

CHURCH LEGACY
A lasting gift to your church

National Analysis of Legacy Data 2010 – 2016

 THE CHURCH
OF ENGLAND
www.churchlegacy.org.uk

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1 Data and Definitions

Data Specification

A key specification was that this analysis should incorporate only figures actually submitted by parishes: parishes which do not submit a return, are assumed to have received no legacies. This treatment differs from many of the analyses provided by the Church of England, which calculated estimates for missing returns. Hence the figures reported here are lower than those from the National Church. Please note 2017 figures are expected to be available by May 2019.

Definitions

Legacy: A gift by will, usually money left to a person or organisation.

Residuary: A gift of the remainder of the estate after all other payments have been made.

Pecuniary: A gift of a fixed sum of money.

Restricted: The legacy is to be spent on a particular purpose or project.

Unrestricted: There are no limitations on how the legacy is to be spent.

Parish Finance Returns

The data is collected from Parish Finance Returns, which all parishes are requested to complete and submit. The responses are analysed here with all imperfections and misunderstandings which may be present. Parishes are required to report Legacy income as follows:

- Restricted and Unrestricted Legacies in £
- Number of New Legacies notified to the Parish during the year.³

Pecuniary vs. Residuary

Parishes do not specify whether a legacy received is Pecuniary or Residuary. Therefore, where total legacies received are divisible by 100, we have classed this as a Pecuniary legacy. Where a legacy received is not divisible by 100, we have classed this as a Residuary legacy.

Common Baseline

All data has been brought to a common baseline as in 2016, for example the former Dioceses of Bradford, Ripon and Wakefield have been combined for all years to give “Leeds”, and changes in church, parish and other allocations, similarly standardised.

Data Variations

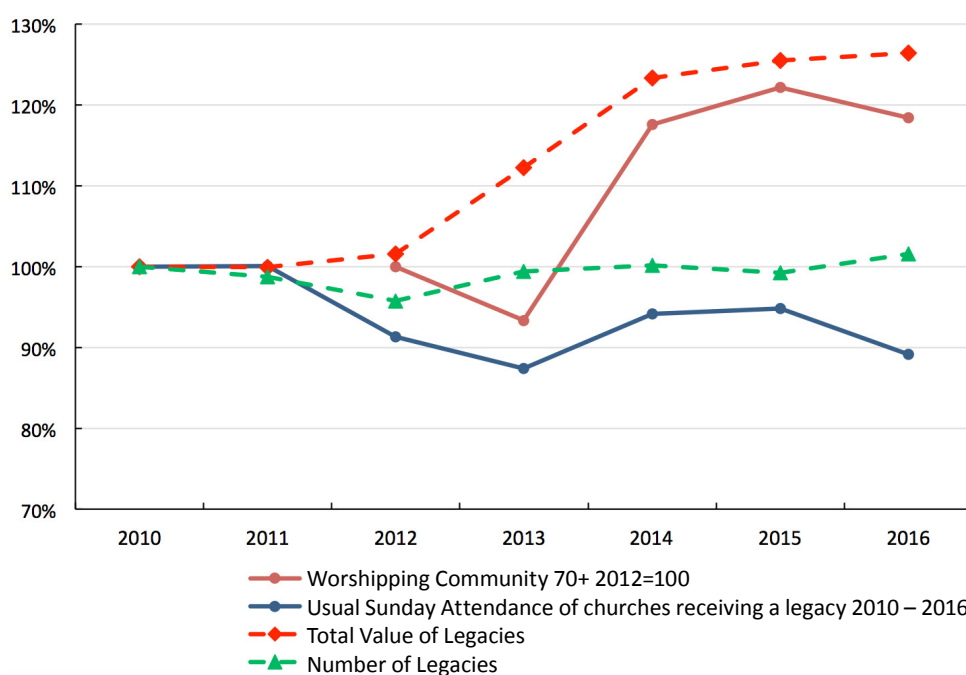
By their nature, legacies are typically substantial, one-off events and therefore extremely variable from one year to another. These variations are explored in more detail in the rest of this report, analysed by Income, Type, Size, Region and Diocese.

³ As legacies may not actually be paid in the year notified, and may be paid over several years, this may or may not be reflected in actual receipts. It may be noted that if accrual accounting is used by the Parish, and credit is taken immediately for the legacy, a “negative legacy” may accrue in subsequent years if the estate is unable to pay all pecuniary legacies in full.

2 Introduction

This Report analyses Legacy Receipts reported by Parishes in the Church of England (except for the Diocese of Europe) between 2010 and 2016. The findings highlight trends, provide greater knowledge and understanding of our legacy income and identify potential avenues for future growth.

Changes in Number and Values of Attendees
based on 2010 as 100%



In general terms, over the 7-year period reviewed, the value of Church of England legacies received has increased and the number of legacies received has remained broadly constant. Income growth has been driven by rising legacy values due to the buoyant economy / housing market over the period.

Looking at parishes where legacies have been received - the worshipping community aged over 70 has increased.² This is the largest 'donor pool' for legacies, and therefore suggests greater potential growth for legacies.

Usual Sunday attendance has declined, as have most other key measures of attendance (between 10% and 15% between 2006 and 2016.)³

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This graph indicates that legacies are not only a current area of growth, but also have the potential to become an important area of growth in the future.

² Figures for the Worshipping Community aged over 70 are only available from 2012 onwards.

³ Church of England Research and Statistics, Statistics for Mission 2016, London, 2017

3 Management Overview

Legacies are a vital source of income to the Charity Sector and to the Church of England. In 2017, UK legacy giving was worth a total of £2.8 billion representing 14% of the fundraised income received by UK charities.

In 2016, Church of England actual PCC legacy giving was worth a total of £46.7 million representing 7% of total PCC voluntary income. Almost 4,000 legacies are received each year, with 1 in every 4 churches benefiting from a legacy.

However, the Church of England legacy income accounts for just 1.7% of the UK legacy market in value terms and 3.2% in numbers terms. In both value and number terms, our market share has been falling over the past 7 years.

A Significant Opportunity

Although legacy income is a life line for many parishes, there is a lack of urgency when it comes to prioritising and promoting it. However, the generations who will give the legacy gifts of the future, are making their wills now.

The opportunity to grow legacy income for the Church is potentially significant. This is mainly due to our church members age demographic, levels of prosperity and strategic advantages over our charity competitors.

A Time Limited Opportunity

But this is a time limited opportunity. The baby boomer generation (those born between 1946 and 1964) are considerably more affluent than previous generations and the generations to come. They represent the key audience for legacy fundraisers due to their potential impact on legacy incomes over the next three decades.

The window of opportunity to grow legacy income will disappear in less than 30 years' time.

Call to Action

We must address this limited 'window of opportunity' **now**, to ensure we maximise the promotion and adoption of legacy income over the next three decades.

If we do nothing, we will inevitably experience a sharp decline in legacy income; legacy income which is needed for mission, for ministry and for the future of our faith.

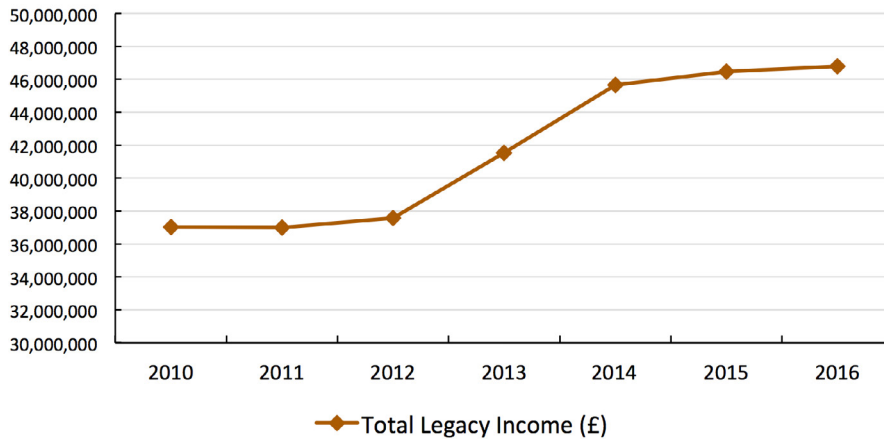


The findings of this Report support our claim that legacies can offer real term growth for parishes, but only if greater levels of resource and investment is provided to maximise their promotion and adoption.

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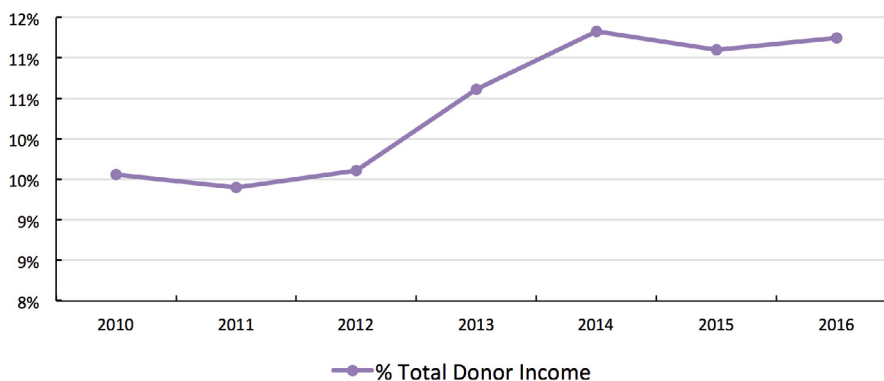
Categorisation by Income

Total Legacy Income (£)



Actual Total Legacy Income was £46.7m in 2016 and has grown on average by 2.2% YOY since 2010 (2.05% in real terms). Income growth has been driven by rising legacy values.

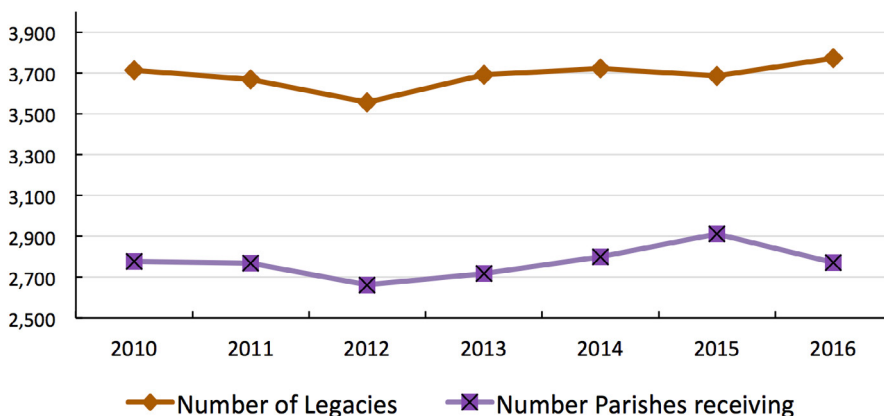
% Total Donor Income



Legacy income as a percentage of donor income currently represents 11%, seeing an average 2% YOY growth since 2010.

Total Donor Income has risen by 7.3% over the 7-year period whilst legacy income has risen by 26.3%.

Total Number of Legacies



The number of legacies received has remained broadly constant since 2010. This does not follow the number of Total Deaths suggesting our market share is falling.

Total Actual Annual Legacy Income from 2010 – 2016

Year	Total Legacies £	Mean Legacy £	Total Donor Income £	% of Donor Income
2016	46,782,384	12,399	415,814,460	11.25%
2015	46,461,353	12,608	418,603,711	11.10%
2014	45,658,851	12,271	403,085,149	11.33%
2013	41,549,723	11,254	391,546,345	10.61%
2012	37,586,550	10,567	391,133,435	9.61%
2011	36,991,136	10,085	393,557,543	9.40%
2010	37,018,768	9,965	387,272,709	9.56%
Total	292, 048, 765			

Total Actual Annual Number of Legacies from 2010 – 2016

Year	Total Number	Number of Parishes Receiving a Legacy
2016	3,773	2,773
2015	3,685	2,913
2014	3,721	2,799
2013	3,692	2,718
2012	3,557	2,663
2011	3,668	2,769
2010	3,715	2,776
Total	25,811	

Key Findings

The average 2.2% YOY increase in legacy income since 2010 and the number of legacies received remaining broadly constant is indicative of a buoyant economy / housing market over the 7-year period. Only greater promotion of legacies will yield actual growth beyond the economy.

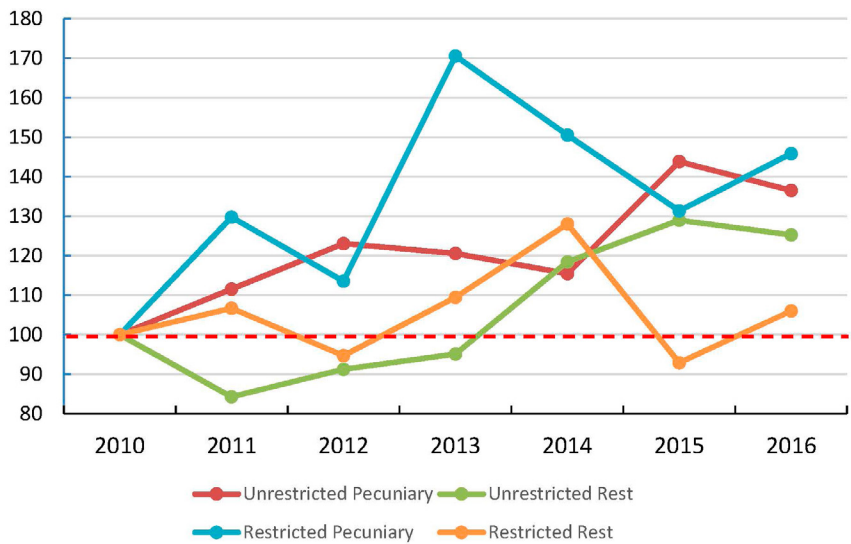
Our Goals

Our short to medium term goals are to increase:

- Total Legacy Income by 4% YOY
- Residuary Gifts by 1% YOY
- The Number of Legacies by 2% YOY

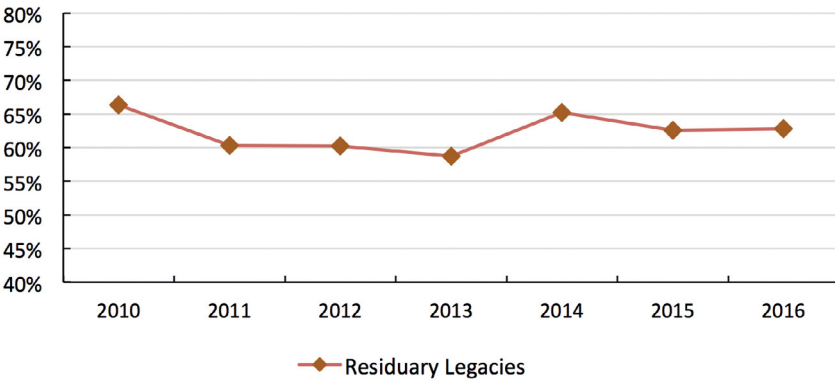
5 Categorisation by Type

Legacy Income from 2010=100



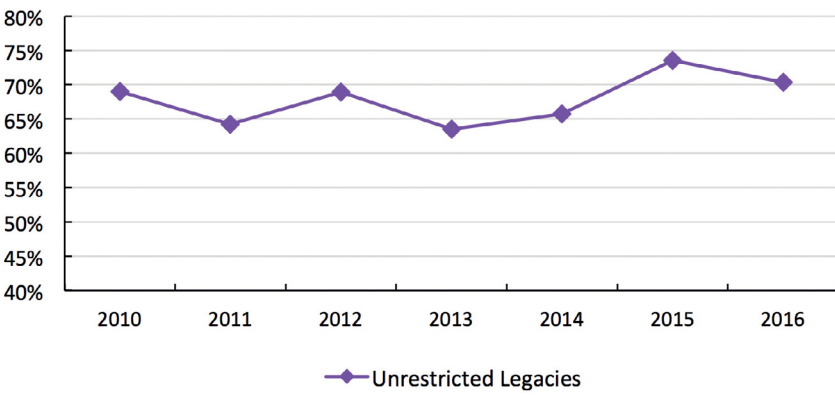
The breakdown of Legacy Income shows that the number of pecuniary gifts continue to increase at a greater rate than the number of residuary legacies. It also shows a positive trend towards unrestricted legacies increasing.

Residuary share of Legacies by £ Value



Collectively the greatest number of legacies received are pecuniary (80%), but the greatest value are residuary. This graph shows that 62% of total legacy income is from residuary gifts.

Unrestricted share of Legacies by £ Value



Collectively the greatest number of legacies received are unrestricted, which enables greater flexibility at a parish level.

Total Actual Annual Legacy Income from 2010 – 2016 (value)

Year	Unrestricted Total £	Unrestricted Pecuniary	Unrestricted Residuary	Restricted Total £	Restricted Pecuniary £	Restricted Residuary £	Total Legacies £
2016	32,912,173	11,195,300	21,716,873	13,870,211	6,215,500	7,654,711	46,782,384
2015	34,156,015	11,790,400	22,365,615	12,305,339	5,598,100	6,707,239	46,461,353
2014	30,002,644	9,468,200	20,534,444	15,656,207	6,415,200	9,241,007	45,658,851
2013	26,378,920	9,885,700	16,493,220	15,170,803	7,269,500	7,901,303	41,549,723
2012	25,911,200	10,089,000	15,822,200	11,675,350	4,838,700	6,836,650	37,586,550
2011	23,757,727	9,145,400	14,612,327	13,233,409	5,529,400	7,704,009	36,991,136
2010	25,537,885	8,198,400	17,339,485	11,480,883	4,262,300	7,218,583	37,018,768

Total Actual Annual Number of Legacies from 2010 – 2016 (2010 = 100)

Year	Unrestricted Total	Unrestricted Pecuniary	Unrestricted Residuary	Restricted Total	Restricted Pecuniary	Restricted Residuary	Total Legacies
2016	128.9	136.6	125.2	120.8	145.8	106.0	126.4
2015	133.7	143.8	129.0	107.2	131.3	92.9	125.5
2014	117.5	115.5	118.4	136.4	150.5	128.0	123.3
2013	103.3	120.6	95.1	132.1	170.6	109.5	112.2
2012	101.5	123.1	91.2	101.7	113.5	94.7	101.5
2011	93.0	111.6	84.3	115.3	129.7	106.7	99.9
2010	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Key Findings

Pecuniary and Residuary legacies (value and number) have increased. NB the increase in Residuary legacies enables the Church of England to achieve greater levels of income growth.

An increase in Unrestricted legacies is encouraging as it provides parishes with greater flexibility to use monies received for the needs and priorities of the church at the time.

Our Goals

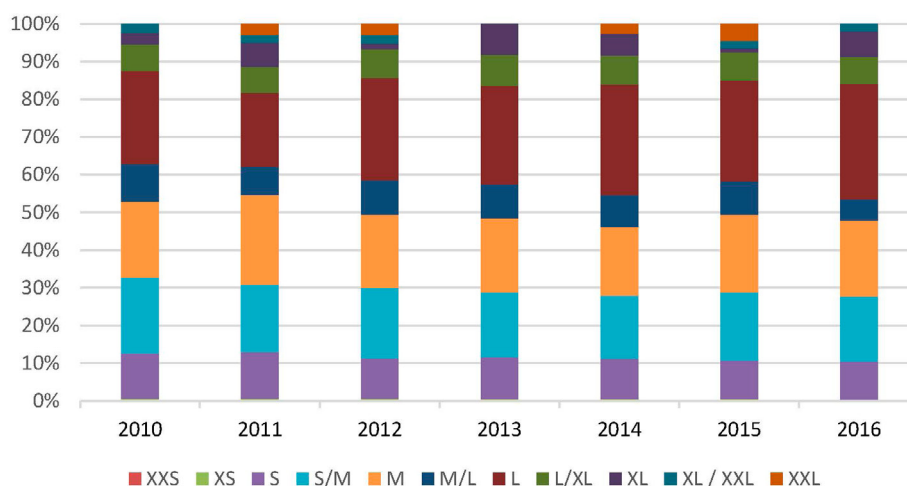
Our medium to long term goals are to increase:

- The Number of Residuary Gifts by 1% YOY
- The Number of PCC Legacy Policies to 50% (currently est. 20%)
- The Number of Unrestricted Legacies

6 Categorisation by Size

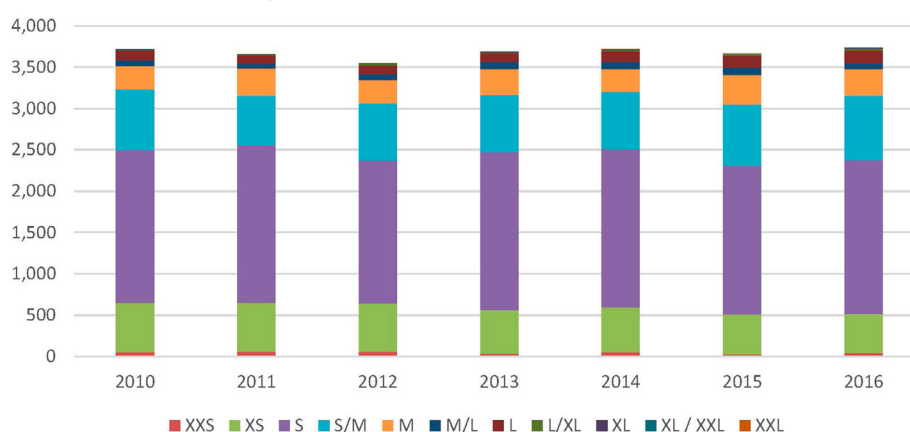
When conducting Legacy Income Analysis, legacies are grouped into Data Size Categories⁴, to better understand the value and number of small, medium, large and extra-large legacies received.

Total Legacies by Value



Looking at a proportional overview of values we can see that legacies of all sizes are received in a fairly equal measure from 2010 – 2016 and therefore we are not dependent on receiving one size category to uphold levels of annual income.

Total Legacies by Count



Although the Size Category Large (£100,000 - £299,999) accounts for the principal proportion of legacy income, the Size Category Small (£1,000 - £9,999) accounts for the substantial number of legacies received. This is followed by Small – Medium (£10,000 - £29,999) and XS (£100 - £999).

⁴These Data Size Categories are used by all charities and provide a means of comparison across the legacy sector. An overview of the Data Categories can be found in Appendix A, page 17

Data Categories - Value of Legacy Income from 2010 – 2016 (£)

Year	XXS - S/M £1 - £29k	M £30k +	M/L £70k +	L £100k+	L/XL £300k+	XL/XXL £500k - £1m+	Total Income
2016	12,956,454	9,393,793	2,656,086	14,345,702	3,325,767	4,104,979	46,782,781
2015	13,397,965	9,543,237	4,076,329	12,507,223	3,414,455	3,522,145	46,467,354
2014	12,268,573	7,899,355	3,737,071	12,845,854	3,388,829	3,654,885	43,794,567
2013	11,977,978	8,153,476	3,743,809	10,878,841	3,416,148	3,379,471	41,549,723
2012	11,275,924	7,306,359	3,417,749	10,207,935	2,895,155	2,487,532	37,590,654
2011	11,380,563	8,800,151	2,766,529	7,269,162	2,549,745	4,224,986	36,991,136
2010	12,130,624	7,454,450	3,676,519	9,128,572	2,606,003	2,022,600	37,018,768

Data Categories – Number of Legacies Received from 2010 – 2016

Year	XXS - S/M £1 - £29k	M £30k +	M/L £70k +	L £100k+	L/XL £300k+	XL/XXL £500k - £1m+	Total Income
2016	3,157	321	66	161	23	10	3,738
2015	3,050	356	88	146	20	6	3,666
2014	3,203	277	80	131	16	10	3,717
2013	3,166	313	82	108	13	7	3,689
2012	3,061	280	73	111	13	10	3,548
2011	3,162	324	58	89	12	10	3,655
2010	3,231	283	72	119	7	3	3,715

Key Findings

We are dependent on receiving a high number of Small and Small to Medium Size legacies, which although relatively low in value, collectively make up around two thirds of our legacy income. Extra Large legacies are few in number, however they significantly impact the growth in overall legacy income. These Data Categories greatly influence the variation in growth/decline from year to year.

Our Goals

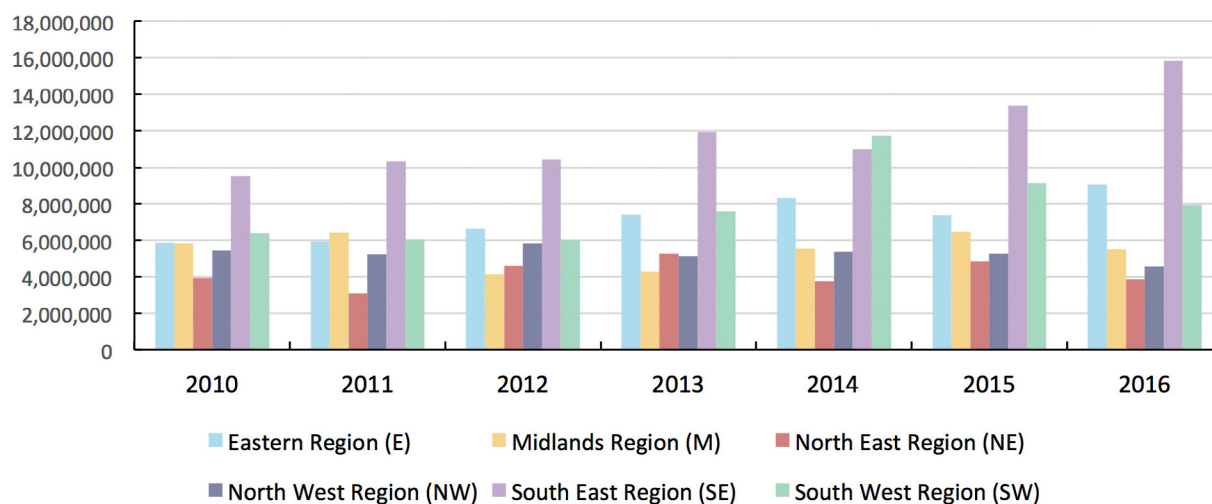
Our medium to long term goals are to increase:

- The Number of Small and Small – Medium Size Legacies (pecuniary)
- The Number of Medium, Large and Extra Large Size Legacies (residuary)

7 Categorisation by Region

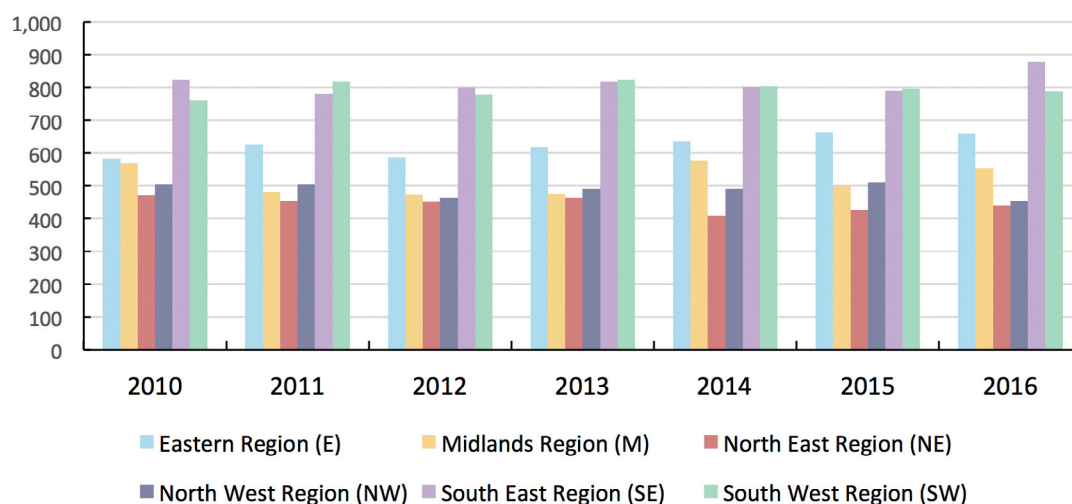
Dioceses can be categorised by regions. This structure enables Dioceses to work together and compare missional / financial statistics given a similar (but by no means the same) geographical area.⁵

Legacy Income in £ by Region



Income has grown fastest in the 3 regions – Eastern, South East and South West which is primarily an economic (house price) effect.

Count of Legacies by Region



The only region to see significant number growth is the Eastern Region, which mirrors patterns in the wider legacy market.

⁵ A breakdown of Dioceses and their Regions can be found in Appendix B, page 18

Value of Legacies by Region from 2010 - 2016 (£)

Year	Eastern E	Midlands M	North East NE	North West NW	South East SE	South West SW	Total Income
2016	9,068,982	5,482,003	3,863,175	4,583,029	15,827,022	7,958,173	46,782,384
2015	7,357,294	6,438,676	4,869,214	5,276,630	13,398,742	9,120,797	46,461,353
2014	8,312,110	5,534,041	3,765,088	5,361,626	10,981,445	11,704,541	45,658,851
2013	7,417,720	4,259,655	5,258,747	5,117,665	11,912,932	7,583,004	41,549,723
2012	6,606,603	4,123,850	4,604,241	5,825,442	10,422,060	6,004,354	37,586,550
2011	5,924,037	6,424,339	3,073,719	5,225,704	10,313,200	6,030,137	36,991,136
2010	5,886,674	5,847,580	3,952,000	5,422,431	9,513,874	6,396,209	37,018,768

Number of Legacies by Region from 2010 - 2016

Year	Eastern E	Midlands M	North East NE	North West NW	South East SE	South West SW	Total Income
2016	659	554	439	453	879	789	3,773
2015	662	498	427	512	790	796	3,685
2014	636	578	410	490	803	804	3,721
2013	619	476	464	491	817	825	3,692
2012	587	473	452	465	801	779	3,557
2011	627	481	454	505	782	819	3,668
2010	583	571	472	505	824	760	3,715

Key Findings

The highest value and number of legacies received are in the South East, South West and Eastern Regions. This is not surprising as residual legacies are influenced by property values resulting in a higher than average size of legacy. Legacies are often first included in a will by people aged 65 and over, therefore popular retirement destinations will see a higher than average number of legacies.

Finally the findings reflect the broader trend of levels of giving being higher in the South than in the North of the country.

Our Goals

Our medium to long term goals are to increase:

- Our work with all Dioceses in all Regions
- Our work with churches in high value property and retirement destination parishes

8 Categorisation by Diocese

Value of Legacies in Dioceses from 2010 – 2016 (£)

No.	Diocese Name	2010	2011	2012	2013	2014	2015	2016
1	Bath & Wells	1,064,624	1,006,590	825,437	1,132,539	2,070,572	961,952	1,095,336
2	Birmingham	1,134,491	745,227	534,423	614,826	428,913	1,496,227	919,559
3	Blackburn	1,066,708	1,259,899	711,869	1,270,862	550,985	712,339	1,649,276
5	Bristol	265,414	300,368	624,288	417,259	988,831	920,813	769,388
6	Canterbury	918,567	613,226	455,631	435,709	575,652	750,518	552,974
7	Carlisle	578,284	1,575,564	2,084,072	517,555	914,346	1,157,549	417,838
8	Chelmsford	1,061,169	550,351	1,186,703	1,199,694	2,311,175	1,885,595	1,767,096
9	Chester	899,646	662,118	622,304	867,217	1,080,369	1,365,119	1,001,619
10	Chichester	1,745,159	2,237,607	3,530,357	1,719,790	1,378,245	2,855,940	2,523,917
11	Coventry	1,055,629	854,203	559,796	499,597	764,591	481,736	813,743
12	Derby	514,729	1,082,362	269,290	539,094	494,518	423,712	770,319
13	Durham	382,183	263,309	295,147	312,406	492,390	479,322	531,078
14	Ely	943,608	480,024	263,994	829,787	1,571,764	1,052,425	1,561,456
15	Exeter	1,668,910	1,543,871	1,752,119	1,812,985	2,092,727	1,845,765	1,383,823
16	Gloucester	777,415	848,003	323,404	767,784	623,876	706,073	1,401,872
17	Guildford	1,373,187	753,812	539,256	1,712,273	2,311,047	827,371	2,216,984
18	Hereford	254,026	249,203	853,138	380,461	394,577	539,809	729,502
19	Leicester	169,634	286,446	72,653	58,001	632,316	218,711	205,145
20	Lichfield	784,079	1,506,440	327,155	563,873	1,096,151	1,421,667	1,297,983
21	Lincoln	711,170	1,076,137	1,843,041	1,059,195	573,721	820,852	651,599

No.	Diocese Name	2010	2011	2012	2013	2014	2015	2016
22	Liverpool	1,198,661	560,159	1,440,521	1,058,803	1,822,950	872,952	546,208
23	London	1,255,455	2,337,758	1,775,628	2,526,192	1,928,083	2,586,101	3,400,835
24	Manchester	1,647,005	1,039,429	769,987	1,307,068	866,836	1,110,281	941,980
25	Newcastle	394,422	401,144	877,266	1,130,583	476,172	912,573	444,117
26	Norwich	831,564	697,224	759,303	979,223	1,294,231	854,373	1,075,235
27	Oxford	1,657,058	1,594,475	1,255,712	1,812,409	1,978,148	3,005,968	3,192,927
28	Peterborough	884,982	699,150	553,759	208,357	411,965	536,448	943,466
29	Portsmouth	457,928	238,191	433,296	713,603	1,281,497	743,600	842,873
31	Rochester	717,018	710,227	735,128	1,219,059	1,489,776	848,226	1,750,919
32	St Albans	659,258	1,682,020	1,060,323	2,059,028	1,448,590	828,364	2,118,050
33	St Eds & Ips	794,923	739,131	939,480	1,082,436	700,664	1,379,237	952,080
34	Salisbury	902,708	879,480	578,752	700,244	2,685,267	1,687,363	871,520
35	Sheffield	371,479	227,632	408,398	551,417	388,577	289,662	460,611
36	Sodor & Man	32,127	128,535	196,689	96,160	126,140	58,390	26,108
37	Southwark	1,847,430	2,066,095	2,130,348	2,487,500	1,320,494	2,524,618	2,188,466
38	S'well & Notts	655,652	692,584	613,143	1,130,131	1,141,239	1,316,328	355,414
39	Truro	297,770	313,681	496,241	778,698	1,161,157	1,240,792	867,807
41	Winchester	961,440	899,953	970,817	1,259,892	800,614	1,014,439	725,554
42	Worcester	1,279,340	1,007,874	894,252	473,672	581,736	540,486	390,338
43	York	1,537,932	1,002,094	1,846,519	1,947,586	1,246,376	1,463,705	1,270,872
44	Europe	0	0	0	0	0	0	0
46	Leeds	1,265,984	1,179,540	1,176,911	1,316,755	1,161,573	1,723,952	1,156,497
Total Income		37,018,768	36,991,136	37,586,550	41,549,723	45,658,851	46,461,353	46,782,384

Number of Legacies in Dioceses from 2010 – 2016

No.	Diocese Name	2010	2011	2012	2013	2014	2015	2016
1	Bath & Wells	154	160	134	123	137	150	149
2	Birmingham	54	57	49	52	58	62	74
3	Blackburn	87	137	111	119	114	113	108
5	Bristol	42	54	45	40	52	46	48
6	Canterbury	77	66	60	65	49	56	53
7	Carlisle	90	100	78	79	100	101	84
8	Chelmsford	124	116	104	141	140	126	116
9	Chester	124	75	88	94	108	95	87
10	Chichester	197	147	221	221	188	185	181
11	Coventry	74	63	60	75	85	63	70
12	Derby	67	63	62	63	75	73	83
13	Durham	48	60	44	60	40	47	43
14	Ely	57	63	52	78	75	88	88
15	Exeter	169	159	182	193	189	157	135
16	Gloucester	74	88	96	117	80	73	81
17	Guildford	109	107	86	94	105	104	93
18	Hereford	54	44	60	51	45	63	71
19	Leicester	57	33	27	27	50	32	22
20	Lichfield	143	82	60	81	128	81	101
21	Lincoln	69	55	64	72	64	78	85

No.	Diocese Name	2010	2011	2012	2013	2014	2015	2016
22	Liverpool	100	88	89	85	81	102	63
23	London	113	109	120	124	128	134	142
24	Manchester	93	93	86	103	79	98	103
25	Newcastle	47	50	58	58	49	52	58
26	Norwich	100	120	94	96	119	96	85
27	Oxford	133	149	135	124	156	147	173
28	Peterborough	55	73	75	53	72	71	72
29	Portsmouth	39	51	53	72	80	56	58
31	Rochester	83	96	79	85	87	67	98
32	St Albans	79	94	83	93	79	115	119
33	St Eds & Ips	99	106	115	86	87	88	94
34	Salisbury	137	124	111	102	105	115	117
35	Sheffield	56	40	51	43	52	47	57
36	Sodor & Man	11	12	13	11	8	3	8
37	Southwark	112	108	100	104	90	97	139
38	S'well & Notts	48	59	66	62	72	56	46
39	Truro	58	62	65	69	69	72	85
41	Winchester	87	121	93	109	92	127	116
42	Worcester	74	80	89	65	65	68	87
43	York	155	131	144	127	118	111	109
44	Europe	0	0	0	0	0	0	0
46	Leeds	166	173	155	176	151	170	172
Total Number		3,715	3,668	3,557	3,692	3,721	3,685	3,773

Value of Legacies in Year

Dio. No.	Diocese Name	7 Year Mean (£)
10	Chichester	2,284,431
23	London	2,258,579
37	Southwark	2,080,707
27	Oxford	2,070,957
15	Exeter	1,728,600
43	York	1,473,583
8	Chelmsford	1,423,112
32	St Albans	1,407,948
17	Guildford	1,390,561
46	Leeds	1,283,030
34	Salisbury	1,186,476
1	Bath & Wells	1,165,293
24	Manchester	1,097,512
22	Liverpool	1,071,465
31	Rochester	1,067,193
7	Carlisle	1,035,030
3	Blackburn	1,031,705
20	Lichfield	999,621
21	Lincoln	962,245
14	Ely	957,580
41	Winchester	947,530
33	St Eds & Ips	941,136
9	Chester	928,342
26	Norwich	927,308
38	S'well & Notts	843,499
2	Birmingham	839,095
16	Gloucester	778,347
42	Worcester	738,243
39	Truro	736,592
11	Coventry	718,471
29	Portsmouth	672,998
25	Newcastle	662,325
6	Canterbury	614,611
5	Bristol	612,337
28	Peterborough	605,447
12	Derby	584,861
18	Hereford	485,817
13	Durham	393,691
35	Sheffield	385,397
19	Leicester	234,701
36	Sodor & Man	94,878
44	Europe	0

Number of Legacies in Year

Dio. No.	Diocese Name	7 Year Mean
10	Chichester	191
15	Exeter	169
46	Leeds	166
27	Oxford	145
1	Bath & Wells	144
43	York	128
8	Chelmsford	124
23	London	124
34	Salisbury	116
3	Blackburn	113
37	Southwark	107
41	Winchester	106
26	Norwich	101
17	Guildford	100
20	Lichfield	97
9	Chester	96
33	St Eds & Ips	96
32	St Albans	95
24	Manchester	94
7	Carlisle	90
16	Gloucester	87
22	Liverpool	87
31	Rochester	85
42	Worcester	75
14	Ely	72
11	Coventry	70
21	Lincoln	70
12	Derby	69
39	Truro	69
28	Peterborough	67
6	Canterbury	61
2	Birmingham	58
29	Portsmouth	58
38	S'well & Notts	58
18	Hereford	55
25	Newcastle	53
13	Durham	49
35	Sheffield	49
5	Bristol	47
19	Leicester	35
36	Sodor & Man	9
44	Europe	0

Average Legacy Size

Dio. No.	Diocese Name	7 Year Mean (£)
37	Southwark	19,420
23	London	18,172
32	St Albans	14,888
2	Birmingham	14,467
38	S'well & Notts	14,436
27	Oxford	14,254
17	Guildford	13,945
21	Lincoln	13,831
14	Ely	13,379
5	Bristol	13,108
31	Rochester	12,555
25	Newcastle	12,463
22	Liverpool	12,336
10	Chichester	11,934
24	Manchester	11,729
43	York	11,525
29	Portsmouth	11,518
8	Chelmsford	11,490
7	Carlisle	11,464
39	Truro	10,742
20	Lichfield	10,351
11	Coventry	10,264
34	Salisbury	10,241
15	Exeter	10,220
6	Canterbury	10,099
36	Sodor & Man	10,063
42	Worcester	9,787
33	St Eds & Ips	9,760
9	Chester	9,685
3	Blackburn	9,153
26	Norwich	9,142
28	Peterborough	8,998
16	Gloucester	8,947
41	Winchester	8,903
18	Hereford	8,765
12	Derby	8,424
1	Bath & Wells	8,100
13	Durham	8,058
35	Sheffield	7,797
46	Leeds	7,722
19	Leicester	6,625
44	Europe	0

Diocesan Growth

Diocesan legacy income and the number of legacies received is often varied and fluctuates significantly when large residual legacies are received / there is an increase in mortality rates.

However, year on year growth in the value of legacy income is apparent with Bristol, Carlisle, Chichester, Durham, London, Oxford, Portsmouth and Truro Dioceses. The largest annual legacy income of £3,400,835 was received by London Diocese in 2016.

Year on year growth in the number of legacies received is apparent with Birmingham, Ely, Derby, Hereford and Oxford Dioceses. The highest number of annual legacies received, 221 was in Chichester Diocese in 2012 and 2013.

Key Findings

Although Diocesan legacy income is often varied and can fluctuate significantly, where Dioceses promote legacy giving as part of Stewardship, year on year increases in the number and levels of legacy income can be visible.

Our Goals

Our medium to long term goals are to:

- Produce Diocesan Legacy Dashboards to help better engage with legacy giving
- Ensure every Diocese has an Officer responsible for promoting legacies



In Summary

If Parishes and Dioceses wish to see continuing and growing levels of legacy income, they must invest in and resource this important area of giving. Integration of legacies within Diocesan Giving Strategies will help to promote and implement practice that enables real term growth. Also making use of national guidance, promotional materials and training will increase awareness and raise the profile internally and externally.

Legacies are a significant opportunity, but only if we act now.

9 Appendices

Appendix A - Data Categorisation

The following codes are used to classify Legacies:

Category	Code
Up to £100	XXS
£100 but under £1000	XS
£1000 but under £10,000	S
£10,000 but under £30,000	S/M
£30,000 but under £70,000	M
£70,000 but under £100,000	M/L
£100,000 but under £300,000	L
£300,000 but under £500,000	L/XL
£500,000 but under £800,000	XL
£800,000 but under £1,000,000	XL/XXL
£1,000,000 but under £1,500,000	XXL

Appendix B - Diocesan Categorisation

For the purposes of analyses, Dioceses are categorised into the following regions:



Dio. No.	North East Region (NE)
13	Durham
46	Leeds
25	Newcastle
35	Sheffield
43	York

Dio. No.	Eastern Region (E)
8	Chelmsford
14	Ely
21	Lincoln
26	Norwich
28	Peterborough
32	St Albans
33	St Edmundsbury & Ipswich

Dio. No.	South East Region (SE)
6	Canterbury
10	Chichester
17	Guildford
23	London
27	Oxford
31	Rochester
37	Southwark

Dio. No.	South West Region (SW)
1	Bath & Wells
5	Bristol
15	Exeter
16	Gloucester
29	Portsmouth
34	Salisbury
39	Truro
41	Winchester

Dio. No.	North West Region (NW)
3	Blackburn
7	Carlisle
9	Chester
22	Liverpool
24	Manchester
36	Sodor & Man

Dio. No.	Midlands Region (M)
2	Birmingham
11	Coventry
12	Derby
18	Hereford
19	Leicester
20	Lichfield
38	Southwell & Nottingham
42	Worcester

The Diocese of Europe is not analysed.

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