staff salaries which is covered above.

	Spend to nearest £'000
Routine maintenance and upkeep	
Repairs/restoration	
Utility services	

Other (please specify)	
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15 If the most recent year's expenditure figures were atypical (for example if a one-off capital project was delivered) then please provide details in the following box.

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#### Section 4: visitors

16 Please estimate the number of visitors who came to the cathedral in the following years (if possible excluding those attending services and educational events).

Year	Visitors
2013 <sup>52</sup>	
2012	
2011	
2010	
2009	

17 How are visitor number estimated? (please indicate whether you have been able to exclude those attending services and educational activities from the numbers set out above and also how accurate you believe these figures to be)

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18 Does the cathedral have a designated visitor officer? (this could be a voluntary post)

Yes	
No, but has plans to appoint one	
No	

19 Please estimate the annual turnover resulting from visitor activity using figures from the most recent financial year.

	Turnover to nearest £'000
Admission/entry fees (to the cathedral/area of cathedral/exhibition)	
Donations	

<sup>52</sup> Sourced from the Church of England's Cathedral Statistics (2013)

Refectory/restaurant	
Retail outlets	

20 Please tell us if you hold any information on the profile/characteristics and motivations of your visitors which is based on data or research undertaken in the past 5 years?

We are particularly interested in where visitors come from, how much they spend in the local area in the course of their visit and how far the cathedral was a key driver in trips by people from outside of the local area.

We will contact you to discuss the information you hold although please feel free to attach any summaries, presentations or reports with your survey response (if you have not already submitted these to the AEC)

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21 How does the cathedral promote itself to visitors?

Website	
Advertising	
Partnership with local tourism agencies	
Other (please state)	

### Section 5: other activities

22 How many children/students attended any cathedral schools during the 2012/13 academic year?

Number of students <sup>53</sup>	
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23 How many children/students attended organised educational events during 2013 (either which take place in the cathedral or are organised by the cathedral and take place elsewhere)?

	Number of students <sup>54</sup>
Nursery/KS1	
Primary/KS2	
Secondary/KS3/KS4	
16-18 years old	
Over 18 years old	

<sup>53</sup> Sourced from the Church of England's Cathedral Statistics (2013)

<sup>54</sup> Sourced from the Church of England's Cathedral Statistics (2013)

24 Please add any information or observations about the children/students attending organised educational events (including trends in frequency of/demand for visits, group sizes, distances travelled).

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25 Does the cathedral have a designated education officer? (this could be a voluntary post)

Yes	
No, but has plans to appoint one	
No	

26 How many of the following did the cathedral have in 2013?

	Total <sup>55</sup>
No. of choirs	
No. of choristers and lay clerks	
No. of voluntary choir members	
No. of musicians	

27 Are there any associated trusts, friends groups and societies connected to the cathedral?

Group	Purpose/aims	Number of people involved

28 At present, how many individuals serve the cathedral in a voluntary capacity?

No. of people volunteering <sup>56</sup>	
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29 Please estimate the average number of hours which were contributed per volunteer over the course of 2013.

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30 Please provide an estimate of the percentage of volunteers who live in the following areas (your responses should sum to 100):

Within the city/town/borough	
Elsewhere in the county (if applicable)	
Outside of the county	

<sup>55</sup> Sourced from the Church of England's Cathedral Statistics (2013)

<sup>56</sup> Sourced from the Church of England's Cathedral Statistics (2013)

31 Please provide an estimate of the number of volunteers who undertake the following tasks

Welcoming visitors	
Providing guided tours	
Assisting at services	
Flower arranging	
Embroidery	
Providing administrative support	
Fundraising	
Other (please state)	

32 Does the cathedral have a designated volunteer officer/coordinator? (this could be a voluntary post)

Yes	
No, but has plans to appoint one	
No	

33 Does the cathedral currently run any specific projects or initiatives to provide support to particular sections of the community? (e.g. older people's lunch clubs, support for the homeless, work with children and families, etc.) Please provide details of the nature and frequency of support and number of participants/beneficiaries.

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34 When did you last renew your cathedral's website?

Within the past year	
Between 1 and 2 years ago	
Between 2 and 3 years ago	
More than 3 years ago	

35 Please provide details of the current level of use of your website (e.g. the number of hits/visitors for the past year).

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36 Does the cathedral make use of social media?

Yes	
No, but has plans to do so	
No	

37 If yes to the above, please provide details in the box below (including the types of social media used, number of followers/connections and primary purpose of this activity).

38 Does the cathedral contribute to the work of other local organisations (in terms of funding or staff time)? (please only include secular activity as we assume you are doing work with your diocese).

39 Please use this space to tell us about any other activities not covered above.

**Many thanks for taking the time to complete this survey**