LIVE Economics ltd

The "Alternative" Economy in Glastonbury – an overview

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Contents

1. Executive summary

The "Alternative Economy" of Glastonbury is defined as businesses which are conducted based on ethical and spiritual values reflected in the town's spiritual background.

The Alternative Economy plays an important role in Glastonbury with more than 50% of the businesses included in this study being part of this sub-sector. According to the businesses sampled here both the alternative and the mainstream economies rely to a large extend on retail and health services. This means that many of the jobs are low paid. However, there is a clear strength to the Glastonbury economy emanating from the role independent businesses play in the town and the positive impact on well-being caused by the alternative economy.

This study uses ONS and other publicly available data to assess the size of the two areas of the economy and the economic role they play. It finds that the Alternative Economy contributes slightly more than can be expected from its overall share in business, however this difference is not statistically significant.

Despite the positive strength of the Glastonbury economy there are also areas of concern. High rates of child poverty, areas of deprivation and unemployment need to be addressed to ensure all can participate in any benefits that result from the presence of the Alternative Economy in the town.

This report makes recommendations how this could be achieved building on the strength particularly in human health and well-being sectors.

2. Introduction

This report into the Alternative Economy in Glastonbury was commissioned by Savaric Whiting Ltd and supported by the Glaston Centre Ltd. Its objective is to map out the structure of the Glastonbury economy and the role that the Alternative Economy plays within it in order to better understand where the economic potential for the town lies.

The Glastonbury economy has been subject to significant change over the last 50 years from a centre for leather and related products to one relying on service such as retail, accommodation (mainly B&B) and personal services[1] . This report does not provide history of this economic change but uses a variety of data sources to describes the role the Alternative Economy plays in the town today. Official statistics are used to assess the size of the Alternative Economy, compare it in structure and economic contribution to the mainstream economy and develop recommendations based on its strength.

3. Definitions

The Alternative Economy is at the heart of this report. The report does not apply the strict definition of the "Alternative Economy" as defined for example by GEO Coop[2]. Many definitions of "Alternative

[1] Bowman, Marion. 2013. 'Valuing Spirituality: Commodification, Consumption and Community in Glastonbury'. In Francois Gauthier and Tuomas Martikainen, eds. *Religion in Consumer Society: brands, consumers and markets*. Farnham and Burlington, VA: Ashgate, pp. 207-224.

[2] GEO Coop is a US based platform which publishes information and resources about environmental and economic questions.

Economy" include the use of a separate currency, systems of barter and exchange or other non-monetary based systems[3] . Such extremes of an "Alternative Economy" have not been included. Instead this report is based on a definition as it is used within the Glastonbury context as economic activity based on ethical and spiritual values linked to the town's religious and spiritual history.

To some extent this definition is a subjective one based on the researchers' knowledge of the Glastonbury economy and informal discussions held with a number of individuals either supporting or running businesses in the town, involved in the Town Council and Chamber of Commerce.

4. Method

4.1. Mapping the Economy of Glastonbury

The purpose of this section is to draw up a "map" of the Glastonbury economy to identify the role "Alternative" businesses play in the overall economy. To do this the research team identified as many businesses as possible and sorted them by category of "Alternative", "Mainstream", or "Both" (indicating that they were not clearly in either of the other two categories).

Sources of information and data used in the map came from a variety of sources including:

- List of Chambers of Commerce members
- A physical count of businesses on the High St and immediate surrounding area
- Businesses (including sole traders) advertising in the "Oracle" (a local 'alternative' free newspaper)
- Office for National Statistics (ONS) listing and classifying local businesses by type
- ONS analysis of turnover by type of business
- A recent qualitative research study of spiritual and alternative organisations in the town undertaken by the Tavistock Institute (supported by the Glaston Centre[4])
- A survey of businesses undertaken in 2007, accompanied by interviews with business owners and entrepreneurs in the town[5]

The businesses identified were also allocated to the standard industrial classification codes (SIC). The SIC classification is an internationally agreed classification used to describe the economic structure of a town, region or country. Categories are built up like a pyramid starting with sections, such as section G which includes retail, then divisions such as division 47 which covers all retail etc.[6] These allocations were used to identify the most likely annual turnover for the businesses included in the economic map of Glastonbury, as well as average wages paid in the sectors. Turnover values and

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https://geo.coop/about#:~:text=In%202007%2C%20due%20to%20the%20increasing%20challenges%20of,database%20of%20the%20cooperative%20economy%20in%20North%20America.

[3] *Alternative economies are typically separate economic structures operating outside of the traditional economy and based on the common principles of a community.* Source: https://geo.coop/story/alternative-economies-community-currencies

[4] Hills D (2020) Spiritual, alternative and faith organisations in Glastonbury: their challenges and resources. Published on the Glaston Centre website https://www.glastoncentre.org/spiritual-organisation-research-project.html

[5] Bowman, Marion with Sarah Robinson, 2007, The impact of the Spiritual Economy on the business community and local economy in Glastonbury: A Pilot Study. Unpublished summary of British Academy Small Research Grant project. Research findings in Bowman, Marion. 2013. 'Valuing Spirituality: Commodification, Consumption and Community in Glastonbury'. In Francois Gauthier and Tuomas Martikainen, eds. Religion in Consumer Society: brands, consumers and markets. Farnham and Burlington, VA: Ashgate, pp. 207-224.

[6] The SIC categories are broken down to different levels of detail. The 2 digit code 47 includes all retail while the 4 digit code 4725 stands for Retail sale of beverages in specialised stores. See Annex 1 for details.

wages were either for the South West, Mendip or England, depending on the data available. Most turnover data are for 2017 with a few exceptions where only 2015 or 2016 data were available.[7]

There is no information available regarding the number of people employed by each of the businesses.

4.2. Biases

It has to be noted that this approach can lead to bias:

- Only businesses visible in the town centre or the two internet portals have been included. There could be a bias against sectors of the economy, such as those in the supply chain to others (e.g, businesses providing equipment to the observed businesses, including shop outfitters, farmers etc), which don't advertise on these portals and are not visible within the town. This can lead to a "self-selection" of certain types of businesses, visible on the high street such as retail.[8]

Where this bias coincides with requirements of "alternative" businesses to attract attention, such as shops and therapists new to the area, this could lead to an oversampling of the "alternative businesses". To address this, further research is recommended.

4.3. Summary

The method described above led to a list of 220 businesses. 187 of these could be sufficiently clearly described to be included in the economic analysis. The ONS data on business geography includes around 630 for the areas of Mendip 011 and 012. This means that around 450 businesses which according to the ONS data are active in the Local Authority of Mendip 011 and 012 have not been included in the list. However, 187 is a sufficiently large number to conduct analysis unless it is concluded that the bias mentioned above is sufficiently large to impact on the results.[9]

5. Literature review

Although there is a strong assumption (in economic theory) that the primary purpose of businesses is to make a profit, there is also quite a large literature now looking at the role of ethics and spirituality within business and the economy and the positive impact that well-being has on labour productivity. This literature brings together empirical evidence with behavioural insights and demonstrates that productivity and performance are driven by factors including a strong commitment to the purpose of the business and the underlying ethics, as well as the physical and mental well-being of its workforce.

5.1. Ethical business

There is evidence, mainly in the grey literature[10], that business with a strong ethical background are more successful economically than businesses without such a culture. Guertler shows that "The unifying effect of one strong belief can lead to a more coherent, focused, motivated workforce and

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[7] The researchers recognise that 2020 will be significantly different from all other years, but will also be a clear outlier.

[8] Further down in the report the differences between the alternative and non-alternative economies are discussed. A test for statistical significance shows that the two data sets are not statistically significant. This bias could be the reason for this finding.

[9] It is about 80% bigger than the sample surveyed in the Bowman study 2007 with 101 responses.

[10] "Grey" literature includes articles in periodicals or journals which are not peer reviewed. However, they are also not newspaper articles.

can be a decisive factor in beating the competition as the company represents more than just an opportunity to earn money."[11] These insights reflect the fact that while efficient production is clearly an important aspect of every business, its workers might be more important in delivering success.

As stated by Horton on Investopedia, 2020: "*A number of factors play a part in making a business profitable, including expert management teams, dedicated and productive employees, consistent consumer demand, and a careful watch over the bottom line. In addition to these well-known business practices, companies that implement a management philosophy that relies heavily on business ethics are proven to be more successful than those that operate in an unethical manner*."[12]

Smith Friday writes: "*Companies with a strong ethical foundation tend to do better financially, have higher rates of employee retention, and benefit from more customer referrals and higher customer service satisfaction numbers. These benefits are generated specifically by ethical employees who enjoy more professional success overall and function with less stress*."[13] It is the link between ethical beliefs and actions in the day to day treatment of customers and fellow workers which impacts on performance. Volkov answers the question "Are Ethical Businesses more Profitable?" with *".... a resounding yes. ..... ethical companies are more profitable for numerous reasons – employees are more productive; employees are less likely to leave a company; consumers respond positively to companies that are perceived as ethical; vendors and suppliers prefer to deal with ethical companies; and ethical companies attract higher talented executives and employees. All of these factors contribute to the bottom-line conclusion – ethical companies are more profitable*."[14]

Ethical behaviour in the market is often driven by the context in which it occurs. "… *ceteris paribus, people are more likely to buy ethically when others around them do too, consistent with a role of social norms in promoting ethical-consumption behaviours*."[15] Therefore the atmosphere and environment in which a business operates also contributes to how strongly ethical standards can prevail.

5.2. Productivity and mental health

Several of the businesses in Glastonbury which contribute to the Alternative Economy are businesses which offer therapeutic or spiritual support to their customers and clients (22% of the Alternative Economy compared to 2% of the non-alternative economy). There is evidence to support the idea that these contribute to the mental health and wellbeing of their clients, and perhaps also, to those working in these organisations.

For example, Bubonya et al (2009) provide evidence that initiatives that reduce work stress have a positive impact on productivity; Brown et al (2019) calculate that a third of the productivity gap between the North and the South of England can be explained by differences in health, whereby mental health differences contribute about 10%, representing a gap of around £4 bn. Both these examples from the literature clearly illustrate the role mental health plays in the economic life of the UK. While it is not possible to quantify what exactly what therapists based in Glastonbury contribute

[11] Gürtler ,Detlef Different religious views around the world may translate into a competitive business advantage JULY 19, 2018, https://www.rolandberger.com/en/Point-of-View/The-connection-between-religion-and-business.html

[12] Investopedia Are Business Ethics Important for Profitability? by MELISSA HORTON Updated Feb 28, 2020, Source: https://www.investopedia.com/ask/answers/040715/how-important-are-business-ethics-running-profitable-business.asp

[13] Association for Talent Development, Ethical Companies and Employees Are More Successful, By Casey Smith Friday, March 24, 2017

[14] https://blog.volkovlaw.com/2014/05/are-ethical-companies-more-profitable-part-ii-of-iv/

[15] Starr, Martha A. The social economics of ethical consumption: Theoretical considerations and empirical evidence in The Journal of Ethical Economics, 2009

to its economy in this respect, in theory, at least, those people who use their services are likely to feel better and be more productive.

5.3. Value based working in Glastonbury

Within the specific context of Glastonbury, it is important to note that there are many people who have felt called to the town and operate businesses there who donate gratis their time, skills, and energy for community and communal initiatives (Bowman 2013). Many of the local organisations such as the Chalice Well, the Abbey, Goddess House or the Glaston Centre ltd have people involved who work on a voluntary basis as trustees or volunteers in running activities, in addition to their paid staff. One interviewee in the Hills (2020) study questioned whether the contribution they made to their organisation should be seen as the same as 'volunteering' of a more conventional kind: *'It's about passion and desire to do something – not the same as a volunteer. I do my job but I'm not paid for it and never have been. I'm paid for part of my job but there is a large other part for which I've never been paid'.*

Similarly some of the entrepreneurs interviewed in 2007 for a study by Bowman[16] saw 'no contradiction between spirituality and business, and indeed tended to regard their business as part of their spiritual path, as well as confirmation of their personal skills and qualities. . . . In line with the philosophy "in every life a lesson", even when some business ventures had not turned out well, spiritual and personal insights were drawn from the experience, as well as commercial refocusing' (Bowman 2013). A more recent study of local organisations (Hills 2020[17]) drew similar conclusions.

Bowman also notes that, while there are people who undoubtedly make what they describe as a 'comfortable' living from their businesses, there is a notable lack of conspicuous consumption and a certain modesty of lifestyle among them. The importance of 'right livelihood', integrity and balance were stressed repeatedly in the interviews, and the concept of having a business with a purpose came up on a number of occasions.

Some of Bowman's interviewees also mentioned a 'poverty consciousness' among some people in town, who were somewhat judgemental of successful business people. 'Conversely, some businesses struggle to keep costs low to the extent that they find profit almost impossible; one catering business owner confided that they only just keep going, but I have witnessed payment being waived or negotiated in cases of hardship in that establishment' (Bowman 2013).

The importance of 'authenticity', fair trade, having a personal relationship with artisans, and having products that are genuinely fit for purpose was stressed by Bowman's interviewees. 'One woman recounted that she had started employing people locally to put together spell kits in preference to her previous supplier, as she needed to be certain that herbs were fresh and candle wax was of a high quality. Another commented on the importance she attached to knowing artisans and sourcing goods herself:

"… people come to us because they know all our stuff is authentic. It's not out of China, it's not a dreamcatcher that just somebody's put together in America, they are all signed by the artist and so

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[16] Reported in Bowman, Marion. 2013. 'Valuing Spirituality: Commodification, Consumption and Community in Glastonbury'. In Francois Gauthier and Tuomas Martikainen, eds. *Religion in Consumer Society: brands, consumers and markets*. Farnham and Burlington, VA: Ashgate, pp. 207-224.

[17] Hills D (2020) Spiritual, alternative and faith organisations in Glastonbury: their challenges and resources. Published on the Glaston Centre website https://www.glastoncentre.org/spiritual-organisation-research-project.html

our reputation here is for authenticity, and I think that is something that follows through in all aspects of life, being authentic and authentic with yourself – and just find that new product as well!" (Interview 27 March 2007) (quoted in Bowman 2013).

Another recurring theme that Bowman notes was 'a conviction that there was enough business to go round for everyone and that entrepreneurs could therefore cooperate and interact positively, buy from each other, attend each other's events, and so on'. One therapist also involved in a herbal products business said,

I guess it's like a … a flow of business. … It's like an inter connected web, you're tuning into that web of connection and allowing a kind of positive flow of products and services and money and receiving and giving to go round that network and I think … you'll find [it] in a lot of people who have quite a spiritual approach to business. Does that make sense? … I suppose one would hope that values such as integrity and honesty and compassion, you know some of those values would not be left at the door when you go into the market place, you know, that those were actually integrated into everything that we do. (Interview 13 March 2007) (quoted in Bowman 2013).

6. The Glastonbury Economy

This section provides a statistical description of the Glastonbury economy. It uses official data sets where possible.

To assess the economic impact of the businesses identified for this study and their role in the economy they were allocated by their description to SIC codes, using 4 digit codes where possible and 3 or 2 digit codes where this was not possible.

The following sections describe the economy of Glastonbury based on these data. In addition to the data collected on businesses currently active in Glastonbury there are also data available on the overall business activity. It has to be noted that the business classification used here does not take into account the alternative nature of many businesses in Glastonbury. It is a different lens through which to look at the economy.

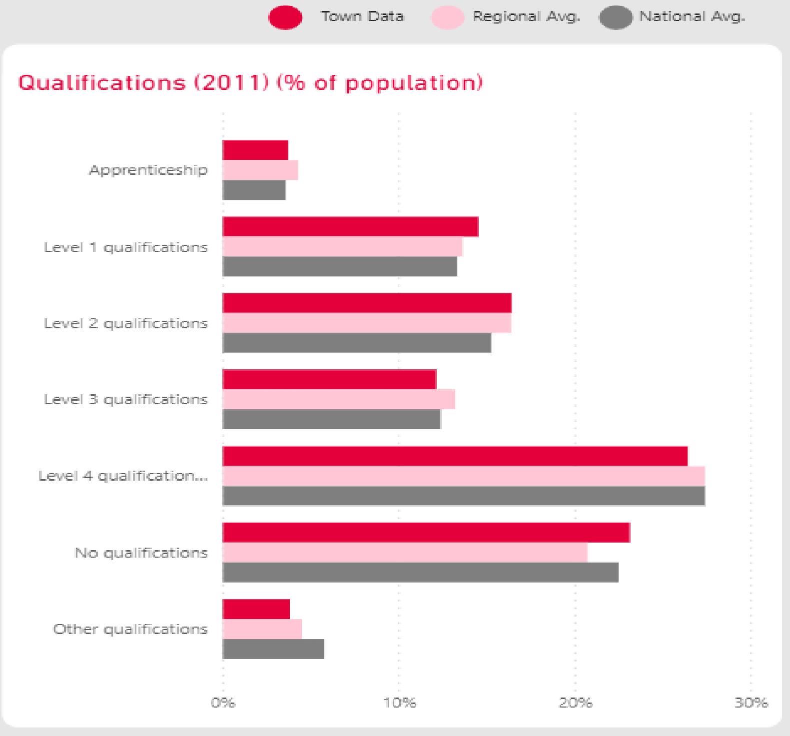
6.1 The population of Glastonbury

Glastonbury has a population of just under 9000 residents. Statistics suggest that on average the economic situation of Glastonbury residents is worse than that of their fellow citizens in the region and the wider UK.[18] It is for this reason that Glastonbury was selected by central government as one of over 100 towns in England in the Towns' Fund programme[19] which are being given up to £25 million to kick start regeneration projects and give areas an economic boost.

While on average the skill profile is not significantly different from the rest of the country, **Figure *1*** shows that there are more people with no or low levels of education compared to other areas of the UK.

[18] The source of the data is the Towns Fund Dashboard https://townsfund.org.uk/dashboard
[19] https://townsfund.org.uk/

Figure 1 Qualifications in Glastonbury compared to the region and rest of UK



Source: https://townsfund.org.uk/dashboard and ONS

The proportion of children for whom benefits are sought is 8 percentage points higher than in the rest of the region and the UK and the indices for deprivation based on employment, health and income are high compared to the region and the rest of the country.

In combination this means that the residents of Glastonbury are more vulnerable to economic shocks and their children are likely to be affected by any potential income loss. The high share of employment in retail (more on this below) compared to the rest of the region and the rest of the UK contributes to over 60% of employees being in so called "at risk" employment categories[20]. However, overall, the employment growth has been high in the town, with an overall growth of 8.3% from 2015 to 2018 compared to 3.4% in the rest of the region.

6.2. The Business Population, Births and Deaths

One important indicator for the economic activity in a local area is the total number of businesses, the setting up of new businesses (so called births) and the closure of businesses (deaths of business). **Table *1*** shows the total number of active businesses in the local area. The total is 675.

[20] Employment at risk are sectors which are deemed to be under particular risk by the COVID pandemic such as retail, restaurants etc. These were defined by the Office for Budget Responsibility. See https://townsfund.org.uk/dashboard

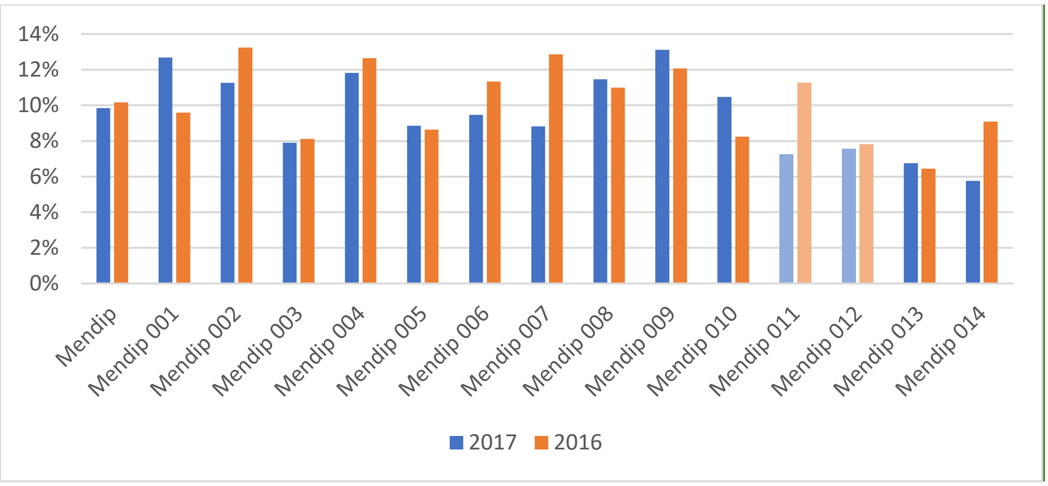
Table 1 Active businesses

Area	2016	2017
Mendip 011	355	345
Mendip 012	320	330

Source: ONS, Business Demography Birth and Death, 2017

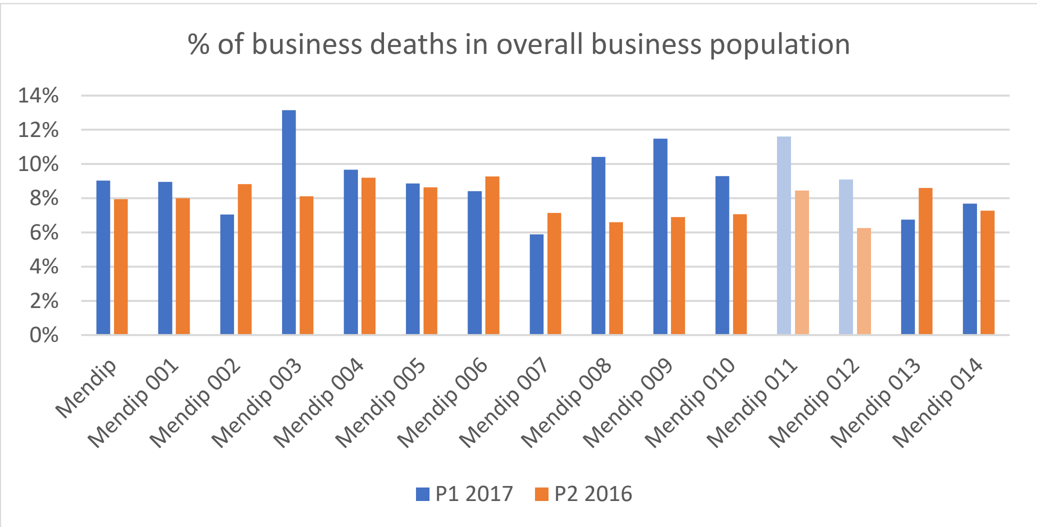
There were some deaths and some births of businesses during this time, although this does not diverge significantly from the average across the while district of Mendip during this period. **Figure 2** and **Figure 3** show the percentage of businesses opening and closing out of the total population of businesses during 2016 and 17.

Figure 2 % of business birth in overall business population (the Glastonbury area is indicated in slightly lighter colours)



Source: ONS, Business Demography Birth and Death, 2017

Figure 3 % of business deaths in overall business population (the Glastonbury area is indicated in slightly lighter colours)



Source: ONS, Business Demography Birth and Death, 2017

Although there appear to have been a relatively high number of business 'deaths' in the town (Mendip 011 and 012) in 2017 (as there were in several neighbouring areas), this appears to have been balanced by a number of new businesses opening during a similar time period. This reflects one of the interesting features of the Glastonbury High St: shops are rarely left empty for long, quickly being filled up by new businesses.

The majority of businesses are also either independently or locally owned. This finding is reflected in work by the New Economics Foundation, which in 2010 classified high streets across the UK by the share of independent shops. Glastonbury, with 77.2% independent shops, was in the top group of towns [21]. This potentially protects the town in times of economic stress, when major national chains jettison staff or go into administration. As the New Economics Foundation (p3) noted, their earlier study had found that: "*In times of recession, chain stores have proven to be fair weather friends. Some have abandoned the high street entirely migrating to large, high volume trading locations. Others have simply shut less profitable stores*".

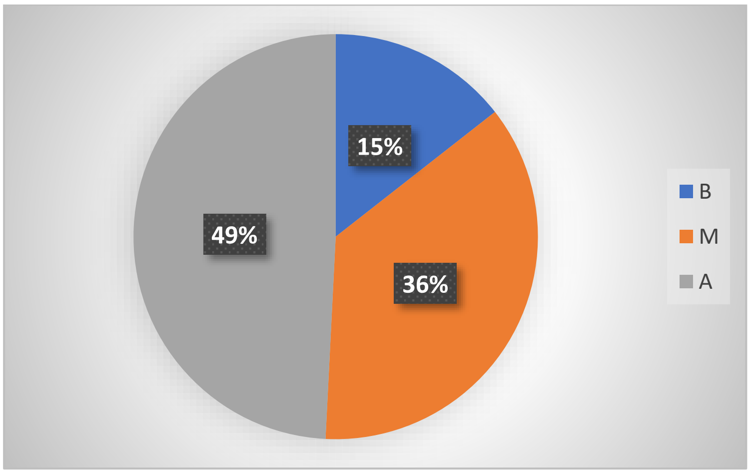
To date, there have been few losses as a result of the COVID epidemic, in spite of a major reduction in visitors during the first months of the summer holidays and cancellation of some of the regular events which attract tourists to the area (e.g. the Glastonbury Festival, annual Goddess Conference and Frost Fayre).

6.3. Business in Glastonbury

This project identified 220 businesses and organisation, of which 187 could be described sufficiently accurately to be included in the analysis. These 187 were categorised as being part of the Alternative Economy or not. (A, alternative, M, mainstream, or B, neither clearly one or the other). The classification was done using data sources b) to d) and is based on the available descriptions and local knowledge. This is just under a third of the active businesses in Mendip 011 and 012.

The total number of businesses which have been clearly identified as being in the "alternative" group make up just under 50% of the businesses identified.

Figure 4 Number of businesses by type in %

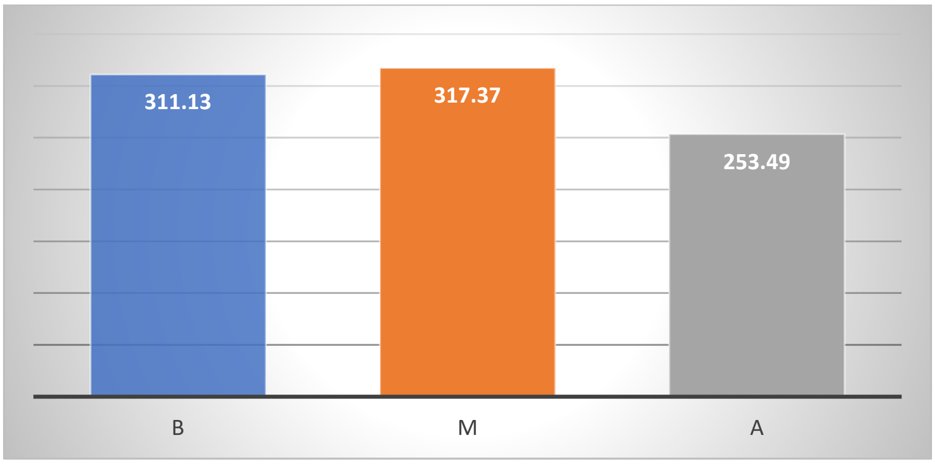


	Number of businesses
B – not determined	27
M – non alternative	68
A – alternative	92
	187

[21] New Economics Foundation, (2010) *Re-imagining the high street: Escape from Clone Town Britain*. The 2010 Clone Town Report

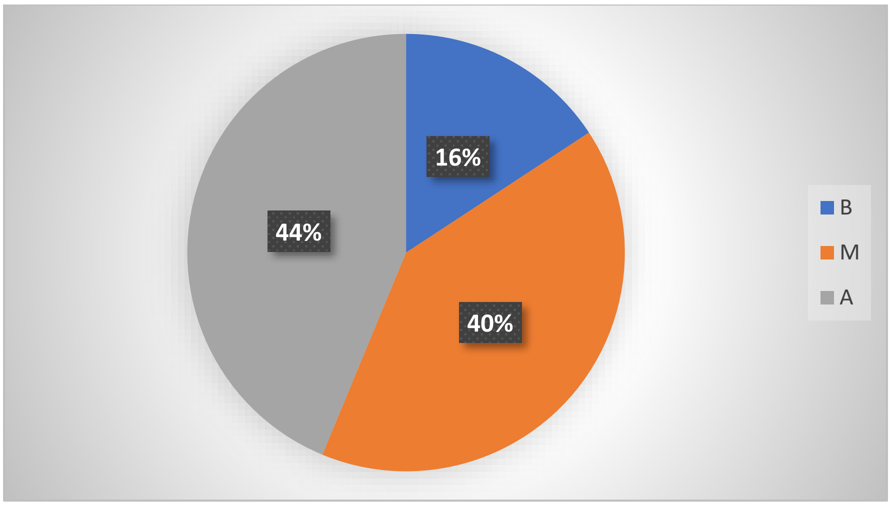
In order to identify the economic contribution of the alternative sector the businesses were sorted into the SIC code which best described their activity. The ONS provides data on the average turnover of business by SIC code. The first calculations show that on average the “Alternative” businesses have a lower turnover than other businesses. This is likely to be caused by the sectors within which they operate and will be analysed further below (section 6.3).

Figure 5 Average turnover in £000s by type of business



To be able to say what the overall economic contribution of the alternative sector is compared to the non-alternative, the number of businesses in the SIC sectors were multiplied with the average turnover. This shows that the total economic contribution of the alternative economy is proportionately smaller than its share in the number of business. **Figure 6** *s*hows that the 49% of business identified as alternative contribute 44% of the overall turnover.

Figure 6 Total turnover of businesses by type in %

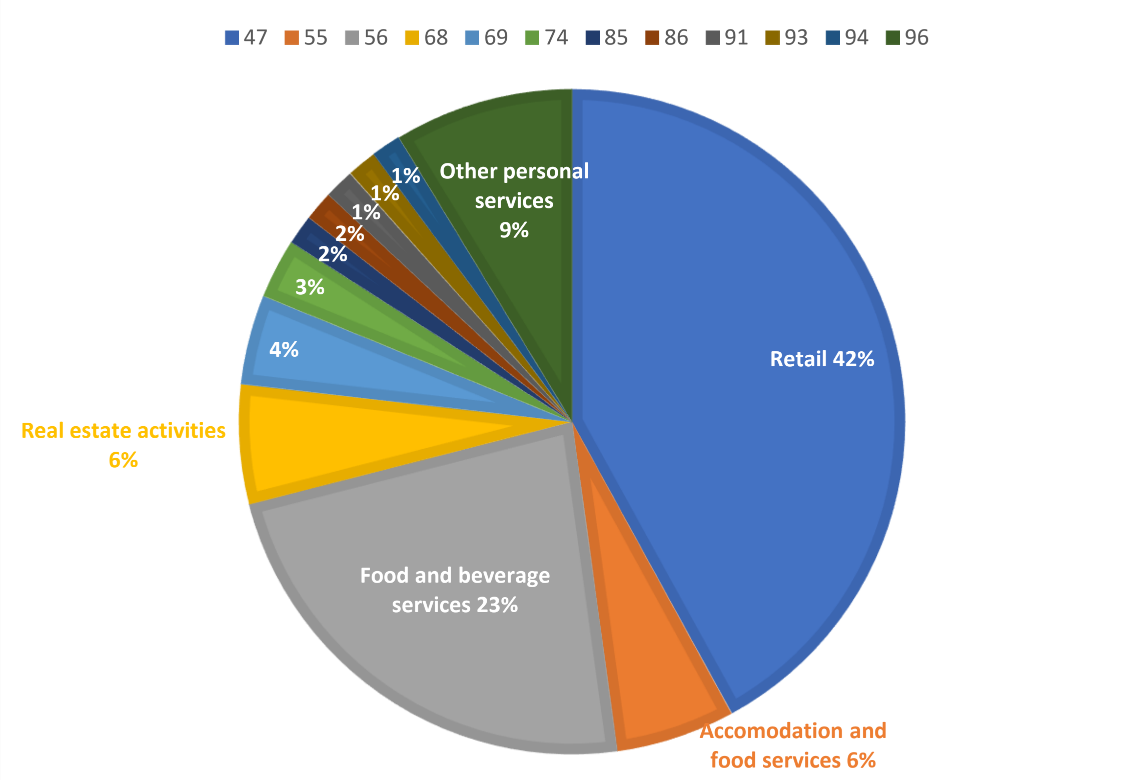


6.3. Sectoral break down

Following the aggregate contribution of the alternative economy compared to the non-alternative it is of interest to break these contributions down by sector. **Table 2**

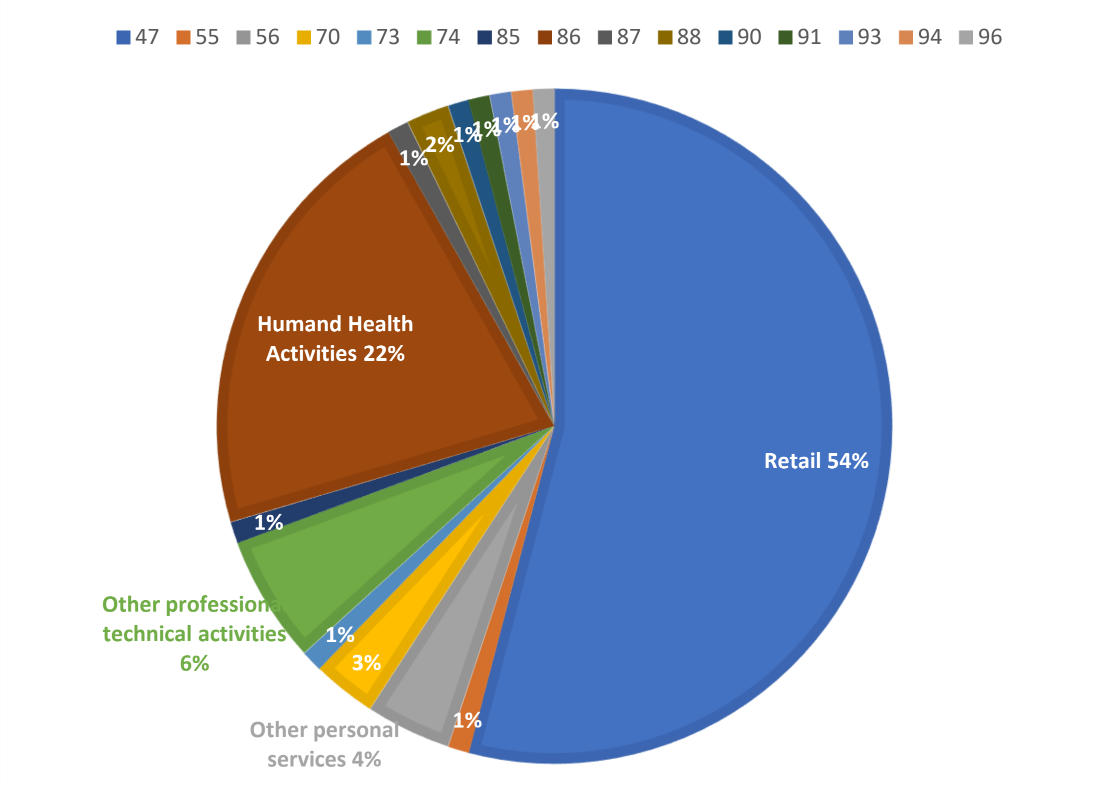
Figure 7 and **Figure 8** show the split of the alternative and non-alternative by subsector. The largest share of the businesses included in this analysis are in retail (SIC 47). Within this sector there is a variety of sub-sets ranging from food to crystals etc. (For the data and definitions see Annex.) For the definitions of the SIC codes (2 digit) see **Table 2**

Figure 7 Non-alternative businesses by 2 digit SIC



Source: ONS, variety of source data for the SIC 2 digit, turnover by industry (mainly South West where available), 2016/2017

Figure 8 Alternative businesses by 2 digit SIC



Source: ONS, variety of source data for the SIC 2 digit, turnover by industry (mainly South West where available), 2016/2017

The comparison between the alternative sector and the non-alternative sector shows that there are fewer subsectors in the non-alternative sector than the alternative with a stronger concentration in SIC 47 (Retail) - 54% in the Alternative Economy compared to 42% in the mainstream, non-alternative economy. However, it has to be noted that the sectoral distribution between the areas of alternative and non-alternative are not statistically significantly different from each other.[22] This means that these comparisons have to be done with some caution.

Table 2: Businesses in the Alternative (A) and Mainstream (M) sectors classified by SIC 2 digit definition

2 digit SIC	Definition	A	M
47	Retail trade, except of motor vehicles and motorcycles	54%	42%
55	Accommodation and Food Service Activities	1%	6%
56	Food and beverage service activities	1%	23%
68	Real Estate Activities	-	6%
69	Legal and Accounting Activities	-	4%
70	Activities of head offices; management consultancy activities	3%	-
73	Advertising and market research	1%	-
74	Other professional, scientific and technical activities	6%	3%
85	Education	1%	1%
86	Human Health Activities	21%	1%

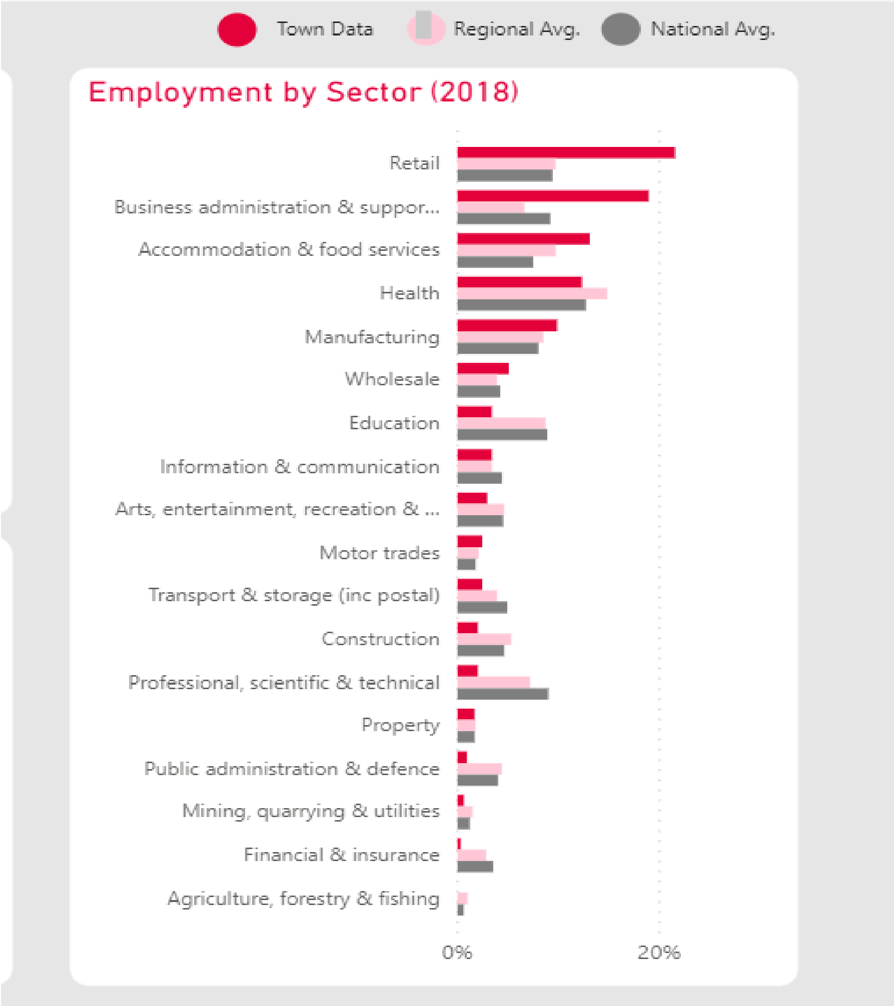
[22] Statistical insignificance can be caused by different factors. a) the two series are very similar with identical means and variances. B) the sample is too small c) another bias has been introduced in the sampling.

2 digit SIC	Definition	A	M
87	Residential care activities	1%	-
88	Social work activities without accommodation (incl charities)	2%	-
90	Creative, arts and entertainment activities	1%	-
91	Libraries, archives, museums and other cultural activities	1%	1%
93	Sports activities and amusement and recreation activities	1%	1%
94	Activities of membership organisations	1%	1%
96	Other personal service activities	1%	9%

Overall the observations based on the data collection done for this survey are borne out by official data, as demonstrated in **Figure 9**.

Figure 9 uses the total number of businesses (630) in the areas of Mendip 011 and 012 (see **Table *1***) and is not subject to the bias described in section 4.2. The retail sector is by far the largest employer, followed by business administration and support services. It has to be noted that some therapists are likely to fall into this category rather than the Health category in which this study has placed them. The data for **Figure 9** includes all businesses in the town of Glastonbury, not just those identified in this study. This explains the differences in the share of retail and other sectors. However, the chart supports the finding that the retail sector is clearly the strongest sector in town even when all businesses are included.

Figure 9 Employment by Sector



Source: https://townsfund.org.uk/dashboard

6.4. The Alternative contribution to the economy in Glastonbury

The next step in the analysis is to assess in more depth and detail how the Alternative Economy contributes to the overall Glastonbury economy. Due to data shortages (for example there were no easily accessible data available on the number of employees or workers in each business) very generalising assumptions had to be made. While this has an impact on the results, it should also be noted that the same assumptions were made for both “areas”, the alternative and the non-alternative economy. This means that any analytical impact of the assumptions will not disproportionately impact on only one of the two areas.

While the turnover figures used in section 6.3 already provide some information on the economic strengths of the two areas, the wages paid by the sectors prominent in the alternative and non-alternative sectors respectively give additional insight into how much those working in Glastonbury are likely to be able to earn and spend.

The study first looked at the average wage data for the SIC 2 digit sectors in the two areas of alternative and non-alternative.

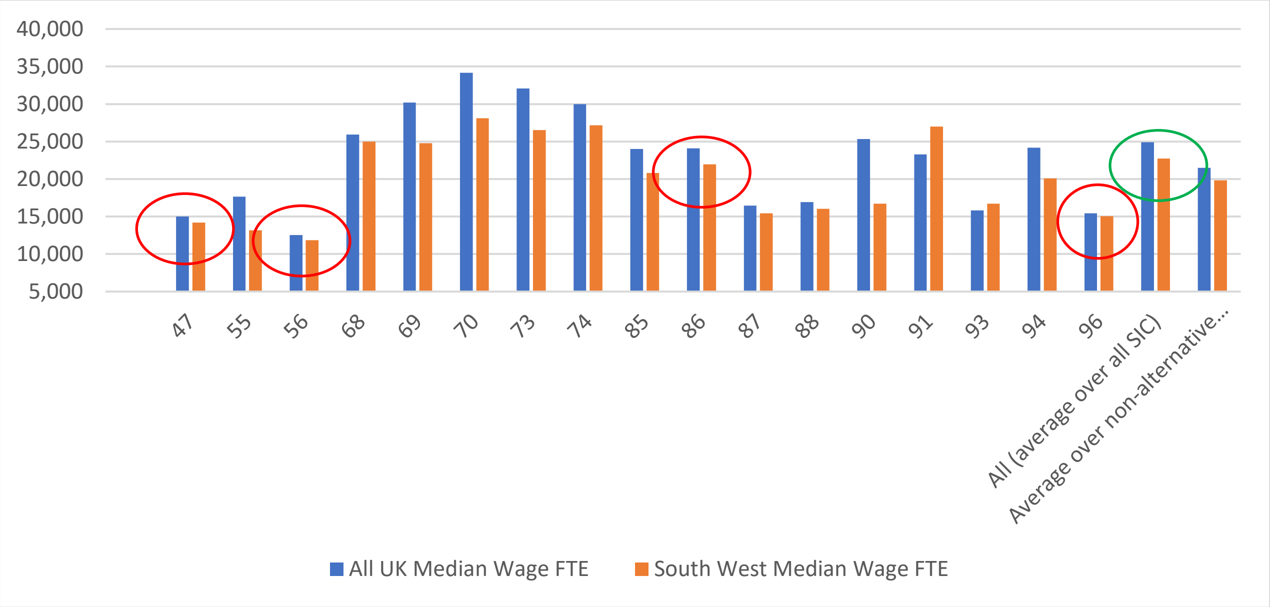
Overall, the median wage level for most industries in the South West is lower than the UK as a whole. This clearly has an impact on the strength of the Glastonbury economy compared to the rest of the UK. Overall the average wage paid in the sectors in which the alternative economy is stronger is slightly lower than the average in the non-alternative economy, at least in the South West of England (£19,390 per year in the Alternative Economy and £19,814 in the non-alternative economy). In the UK overall, the businesses represented in the Alternative sector would have a higher average wage (£21,792 for Alternative Economy compared £21,507 for non alternative economy). However the differences are not statistically significant. Detail can be found in

3 Wages in the UK and the South West

Table *3* in the Annex.

Error! Reference source not found.0 highlights that some of the sectors particularly strong in the Alternative Economy are low wage sectors. Examples include sector 47 (retail) and sector 86 (Human Health Activities); others are circled in red. These are sectors which represent a larger than average share in the Glastonbury economy and which pay less than the national average, circled in green. [See Table 2 for code descriptions.]

Figure 10 Annual Wages - UK and South West, 2019, SIC sectors analysed in this report



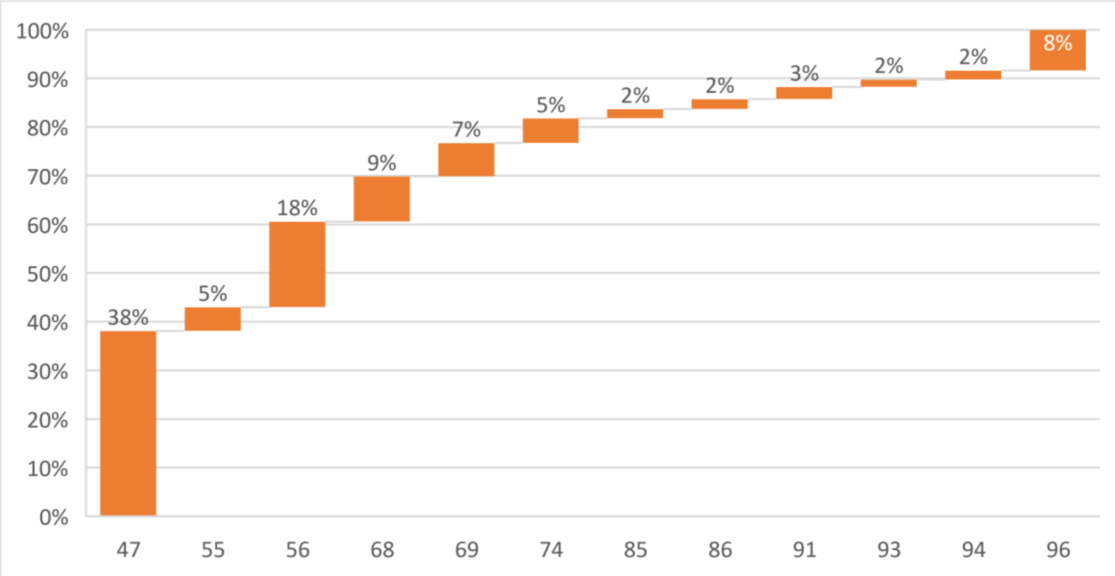
Source: ONS, Annual Survey of Hours and Earnings, 2019

Bearing in mind the fact that the wage differences are not statistically significant further comparisons between the sectors have been made in order to identify potential for further contributions of the alternative economy to the overall economy of Glastonbury.[23]

Figure 101 and **Figure 2** show how in terms of wages the different SIC 2 sectors contribute to the overall area based on our analysis of the 187 businesses identified earlier.

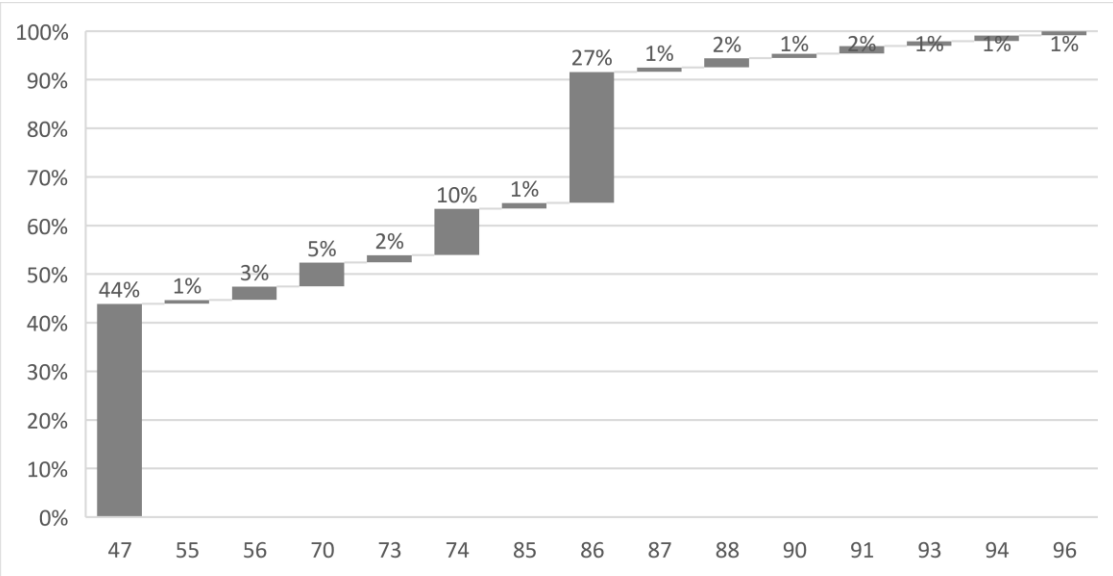
[23] The comparison conducted below will focus on the alternative economy with the non-alternative as defined in this report in the South West only.

Figure 101 Contribution of SIC code to overall economic impact of the mainstream economy (non-alternative)



Source: ONS (wage and number of business data) and own calculations (note: years for number of businesses and wages not the same)

Figure 12 Contribution of SIC code to overall economic impact of alternative economy



Source: ONS (wage and number of business data) and own calculations (note: years for number of businesses and wages not the same)

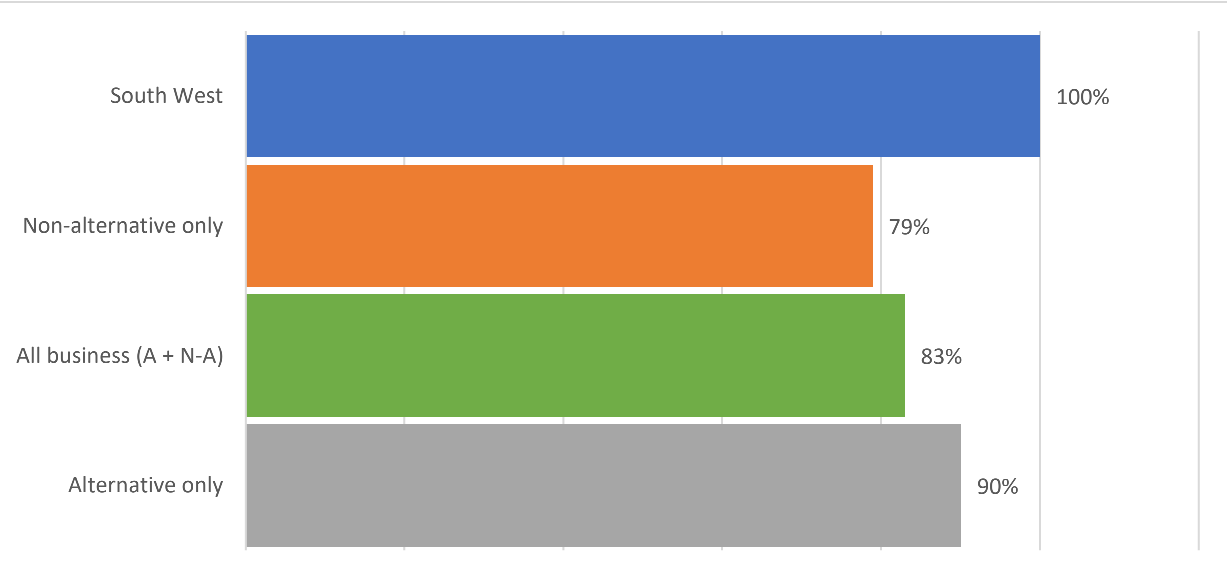
While sector 47 (retail) stands out for both sectors, the role of sector 86 (Human Health Activities) which contributed 21% to the total number of alternative businesses contributes 27% to the income earned in the alternative economy.

6.5. Contribution of the Alternative Economy in economic welfare of Glastonbury.

Any interpretation of the data presented in **Figure *10*** and **Figure** has to take into account the fact that the data series are not statistically significantly different from each other. However, this could have been caused by the method of sampling businesses included in the study.

One way of testing what the Alternative Economy adds to the Glastonbury economy compared to the non-alternative economy, is to examine how the Glastonbury economy would perform compared to the South West overall if the whole of the Glastonbury economy consisted either only of the non-alternative or only of the alternative. **Figure 3** provides this comparison. Combining the alternative and non-alternative economy the Glastonbury economy performs at 83% compared to the rest of the South West. Assuming that the whole of the Glastonbury economy had the same structure as its non-alternative side would reduce this to 79%. Assuming the whole of the Glastonbury economy had the structure of the Alternative Economy would increase this to 90%, i.e. overall the Glastonbury economy would still be performing worse than the rest of the South West, but at 90% compared to 83% in its current structure.[24]

Figure 13 Relative economic performance (as measured in wages) of Glastonbury compared to the rest of the South West



It would be useful if further research were undertaken to make a more in-depth analysis of whether Glastonbury differs in any significant way from other small towns in the UK that depend heavily on visitors and tourists and face similar economic challenges. Such a study would be quite complex, as it would need a great deal of information about such comparators, and other factors at play, that might be influencing their employment/unemployment rates, overall wellbeing, or the longevity and sustainability of the businesses on their high streets. This was beyond the scope of the present study.

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[24] The comparison uses the sectors represented in the sample of businesses analysed in this report. Wages plus the number of businesses across the sectors are used to calculate the value for the comparison with the rest of the South West.

7. The spiritual economy of Glastonbury

Having compared the alternative and non-alternative (mainstream) economies within Glastonbury using the Standard Industrial Classification (which arguably does not differentiate between these two) it is important to understand why the Alternative Economy is so strong in Glastonbury. The "Alternative Economy" as defined in this report does arguably not capture the full depth of the spiritual side of businesses in Glastonbury, many of which were set up either as part of searching for a different more spiritual lifestyle or are recognising this need in their customers. Marion Bowman, in her research on the 'spiritual economy' in Glastonbury a few years earlier[25], noted that:

'Since the 1970s the town of Glastonbury has experienced a brutal transition from primarily an industrial and manufacturing economic base to a more varied, service-based (and in one sector, spiritual service-based) economy. With around 40 per cent of its high street outlets now occupied by 'alternative' shops, and a hinterland of spiritually related businesses, healing practitioners of many sorts, specialised bed and breakfasts, diverse devotional communities, and myriad spiritually inspired events and activities, spiritual values and different ways of valuing spirituality have a clear impact on the economy and population as a whole'.

Quoting a number of authors who have written about the town, Bowman (2013) notes that Glastonbury is 'one of the most popular and multivalent pilgrimage sites in the UK, exerting an attraction for a variety of spiritual seekers on account of the many myths that surround it and the myriad claims made for it'. In addition to a wide variety of healing modalities available, 'annual events bring in people from Britain, Europe, America, and elsewhere; there are specialist bed and breakfast options; and complex patterns of "portfolio working" within which people combine, for example, clairvoyance and part-time shop work'.

In 2007 Bowman conducted a small-scale, questionnaire-based, pilot survey of local of goods-and-services-related businesses, complemented by interviews with both 'spiritually inspired' and mainstream business people. 101 (63%) respondents completed the questionnaire distributed to 160 businesses in the town. Nearly 60% of respondents were self-employed, and 46 per cent reported that Glastonbury's reputation as a religious and spiritual centre influenced the decision to be involved in business there. For 49 per cent of the respondents, Glastonbury's reputation as a religious and spiritual centre had an impact on the type of business they had decided to run in Glastonbury.

Seventy-three per cent of questionnaire respondents believed that religious and spiritual events in Glastonbury have a positive impact on their business, a result not simply relating to those involved in 'alternative' activities: 'One couple who had run a "traditional" bed and breakfast for many years, for example, appreciated that "alternative" events, ceremonies, and so on now provide year-round visitor attractions, whereas in the past they used to close over winter'.

The alternative culture has been particularly important in keeping the high street alive, ensuring that any shop becoming empty is rapidly filled. Bowman notes that, along with seeking to be financially viable, having a shopfront in Glastonbury can also be seen as a way of 'staking a claim' there and having a particular brand of spirituality visible to the public. There is also the 'collective' impact of having a large number of such businesses in one location, transforming the High St over the last 30

[25] Bowman, Marion. 2013. 'Valuing Spirituality: Commodification, Consumption and Community in Glastonbury'. In Francois Gauthier and Tuomas Martikainen, eds. *Religion in Consumer Society: brands, consumers and markets*. Farnham and Burlington, VA: Ashgate, pp. 207-224.

years, from a relatively normal 'market town' to one in which nearly every other shop in the High St caters for 'alternative, spiritual and ecological' interests. Regular cafes and pubs often provide vegetarian or vegan options and organisations – and individuals - in the town provide a wide range of other services, including workshops, trainings, individual therapy sessions and other events (e.g. 'Body mind spirit or vegan fayres in the town hall). Calculating the additional revenue that such activities and events bring into the town was beyond the scope of the present study but would be worth further investigation. The nature of the 'spiritual tourists' had apparently changed over time. As one proprietor of a pagan lifestyle shop in the Bowman survey noted: *"More middle-class people come to Glastonbury now than ever. At one time it was the real sort of early twenties, hippy-style people or the middle-aged Christian. … That was all there was. … Now you have the massive difference of many more middle-class pagans, because they're more able freely today to express themselves and so they're not afraid to come to town.*" (Interview, 20 March 2007) (Bowman 2013)

However, Bowman also notes that (at the time of her survey) there were some long-term, ongoing tensions and differences in perceptions relating to the contribution of 'alternative' businesses and Glastonbury's status as a multivalent spiritual centre to the town's economic welfare, with some seeing it as either irrelevant or indeed inimical to the town's prosperity. On the other hand, some of those involved in alternative businesses felt that, although they have revitalised the high street and brought employment and visitors to Glastonbury, their concerns and visions for the future of the town had been largely discounted by the mainstream community. There appear to have been some important changes since that time, with greater representation from alternative businesses on the Chamber of Commerce and Town Council, and the involvement of the Pilgrim Reception Centre in the new site for the Tourist Information Centre at St Dunstan's House (next to the Abbey). It is hoped that the present study can further contribute to understanding the ways in which alternative and mainstream business contribute in their different ways to the local economy.

8. Discussion

The results presented in the sections above draw a picture of a town economy with two areas – the alternative and the non-alternative. Both have a strong representation in sectors which pay comparatively low wages (eg retail). Overall deprivation in Glastonbury is high as shown in the index of deprivation, possibly reflecting the relatively low wage economy of the town. [26]

However, the qualitative research conducted paints a picture of dedicated businesses, entrepreneurs who have set up business in Glastonbury not to make a profit but to enable them to live in Glastonbury or to help others improve their life – resonating with the research presented in section 5. Glastonbury attracts creative and entrepreneurial people, many of whom are willing to take a risk[27] and start a business, even with relatively little capital or experience.[28] Many businesses are conducted from people's homes, in relatively small shops or in spaces in and around the shops (meeting rooms, therapy rooms).[29]

This has contributed to a flourishing – if somewhat unusual – town centre in which shops are rarely left empty, and the entry of major chains (and too many charity shops) has been avoided.[30] Bowman

[26] See Annex 2 for the Index of Deprivation.
[27] See Hills D (2020) Spiritual, alternative and faith organisations in Glastonbury: their challenges and resources. Published on the Glaston Centre website https://www.glastoncentre.org/spiritual-organisation-research-project.html
[28] Glastonbury Town Plan, 2009: Glastonbury "has a comparatively larger than average self-employed sector."
[29] See research by Hills D (ibid)
[30] See New Economic Foundation, Reimagining the High Street, 2020

talks about a "unique spiritual service industry"[31] which offers some of the services addressing the stresses of modern times.

The combination of experiences and spirituality also makes for a flexible and adaptable economy – with many people having more than one source of income and are not too dependent on one, full time, job.[32] This is probably a great advantage in the current economic climate in which many larger businesses are having to jettison staff – or go into administration.[33]

Some of the alternative businesses have also been quick to adapt to providing services online during the COVID pandemic – which has increased their reach, drawing income from a much wider geographic area into the town, rather than just increasing the number of tourists visiting the town. This has been supported by a local organisation, Glastonbury Online, which provided free listings during the COVID lock down[34]. This is just one example of the entrepreneurial side of Glastonbury, which has probably also contributed to the town being relatively self-sufficient when it comes to some resources – printing and computing services, entertainment, places to eat out, etc (as listed, for example, on the Glastonbury Online website).

9. A Future for Glastonbury

The economic structure described above allows the identification of the potential sources for economic growth, which includes all residents and visitors to the town. This section includes some suggested areas for development

- **Support independent shops and businesses in Glastonbury.** As the work by the New Economic Foundations and recent figures of store closures by large retail chains[35] has shown, having independent businesses and shops in a town does not only add to the attractiveness of the town to visitors but also increases the resilience in case of economic shocks.
- **Build on the potential of Glastonbury to support well-being**. The alternative economy focuses on well-being, be this by providing services or offering goods in shops people choose to enhance their well-being.

  Both the independent businesses and the well-being and healing economy require skills. Glastonbury may want to ensure that the local population, especially younger people, are able to plug into these opportunities and find employment which pays more than the average retail or care roles.

- **Broaden the visitor and tourist base**: Independent shops and the market town 'feel' (compared to the "cloned" high streets so prevalent across the country) attract tourists and visitors seeking not just to have a nice time out but also to improve their well-being and life style. This raises the possibility of being more explicit in terms of advertising the town, by having 'themed' advertising targeting particular tourist sectors (eco tourism, health tourism

[31] Bowman, Marion. 2013. 'Valuing Spirituality: Commodification, Consumption and Community in Glastonbury'. In Francois Gauthier and Tuomas Martikainen, eds. *Religion in Consumer Society: brands, consumers and markets*. Farnham and Burlington, VA: Ashgate, pp. 207-224.
[32] See Hills (D) ibid
[33] See PWC, 2020 https://www.pwc.co.uk/press-room/press-releases/store-closures-hit-record-levels.html
[34] See https://glastonbury.uk/shop-online-from-glastonbury-in-lockdown/
[35] https://www.pwc.co.uk/press-room/press-releases/store-closures-hit-record-levels.html and https://www.pwc.co.uk/press-room/press-releases/store-closures-twice-the-rate-of-last-year.html

etc). This could help in spreading the duration of the tourist season, as well as potentially attracting new (and possibly higher income?) visitors to the town.

- **Create a culture of research and learning** and link this to higher skilled employment
  In combination with well being there is also scope for research of the local, national and spiritual history, spirituality and environmental issues in a location such as Glastonbury. This could provide links to academic institutes and related research networks, again bringing a different kind of visitor to the town.

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Annex

1 Standard Industrial Classification

The Standard Industrial Classification is built similar to a pyramid. Starting with sections (sometimes call broad industrial groups) which are then subdivided into divisions (2 digit), groups etc. For detail, please see the box below.

section C	Manufacturing (comprising divisions 10 to 33)
division 13	Manufacture of textiles
group 13.9	Manufacture of other textiles
class 13.93	Manufacture of carpets and rugs
subclass 13.93/1	Manufacture of woven or tufted carpets and rugs

There are 21 sections, 88 divisions, 272 groups, 615 classes and 191 subclasses. The full structure of UK SIC (2007) is shown on pages 27 to 53.

Source: ONS, UK Standard Industrial Classification of Economic Activities 2007 – SIC(2007)

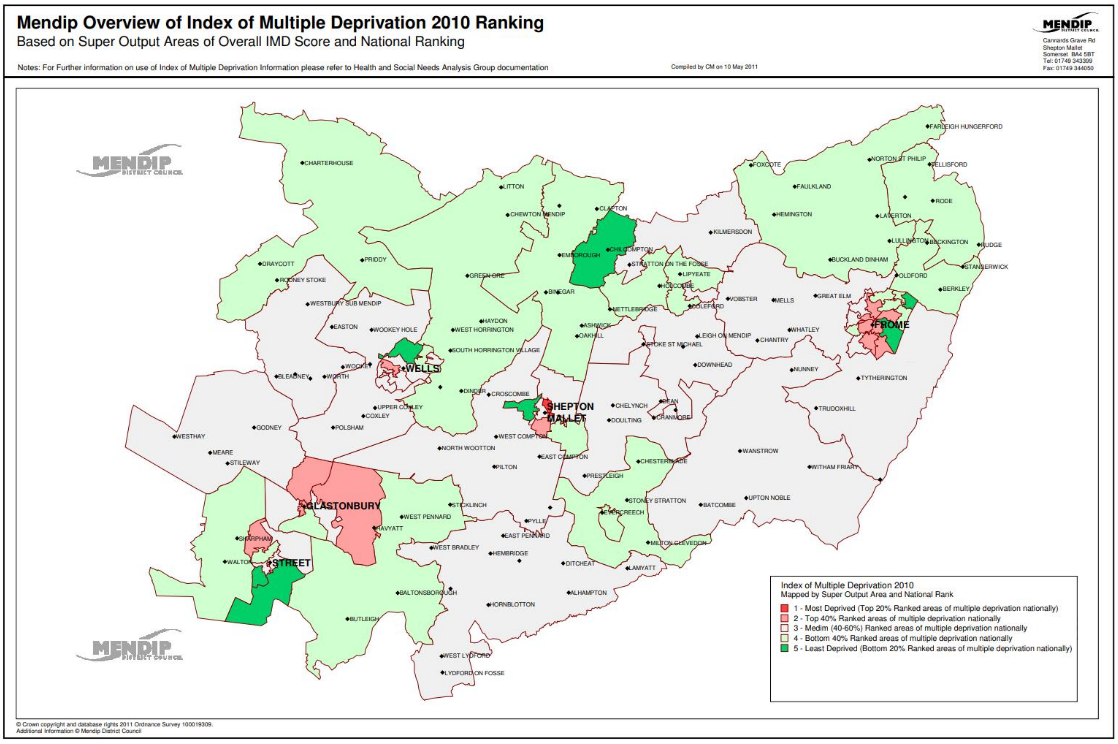
SIC 4 (5) digit definitions
4711 : Retail sale in non-specialised stores with food; beverages or tobacco predominating
4722 : Retail sale of meat and meat products in specialised stores
4724 : Retail sale of bread; cakes; flour confectionery and sugar confectionery in specialised stores
4725 : Retail sale of beverages in specialised stores
4726 : Retail sale of tobacco products in specialised stores
4729 : Other retail sale of food in specialised stores
4741 : Retail sale of computers; peripheral units and software in specialised stores
4751 : Retail sale of textiles in specialised stores
4752 : Retail sale of hardware; paints and glass in specialised stores
4753 : Retail sale of carpets; rugs; wall and floor coverings in specialised stores
4759 : Retail sale of furniture; lighting equipment and other household articles in specialised stores
4761 : Retail sale of books in specialised stores
4762 : Retail sale of newspapers and stationery in specialised stores
4765 : Retail sale of games and toys in specialised stores
4771 : Retail sale of clothing in specialised stores
4772 : Retail sale of footwear and leather goods in specialised stores
4773 : Dispensing chemist in specialised stores
4775 : Retail sale of cosmetic and toilet articles in specialised stores
4776 : Retail sale of flowers; plants; seeds; fertilisers; pet animals and pet food in specialised stores
4777 : Retail sale of watches and jewellery in specialised stores

4778 : Other retail sale of new goods in specialised stores
4779 : Retail sale of second-hand goods in stores
5520: Holiday and other short-stay accommodation
56101 : Licensed restaurants
56102 : Unlicensed restaurants and cafes
56302 : Public houses and bars
6831: Real estate agencies
6910: Legal activities
7022: Business and other management consultancy activities
7311: Advertising Agencies
7401: Specialised design activities
7490: Other professional, scientific and technical activities n.e.c.
8559: Other education n.e.c.
8690: Other human health activities
8790: Other residential care activities
8899: Other social work activities without accommodation n.e.c.
9003: Artistic Creation
9101: Library and archive activities
9102: Museum activities
9329: Other amusement and recreation activities
9491: Activities of religious organisations
9601: Washing and (dry-)cleaning of textile and fur products
9602: Hairdressing and other beauty treatment

2 Index of deprivation

As many other small towns, Glastonbury has a comparatively high rate of deprivation as **Figure *11*** illustrates.

Figure 11 Mendip Overview of Index of Multiple Deprivation 2010 Ranking



Source: https://www.mendip.gov.uk/media/1960/Mendip-Overall-Index-of-Multiple-Experimentation-2010-with-Rank/pdf/Overall_IMD_2010_with_Rank.pdf?m=635006046347130000

3 Wages in the UK and the South West

Table 3 Median wages in 2 digit SIC, UK and South West, FTE, in £

Non alternative businesses by 2 digit SIC	All UK Median Wage FTE	South West Median Wage FTE	Alternative businesses By 2 digit SIC	All UK Median Wage FTE	South West Median Wage FTE
47	15,016	14,181	47	15,016	14,181
55	17,633	13,162	55	17,633	13,162
56	12,522	11,870	56	12,522	11,870
68	25,924	24,970			
69	30,195	24,769			
			70	34,181	28,109
			73	32,066	26,524
74	30,000	27,163	74	30,000	27,163
85	24,000	20,814	85	24,000	20,814
86	24,090	21,982	86	24,090	21,982
			87	16,438	15,421
			88	16,912	16,039
			90	25,329	16,733
91	23,284	27,004	91	23,284	27,004
93	15,800	16,733	93	15,800	16,733
94	24,168	20,094	94	24,168	20,094
96	15,451	15,030	96	15,451	15,030
All (average over all SIC)	24,897	22,726	All (average over all SIC)	24,897	22,726
Average over non-alternative economy	21,507	19,814	Average over alternative economy	21,792.67	19390.6

Source: ONS, Annual pay - Gross (£) - For all employee jobs: United Kingdom, 2019