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The Economic and Social Impact of England's Cathedrals

A report to the Association of English Cathedrals

Contents

1.0 Executive Summary

The purpose of this research is to update the assessment of the economic and social impact of England's cathedrals provided in previous studies in 2014 and 2004. Economic impacts are estimated using 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 English cathedrals and a series of six case studies. Figures given are for 2019, with the impact of COVID-19 in 2020 explored in section 6.

1.1 What are the economic impacts of cathedrals?

Attracting visitors – it is estimated that cathedrals attracted over 9.5 million tourist or leisure visitors in 2019, an increase of 15% on the 2014 total of 8.2 million. For the purposes of the economic impact assessment, this figure excludes worshippers and those taking part in formal educational activity. The additional expenditure generated by these visitors is estimated to be in the order of £128 million in the local economies concerned.

Supporting local businesses and economies – in addition, cathedrals are estimated to generate a net contribution of around £107 million in local spending per year (comprising direct, visitor-related and multiplier effects).

Creating local jobs – expressing this impact in terms of employment suggests that cathedrals support 5,535 jobs in their local economies.

This results in a combined total of approximately £235 million in local spending per year, a slight increase on the £220 million estimated in the 2014 study.

1.2 What are the social impacts of cathedrals?

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.

Opportunities for volunteers – cathedrals benefit from the time and skills of over 15,000 volunteers, who fulfil a range of roles including welcoming visitors and assisting at services. The total number of volunteers has increased slightly since the 2014 report (14,760). Volunteers provide an estimated total of 906,000 hours of input per year, equivalent to approximately 500 full-time employees.

Opportunities for learning – cathedrals also provide numerous opportunities for both formal and informal learning and it is estimated that over 308,000 learners participated in organised educational activities in 2019. Visits are most commonly made by primary school groups and material covers a range of curriculum subjects.

1.3 How did COVID-19 affect cathedrals during 2020?

COVID-19 has brought a number of challenges for cathedrals. Almost all their income sources were adversely affected by lockdowns and continuing restrictions. This has had a direct impact on cathedrals' ability to be self-sustaining in 2020, and cathedrals estimate their finances will be constrained for some time to come. In 2020, emergency grants provided cathedrals with much needed finances.

Reduced non-visitor income[1]: The government mandated closure of cathedrals and restrictions on gatherings resulted in a significant fall in cathedrals average non-visitor income in 2020. This was driven by a reduction of almost 80% in income generated from the use of cathedral facilities. Closure and restrictions on congregation size also meant fewer people attending services in the cathedral, down from a midweek average of 362 adults and 108 children in 2019, to 84 and 25 respectively in 2020. As such, donations from the congregation fell on average.

Reduced visitor numbers and income: Visitor numbers in 2020 (excluding those attending services and educational events) have fallen by approximately 70% compared to 2019. Visitors provide a significant source of income for cathedrals through entry fees, donations, and on-site spending in catering and retail outlets (see Section 4). As such, this fall in visitor numbers has had a significant effect on cathedrals' income levels, particularly for cathedrals dependent on the visitor economy.

Reaching people in new ways - COVID-19 has also given rise to new opportunities, in particular by encouraging cathedrals to live stream their services and to use Zoom to provide interactive, face-to-face pastoral support. In many cases, such technologies have enabled cathedrals to reach more individuals, including individuals not physically able to attend services in the cathedral. In addition, in recognition of schools increased reluctance to travel, by the end of 2020 around a third of cathedrals had already began offering or developing online resources specifically for schools, including online tours, talks and activity packs.

[1] Non-visitor income includes donations from the congregation, grants, income from facilities and income from educational events.

2.0 Introduction

Ecorys is pleased to present this report to the Association of English Cathedrals (AEC). This work was originally commissioned in 2019 but due to cathedral employees being furloughed in March 2020, roll out of the survey was delayed until October 2020, with completion of the survey by cathedrals delayed until March 2021. The research was published in August 2021. It involved a survey of the 42 English cathedrals and six case studies.

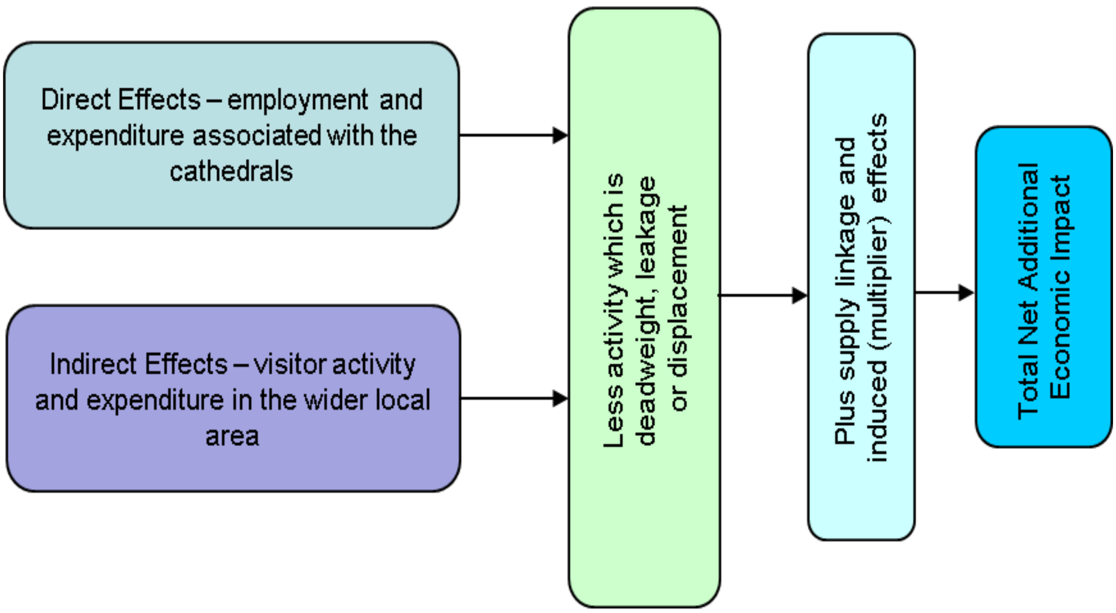
2.1 Purpose of the research

The purpose of this study is to update the assessments provided in the 2004 and 2014 ECOTEC/Ecorys[2] studies[3]. It was noted that cathedrals had made extensive use of the findings of the earlier studies as a way to demonstrate their value in economic and social terms. Therefore, it was considered that there would be value in repeating the exercise to provide a more up-to-date assessment.

2.2 Methodology and analytical framework

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 considers 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 2.1 Framework for estimating economic impacts



[2] In October 2010, ECOTEC Research and Consulting changed its name to Ecorys UK.
[3] The Economic and Social Impacts of Cathedrals in England (ECOTEC Research and Consulting, June 2004), available at https://historicengland.org.uk/content/heritage-counts/pub/the-economic-and-social-impacts-of-cathedrals-in-england/ and The economic and social impacts of England's cathedrals (Ecorys, 2014), available at https://www.englishcathedrals.co.uk/wp-content/uploads/2021/05/economic-social-impacts-englands-cathedrals-2.pdf

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:

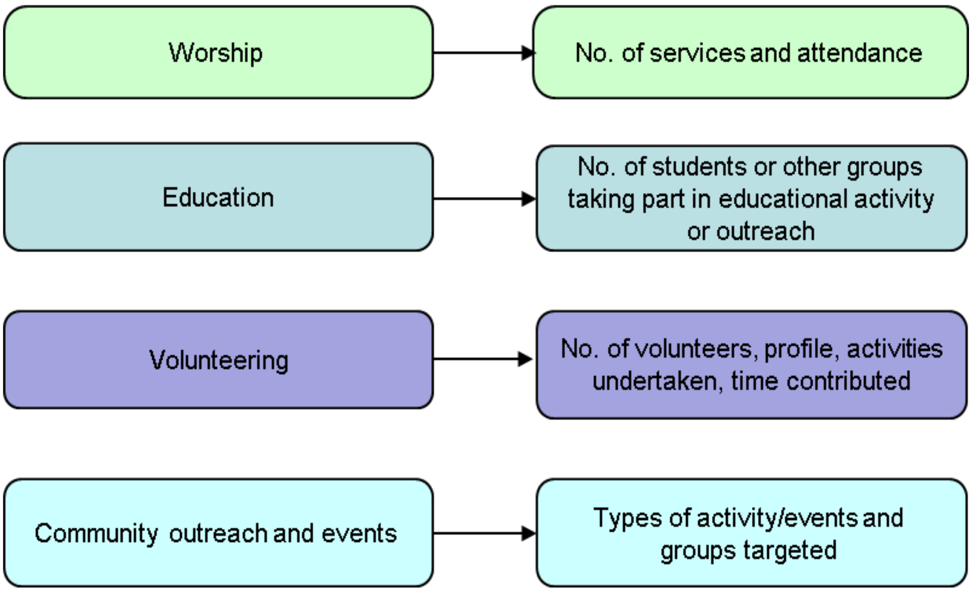
- Deadweight – the benefits which would be expected to occur anyway, regardless of the presence of a cathedral (for example, as a result of visitors who would have come to the area anyway).
- Displacement – the extent to which the cathedral generates economic benefits at the expense of other areas or attractions (for example, 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 locally).

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*

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, plus 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.

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



Evidence to inform the impact assessment was collected using a survey of all 42 English cathedrals and a series of six case studies. The survey questionnaire was based on the survey used for the 2014 study, which was updated to improve its clarity and relevance. Questions on the perceived effect of the coronavirus pandemic on cathedrals were also added, and where relevant the questionnaire asked for 2019 figures (to estimate the 'normal' levels of impact) and 2020 to account for the effects of the pandemic. A review of the questions revealed some duplication between this study and the information which is 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 2019 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 late October 2020 and a 100% response rate was achieved.

Information on visitor characteristics and motivations to visit individual cathedrals was limited in the 2014 study. While a few cathedrals have since explored this issue themselves, detailed information for each of the 42 cathedral remains limited in this area. As such, some assumptions are made based on available information, enabling us to provide economic impact estimates (see Section 4).

Information was also collected through a series of six case studies chosen purposely to provide evidence from different types of cathedral (see Section 3.1). 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.

2.3 Structure of the report

The remainder of this report is structured as follows:

- Section 3 sets out the background and context for this study.
- Section 4 provides an assessment of economic impacts.
- Section 5 presents evidence regarding social impacts.
- Section 6 outlines the key impacts COVID-19 had on cathedrals in 2020.
- Section 7 summarises the key findings from the research.
- Short case study reports are provided in Annex One, with a copy of the survey used to collect information from cathedrals provided in Annex Two.

3.0 Study background and context

3.1 Cathedrals in England

The population of interest was the 42 Anglican cathedrals in England, which also formed the subject of the previous two studies. A cathedral is the mother church of a diocese and the location of the bishop's seat or cathedra.

Cathedrals have a diverse history, and their number increased with the dissolution of monasteries in the 16th century and 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 19th and early 20th 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.

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.

This current study provided an opportunity to review the typology from the earlier work (see Table 3.1). However, after some discussion it was decided that the typology (and associated classification) would remain the same as in the 2004 and 2014 studies, to allow some comparability of the findings.

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 case studies were selected:

- Gloucester (medium-sized, historic)
- Leicester (parish church)
- Liverpool (urban)
- Rochester (medium-sized, historic)
- St Edmundsbury (parish church)
- Winchester (large, international importance).

Table 3.1 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

3.2 Evidence of impact

3.2.1 Tourism

Cathedrals play an important role in tourism and are a key feature of the nation's cultural heritage. According to a Research and Statistics report published by the Church of England, in 2018 there were 9.8 million visitors reported by cathedrals, representing a small overall increase of 2% (200,000 people) since 2008. Following a dip in visitors in 2016 and 2017, these 2018 figures represented a record high[4]. Despite only a few cathedrals charging for entry, paying visitors accounted for 33% of all visitors (3.2 million people) to cathedrals in 2018[5].

A report compiled on behalf of English Heritage in 2018 presents evidence from a survey of visitor attractions. According to this data, there were on average 167,000 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 2018: a 3% increase from 2017. Of these visitors, it was estimated that 43% were overseas visitors (an increase of 9% since 2017), 32% were local (day trip visitors) and 25% were visitors from the rest of the UK[6].

4 https://www.churchofengland.org/more/media-centre/news/record-numbers-visitors-and-worshippers-flock-englands-cathedrals
5 https://www.churchofengland.org/sites/default/files/2019-11/Cathedral%20Statistics%202018.pdf
6 https://historicengland.org.uk/content/heritage-counts/pub/2019/visitor-attractions-trends-england-2018/

According to the Association of Leading Visitor Attractions (ALVA), St Paul's Cathedral was the 18th most visited attraction in the UK in 2019, receiving more than 1.7 million visitors.[7] The cathedrals of Canterbury, Durham and York also featured within the ALVA's top 53 attractions in 2019.

Cathedrals themselves report growing visitor numbers over recent years helped by innovative exhibitions such as the Weeping Window of poppies temporarily installed at Hereford Cathedral (bringing in 196,000 visitors)[8] and a helter-skelter positioned within Norwich Cathedral that gave visitors close-up views of its ornate roof.[9] Rochester Cathedral also reported record visitor numbers, helped by a number of high-profile projects, including an adventure golf course and a sculpture against knife crime[10].

In 2009, the AEC commissioned a survey which interviewed a total of 5,842 people, 50% of 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.

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.

3.2.2 Serving the community

In addition to their role as a place of worship, the 2004 and 2014 studies found that cathedrals also make a substantial contribution to society through the provision of opportunities for education and volunteering, as well as in supporting the wider community. This support includes setting up initiatives designed to address the needs of the most vulnerable members of a community, such as the Archer Project run by Sheffield Cathedral that aims to help lift people out of homelessness[11].

Cathedrals also host events which are open to all, such as the annual Lichfield Festival which brings a range of music, comedy, and literature events to the city[12]. Cathedrals such as Salisbury Cathedral have also tried to inspire their community to be more environmentally friendly[13], and been recognised for their efforts via the A Rocha UK "Eco Church" award, which recognises the church's ecological impact and its work in promoting sustainability throughout its community[14].

In addition, cathedrals are valued for their architecture, their place in history and their aesthetic appeal[15]. Teaching is also a big part of a cathedral's impact, with guided tours providing opportunities for learning as well as openings for volunteers to gain experience. Most cathedrals also employ education officers who work to provide tours and workshops to young learners, covering not just religion but also history and wide a range of other subjects[16]. In 2018, a Historic England survey found that a record number of visits were made by school children on school visits

7 Association of Leading Visitor Attractions (ALVA), 2019 member visitor figures: https://www.alva.org.uk/details.cfm?p=609. ALVA attractions include gardens, heritage sites, museums, galleries, and leisure sites (e.g. zoos) within the UK.
8 https://www.herefordcathedral.org/news/poppies-weeping-window-experienced-by-thousands
9 https://www.itv.com/news/anglia/2019-08-08/norwich-cathedral-installs-50ft-helter-skelter-to-give-visitors-a-better-view/
10 https://www.rochestercathedral.org/articles/2020/1/9/i3dzhk8xw5l8f7al6g1l3fdsnommyc
11 https://www.archerproject.org.uk/about
12 https://lichfieldfestival.org/about/
13 https://www.salisburycathedral.org.uk/news/cathedral-earns-silver-eco-award
14 https://ecochurch.arocha.org.uk/
15 http://www.theosthinktank.co.uk/publications/2012/10/12/spiritual-capital-the-present-and-future-of-english-cathedrals
16 Ecorys surveys (2014, 2020).

to the places of worship included in the survey sample, showing that cathedrals and churches continue to have a place in modern education[17].

3.2.3 Ongoing need for support

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

In 1991, English Heritage (now Historic England) 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[18].

However, cathedrals are still eligible to apply for general grants from Historic England which can be used to fund repair work, although up to 2019 the amount of funding available had been decreasing year on year for some time and is restricted to buildings at risk. Cathedrals can also apply to the National Lottery Heritage Fund's general development funds, and many successful projects have been funded that way. In May 2019, the National Lottery Heritage Fund awarded over £8m to four cathedrals (Leicester, Lichfield, Newcastle and Worcester) to help them engage their communities through arts, heritage and learning projects[19]. As well as a funding a number of repairs and restoration projects, in Leicester the grant will help build a new Heritage Learning Centre[20], including a permanent interactive exhibition and a learning space, which it is hoped will build on the large increase in visitor numbers seen since Richard III was interred in the Cathedral in 2015. Following the project's completion in 2022, it is estimated that there will be an overall economic impact of £15.0 million per year, £10.6 million of which will be directly related to the work of Leicester Cathedral, with the rest attributable to indirect effects[21]. Meanwhile, Newcastle Cathedral's modernisation work is planned to be completed in 2021 and will turn the cathedral into a community hub, able to host large-scale events[22].

In addition, the Church of England's Cathedrals and Church Buildings Division continues its partnership with The Goldsmith's Company, The Pilgrim Trust, The Radcliffe Trust and the Wolfson Foundation to provide financial support to the Church of England's buildings, historic artefacts and artistic collections.

English Heritage (now Historic England) 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[i23] 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.

The First World War Centenary Cathedral Repair Fund, launched by the government in its March 2014 budget, invited applications from both Church of England and Roman Catholic cathedrals to address urgent repairs. The fund prioritised making buildings weatherproof, safe and open to the public so they would be in a safe condition to host acts of remembrance for the centenary of the First World War armistice in 2018. Grants were awarded over two phases, each totalling £20 million. A total of 146 awards were made to 57 cathedrals, with some cathedrals receiving more than one grant. Decisions on funding allocations were taken by an expert panel which included

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17 https://historicengland.org.uk/content/heritage-counts/pub/2019/visitor-attractions-trends-england-2018/
18 http://www.english-heritage.org.uk/about/news/eh-support-cathedrals/
19 https://www.churchofengland.org/more/media-centre/news/english-cathedrals-celebrate-ps8m-national-lottery-funding-boost
20 https://leicestercathedral.org/leicester-cathedral-revealed/project/
21 Leicester Cathedral: Economic Impact Assessment, (University of Wolverhampton, 2017)
22 https://www.livingnorth.com/northeast/people-places/discovering-newcastle-cathedral
23 http://www.english-heritage.org.uk/about/news/englands-cathedrals-success-story/

Historic England, the National Lottery Heritage Fund, the Church of England and the Catholic Church. A total of 12 cathedrals were awarded more than £1 million; the average award was £274,000.[24]

In 2017, the government's Taylor Review of the Sustainability of English Churches and Cathedrals[25] recommended that churches and cathedrals should prepare for reduced reliance on government funding, instead calling for a cultural shift towards communities contributing to their upkeep. Pilot studies of a new approach, funded by the Government, were conducted to test three of the review's recommendations:

- Building a national network of "Community Support Advisers" (CSAs) to advise congregations on building relationships and using their buildings to meet local needs
- A network of Fabric Support Officers (FSOs) to work closely with them to plan and execute works
- Implementing a mechanism for assessing priorities for repair.

The review envisaged that funding CSAs and FSOs would cost the Government £15 million a year, and also recommended a £36-million major repairs fund and a £15-million minor repairs fund.

In response to the Taylor Review, the Department for Culture, Media and Sport announced a £1.8 million pilot of a scheme to create a sustainable future for places of worship[26]. The scheme was piloted in Manchester and Suffolk from autumn 2018 until March 2020. It included a £500,000 minor repairs fund, which eligible listed places of worship in the two areas were able to access. The rest of the money funded CSAs and FSOs, who worked with those taking care of the buildings and with local communities. The funding was available to any denomination or religion, provided that the building is listed, and it was hoped that access to funds would help places of worship address repairs sooner, preventing repair costs from escalating. The pilot focused on parish churches as opposed to cathedral, but the pilot evaluation[27] did find that for the churches who received funding, repair work was carried out between two to five years earlier than it otherwise would have been. The evaluation noted that this earlier timing of maintenance and repairs was likely to have prevented 'irretrievable loss of historic fabric and to have saved notable costs', illustrating the importance of timely repairs.

In 2020, lockdowns and restrictions on travelling due to the coronavirus pandemic severely limited cathedrals' ability to generate their own income, especially during periods when cathedrals were instructed by the government to close to reduce the spread of the virus. These closures and subsequent restrictions on visitor numbers raised cathedrals' need for grant funding, and a number of emergency grants from government and the Church Commissioners were introduced for which cathedrals were eligible to apply. The initial effect of the coronavirus on cathedrals, including the early impact on their finances, is discussed further in Section 6.

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24 https://www.englishcathedrals.co.uk/latest-news/repair-fund-40m-prepares-cathedrals-first-world-war-commemorations/
25 https://www.churchtimes.co.uk/articles/2017/22-december/news/uk/review-calls-for-change-of-attitude-to-church-buildings
26 https://historicengland.org.uk/advice/caring-for-heritage/places-of-worship/churches-sustainability-review/
27 https://www.gov.uk/government/publications/the-taylor-review-pilot-final-evaluation

4.0 Economic impacts

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 2.2.

4.1 Direct impacts

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.

4.1.1 How many people do cathedrals employ?

Table 4.1 sets out average employment numbers for clergy, lay staff and contractors indirectly employed, expressed in terms of full-time equivalent (FTE) staff. This is followed by Table 4.2, which sets out total figures for each of the five cathedral groups and an overall value[28]. 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 12% as many staff. **The overall total employment figure of 2,347 FTE staff represents an increase of just over a quarter on the 2014 figure of 1,870.**

Table 4.2 Average employment per cathedral, respondents only (FTE)

	Clergy	Lay staff	Indirect	Total
Large international	5	129	20	154
Medium historic	3	42	8	53
Medium modern	3	16	8	26
Urban	4	30	2	41
Parish church	3	15	7	19
All	**3**	**44**	**8**	**56**

Source: Ecorys analysis

Table 4.3 Total employment, all cathedrals (FTE)

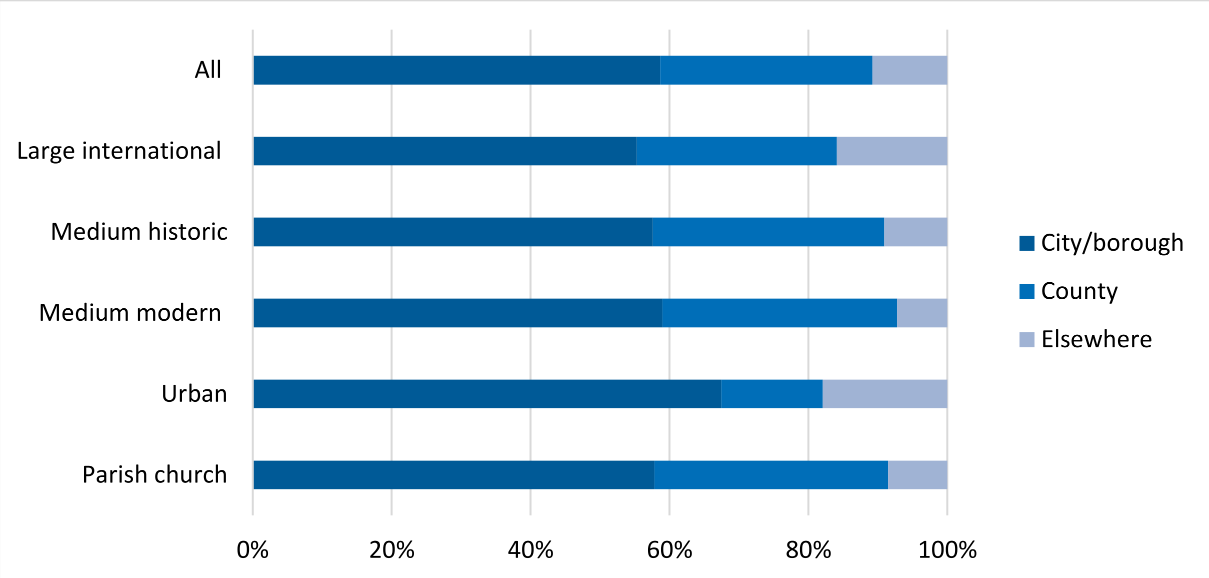
	Clergy	Lay staff	Indirect	Total
Large international	29	773	122	923
Medium historic	58	750	151	959
Medium modern	5	31	16	52
Urban	19	150	34	203
Parish church	30	163	18	210
All	**140**	**1,867**	**341**	**2,347**

Source: Ecorys analysis

[28] Please note that this table provides a total of clergy and lay staff for all 42 cathedrals based on the averages presented in Tables 4.1. 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 under-stated.

Cathedrals were also asked to report the place of residence of staff. Overall, it was estimated that, on average, over half of staff (59%) lived in the immediate local area, with most of the remainder living elsewhere in the county (31%) and only a minority living further afield (11%). However, there was some variation by type of cathedrals with large, internationally important sites most likely to source their staff from a wider catchment area, with just under half coming from beyond the immediate local area. Those in the urban grouping were most likely to source their staff from the local area (67%), perhaps as a result of the higher density of population and available labour force in major urban areas. The place of residence of staff by type of cathedral is illustrated in Figure 4.1.

Figure 4.2 Staff place of residence[29]



Source: Ecorys analysis

Case study example
Over 90% of the 127 people employed by Liverpool Cathedral in 2019 lived within the city. Interviewees noted that the cathedral operates a policy of trying to fill all roles locally where possible, as one of its key aims is to make a positive impact on employment in the local economy. For example, the cathedral recently renegotiated its catering contract, with the successful caterers being a locally based company. This catering company provides all the food in the cathedral restaurant, as well as all the catering for the public and corporate dinners that the cathedral hosts throughout the year. In addition, the cathedral shop supports local artists through selling merchandise, such as coasters, cards, prints and baubles, that feature designs by local artists.

Cathedrals were also asked to report spending on wages and salaries in 2019 for their own staff (i.e. excluding indirect employees) as reported in Table 4.3. As would be expected given the preceding data on employment, the large international grouping spends on average three times more on wages and salaries than the next highest spenders (the medium historic grouping).

Overall, cathedrals spend around £51 million per year on wages and salaries, suggesting a total wage bill of around 20% higher than that estimated in 2014 (£42 million).

[29] This is based on the data provided by the cathedrals that responded to this question.

Table 4.4 Spending on wages and salaries, average and total (2019)

	Average	Total
Large international	£3.9m	£23.5m
Medium historic	£1.0m	£18.5m
Medium modern	£0.50m	£1.0m
Urban	£0.72m	£3.6m
Parish church	£0.41m	£4.5m
All	**£1.2m**	**£51.1m**

Source: Ecorys analysis

4.1.2 How much do cathedrals spend?

The survey also collected information on expenditure on procurement of goods and services, including routine maintenance and upkeep, restoration work, utility services, insurance and cathedral operations in 2019 (Table 4.4)[30]. As might be expected given their size, large cathedrals reported the highest levels of spend, with their average spend around three times that of medium sized cathedrals. Expenditure on routine maintenance and repairs and restoration are included in the totals provided above; however, this is a significant area of spending which is also shown separately in Table 4.5.

Table 4.5 Spending on goods and services, average and total (2019)

	Average[31]	Total[32]
Large international	£3.8m	£22.9m
Medium historic	£1.2m	£20.7m
Medium modern	£0.52m	£1.0m
Urban	£0.54m	£2.7m
Parish church	£0.24m	£2.7m
All	**£1.2m**	**£50.0m**

Source: Ecorys analysis

Table 4.6 Spending on maintenance and restoration, average and total (2019)

	Maintenance[33]		Restoration[34]	
	Average	**Total**	**Average**	**Total**
Large international	£1.0m	£6.3m	£0.72m	£4.3m
Medium historic	£0.16m	£2.9m	£0.64m	£11.5m
Medium modern	£0.06m	£0.13m	£0.02m	£0.05m
Urban	£0.19m	£0.93m	£0.07m	£0.37m
Parish church	£0.06m	£0.70m	£0.07m	£0.80m
All	**£0.25m**	**£11.0m**	**£0.38m**	**£17.0m**

Source: Ecorys analysis

Approximately a third of cathedrals highlighted items of expenditure which were atypical, including items such as urgent repairs, projects to improve accessibility, and major restoration projects. However, total spending on maintenance and repairs and restoration, along with total procurement expenditure, is in line with that recorded in

[30] For the majority of cathedrals values are given for the whole of 2019. Three cathedrals noted that they had provided data for their 2019/2020 financial year.

[31] This is based on the data provided by the cathedrals that responded to this question.

[32] This is based on the use of the group level averages to provide a total for all 42 cathedrals.

[33] This is based on the data provided by the cathedrals that responded to this question.

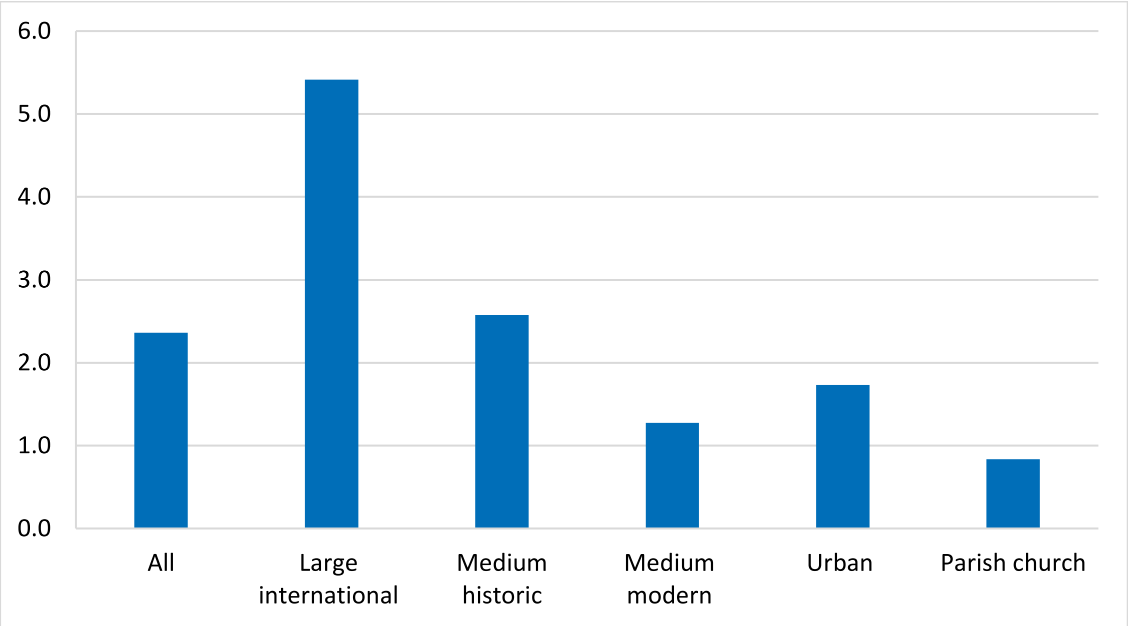
[34] This is based on the use of the group level averages to provide a total for all 42 cathedrals.

the 2014 study. 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.

Case study example
Winchester Cathedral has its own Works Department, including stonemasons, which enables the cathedral to carry out many essential repairs in-house. In addition, the Works Department takes on local apprentices in traditional crafts. The majority of other suppliers that the cathedral uses are local, including its electrical coordinators, fire risk services, and IT company.

As shown in Figure 4.2, average non-visitor related income was £2.4 million, ranging from £5.4 million for large, international important cathedrals to £0.8 million for parish church cathedrals. Grants and giving are important sources of income, although this total can fluctuate widely year-by-year and 11 cathedrals reporting having received either a significant grant (for example from the National Lottery Heritage Fund) and/or atypical legacies during 2019. Other sources of income include property, investments and events.

Figure 4.3 Average income (excluding visitors) (£m, 2019)



Source: Ecorys analysis

4.2 How many people visit cathedrals?

Visitor figures for 2019 (excluding those attending services and educational events) are presented in Table 4.6. **This shows that cathedrals attracted over 9.5 million (tourist or leisure) visitors[35] in 2019**; a 15% increase on the 8.2 million estimated in the 2014 study. This increase may represent improved precision in recording visitors at some sites, which means that cathedrals are better able to isolate tourist and leisure visitor numbers from worshippers and education groups. A few cathedrals have also reduced or eliminated entry fees, which is thought to have increased visitor numbers, or actively sought to increase visitor numbers by holding more events and exhibits. For example, Leicester Cathedral has seen a significant increase in tourist numbers since King

[35] 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 while 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.

Richard III was buried in the cathedral, while York Minster saw a record number of visitors in 2019 partly thanks to its Northern Lights sound and light projection events, which were seen by 22,500 people[36].

Table 4.7 Visitor numbers, average and total (2019, rounded to nearest '000)

	Average	Total
Large international	540,000	3,238,000
Medium historic	199,000	3,582,000
Medium modern	48,000	95,000
Urban	339,000	1,694,000
Parish church	83,000	908,000
All	**227,000**	**9,518,000**

Source: Ecorys analysis

Case study example

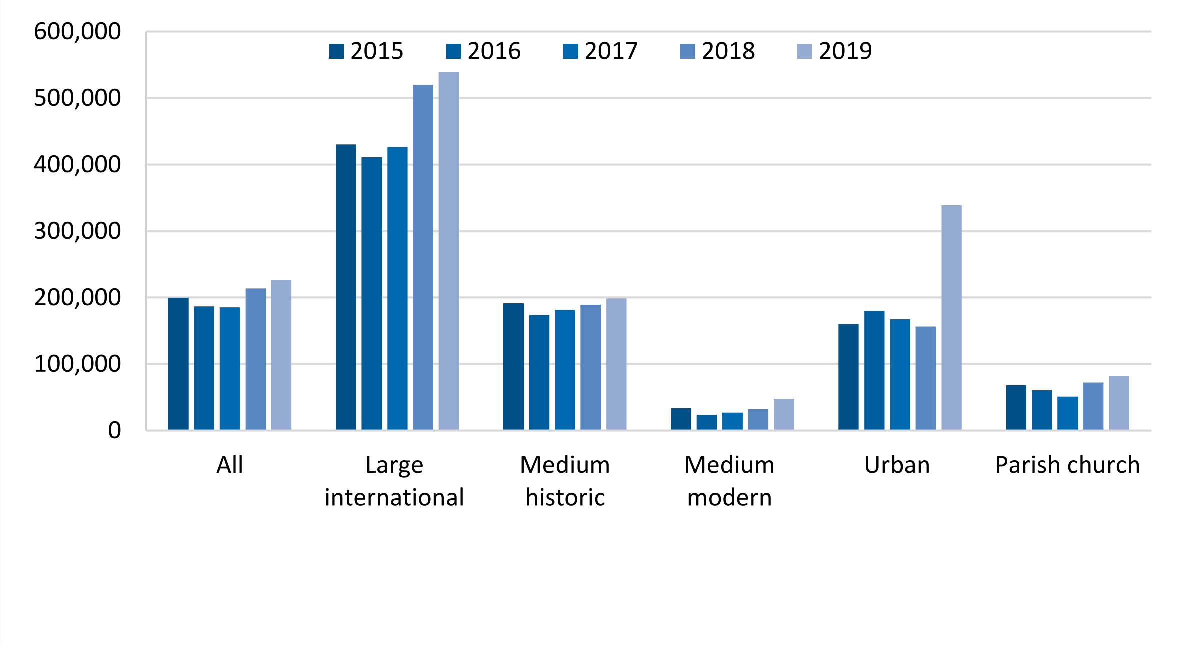
In recent years, Rochester Cathedral has made a renewed effort to increase its attractiveness to visitors through hosting a series of exhibitions, and interviewees spoke of a desire to turn Rochester into a destination cathedral. In 2019, the cathedral made international news when it hosted a mini golf course in its nave – the first of several unorthodox exhibitions. The cathedral's events programme has resulted in an increase in visitor numbers over recent years, with a corresponding change in the demographics of visitors, including more families visiting. Numbers attending special services have also increased, which cathedral staff attribute to the calendar of events. For instance, in the year following several high-profile exhibitions, there was a 16% increase in attendance at Christmas and advent services.

A variety of different methods are used to record visitor numbers, with the majority of cathedrals using handheld or automatic counters. Where an entry fee is in place, this provides a record of admissions. Other methods used to estimate visitor numbers include sampling, observations, records of donations, and entries in a visitors book. The use of visitor books, handheld counters and observation in particular are felt to result in underestimates, due to not all visitors signing books and issues of covering multiple entry points and all opening times.

Overall, there appears to have been a slight uplift in visitor numbers in 2019 compared to 2018. However, it is considered that, in general, trend data should be treated with caution, particularly due to changes in the methods used for recording visitor numbers and their limitations. Our estimate of 9.5 million visitors in 2019 is also slightly lower than the 9.8 million visitors estimated in 2018 by the Church of England in their Research and Statistics report[37]. This difference likely reflects the fact that figures are estimates, so are subject to a margin of error.

37 https://www.churchofengland.org/more/media-centre/news/record-numbers-visitors-and-worshippers-flock-englands-cathedrals

Figure 4.4 Average visitor numbers (2015-2019)[38]



Source: Ecorys analysis

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

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

Table 4.8 Turnover from visitor activity, average and total (most recent)

	Average[39]	Total[40]
Large international	£5.0m	£30.2m
Medium historic	£0.74m	£14.4m
Medium modern	£0.40m	£0.82m
Urban	£0.80m	£4.0m
Parish church	£0.22m	£2.3m
All	**£1.5m**	**£51.7m**

Source: Ecorys analysis

All survey respondents reported that they have a website and social media accounts which they used to promote the cathedral to visitors during 2019. This is reflected in an online survey carried out by Durham Cathedral in 2020[41], in which the majority (75%) of visitors reported getting their information via the cathedral's website, followed by the cathedral's Facebook page (56%). Just over nine-tenths (93%) of cathedrals also worked in partnership

[38] This is based on the data provided by the cathedrals that responded to this question.
[39] This is based on the data provided by the cathedrals that responded to this question.
[40] This is based on the use of the group level averages to provide a total for all 42 cathedrals.
[41] Visitor Survey 2020 (Durham Cathedral, not yet published).

with local tourism agencies, and a similar share used advertising. Approximately one tenth (14%) reported using other means of promotion, with the most common being newsletters and media coverage.

Detailed 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[42]. 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. This suggests that visitors come from a range of different faiths, along with a significant proportion who do not consider themselves to be religious.

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. The vast majority reported their ethnicity as white (95%) and one-tenth of the sample reported having a long-standing illness or disability.

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.

Around one-third of visitors lived within a distance of 15 miles from the cathedral at which they were interviewed, while 32% lived more than 50 miles away (but still in Britain) and around 15% came from overseas.

Cathedrals were often referenced as the motivation for visiting the city that day, with 47% of visitors noting that visiting a cathedral was the main reason for their visit.

Visitor research has been undertaken by a number of individual cathedrals[43]. The available evidence suggests that those in the large, international grouping attract a higher proportion of overseas visitors, with available estimates suggesting this can be as high as 85%.

For other types of cathedral, the proportion of visitors from the local area varies, with estimates ranging from under 10% to 40%. This is 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’.

4.3 What other economic benefits do cathedrals bring?

There is limited evidence of the wider economic benefits resulting from cathedrals. 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. Over 90% of cathedrals work with their local tourism promotion agencies to further this aim.

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[44]. Therefore, the tourism impact of cathedrals is likely to extend beyond the number of visitors to a cathedral, since the cathedral’s image could help

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[42] The total population for this study was 38 cathedrals, including Westminster Abbey.

[43] Ecorys survey (2020).

[44] For example, Liverpool Cathedral features on the visit Liverpool website at https://www.visitliverpool.com/things-to-do/liverpool-cathedral-p9023

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.

Case study example

Rochester Cathedral is one of several historic and cultural attractions in Rochester: close by is Rochester Castle and the town has strong links to Charles Dickens, who lived there and featured the town in his writings. The wider Medway area has further tourist attractions such as Chatham Historic Dockyard and the Royal Engineers Museum. Consultees felt that individually the cathedral and other sites were not necessarily attractions by themselves, but together they constituted a full day offer for tourists. Exit surveys conducted by the cathedral support this view, showing that people would often combine a visit to both the cathedral and castle.

Cathedrals are often focal points for tourists when visiting a different city, and, for some visitors, are the most recognisable feature of that city. As well as the more well-known and popular cathedral cities such as York and Canterbury, this is also true for smaller cities whose awareness is perhaps less widespread. For example, a survey of visitors taking a city break in Coventry[45] showed that awareness of Coventry Cathedral was considerably higher than any other attraction in the city, and for 34% of holidaymakers was the main reason for visiting the city, showing that cathedrals can be a valuable gateway for cities' local tourism industries. A visitor's survey carried out by Durham Cathedral showed that, beyond visiting the cathedral, most people (87%) will stay in the city centre for at least a couple of hours, if not all day and even overnight[46]. Cities such as Leicester have sought to harness their cathedral's reputation, in this case by regenerating the 'Cathedral Quarter'[47] and attracting visitors to shops and restaurants in its vicinity.

Case study example

According to interviewees, Gloucester Cathedral is regarded as an important part of the city's identity by its residents. The cathedral is believed to be one of three main reasons why visitors come to Gloucester, alongside shopping and rugby. In 2019 the cathedral welcomed 447,000 visitors, of which an estimated 57% were tourists. Visitors are motivated by the cathedral's architecture and its proximity to the Cotswolds, which allows them to combine a visit to the cathedral as part of a day out or short break in the local area. More recently, featuring in the Harry Potter films has added to the cathedral's popularity, particularly amongst overseas and younger visitors.

Many cathedrals occupy central locations, and the buildings and precincts add to the value of the public realm. This helps 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 Winchester and Leicester, who have developed close relationship with their local Business Improvement Districts (BIDs).

Case study example

Winchester Cathedral is an active member of the local BID and works collaboratively with local businesses. In particular, they are heavily involved with the Winchester Central Regeneration Scheme, which plans to regenerate an area close to the high street as part of a wider goal to increase social diversity, and to ultimately encourage the working age population to remain in Winchester.

45 Coventry Visitor Survey 2019 (NGIS, 2019).
46 Visitor Survey 2020 (Durham Cathedral, not yet published).
47 Leicester Cathedral: Economic Impact Assessment (University of Wolverhampton, 2017).

Case study example

Leicester Cathedral is a member of the local BID, which is hosted in the diocese buildings in St Martin's House. The cathedral works closely with the BID to reduce homelessness in Leicester, and in 2018 the cathedral led on developing a homelessness charter for the city. This charter brings together various organisations in the city, including the council, the police, local businesses and charities, and sets out key aims for the city, including increasing the availability of affordable accommodation.

4.4 Economic impact assessment

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 2.2 for description). This assessment has been undertaken at the level of the local economies concerned[48].

4.4.1 Direct effects

Section 4.1.1 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 (Figure 4.1). The resulting adjusted estimates of net additional employment effects (excluding multipliers) are set out in Table 4.8.

Table 4.9 Local employment effects (adjusted, FTE)

	Gross emp.	Deadweight	Displacement	Leakage	Adj. emp.
Large international	923	0	0	0.45	510
Medium historic	959	0	0	0.42	552
Medium modern	52	0	0	0.41	31
Urban	203	0	0	0.33	137
Parish church	210	0	0	0.42	122

Source: Ecorys analysis

Section 4.1.2 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 which recommends application of a factor of 25% to indicate, on average, a medium level of leakage. This is defined as being a situation where a reasonably high proportion of the benefits will be retained within the target area[49]. The latest available data suggests that across the UK economy (non-financial sectors), the ratio of employment to turnover is one job for every £150,800[50]. This ratio has been applied to convert the estimates of spending into an estimate of employment (see Table 4.9).[51]

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[48] Defined as the local authority area.

[49] Additionality Guide (Homes and Communities Agency, 2014).

[50] Annual Business Survey 2018 (ONS, May 2020).

[51] Note that this represents only the 'first round' effect.

Table 4.10 Local procurement effects (adjusted)

	Gross exp.	Deadweight	Displace-ment	Leakage	Adj. exp	Related emp.
Large international	£22.9m	0	0	0.25	£17.2m	114
Medium historic	£20.7m	0	0	0.25	£15.5m	103
Medium modern	£1.0m	0	0	0.25	£0.8m	5
Urban	£2.7m	0	0	0.25	£2.0m	13
Parish church	£2.7m	0	0	0.25	£2.0m	13

Source: Ecorys analysis

4.4.2 Visitor-related effects

Section 4.2 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.

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 or 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.

Table 4.10 shows the estimated breakdown of visitors by these categories and cathedral typology. 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 4.11 Visitor types (2019, rounded to nearest ‘000)[52]

	Local	Day trip	Holiday	Overseas
Large international	11% 368,000	27% 865,000	20% 662,000	41% 1,344,000
Medium historic	32% 1,141,000	25% 883,000	33% 1,171,000	11% 386,000
Medium modern	50% 47,000	25% 24,000	14% 13,000	11% 11,000
Urban	16% 277,000	36% 616,000	24% 406,000	23% 395,000
Parish church	58% 536,000	19% 170,000	11% 98,000	12% 104,000

Source: Ecorys analysis

[52] This is based on the data provided by the cathedrals that responded to this question.

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 suggest 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 the first column of Table 4.11[53].

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 4.12 Visitor numbers (adjusted)

	Day trip	Holiday	Overseas
Large international (assumed 45% additional)	389,000	298,000	605,000
Medium historic (assumed 40% additional)	353,000	469,000	155,000
Medium modern (assumed 35% additional)	8,000	5,000	4,000
Urban (assumed 25% additional)	154,000	102,000	99,000
Parish church (assumed 20% additional)	34,000	20,000	21,000

Source: Ecorys analysis

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 £37 per visit[54] while holiday visits are estimated to spend in the region of £65 per night[55]. A recent survey of international visitors suggests that on average they spend a total of £86 per day[56]. As these figures include any entry 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 4.4.1 above). As no information is available on the average length of stay, we have conservatively assumed this to be one night[57]. Using this data, estimated additional local visitor spend is set out in Table 4.12.

[53] 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.
[54] https://www.visitbritain.org/sites/default/files/vb-corporate/gbdvs_2018_annual_report.pdf
[55] https://www.visitbritain.org/sites/default/files/vb-corporate/40413193-260c_gb_tourist_annual_report_2018_fv-v3.pdf
[56] https://www.visitbritain.org/2018-snapshot
[57] This implicitly assumed that the overnight stay will take place in the local area.

Table 4.13 Additional local visitor spend

	Day trip	Holiday	Overseas
Large international	£8.6m	£14.9m	£42.9m
Medium historic	£7.8m	£23.4m	£11.0m
Medium modern	£0.18m	£0.24m	£0.26m
Urban	£3.4m	£5.1m	£7.0m
Parish church	£0.75m	£1.0m	£1.5m

Source: Ecorys analysis

Summing the estimated visitor spend across all cathedrals results in a total of over £128 million of additional spending in the local economies concerned, similar to the estimated total of £125 million in the 2014 study. While visitor numbers have increased by 15% over this period, the percentage of overseas visitors has fallen while the percentage of local visitors has risen. As overseas visitors are estimated to spend the most per day, this change in visitor makeup has dampened the growth in additional spending to some extent. A number of cathedrals reported that they were specifically targeting local visitors above overseas visitors, to strengthen links with their local communities.

Recent data suggests that the ratio of turnover to employment for tourism-related activity is in the region of £42,470[58]. Applying this figure to the estimates of visitor spend produces the employment figures set out in Table 4.13.

Table 4.14 Local visitor-related employment

	Jobs supported
Large international	1,563
Medium historic	993
Medium modern	16
Urban	364
Parish church	76
Total	**3,012**

Source: Ecorys analysis

4.4.3 Multiplier effects

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.

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 and 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[59]. For analysis of the local economic impacts, a figure slightly

58 Annual Business Survey 2018 (ONS, May 2020).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 a proxy.
59 Additionality Guide (Homes and Communities Agency, 2014).

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.

4.5 What is the economic impact?

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.

Table 4.15 Estimated local employment impact.

	Cathedral-related effects	Visitor-related effects	Total
Large international	750	1,875	2,625
Medium historic	785	1,190	1,980
Medium modern	45	20	60
Urban	180	440	620
Parish church	160	90	252
Total	**1,920**	**3,615**	**5,535**

Source: Ecorys analysis. Figures have been rounded to the nearest five and may not sum due to rounding.

The total employment estimate of 5,535 is very close to the estimate of 5,510 which resulted from the 2014 study[60]. It is further estimated that cathedrals generate a total spend of over £235 million in their local economies: close to the approximate value of £220 million estimated in the 2014 study[61].

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 the potential to influence wider investment or visitor decisions.

5.0 Social impacts

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

5.1 Opportunities for worship

Each cathedral has a programme of regular services. Table 5.1 sets out the average number of services which took place in a typical week during 2019 (excluding any special services or events). The number of services on a Sunday ranged from one to six and on other days from three to 30. The 2014 study reported that the number of regular midweek services ranged from five to 40, which suggests that the number of services has decreased in at least some cathedrals. Analysis using the typology shows that, on average, large, international cathedrals have the highest number of services on Sunday (five) and also during the week (21).

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[60] Comparisons should be treated as indicative due to methodological differences between the two studies.

[61] This total is based on estimated local wages and salaries, procurement and visitor-related spend, plus application of a composite multiplier of 1.2.

Table 5.16 Average number of services (2019)

	Sunday	Midweek
Large international	5	21
Medium historic	4	17
Medium modern	4	12
Urban	4	19
Parish church	3	17
All	**4**	**17**

Source: Ecorys analysis

The annual returns collected by the Church of England capture information on attendance at all services in an average week (again excluding special events or services), see Table 5.2. 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 2014 study are very similar to the 2019 figures, suggesting attendance has remained stable.

Table 5.17 Average attendance at all services (2019)

	Sunday		Midweek	
	Children	Adults	Children	Adults
Large international	137	840	92	1,183
Medium historic	49	318	185	289
Medium modern	48	291	40	186
Urban	40	312	32	168
Parish church	27	218	47	153
All	**55**	**364**	**108**	**362**

Source: Ecorys analysis

Attendance at services during the festivals of Easter and Christmas in 2019 follows a similar pattern, with large, internationally important cathedrals attracting the highest numbers on average, followed by medium-sized, historic types.

Reported trends in congregation size are mixed, with around a third of cathedrals reporting some degree of growth over the past five or ten years. Another third reported that congregations have been stable, with the remaining third experiencing 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, 26% of cathedrals noted an increase in the diversity of the congregation, including those from migrant communities, those identifying as LGBT+, and a wider age range due to a rise in the attendance of young families. A minority of cathedrals (17%) reported that their congregation was ageing.

In 2019, the most common type of occasional service was a baptism, followed by funerals, marriages and memorial services (Table 5.3). 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 5.18 Average number of special services, per year (2019)

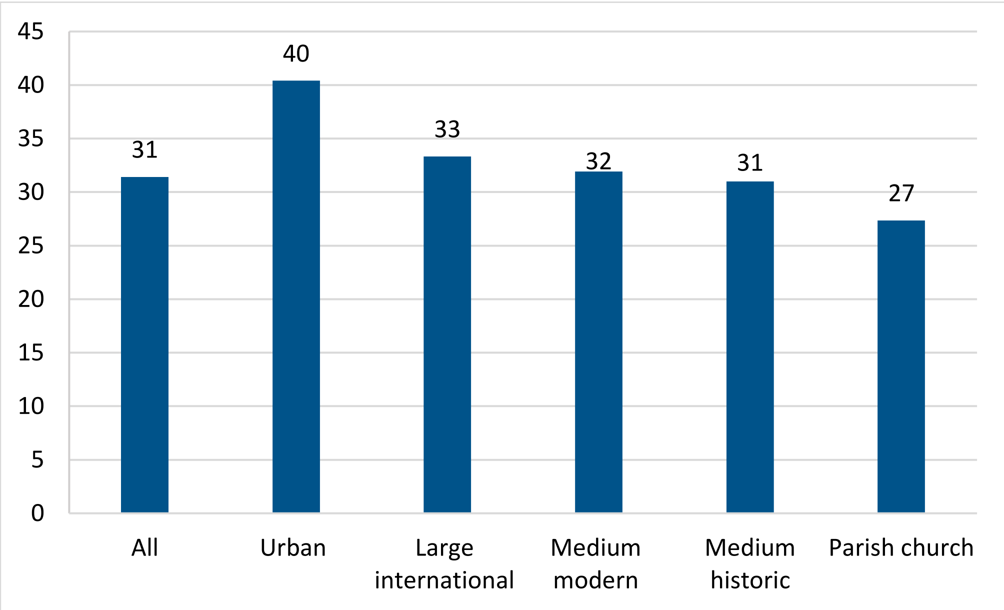
	Baptisms	Marriages	Funerals	Memorial services
Large international	26	9	5	5
Medium historic	12	7	7	4
Medium modern	8	2	7	4
Urban	17	4	4	7
Parish church	25	3	8	2
All	**18**	**6**	**6**	**4**

Source: Ecorys analysis

Just over three quarters of cathedrals reported running a Sunday school during 2019. The average number of children and young people aged 17 and under attending over the course of 2019 varied widely both by cathedral type and within cathedral type, from over 130 to less than five. The highest average Sunday school attendance can be observed at large international cathedrals, followed by medium historic and parish church types.

Figure 5.1 shows the number of children and young people involved in serving the cathedral, including those who are members of a cathedral choir and those who volunteer at the cathedral. Urban cathedrals reported the highest numbers on average, followed by large international and medium sized modern.

Figure 5.1 Average number of children and young people involved in serving the cathedral (2019)



Source: Ecorys analysis

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 5.5).

5.2 Opportunities for volunteering

The number of individuals serving in a voluntary capacity totalled 15,375 and ranged from 54 to 804 per cathedral, with an average of around 360. The total number of volunteers has slightly increased compared to that recorded in the 2014 study (14,760). Large internationally important cathedrals attracted the greatest number of volunteers on average (Table 5.4). Around two-thirds of cathedrals reported that they have a designated volunteer officer; in some cases this was also a voluntary post.

Table 5.19 Number of people volunteering, average and total (2019)

	Number of volunteers	
	Average	Total
Large international	588	3,529
Medium historic	425	7,656
Medium modern	323	645
Urban	262	1,311
Parish church	203	2,234
All	**366**	**15,375**

Source: Ecorys analysis

This increase in the number of volunteers supporting cathedrals contrasts with data on general trends in volunteering in England presented by the Department for Digital, Culture, Media and Sport. The department found that participation in formal and informal volunteering has reduced since 2014, when 70% reported volunteered either formally or informally, compared to 62% in 2018-19[62]. 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[63], which suggests that cathedrals generate important social benefits as a result of providing a focal point for volunteering.

The average number of hours per volunteer during the course of the year was estimated as 64 hours (or 1-2 hours per week), giving an estimated total of 906,000 hours[64], equivalent to 500 full-time employees.

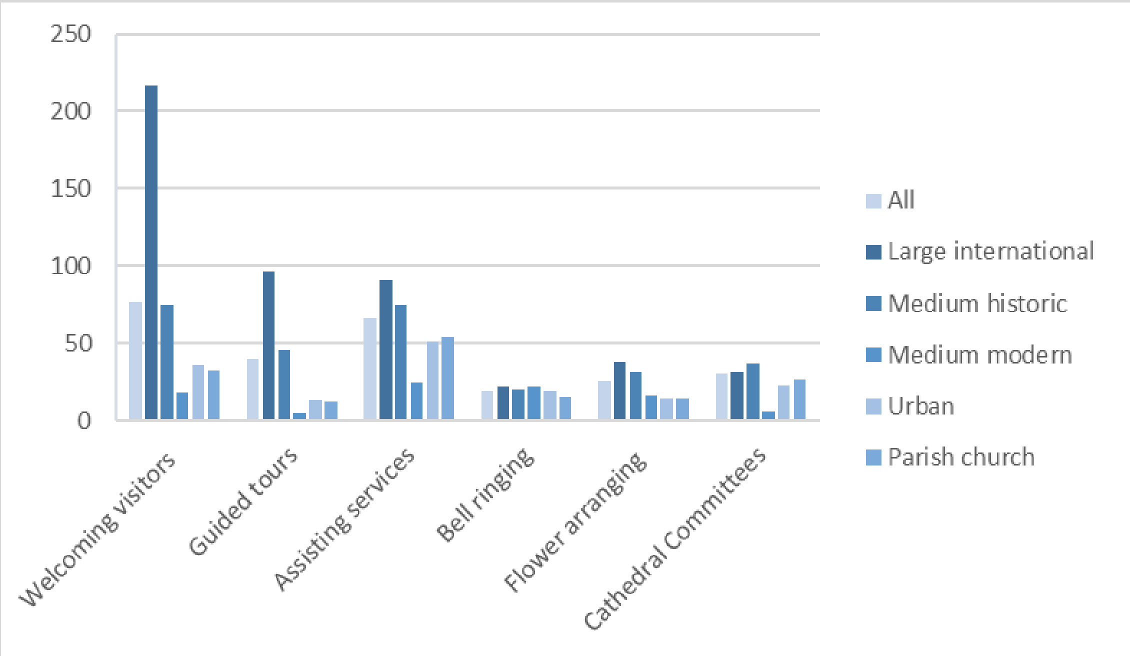
The majority of volunteers were reported to live in the local area, ranging from 74% (medium sized modern) to 60% (large international importance, medium historic, and urban). Volunteers were most commonly tasked with assisting at services and welcoming visitors (an average of 67 and 76 volunteers respectively), with large international cathedrals having a significantly higher number of volunteers welcoming visitors than other cathedrals. Flower arranging, bell ringing, and providing guided tours were also common volunteer activities across cathedrals.

[62] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/820610/Community_Life_Survey_2018-19_report.pdf

[63] See, for example, the Institute for Volunteering Research's Evidence Bank: https://www.bl.uk/social-welfare/editorials/the-evidence-bank-of-the-institute-for-volunteering-research

[64] This is calculated by applying the average of 64 hours (based on data from 37 cathedrals) to the entire population of 42 cathedrals.

Figure 5.2 Volunteer tasks (average number of volunteers (2019)



Source: Ecorys analysis

Volunteers were also reported to assist with a wide range of other tasks including serving in the cathedral shop, providing admin support, gardening, embroidery, fundraising, outreach/community activities, and event stewarding.

Case study example
Around 310 people volunteered at St Edmundsbury Cathedral in 2019. Volunteers supported the daily operations of the cathedral in diverse roles including welcomers, shop assistants, flower arrangers, gardeners, and bellringers. Roughly two-thirds of volunteers lived in Bury St Edmunds. Staff reported that volunteers are essential for the running of the cathedral and that their volunteers received a sense of pride, belonging, and responsibility as a result of their involvement. In particular, many volunteers were recent retirees, for whom volunteering provided purpose and a sense of community.

Recent data from VisitEngland confirms the high reliance and increasing importance of volunteers for places of worship in general[65]. Of the places of worship taking part in the VisitEngland research, 100% reported use of unpaid volunteers (compared to 87% for all attractions) and 17% of this group reported that use of volunteers had increased in 2018 compared to 2017 (with only 7% reporting a decrease). 19% felt that volunteer numbers would increase further in 2019; only 1% predicted a decrease.

5.3 Opportunities for learning

Over 308,000 students participated in educational events organised by cathedrals in 2019. Nearly half of these pupils were of primary age (46%), followed by secondary age pupils (28%). Large internationally important cathedrals accommodated the highest numbers of students on average, including around 60% more primary school age pupils as those in the next highest category (medium historic cathedrals) (Table 5.5). Student participation is lower than the figure of almost 320,000 reported in the 2014 study, driven by a fall in participation of students aged 16 and over.

65 https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/annual_attractions_survey_2018_trends_report.pdf

Around a third of cathedrals reported that demand for educational activities has been stable or increasing over recent years, up to the start of 2020. A number of cathedrals also mentioned that it was unusual for schools to travel for much more than an hour to visit the cathedral, with transport costs cited by schools as a key reason for schools keeping trips local. All but four cathedrals reported that they had a designated education officer in 2019; in some cases this was a voluntary post. Of these four, three stated they had plans to appoint an education officer.

Table 5.20 Participation in organised educational events, average and total (2019)

	Nursery/KS1		Primary/KS2		Secondary/ KS3-4		16-18 years		Over 18	
	Av.	Total	Av.	Total	Av.	Total	Av.	Total	Av.	Total
Large international	3,248	19,488	6,256	37,534	6,300	37,801	663	3,978	826	4,953
Medium historic	1,126	20,265	3,902	70,236	1,922	34,589	232	4,170	531	9,552
Medium modern	499	998	971	1,941	186	372	47	93	27	53
Urban	1,130	5,652	2,967	14,834	1,022	5,111	143	716	157	783
Parish church	515	5,664	1,755	19,310	811	8,921	90	989	51	557
All	**1,240**	**52,067**	**3,425**	**143,855**	**2,067**	**86,794**	**237**	**9,946**	**379**	**15,898**

Source: Ecorys analysis

Case study example

Through its education programme, Rochester Cathedral welcomed around 12,000 school students in 2019, offering them educational activities spanning multiple subjects, including history, RE, science, maths, and languages. The cathedral also coordinates with other local attractions such as the Castle, Huguenot Museum, and Bridges Trust to develop cohesive day trips for school groups. In addition, when the cathedral hosted the Knife Angel sculpture in 2019 (a 27-foot-tall sculpture made from confiscated knives), the cathedral encouraged local schools to visit and use the trip as a way to open up discussions around knife culture.

Case study example

Liverpool Cathedral operates a city-wide school outreach programme to encourage and provide music education to school children. Through the Liverpool Cathedral Schools Singing Programme, the cathedral delivers singing lessons in schools. In addition, the cathedral runs choirs aimed at different abilities and ages, from 12 months old (through its Tiny Maestros programme) to adults. The cathedral also offers a Grade 5 Music Theory Foundation Course. As part of the Schools Singing Programme, all pupils involved perform at a concert held in Liverpool Cathedral. The cathedral choristers are also made up of girls and boys from different schools across Liverpool.

5.4 Engaging with the community

It is clear that cathedrals engage with the wider community in a multitude of different ways. Over 90% of cathedrals provided details of specific projects or initiatives to provide support to particular sections of the community. The most common initiatives were supporting a food bank and supporting the homeless, with over two-thirds of cathedrals supporting at least one of these. Other examples of cathedrals supporting the community include:

- Community cafes
- Lunch clubs for older people
- Work with children and families, including parent and baby/toddler groups
- School holiday clubs for children
- Pastoral support for those visiting the cathedral and the wider community

- Support for migrants and asylum seekers
- Support for those with mental health illnesses
- Support for the unemployed
- Outreach activity in schools, residential homes and hospitals.

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

Case study example

Gloucester Cathedral has recently employed a full-time member of staff as a Community Engagement and Social Responsibility Manager, reflecting the amount of outreach work the cathedral does. Due to the relative poverty within the immediate area surrounding the cathedral, a lot of the cathedral's community work is with the local homeless population, including running a breakfast club twice a week since 2007, which typically sees an attendance of 30-40 people. More recently, the cathedral has started a gardening group and a walking rugby group, which have quickly become popular amongst local homeless individuals. The cathedral also exhibited the work of a formerly homeless photographer, which interviewees reported was highly successful at raising awareness of homelessness.

Case study example

Leicester is a National Asylum Seeker Service (NASS) designated dispersal city, and the cathedral is involved with a number of city-wide initiatives to welcome and support asylum seekers. It has an ongoing partnership with the city council, whereby all Syrians arriving in the city go to the cathedral on arrival. The cathedral welcomes these refugees and helps orientate them into Leicester. The cathedral also runs a weekly drop-in centre in connection with the charity 'City of Sanctuary', offering a mixture of social and support activities, such as craft activities, games, and IT and English classes for refugees. In addition, the cathedral has a team of speakers who go into schools and deliver talks explaining what it is really like to seek asylum in 21st century Britain. In 2019, the cathedral also hosted the Leicester Welcome Project, which gave immediate practical support to asylum seekers living in and near Leicester, providing gifts of food, clothes and toiletries.

Case study example

St Edmundsbury Cathedral is seeking to create additional employment opportunities through signing up to the Government's Kickstart scheme, as part of a consortium with various other cathedrals. Under the scheme, grant money is provided to fund work placements at the cathedral for Universal Credit claimants between the age of 16 and 24. In addition to creating employment opportunities, the scheme provides work skills and mentoring opportunities to local young people.

All but two cathedrals reported having an associated friends' group, trust or similar affiliated organisation. These groups support 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.

5.5 What other events do cathedrals support?

Data collected by the survey shows that cathedrals are well-used for a range of events. There is wide variation in numbers of events supported and their attendance, as would be expected given the variation in size and space available for this type of activity. Conferences were the most popular event type (Table 5.6), particularly for those in the urban grouping: perhaps reflecting the increased demand for such events in urban areas. Exhibitions were much fewer in number but attracted relatively high audiences. For example, recent art exhibitions (such as the

Museum of the Moon)[66] at a number of cathedrals, including Gloucester, Leicester, Liverpool and Rochester, have attracted a great deal of interest. Like conferences, exhibitions can offer significant opportunities for revenue generation, although it is recognised that not all cathedrals have space to hold major paid events.

Table 5.21 Average numbers of other uses of cathedral buildings and precincts (2019) *(average attendance)*[67]

	Concerts	Lectures /talks	Exhibitions	Conferences	Ceremonies
Large international	38 *(444)*	30 *(107)*	3 *(37,133)*	78 *(521)*	12 *(1,206)*
Medium historic	39 *(264)*	14 *(53)*	6 *(12,503)*	43 *(124)*	7*(1,147)*
Medium modern	22*(365)*	3 *(33)*	3 *(1,467)*	10 *(1,160)*	15 *(909)*
Urban	43 *(632)*	48 *(529)*	4 *(170)*	139 *(340)*	15 *(1,607)*
Parish church	44 *(123)*	10 *(31)*	7 *(1,737)*	14 *(91)*	5 *(1,307)*
All	**40 *(318)***	**20 *(251)***	**5 *(6,983)***	**54 *(316)***	**8 *(1,310)***

Source: Ecorys analysis

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

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 or financial support.

Case study example

Winchester Cathedral hosts many events throughout the year with the main highlight being the Christmas market which is recognised as one of the best in Europe[68]. Funded and run by the cathedral, the market usually attracts over 400,000 visitors per year, with interviewees noting that the market increases footfall and spending in the local retail and hospitality sectors. Consultees noted that hosting large-scale events also creates an employment benefit in the local community, as services such as security, retail, and hospitality are outsourced to local suppliers for special events.

Case study example

Consultees reported that St Edmundsbury holds a diverse range of events, including yoga, gong bath meditation, badminton, and film screenings, as well as more traditional talks and lectures. The cathedral has also actively engaged families through organising events aimed at children, such as hosting an animatronic T Rex dinosaur and arranging science activities during school holidays. The cathedral also acts as one of the venues for the annual Bury St Edmunds Festival and hosts the annual awards for the Bury in Bloom project, which aims to attract tourist through planting and maintaining flower displays around the town.

[66] https://my-moon.org/

[67] Averages are based on cathedrals who responded to these questions.

[68] https://christmas.winchester-cathedral.org.uk/exhibitors

Case study example
Liverpool Cathedral works with national and local charities to arrange an annual charity abseil down the cathedral, in which approximately 800 people typical participate. The cathedral also hosts an annual sleepover in its grounds to raise money for The Whitechapel Centre, a local homeless charity: in 2019, 450 people took part in this event. In addition, the cathedral hosts a community market twice a week: the market offers food deemed to be surplus to requirements by supermarkets, for sale at below market rate prices, with the main aim being to support people who may be on the brink of using foodbanks.

Case study example
Leicester Cathedral hosts various civic engagement events throughout the year, including the Lord Mayor’s civic service, an Armed Forces Day, and the annual VE day service. Carol concerts are also held for specific parts of the local community, including the police force, the university, and a local grammar school. In addition, the Cathedral also provides space for the city to host comedy gigs, music concerts and dinners for businesses and charities.

6.0 Impact of COVID-19

In March 2020 England went into lockdown as a result of COVID-19. This, along with later national and local lockdowns, imposed restrictions on cathedrals opening times, with all places of worship mandated to close for part of 2020. When cathedrals were legally allowed to open, necessary safety conditions in the form of social distancing limited the number of people that could be in the cathedral at any one time. Safety concerns also meant that people's ability to travel was limited by 'stay local' orders, and willingness to travel fell. This section sets out quantitative and qualitative evidence collected through the survey and case study research regarding the emerging impact of COVID-19 on cathedrals. It is intended to give an insight into the key trends observed in 2020, rather than to provide a complete analysis of the impact of COVID-19 on cathedrals.

6.1 Employment

Cathedrals responded to their mandated closures and restrictions on group gatherings by a combination of furloughing employees, reducing working hours, making redundancies, and introducing wage freezes. All but two[69] cathedrals reported making use of the government furlough scheme, with the majority furloughing over 70% of their staff during the first lockdown (March to July 2020). On average, the share of workers furloughed appears to have been lower during the second lockdown of 2020, although some cathedrals report increasing their use of the scheme over the second half of 2020. Both full-time and part-time furloughing was used, with no clear differences observed in the extent to which different cathedral types made use of the furlough scheme.

Around two-thirds of cathedrals reported that redundancies had been made as a direct result of COVID-19. Often the number of redundancies made were small (between one and five employees), although seven cathedrals reported that over a quarter of staff were made redundant. These higher levels of redundancies were reported by large international and medium historic cathedrals.

Seven cathedrals reported reducing hours for a small number of jobs from full-time to part time, while three cathedrals reported introducing wage freezes in 2020.

Case study example

The biggest dent in Winchester Cathedral's annual income in 2020 was due to the cancellation of the Christmas market. This also impacted local businesses which usually benefit from increased footfall and visitor spend during the event. The Cathedral usually hires around 100 seasonal staff at Christmas to support the Christmas market, the absence of which has contributed to Winchester Cathedral's total net employment loss of 18%. Although COVID-19 has not forced Winchester to make any redundancies, staff numbers have decreased slightly due to voluntary leavers and a recruitment freeze.

6.2 Non-visitor income

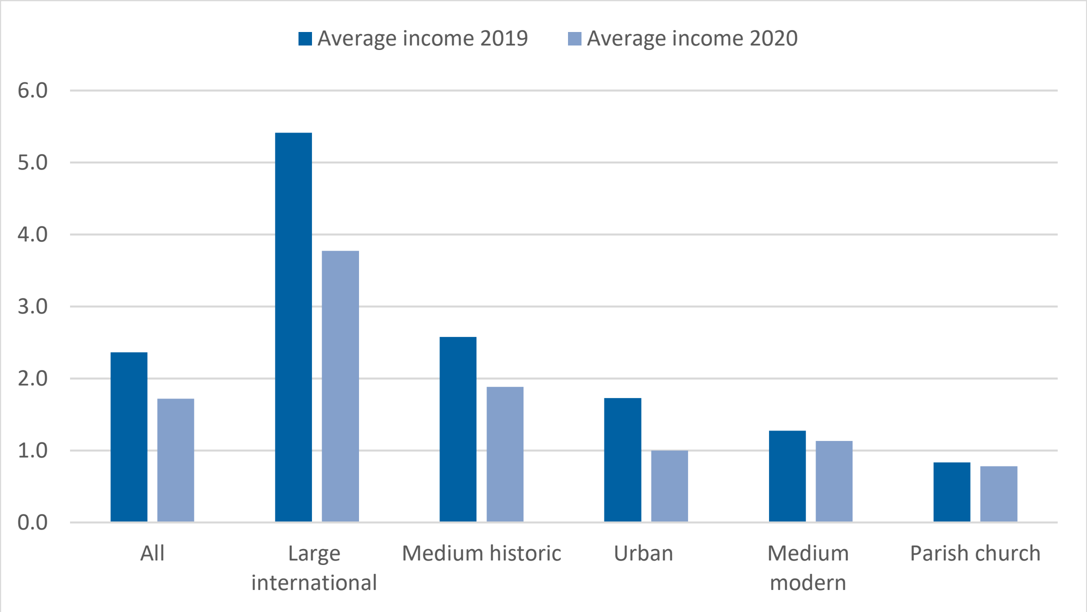
Unsurprisingly, the closure of cathedrals and restrictions on gatherings resulted in a significant fall in cathedrals average non-visitor income in 2020 (Figure 6.1). This fall was driven by a reduction of almost 80% in income generated from the use of cathedral facilities, as virtually all bookings from the middle of March 2020 were cancelled or rescheduled for a later year. Closure and restrictions on congregation size also meant fewer people attending services in the cathedral, so donations from the congregation fell on average. Large international cathedrals saw the largest percentage fall in income from both these categories compared to their 2019 levels.

However, due to cathedrals' success in applying for emergency funding – particularly from the government through the Cultural Recovery Fund, the Heritage Emergency Fund, and support from the Job Retention Scheme - and

[69] One cathedral did not respond to this question and one responded but did not mention the furlough scheme.

from the Church Commissioners and some independent grant making trusts, income received via grants was 10% higher on average in 2020 than it was in 2019, absorbing some of the fall in income from other sources. A total of 16 cathedrals reported being supported by either the Cultural Recovery Fund or the Heritage Emergency Fund. A small number of cathedrals also noted one-off grants in 2020 that were unrelated to COVID-19, such as special one-off grants for repair work.

Figure 6.1 Average income (excluding visitors) (£m[70])



Source: Ecorys analysis

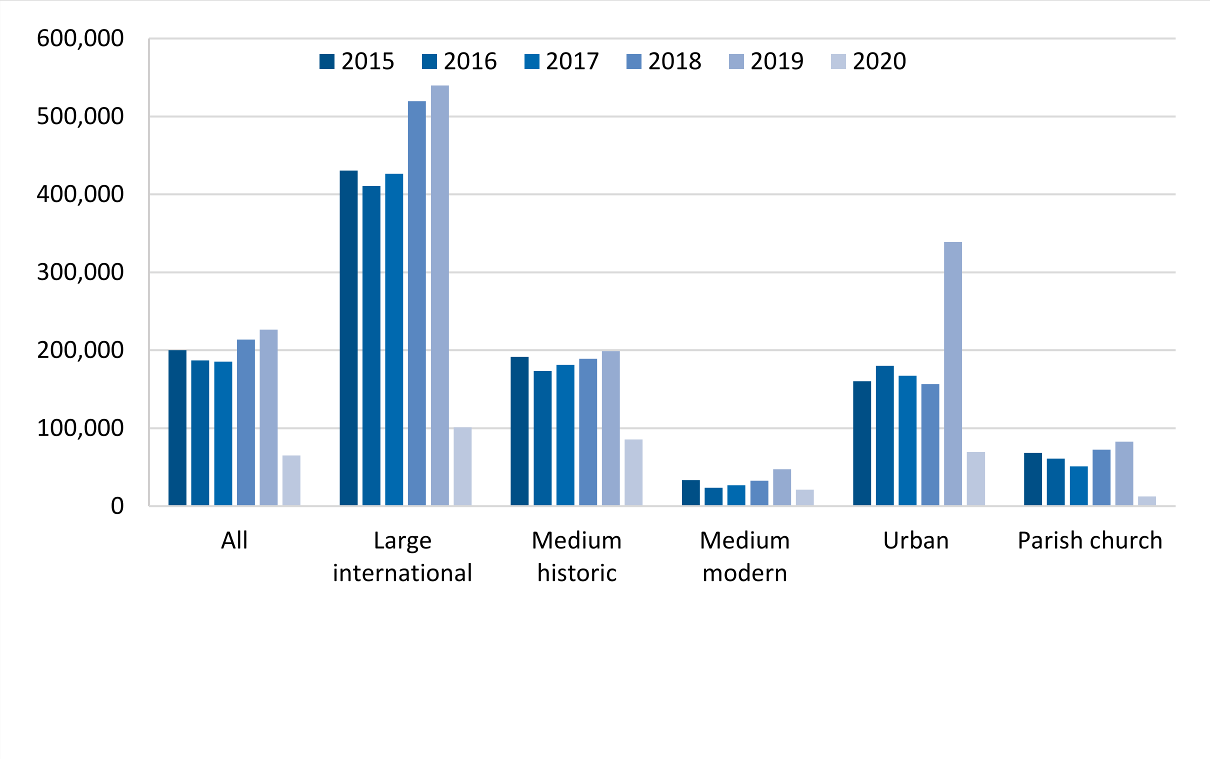
6.3 Visitor numbers

Visitor numbers excluding those attending services and educational events for 2020 compared to previous years are presented in Figure 6.2. As outlined in Section 4.2, comparisons of visitor numbers in different years should be treated with caution, particularly due to changes in methods for recording visitor numbers. Visitor numbers for 2020 may also be slightly underestimated, as not all cathedrals provided estimates covering the last full quarter of 2020. However, given local and national lockdowns were in force for part of the last quarter of 2020, and social distancing requirements remained in place, it is assumed visitor numbers would have remained low over this quarter.

As expected, the values suggest a large fall in visitor numbers, from an average of 227,000 in 2019 to 65,000 in 2020: a fall of over 70%. Large international cathedrals have experienced the largest fall, reflecting the fact that they typically attract more visitors than any other cathedral type. As noted in Section 4, visitors provide a significant source of income for cathedrals through entry fees, donations, and on-site spending in catering and retail outlets. As such, this fall in visitor numbers had a significant effect on cathedrals' income levels.

[70] A small number of cathedrals were unable to provide financial data for either the whole of 2020, or for the whole of their financial year covering 2020. As such values presented for 2020 may slightly underestimate the total income received in 2020. Figures presented are based on average values.

Figure 6.2 Average visitor numbers



Source: Ecorys analysis

6.4 Opportunities for worship

Unsurprisingly, the average number of regular services taking place in cathedrals fell in 2020 (Table 6.1). In particular, the number of midweek in-cathedral services fell, from an average of 17 services in 2019 to 10 in 2020. Large international cathedrals, which in 2019 held the largest number of midweek services, saw the largest average fall.

Table 6.22 Average number of services (2020,2019)

	Sunday (in cathedral)		Midweek (in cathedral)		Sunday (online)	Midweek (online)
	2019	2020	2019	2020	2020	2020
Large international	5	4	21	11	2	7
Medium historic	4	3	17	11	2	4
Medium modern	4	4	12	10	1	0
Urban	3	2	17	8	2	9
Parish church	4	2	19	11	4	8
All	**4**	**3**	**17**	**10**	**2**	**6**

Source: Ecorys analysis

The average number of in-cathedral services on a Sunday in 2020 ranged from none to five and on other days from none to 23. Cathedrals with no services were cathedrals that remained closed for much of the year (as a result of national and local lockdowns) and those that were open for private prayer only, resulting in regular services taking place online. Prior to March 2020, no cathedral offered online services, yet during the course of 2020, cathedrals offered an average of two online Sunday services and six online midweek services. These online services continued throughout the year, including when lockdowns ended, as cathedrals were aware that some individuals were relying solely on the online services for their worship. Despite the clear difficulties of 2020, all cathedrals managed to offer at least one service a week on average, held either online or in the cathedral.

Average attendance at in-cathedral services also fell, from a midweek average of 362 adults and 108 children in 2019, to 84 and 25 respectively in 2020. However, cathedrals' online offerings meant that services were not restricted to those who could fit in the cathedral under new social distancing restrictions, and that those who were hesitant to travel could still attend. These services were often conducted over Zoom or live streamed via YouTube or Facebook, with recordings also placed on cathedrals' websites and social media channels. Cathedrals typically did not record numbers attending, but believed that attendance far outweighed pre-COVID levels, with services watched live and at a later date by people around the world.

In response to government guidelines aiming to minimise infection spread, cathedrals reported that services (both in-cathedral and online) are now shorter than they were pre-COVID. Government mandated restrictions on communal singing, both for the congregation and for cathedral choirs, have meant indoor singing is either not taking place or is taking place in a reduced form, including fewer hymns and/or smaller choirs. Cathedrals have also reduced the number and length of readings, and where in-cathedral services have taken place, these have often been ticketed (with free admission) to limit the number attending to that determined in the COVID risk assessment and ensure social distancing is observed.

The number of special services also fell in 2020 (Table 6.2), in particular the average number of baptisms, which fell from 18 in 2019, to two in 2020.

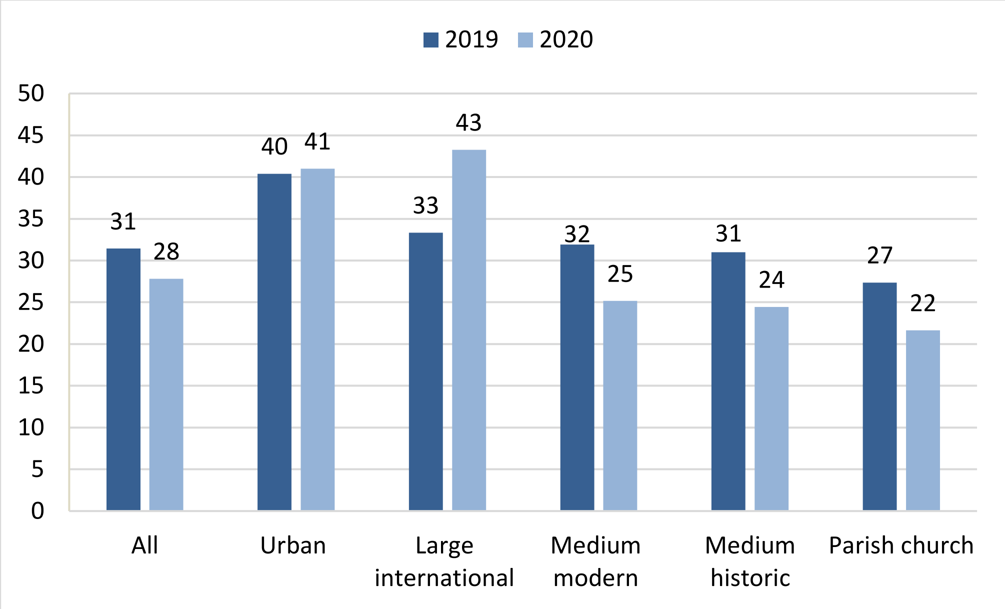
Table 6.2 Average number of special services per year)

	Baptisms		Marriages		Funerals		Memorial services	
	2019	2020	2019	2020	2019	2020	2019	2020
Large international	26	5	9	3	5	3	5	2
Medium historic	12	3	7	2	7	3	4	1
Medium modern	8	1	2	2	7	5	4	1
Urban	17	1	4	1	4	2	7	0
Parish church	25	1	3	1	8	2	2	1
All	**18**	**2**	**6**	**2**	**6**	**3**	**4**	**1**

Source: Ecorys analysis

The average number of young people serving the cathedral in 2020 during periods when the cathedral was open for public worship remained similar to the averages seen in 2019 (Figure 6.3), suggesting children and young people were happy to attend services with social distancing restrictions in place. A few cathedrals reported a growth in numbers in 2020 due to increased choir membership. Sunday school attendance has varied, with some cathedrals maintaining numbers and even seeing a small increase, while other cathedrals have seen attendance more than half in 2020. Of the cathedrals that stated they had run Sunday schools in 2019, 43% reported not running Sunday schools since the pandemic started.

Figure 6.3 Average number of children and young people involved in serving the cathedral (2019, 2020)



Source: Ecorys analysis

6.5 Opportunities for learning

Government regulations meant that all school visits to cathedrals had to cease during the 2020 lockdowns. As a result, many cathedrals furloughed their education staff during these periods. However, the majority of cathedrals were prepared to start welcoming schools as soon as visits were permitted, with fewer than 10% of cathedrals reporting making education staff redundant in 2020. Cathedrals reported that while bookings were still being made for 2020 during the lockdowns, large numbers of schools later cancelled, reflecting a reluctance to travel and a reluctance to miss any more school classes. Of the visits that went ahead, class sizes were necessarily smaller due to social distancing constraints. Cathedrals that usually greet international school parties reported that no international bookings had been taken following the first lockdown.

In recognition of schools increased reluctance to travel, by the end of 2020 around a third of cathedrals had already began offering or developing online resources specifically for schools, including online tours, talks and activity packs. These cathedrals anticipated in person visits would be reduced for some time, with online resources offering the best way to continue their education programmes. These online resources have the additional benefit of being cheaper for schools since no travel costs are involved. In the longer-term, this may mean that more schools become involved with cathedrals' education programmes, although many schools are still likely to perceive greater benefit from visiting in person, and solely remote involvement would mean little if any economic impact from these visits for cathedrals (such as gift shop purchases).

6.6 Engaging with the community

Overall, around three quarters of the community projects and initiatives that cathedrals ran or supported by March 2020 had to be discontinued or reduced as a result of COVID-related lockdowns and restrictions. The quarter of projects that continued – or even increased their reach – tended to be activities that could take place online, such as community choirs or coffee mornings for older people. Many cathedrals introduced new initiatives following the start of lockdown, including offering food shopping services for the elderly and shielding congregants, and establishing one-to-one outreach programmes where staff and volunteers directly phoned congregants to see if they needed any support.

Case study example

Consultees reported that COVID-19 has meant that much of the positive momentum of Rochester events programming has been lost. However, the Cathedral has continued to use its space in innovative ways, acting as an asymptomatic testing centre and offering to be a vaccination site. It has also integrated technology where possible, live streaming services and working with high street traders to develop a COVID-safe QR code trail to tell the Christmas story during December 2020. Despite the disruptions of COVID-19, interviewees reported that during lockdowns the Cathedral was seen as a place of mental wellbeing and not just spiritual wellbeing.

Data collected by the survey shows that the number of events taking place at cathedrals fell significantly in 2020 (Table 6.3), as the majority of planned events were postponed or cancelled. As noted in Section 4, these events can provide significant opportunities for revenue generation, with many cathedrals reporting that their inability to hold such events has had a large negative impact on their finances. Cathedrals also reported that private companies cancelled annual national and international corporate events and festivals. In many cases events have not been rescheduled, as the companies involved are unsure of when it will be safe to hold such events.

Table 6. 3 Average numbers of other uses of cathedral buildings and precincts (2019, 2020)

	Concerts		Lectures /talks		Exhibitions		Conferences		Ceremonies	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
Large international	38	8	30	3	3	1	78	9	12	2
Medium historic	39	6	14	4	6	2	43	2	7	1
Medium modern	22	5	3	0	3	2	10	1	15	0
Urban	43	4	48	8	4	1	139	9	15	0
Parish church	44	8	10	2	7	1	14	3	5	0
All	**40**	**7**	**20**	**3**	**5**	**1**	**54**	**4**	**8**	**1**

Source: Ecorys analysis

Case study example

Interviewees from Liverpool Cathedral expect the coronavirus to have a long-running effect on the Cathedral, with people feeling less secure in travelling internationally and nationally, and visitor numbers being limited by necessary social distancing constraints for some time to come. The Cathedral envisages a long-running fall in demand for international conference and corporate dinners, which previously helped the Cathedral raise a significant amount of funding. As such, the Cathedral has revised its business plan, bringing forward changes it was planning to implement over the longer term, including switching from hosting corporate to public events, and a focus on increasing visitor numbers from the city and region, to become a cathedral for the city rather than for the international visitor. While these are changes the Cathedral wanted to implement anyway, the effects of COVID have forced the Cathedral to focus on them immediately.

Case study example

COVID-19 is perceived to have had a huge impact on Gloucester Cathedral financially, and interviewees estimate the pandemic has cost the Cathedral over half of its £2.2m annual budget for 2020. With the cancellation of nearly all overseas and school visits and a reduction in UK residents travelling from further afield, the Cathedral has missed out on much of the income it would have gained from visitor donations, which in 2019 provided in excess of £595,000. The surrounding businesses to the Cathedral have also borne some of the brunt of a lack of visitors, with local cafés, who would usually be flooded with visitors from the Cathedral during events such as graduations, operating reduced menus and opening hours, even when government restrictions have lifted. Whilst the Cathedral hopes to largely rebound to its 2019 visitor numbers by 2022, interviewees did not expect overseas visitor numbers to rebound until 2023.

7.0 Conclusions

7.1 What are the economic impacts of cathedrals?

The study has found clear evidence that cathedrals make a significant contribution to their local economies. This finding is consistent with similar study in 2014 and 2004. Since 2014, the number of tourist or leisure visitors[71] that cathedrals attract has increased by 15%, driven by an increase in the number of local visitors. Overall total employment has risen by just over a quarter, from 1,870 in 2014 to 2,347 FTE staff in 2019. Linked to this rise in employment, cathedrals' total wage bill has increased by around 20% since 2014, from an estimated £42 million to £51 million per year.

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 of 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 £128 million during 2019.** Despite the 15% increase in visitor numbers, this value is similar to the £125 million estimated in 2014, as the share of overseas visitors (who are estimated to spend the most per day during a visits) has fallen, while the share of local visitors (who are estimated to spend the least per day during a visits) has risen.

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 £235 million per year**. Expressing this impact in terms of employment, suggests that cathedrals support a total of 5,535 jobs in the local economies concerned, similar to the 5,500 figure estimated in 2014.

7.2 What are the social impacts of cathedrals?

As in 2014, there is also 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.

This includes cathedral's role as places of worship, offering space for prayer and remembrance. 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.

Cathedrals benefit from the time and skills of over 15,000 volunteers, who fulfil a range of roles including welcoming visitors and assisting at services. As heritage sites and through the activities they offer, Cathedrals also provide numerous opportunities for both formal and informal learning. It is estimated that over 308,000 learners participated in organised educational activities in 2019.

7.3 How did the coronavirus affect cathedrals during 2020?

The coronavirus has brought about a number of challenges for cathedrals, particularly in the form of reduced visitor numbers. **Due to government mandated closures and restrictions on gathers, visitor numbers in 2020 (excluding those attending services and educational events) fell by approximately 70% compared to 2019.**

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[71] 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 while 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.

Visitors provide a significant source of income for cathedrals through entry fees, donations, and on-site spending in catering and retail outlets (see Section 4). As such, this fall in visitor numbers has had a significant effect on cathedrals' income levels, particularly for cathedrals dependent on the visitor economy. **Similarly, COVID-19 also resulted in a significant fall in cathedrals average non-visitor income in 2020. This was driven by a reduction of almost 80% in income generated from the use of cathedral facilities**, as interest in hiring cathedral buildings and catering services for corporate and/or public events fell. Closure and restrictions on congregation size also meant fewer people attending services in the cathedral, down from a midweek average of 362 adults and 108 children in 2019, to 84 and 25 respectively in 2020. As such, donations from the congregation fell on average. This reduced income has had a direct impact of cathedrals ability to be self-sustaining in 2020, and cathedrals estimate their finances will be constrained for some time to come. In 2020, emergency grants have provided cathedrals with much needed finances.

COVID-19 has also given rise to new opportunities, in particular in encouraging cathedrals to reach people in new ways, including live streaming their services and using Zoom to provide interactive face-to-face pastoral support. In many cases, such technologies have enabled cathedrals to reach more individuals, including individuals not physically able to attend services in the cathedral. In addition, in recognition of schools' increased reluctance to travel, by the end of 2020 around a third of cathedrals had already began offering or developing online resources specifically for schools, including online tours, talks and activity packs.

7.4 Recommendations for future research

Further research into how cathedrals are being affected by COVID-19 is needed. In particular, the impact on cathedrals' finances needs further exploration to determine how key changes related to COVID-19 are affecting cathedrals' ability to be self-sustaining. Any knock-on impact on cathedrals' ability to continue offering pre-COVID levels of support to their local communities also needs to be examined.

In addition, the 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 and motivations and behaviour by type of cathedral and type of visitor (day, staying, overseas).

Annex One: Survey Questionnaire

The Economic and Social Impacts of Cathedrals in England

We are writing to invite you to help with an important piece of research to improve and update the assessment of the economic and social impacts of England's cathedrals. This research is being undertaken by Ecorys, an independent research company, on behalf of the Association of English Cathedrals (AEC). The research will build on research undertaken in 2014 and 2004.[72] Additionally, it will explore the impact of COVID-19 on cathedrals: for example, asking for pre-COVID and current/post-COVID lockdown (2020) figures.

We would be very grateful if you could take the time to complete this survey and **return it by email by 20th November.** We expect the survey will take approximately 30 minutes to complete.

Your response to this survey will be an important component of the evidence base for the study. Where possible, we have drawn upon existing information to pre-populate sections of this form – please review this information (highlighted in light grey) and correct any inaccuracies (any new information will be shared with Association of English Cathedrals).

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. Text Boxes can be extended, allowing you to write as much as you wish. Additional rows can also be added to tables as required. To capture how services have altered as a result of COVID-19, some questions ask for information on 2020 as well as for 2019. For 2020, please provide information on the year to date unless otherwise specified.

We have produced a privacy notice that sets out how the information you share with Ecorys will be used. This is available to view at the following link https://www.ecorys.com/sites/default/files/2020-09/Privacy%20Notice%20.pdf.

Section 1: contact details[73]

Cathedral	
Contact name	
Email address	
Telephone number	

[72] The economic and social impacts of England's cathedrals (Ecorys, 2014), The economic and social impacts of cathedrals in England (ECOTEC, 2004).
[73] Information provided by AEC.

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 2019 and in 2020.

	Sunday 2019	Midweek 2019	Sunday 2020	Midweek 2020
Average no. of services in cathedral church				
Average no. of online 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 2019 and in 2020.

Average attendance[74]	Sunday 2019	Midweek 2019	Sunday 2020	Midweek 2020
Children (under 16) in cathedral				
Children (under 16) online				
Adults (16 and over) in cathedral				
Adults (16 and over) online				

3 Please provide details of the total number of people attending worship during the festivals of Easter and Christmas in 2019.

	Attendance[75]
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 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 23rd December)	

[74] Sourced from the Church of England's Cathedral Statistics (2019).
[75] Sourced from the Church of England's Cathedral Statistics (2019).

4 Please provide details of the number of special services during 2019 and during 2020. For 2020, please provide details pre lockdown (prior to 23rd March 2020) and post lockdown (after 3rd July 2020).

	2019 numbers[76]	2020 numbers (before lockdown)	2020 numbers (after lockdown)
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) attended Sunday School or were involved in serving the cathedral (singing, serving, etc.) during 2019 and 2020 (after the resumption of public worship)?

	Number 2019	Number 2020
Attend Sunday School		
Serve the cathedral		

6 Please provide details of other uses of the cathedral buildings and precincts during 2019 and during 2020.

Use	Number in 2019	Total attendance 2019	Number in 2020	Total attendance 2020
Concerts				
Lectures/talks				
Exhibitions				
Conferences/events				

[76] Sourced from the Church of England's Cathedral Statistics (2019).

Ceremonies (such as graduation days)				
Other				

7 If relevant, please provide further information about the 'Other' uses of the cathedral buildings and precincts reported in Q6 since your cathedral re-opened for public worship in 2020.

8 Please add any information or observations about changes in the use of the cathedral over the last 5-10 years excluding changes purely related to COVID-19. 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?

9 Please outline any changes in the use of the cathedral due to COVID-19. For example:

- Has the size of your congregation changed?
- Has the profile of those attending services changed (in terms of age, gender, or other characteristics)?
- Has the number and/or type of services changed significantly?
- Has the way services are delivered changed e.g. delivered via the internet?
- Has the length or frequency of services changed?

Section 3: running the cathedral

10 How many salaried posts were directly associated with maintaining and running the cathedral during 2019? 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)		

11 Please tell us how much the cathedral spent on wages and salaries in 2019 for its own (direct) employees? Please exclude employer national insurance and pension contributions.

12 On average, how many people were indirectly employed by (i.e. received payment for their work) the cathedral in 2019? (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)	

13 Please estimate the percentage of salaried staff directly employed by the cathedral, and those receiving payment for their work indirectly employed by the cathedral, in 2019 who live in the following areas (your responses for 'directly employed' should sum to 100, as should your responses for 'indirectly employed'):

	Directly employed	Indirectly employed
Within the city/town/borough		
Elsewhere in the county (if applicable)		
Outside of the county		
Sum total	100%	100%

14 Please estimate the percentage of wages paid to direct employees of the cathedral in 2019 who live in the following areas (your responses for 'directly employed' should sum to 100):

Area	Directly employed
Within the city/town/borough	
Elsewhere in the county (if applicable)	
Outside of the county	
Sum total	100%

15 Please outline any changes in employment due to COVID-19. For example:

- Has the number of people directly or indirectly employed by the cathedral changed?
- Has the number of full time or part time jobs changed?
- Has spending on wages and salaries changed?
- What proportion of workers have been furloughed and for how long?

16 Please indicate the extent to which the cathedral benefits from the following sources of finance. Please use figures from 2019 as well as 2020 to date, excluding 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/ management accounts).

	Income	
	2019	2020
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)		
Total		

17 If any of the income figures given in Q16 were atypical (for example a major grant or bequest/legacy was received or impacted by COVID-19) then please provide details in the following box.

18 Please indicate the annual spend on goods and services using figures from 2019. Please exclude expenditure on staff salaries which is covered above. Please also estimate the percentage of the total spend that goes to organisations/workers based in the local area, elsewhere in the county and outside the county. Your responses for each row should sum to 100%.

	Spend (£)	*% of spend going to organisations within the city / town / borough (%)*	*% of spend going to organisations elsewhere in the county (%)*	*% of spend going to organisations outside the county (%)*
Routine maintenance and upkeep				
Repairs/restoration				
Utility services				
Other (please specify)				

19 If 2019's expenditure figures were atypical (for example if a one-off capital project was delivered) then please provide details in the following box.

Section 4: visitors

20 Please estimate the number of visitors who came to the cathedral in the following years by visitor type (if possible, excluding those attending services and educational events). If you are unable to provide numbers, please estimate percentages for each visitor type, as a proportion of the total number of visitors who came to the cathedral in that year'.

Visitor type	Number of visitors by type per year					
	2020 (to date)	2019	2018	2017	2016	2015
Visitors from the immediate local area						
Visiting the area as part of a day trip from home						
On holiday from elsewhere in the UK (i.e. staying away from home)						

On holiday and originate from overseas						
Other						
Total number of visitors per year						

21 In 2019, how many worshippers (as asked about in section 2) could also be classed as tourists i.e. the number of people on holiday in the area who also attend a service?

22 How are visitor number estimated? (please indicate: 1. whether you have been able to exclude those attending services and educational activities from the numbers in question 19 and also 2. how accurate you believe these figures to be)

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

Yes	
No, but has plans to appoint one	
No	

24 Please estimate the annual turnover by visitor type resulting from visits to the cathedral, using figures from 2019.

	Turnover			
Visitor type	Admission/entry fees (to the cathedral/area of cathedral/exhibition)	Donations	Refectory/restaurant	Cathedral retail outlets
Visitors from the immediate local area				
Visiting the area as part				

of a day trip from home				
On holiday from elsewhere in the UK (i.e. staying away from home)				
On holiday and originate from overseas				
Other				
All visitors				

25 How does the cathedral promote itself to visitors?

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

Section 5: other activities

26 How many children/students attended any cathedral schools during 2019? If the cathedral does not have a school, please write 'not applicable'.

Number of students[77]	

27 How many children/students attended organised educational events during 2019 (either which take place in the cathedral or are organised by the cathedral and take place elsewhere)? Please note this includes any children attending educational events, not just children from the cathedral school.

	Number of students[78]
Nursery/pre-prep/KS1	
Primary/KS2	
Secondary/Senior/KS3/KS4	
16-18 years old	
Over 18 years old	

[77] Sourced from the Church of England's Cathedral Statistics (2019).
[78] Sourced from the Church of England's Cathedral Statistics (2019).

28 Please add any information or observations about the children/students attending organised educational events (including the impact of COVID-19 and any longer-term trends in frequency of/demand for visits, group sizes, distances travelled). Please include information related to any children attending educational events, not just children from the cathedral school.

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

Yes	
No, but has plans to appoint one	
No	

30 How many of the following did the cathedral have in 2019?

	Total[79]
No. of choirs	
No. of choristers and lay clerks	
No. of voluntary choir members	
No. of musicians	

31 Are there any associated trusts, friends' groups and societies connected to the cathedral? Please report information prior to lockdown i.e. prior to 23rd March 2020.

Group	Purpose/aims	Number of people involved

[79] Sourced from the Church of England's Cathedral Statistics (2019)

32 Prior to COVID-19 and lockdown measures beginning on 23rd March 2020, how many individuals were serving the cathedral in any sort of voluntary/unpaid capacity? For example, bell ringers, guides, flower arrangers etc.

No. of people volunteering[80]	

33 Please provide an estimate of the percentage of these 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	

34 Please provide an estimate of the number of these volunteers who undertook the following tasks (prior to lockdown measures starting on 23rd March 2020), along with the average number of volunteering hours contributed per week for each task. The average number of volunteering hours per week for each task should cover all volunteers for that task, rather than an average value per individual.

	Number of volunteers	Average number of hours contributed per week
Welcoming visitors		
Providing guided tours		
Assisting at services e.g. servers, stewards, Eucharistic ministers, readers, producing rotas		
Bell ringing		
Flower arranging		
Embroidery		
Providing administrative support		
Fundraising		
Fabric Advisory Committee		
Other cathedral committee members e.g. Chapter members		
Other (please state)		

[80] Sourced from the Church of England's Cathedral Statistics (2019)

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

Yes	
No, but has plans to appoint one	
No	

36 Please indicate (with a yes/no/don't know response) if, prior to lockdown measures starting on 23rd March 2020, the cathedral was supporting any specific projects or initiatives aimed at particular sections of the community or local organisations?

Activity[81]	Our church runs this activity	Our church hosts this activity in its own building(s)	Our church does this activity in partnership with others	Our church supports this activity in other ways
Community cafe				
Food bank				
Holiday/ Breakfast/ After-school clubs for children				
Lunch club, coffee morning, or similar hospitality for older people				
Money matters & debt advice				
Night shelter or other homelessness provision				
Parent/carer and toddler group or play group				

[81] Types of projects/initiatives taking place sourced from Statistics for Mission 2019.

Pastoral provision for the wider community (e.g. Street Pastors, counselling/ support, befriending schemes)				
Youth work (for wider community)				
Other community activity (please specify)				

37 Please provide information on how frequently each initiative was held prior to lockdown measures starting on 23rd March 2020. If the cathedral provides a combination of initiatives, please provide separate information for each initiative.

Activity	Not applicable / we do not run, host or deliver this activity in partnership with others	Daily	Several times a week	Weekly	Once every two weeks	Monthly	Other (please specify)
Community cafe							
Food bank							
Holiday/ Breakfast/ After-school clubs for children							
Lunch club, coffee morning, or similar							

hospitality for older people							
Money matters & debt advice							
Night shelter or other homelessness provision							
Parent/carer and toddler group or play group							
Pastoral provision for the wider community (e.g. Street Pastors, counselling/ support, befriending schemes)							
Youth work (for wider community)							
Other community activity (please specify)							

38 Please provide details on the average numbers attending or supported by each session (prior to lockdown measures starting on 23rd March 2020) for the below programmes and initiatives. If the cathedral provides a combination of initiatives, please provide separate information for each initiative.

Activity	Not applicable / we do not run this activity	1-10	11-20	21-30	31-40	41-50	More than 50 (please write in a single figure estimating the number of people attending per session)
Community cafe							
Food bank							

Holiday/ Breakfast/ After-school clubs for children							
Lunch club, coffee morning, or similar hospitality for older people							
Money matters & debt advice							
Night shelter or other homelessness provision							
Parent/carer and toddler group or play group							
Pastoral provision for the wider community (e.g. Street Pastors, counselling/ support, befriending schemes)							
Youth work (for wider community)							
Other community activity (please specify)							

39 Please indicate if support for any specific projects or initiatives aimed at particular sections of the community or local organisations was: 1) discontinued, 2) reduced 3) level of support remained the same or 4) greater, during lockdown?

Activity	Our cathedral runs this activity	Our cathedral hosts this activity in its own building(s)	Our cathedral does this activity in partnership with others	Our cathedral supports this activity in other ways
Community cafe				
Food bank				
Holiday/ Breakfast/ After-school clubs for children				
Lunch club, coffee morning, or similar hospitality for older people				
Money matters & debt advice				
Night shelter or other homelessness provision				
Parent/carer and toddler group or play group				
Pastoral provision for the wider community (e.g. Street Pastors, counselling/ support, befriending schemes)				
Youth work (for wider community)				

Other community activity (please specify)				

40 Please use this space to tell us about any other activities not covered previously, or any other comments. Many thanks for taking the time to complete this survey.

Many thanks for taking the time to complete this survey.