

Economic Impact Assessment

Leicester Cathedral

Executive Summary

5 October 2017



Letter of Introduction



The traditional role of a cathedral as a place of Christian prayer and worship, open to diverse and disparate parts of our society, is still widely recognised and applauded, even in an age where traditional understandings of faith can no longer be assumed, and in UK's first plural city where diversity of faith is a gift to be celebrated and affirmed.

What is less often appreciated is the tangible contribution a cathedral can make to the economy of its community, through direct employment but also as a place that draws many into the city, and plays its proper part in the local economy that

results from that. That is especially true in Leicester, given widespread and continuing interest in the extraordinary story of the discovery in 2012 of the mortal remains of King Richard III, and their final laying to rest in our cathedral church in March 2015.

This report, commissioned with the support of the Leicester and Leicestershire Enterprise Partnership, seeks to document something of that more tangible impact Leicester Cathedral makes on our city and county. And as part of our ongoing development project, *Leicester Cathedral Revealed*, this report also makes the case for how much more might be achieved as much in those ways as in the many other areas a cathedral can serve, and add value to its community.

Leicester Cathedral aspires to be “a beating heart for city and county”. It does so in many ways, through prayer and worship, through service to the vulnerable, and as a place of gathering for many. What this report establishes is how much it also achieves in economic terms.

I commend it not only to those who already feel a strong sense of belonging to the Cathedral and its life, but also to the wider audience of friends and partners. Our Cathedral is vital to the future development of Leicester and Leicestershire. Please join with us and help us to maximise this impact for the benefit of all.

The Very Revd David Monteith

Dean of Leicester

Executive Summary

Headline Economic Impacts

The research carried out here demonstrates that Leicester Cathedral makes an overall economic impact of £8.7 million per annum. Of this impact, £6.0 million is directly related to the work of Leicester Cathedral and £2.7 million to indirect and induced effects per annum.

Following the completion and opening of the project *Leicester Cathedral Revealed*, it is estimated that there will be an overall economic impact of £15.0 million per annum of which £10.6 million will be directly related to the work of Leicester Cathedral and £4.4 million to indirect and induced effects per annum.

Nature of the research

This economic impact study has involved desk research, consultation with key stakeholders in Leicester, Leicestershire and elsewhere, qualitative and quantitative research, observational research and comparative analysis. The context of cathedral tourism is discussed in the context of tourism overall.

The Richard III factor

A key issue arising from this study is the ongoing centrality of Richard III within the visitor offer, at both the Cathedral and the King Richard III Visitor Centre.

The impact of the discovery and subsequent interment of KRIII is likely to lessen over time and evidence suggests this is happening already but both by design and serendipity a 'Cathedral Quarter' has emerged in which the KRIII Visitor Centre plays an important part., The link both physically and emotionally between the Cathedral and the KRIII Visitor Centre needs to be reinforced and anecdotally there is a view that the 'public' do not always make the connection between both sites. There would be mutual benefit in developing closer co-operation and more robust cross marketing to sustain visitor flow across both sites and to ensure that the important role of the Cathedral in Leicester's tourist offer is more widely recognised.

Future prospects

Leicester's international and national profile as a place for tourism has significantly increased in the last three years with the City and County hosting nationally recognised attractions. The heightened attention has led to significant increased footfall from visitors. The £11.3 million project *Leicester Cathedral Revealed* will reinforce the role of the cathedral as an important cultural and faith gathering point in the UK's first plural city.

The Cathedral, through the project *Leicester Cathedral Revealed*, should position itself such that the Tomb of King Richard III does not become the sole focus of the casual visitor. We note that the Cathedral has a good story to tell around the Victorians and its Arts & Crafts

heritage, and it is well placed to do so at the local and county level where it will fill a gap in the regional narrative.

Recommendations

Based on the research, impacts and visitor feedback, a number of additional recommendations have been made:

1. Managing Visitor Experiences

The visitor welcome at the Cathedral is informal and friendly, but is also increasingly dated in comparison to the offer at other cathedrals. With the Cathedral's aspiration to attract 190,000 visitors a year, a more formal visitor welcome facility would be congruent with this approach.

- Work needs to be done to improve clarity around visitor experiences and expectations.
- General visitor hours should be made clearer through the website.
- It may be effective to provide mobile phone app facilities to make donations .

2. Maximising Visitor Revenue

- The introduction of contactless donations would provide an additional way to encourage donations.
- The text giving system needs to be more widely and effectively promoted
- Whilst a full gift shop may not be viable, the fact that the Cathedral provides welcoming staff means that resources exist to operate a small visitor focussed offer.
- The research suggests that a lower donation fee may increase the number of donations

3. Finding the Cathedral

- Cathedral signage is limited in the City
- The research presented here identifies that the Cathedral is a major attractor to the city – the creation of a named and formal Cathedral Quarter would create a wider identify for this area of the city
- The High Street west exit from the HighCross Shopping Centre, has a large poster promoting the KRIII Visitor Centre but no mention of the Cathedral.

4. Partnership Working

- A partnership approach has been instigated through the Three Places Group that promotes the Cathedral, the KRIII Visitor Centre and Bosworth Battlefield Heritage Centre and the Cathedral is a member of the City's Tourism Forum and Heritage Partnership.

The Cathedral should join the County wide Tourism Advisory Board if it is to play its proper place in the local tourism market and this would help raise.