



**The Economic & Employment Impacts of the
International Association of Scientologists (IAS)
2025 Annual Anniversary Event**

An assessment by:

Marshall Regen Ltd

On behalf of:

The Church of Scientology

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About the Authors

Marshall Regen Ltd is a well-established economic development, cultural and regeneration consultancy based in Hove. It is owned and managed by Scott Marshall, formerly Director of Regeneration, Housing & Culture at Brighton & Hove City Council; and Director of Economy at Adur & Worthing Councils. Scott has a degree in economic development and planning and has over 30 years' experience of working in the public and private sectors.

He has worked closely with Bruce Nairne from **Nairne Consultancy Services** for over a decade, undertaking social and economic impact assessments, developing business cases to secure millions of pounds of public funding to support local economic development, and developing economic plans and strategies to prioritise local authority investment decisions. Bruce has postgraduate qualifications in research and consultancy, is a Member of the Institute of Economic Development and is an APMG Better Business Case qualified practitioner.

Scott also works closely with private sector developers, commercial agents and other private sector partners, supporting them to navigate through planning and political processes.

Scott and Bruce have authored similar Socio-Economic Impact reports for:

- Royal Pavilion and Brighton Theatres & Museums and Brighton Dome & Festival in 2025;
- Economic & Employment Impacts of Brighton & Hove Albion's 2022/23 Football Season on Brighton & Hove and Sussex economies in 2023
- Albion in the Community Social Value Report in 2019;
- Sussex County Cricket Club and the Sussex Foundation in 2019; and
- British Airways i360 in 2019.

Marshall Regen Ltd and **Nairne Consultancy Services** have successfully delivered projects for Mid Sussex District Council including:

- Sustainable Economy Strategy and Action Plan in 2022;
- Levelling Up Fund application for the Martlet's Shopping Centre in 2021; and
- Subsidy control advice for the Martlets Shopping Centre funding package in 2025.

In addition, they worked with West Sussex County Council's Digital Infrastructure Team to develop the business case to secure Local Growth Funding for the Converged Digital Fibre Connectivity Project, which provided digital links between Crawley, Horsham, Haywards Heath and Burgess Hill.

They have also authored other local economic development strategies for public sector clients including:

- West Sussex Economic Strategy (2025);
- Eastbourne Economic Strategy (2025);
- Rother Economic Strategy (2024);
- Coastal West Sussex Economic Plan (2022);
- East Hants District Council Place-Making Strategy (2019); and
- Chichester District Council's Inward Investment and Growth Strategy (2019).

They have developed business cases (based on the Five Case Model) to secure millions of pounds worth of Government investment for economic development projects in Sussex, including:

- Future High Streets Fund, Towns Deal and Levelling Up Fund in Newhaven;
- Levelling Up Fund in Bexhill (De La Warr Pavilion);
- Levelling Up Fund in Littlehampton (The Green) and Bognor Regis (Alexandra Theatre); and
- Levelling Up Fund in Eastbourne (Towner Gallery and Black Robin Farm).

They also developed the evidence base that underpins the Get Sussex Working Plan (2025); provided strategic support to West Sussex County Council to manage the transfer of Local Enterprise Partnership functions to local authorities (including establishing the West Sussex Economic Growth Board); and developed a detailed economic assessment of Coastal West Sussex on behalf of the Coastal West Sussex Partnership in 2022.

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Executive Summary

“We have worked with the IAS for many years and this event brings a huge boost to the local economy – particularly through hotel rooms. The guests travel from all over to East Grinstead and all of the hotels in the Gatwick area benefit hugely from increased occupancy during this time.”

Hotel General Manager – [REDACTED]

The 2025 International Association of Scientologists (IAS) Annual Anniversary Event was held at Saint Hill Manor, East Grinstead between 31 October and 2 November 2025. The three-day event attracted around 6,500 visitors to its Friday and Sunday events, just under half (47%) were from overseas. More than 4,500 people also attended the activities on Saturday. Including staff, the overall number of individuals who attended this event over three days exceeded 7,000. For the purposes of this survey, it has been assumed that the vast majority of those attending Saturday events also attended the Main event on Friday, so they have been discounted entirely. There were around 1,200 additional local visitors to the charity concert on the Sunday.

Table 1: IAS Annual Event Overseas and Domestic Visits

	All Visits	Overseas Visits	Domestic Visits
Main Event Visits	5,285	3,054	2,231
Charity Event Visits	1,200	0	1,200
Total Visits	6,485	3,054	3,431
Percent of Visits	100%	47.1%	52.9%

Their spending on accommodation, transport, and food & drink deliver significant benefits to the East Grinstead, Sussex and UK economies at a time of year that is outside the peak tourism season. Many visitors also use the IAS Annual Event as a springboard to spend more time in the UK, resulting in further spending, including on leisure and other retail, throughout the UK. The IAS and the Church also spend significant amounts through the year in preparing for the Annual Event.

Table 2: Gross Spending Benefits in the UK, Local (Sussex) and East Grinstead

	UK	Local (Sussex)	East Grinstead
<i>Average spending per night</i>	<i>£331.53</i>	<i>£289.34</i>	<i>£201.34</i>
Total visitor spending benefit	£9,106,143	£7,628,830	£5,485,743
Church & staff spending benefit	£3,948,366	£562,147	£265,078
Total Direct spending benefit	£13,054,509	£8,190,977	£5,750,821
Indirect & Induced Spend Benefit	£8,655,140	£3,112,571	£1,207,672
Total Gross Benefit	£21,709,649	£11,303,548	£6,958,493

Visitors spent an average of £331.53 per night on their visit to the IAS Annual Event, including £289.34 per night in Sussex (including East Grinstead) and £201.34 per night in East Grinstead. The gross benefit of the event to the **UK was £21.71 million**. This includes £11.30 million that was spent in Sussex and **£6.96 million that was spent in East Grinstead**. Most of the spending was by visitors -

£9.11 million in the UK, of which £7.63 million was spent in Sussex and £5.49 million of which was spent in East Grinstead.

Some of the spending would have occurred anyway¹, without the IAS Annual Event, particularly at UK level. The net benefits are shown in the table below.

Table 3: Net Spending Benefits in the UK, Local (Sussex) and East Grinstead

Net Benefits	UK	Local (Sussex)	East Grinstead
Net direct benefits	£10,486,107	£6,851,459	£5,413,549
Net indirect & induced benefits	£6,920,830	£2,603,555	£1,136,845
Net Benefits	£17,406,937	£9,455,014	£6,550,394

Once displacement (spending that would have happened anyway) is taken into account, the overall net benefit of the IAS Annual Event was £17.41 million to the UK, £9.46 million of which benefitted Sussex, and £6.55 million of which benefitted East Grinstead.

This spending supports jobs in the UK, Sussex and East Grinstead. These are likely to be sustainable jobs, assuming that the IAS Anniversary Annual Event continues to be held at Saint Hill Manor every year. The gross and net (once displacement is considered) full-time equivalent (FTE) jobs are supported by the Annual Event are shown in the table below.

Table 4: Gross and Net Full-Time Equivalent (FTE) Employment Benefits to the UK, Local (Sussex) and East Grinstead

	UK	Local (Sussex)	East Grinstead
Gross FTE Jobs	287	149	92
Net FTE Jobs	230	125	87

The IAS Annual Event supports **287 gross jobs across the UK**, 149 of these are in Sussex and **92 of them in East Grinstead**. Once displacement is considered the net employment benefits are 230 jobs in the UK, 125 in Sussex and 87 in East Grinstead.

The IAS Anniversary Annual Event provides an opportunity to bring Scientologists from around the world together, to celebrate achievements, share knowledge and to set out future goals, particularly around spiritual and moral advancement, education and human rights. It is also an opportunity for the Church of Scientology to invite local people to its Charity Concert, which was held on the last day of the Event; and to raise money for local charities and good local causes.

This year's event resulted in charitable donations to five local organisations, as shown in the table overleaf.

¹ See method section, below

Table 5: IAS Charitable Donations in 2025 by Charity and the Award

Charity	Donation
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Total	[REDACTED]

A total of **£400,000 of charitable donations** was awarded at the 2025 IAS Anniversary Annual Event weekend. This included donations to the Sussex Branch of the [REDACTED] Friends of [REDACTED] Hospital; [REDACTED] East Grinstead [REDACTED]; and East Grinstead [REDACTED]

“The money received from your charity concert makes a significant impact on The Friends of [REDACTED] Hospital enabling us to purchase equipment for the hospital and contributing to the costs of our annual fundraising fete”.

Chair - Friends of [REDACTED] Hospital

1. Introduction

The International Association of Scientologists (IAS) commissioned **Marshall Regen Ltd** to undertake an independent assessment of the economic and employment benefits that its 2025 IAS Anniversary Annual Event delivers to the local, sub-regional (Sussex) and United Kingdom (UK) economies.

The assessment includes:

- Spending by visitors in the local, regional and national economies during, before and after the event;
- Spending by the Church and Church staff on goods and services in preparation and delivery of the event;
- The multiplier benefits of spending in other parts of the UK, local (Sussex) and East Grinstead economies; and
- Calculations of the gross and net economic and employment benefits to the UK, local area (Sussex) and East Grinstead.

The assessment also shows the direct benefits that local community organisations received in the form of donations from the Church and the IAS in 2025.

2. The International Association of Scientologists (IAS)

The Church of Scientology is a religious movement that was founded by L. Ron Hubbard in the early 1950s. It has expanded its reach to across all continents of the world. Scientologists believe in the concept of an immortal spirit that is distinct from the mind and the body. The religion aims to bridge Eastern philosophy with Western thought, with the ultimate goal to lift all people to higher states of existence.

In 1984, the International Association of Scientologists (IAS) was established at Saint Hill Manor in East Grinstead, West Sussex with the aim of uniting, advancing, and supporting the Scientology religion and Scientologists in all parts of the world. Members of the IAS participate in a wide range of activities locally, nationally and internationally. These include participating in spiritual, moral, education and human rights awareness projects, and providing practical help and training in response to disasters that occur around the world.

In 2014, Florida State University undertook an assessment of the economic impact of the Church of Scientology on Clearwater, Florida & Surrounding Areas. This found that the Church's activities generated nearly \$917 million of economic benefit, including \$485 million in direct, and \$432 million in indirect and induced benefit. This generated 7,514 jobs (4,311 direct, and 3,203 indirect and induced jobs).

Whilst the Florida study focused on the wider economic impact of the Church of Scientology on Florida, this assessment is specifically confined to the impacts of the IAS Annual Anniversary Event at Saint Hill. The most significant economic benefits accrue from visitor spending locally, regionally and nationally.

3. The IAS Annual Anniversary Event

The IAS hosts an annual three-day event at Saint Hill every October. The 2025 event took place between Friday 31st October and Sunday 2nd November. In addition to local and national visitors, the event attracted over 3,000 visitors from around the world, many of whom use it as a springboard to visit other places within the United Kingdom, extending the economic footprint of the event beyond the local area and over a longer period of time.

The Annual Event involves months of preparation and organisation, which includes:

- Erecting 3 large marquees that can accommodate the thousands of people who attend the event;
- Coordinating services and planning and events, including procuring performers, providing catering and supporting attendees with travel and accommodation requirements;
- Planning and rehearsing the events, seminars and awards presentations; and
- Preparing the Saint Hill Charity Concert.

The three-day event commenced with an afternoon of celebratory activities, followed in the evening by the main presentation and address by the Church of Scientology's Ecclesiastical Leader, Mr David Miscavige. This set out the achievements of members of the IAS and future plans. The Saturday involved a series of events and workshops on issues that include moral teaching, drug education, human rights and how to apply Scientology principles in practice. Saturday evening involved a formal dinner, presentations and concert. The Sunday event was the Charity Concert, performed by international artists. The Charity Concert was attended by around 1,500 local people and the money that was raised from the concert was donated to local charities and good causes.

The IAS Anniversary Annual Event is a key contributor to the local visitor economy, attracting thousands of visitors from around the world outside the main tourist season. Visitors spend on hotel accommodation, food & drink, transport and other items (such as clothes) during their stays. Many international visitors, in particular, use their visit as an opportunity to visit other parts of Sussex and the UK during their stay.

4. Method and Assumptions

4.1 Visitor Survey

The calculations that have been used to undertake this assessment are based on an on-line survey of visitors to the event. This asked respondents to state the following:

- Their usual place of residence, including the country if they were from outside the UK;
- The number of nights they intended to stay in East Grinstead, elsewhere locally and elsewhere in the UK;
- How much, in total they expected to spend in East Grinstead, elsewhere locally and elsewhere in the UK by theme:
 - Accommodation (hotels, guesthouses, Airbnb etc.)
 - Transport (taxis, car hire, gas/petrol, trains, coaches and buses etc.)
 - Food & drink (restaurants, bars, pubs etc.)
 - Shopping
 - Leisure (including sports events, museums, galleries, theatres & cinemas etc.)
 - Other.

Respondents were asked to specify spending in each area within £100 bands up to £500, from £500 to £1,000, within £1,000 bands from £1,000 to £5,000 and £5,000+. Respondents also had the option to select £0 spent under each theme. The mid-point for each band was used as the reasonable spending estimate – i.e.: for £1-£100, respondents were assumed to have spent £50, for £101-£200, they were assumed to have spent £150, and so on.

For the geographies, elsewhere local was defined as being within 45 minutes travel time (excluding London), and elsewhere in the UK was defined as beyond 45 minutes travel time, including London.

Distances within 45 minutes travel time (excluding London) has been used as a proxy for Sussex. This may mean that calculations attributed to Sussex are slightly inflated, as it is likely to include people who have travelled from some parts of Kent and Surrey.

Respondents were asked to state their answers in either US Dollars, GB pounds or Euros. For the analysis, these were converted into GB pounds, based on the following exchange rates:

- 1 Euro = 0.88 GB pound
- 1 US Dollar = 0.76 GB pound

The survey was translated into eight different languages. There were 405 responses².

² English (252); Italian (46); French (40); German (40); Spanish (15); Hungarian (6); Czech (5); Slovak (1).

4.2 Staff Survey

There are around 330 staff at Saint Hill. Many of these spend on clothes and other items in preparation for the annual event. Staff were surveyed separately from visitors. There were 73 respondents to this survey. Respondents were asked to state how much they spent in each of the spatial areas by the same themes as the visitors. The average spend by respondents was aggregated to the total number of known staff (330) at Saint Hill to calculate the gross figure.

4.3 Spend by the IAS

Details of direct spend in preparing and hosting the event was provided by the IAS. Spend in East Grinstead, other local (Sussex) and spend in the UK was provided by item. The themes were then converted to the themes that were used in the visitor and staff surveys.

4.4 Analytical Approach

The survey responses enabled spend per visit and spend per night to be calculated for overseas and domestic visitors for each spending theme in each spatial area. These were then aggregated to the total number of visits to the event and nights associated with the event. Spending by staff was aggregated in the same way.

This provided details of the direct, gross spending by theme in East Grinstead, other local (Sussex) and the UK. Other local (Sussex) calculations include spending in East Grinstead and UK calculations include spending in Sussex.

The gross calculations were converted into net benefits in the following ways:

- All spending by East Grinstead residents has been removed from the calculations for each spatial area. It is assumed that this would have been spent locally, within Sussex and within the UK anyway, had the IAS Annual Event not taken place;
- All spending by Sussex residents has been removed from the local (Sussex) and UK calculations. In the absence of the IAS event, it is assumed that they would have spent elsewhere in Sussex or the UK. Spending by residents from Sussex who live outside East Grinstead and spending by residents from other parts of the UK is included in the East Grinstead analysis, as it is additional spending in the town, which is unlikely to have occurred in the absence of the event;
- All spending by visitors who live in the UK (including from Sussex and East Grinstead) is excluded from the UK calculations, as it is assumed that they would spend on other things within the UK in the absence of the IAS event. Spending by UK visitors who live outside Sussex is assumed to be additional to Sussex and spending by UK visitors who live outside East Grinstead is assumed to be additional to East Grinstead;

- All overseas visitor spend is assumed to be additional to the UK, Sussex and East Grinstead. This is because the event is the main reason for their visit, even if they spent elsewhere in the UK before or after their visits; and
- All spending by the Church that is associated with the event is assumed to be additional because it would not have occurred in the absence of the event.

All spending by visitors and by the Church and staff in its preparation and hosting of the event results in additional supply chain benefits in other parts of the economy. This is known as the multiplier effects. A local multiplier of 1.21³ has been applied to the benefits at East Grinstead level; a multiplier of 1.38⁴ has been applied to benefits at local (Sussex) level, and a multiplier of 1.66⁵ has been applied to benefits at UK level.

Gross and net employment benefits have been calculated by dividing the direct and indirect gross and net spending by the estimated spend that it takes to create one full-time equivalent (FTE) job. According to Visit Britain, it took £54,000 of spending to create one FTE job in 2013⁶. This has been updated to £75,623 to reflect 2025 prices⁷.

5. Event Visits

“The annual event is consistently great for local business. We see a noticeable uplift in revenue from visitors attending the event along with events being held at surrounding hotels in the lead up to it, and the increase in bedroom sales during the event period is especially beneficial. It brings valuable footfall to the area and provides a welcome boost to the local economy.”

Conference & Events Office Manager - [REDACTED]

The table overleaf shows the number of individual visitors to the IAS Anniversary Annual event, broken down by overseas and domestic visits, based on the survey responses.

³ Table 4.12 (retailing at local level); Additionality Guide (4th Edition); Homes & Communities Agency (now Homes England); 2014

⁴ Table 4.12 (retailing at regional level); Additionality Guide (4th Edition); Homes & Communities Agency (now Homes England); 2014

⁵ Multipliers (Retail) UK Analytical Tables Input-Output Tables 2022; Office for National Statistics; 2024

⁶ Tourism Jobs and Growth – The Economic Contribution of the Tourism Economy in the UK; Deloitte & Oxford Economics; 2013

⁷ GDP at Market Prices and Money GDP; Office for National Statistics; 2025

Table 6: Domestic & Overseas Event Visits

	All Visits	Overseas Visits	Domestic Visits
Main Event Visitors	5,285	3,054	2,231
Additional Charity Event Visitors	1,200	0	1,200
Total Visits	6,485	3,054	3,431
Percent of Visits	100.0%	47.1%	52.9%

There were 6,485 visitors associated with the event (on Friday and Sunday). This included 1,200 additional visitors who attended the charity event that was held on the Sunday, which was largely attended by local residents. For the analysis, these visitors are assumed to all be UK residents. The proportion of overseas and UK visits reflects this – with 47.1% of all visits to the event being from overseas and 52.9% being UK residents.

There were 405 visitor survey respondents. This is 6.2% of all visits to the annual event. Of the 405 respondents, 234 (57.8%) lived outside the UK and 171 (42.2%) lived within the UK.

6. Gross Spending Benefits

6.1 Gross Direct Spending Benefits

There were 28,585 staying visitor nights associated with the Annual Event. This included 18,230 nights by overseas visitors and 10,355 by domestic visitors.

The table below shows the average spend per night by overseas visitors and the total spend in the UK, local (Sussex) and East Grinstead.

Table 7: Spending per Night and Overall Spending by Overseas Visitors in the UK, Sussex and East Grinstead

	UK	Sussex (local)	East Grinstead
Average Spend per Night	£369.34	£311.82	£228.83
Total Overseas Visitor Spend	£6,733,028	£5,684,425	£4,171,601

Overseas visitors spent an average of £369.34 per night on their visit to the UK for the IAS Annual Event. This included spending on all items: accommodation, transport, food & drink, shopping, leisure and other.

An average of £311.82 per night of the UK spend was spent in Sussex (including East Grinstead) and £228.83 per night of the UK spend was spent in East Grinstead itself. Once these are summed to the total visitor nights by overseas visitors, the total gross spend associated with the event by overseas visitors was £6.73 million. This includes £5.68 million in Sussex (local), and £4.17 million in East Grinstead. In other words, 84% of overseas visitor spend in the UK that was associated with the event was spent locally in and around Sussex and 62% of this was spent in East Grinstead.

The table below shows the average spend per night by domestic visitors and the total spend in the UK, local (Sussex) and East Grinstead.

Table 8: Spending per Night and Overall Spending by Domestic Visitors in the UK, Sussex and East Grinstead

	UK	Local (Sussex)	East Grinstead
Average Spend per Night	£229.19	£187.78	£126.91
Total Domestic Visitor Spend	£2,373,115	£1,944,405	£1,314,143

Domestic visitors spent an average of £229.19 per night on their visit to the IAS Annual Event. This included spending on all items: accommodation, transport, food & drink, shopping, leisure and other.

An average of £187.78 per night of the UK spend by domestic visitors was spent in or around Sussex (including East Grinstead) and £126.91 per night of the UK spend was spent in East Grinstead itself. Once these are summed to the total visitor nights by domestic visitors, the total gross spend associated with the Annual Event by domestic visitors was £2.37 million. This includes £1.94 million in and around Sussex (including East Grinstead), and £1.31 million in East Grinstead itself. In other words, 82% of domestic visitor spend in the UK that was associated with the event was spent in and around Sussex, and 55% was spent in East Grinstead.

The table below shows the average spend per night by all visitors and the total spend in the UK, local (Sussex) and East Grinstead.

Table 9: Spending per Night and Overall Spending by all Visitors in the UK, Sussex and East Grinstead

	UK	Local (Sussex)	East Grinstead
Average Spend per Night	£331.53	£289.34	£201.34
Total Visitor Spend	£9,106,143	£7,628,830	£5,485,743

All visitors spent an average of £331.53 per night on their visit to the IAS Annual Event.

An average of £289.34 per night of the UK spend by visitors was spent in or around Sussex (including East Grinstead) and £201.34 per night of the UK spend was spent in East Grinstead itself. Once these are summed to the total visitor nights by all visitors, the total gross spend associated with the Annual Event by all visitors was £9.11 million. This includes £7.63 million in and around Sussex (including East Grinstead), and £5.49 million in East Grinstead itself. In other words, 84% of visitor spend in the UK that was associated with the event was spent in and around Sussex, and 60% was spent in East Grinstead.

The table below shows the average spend by staff and by the Church in each of the spatial areas, alongside the spending by the Church on goods and services in preparing for and hosting the annual event.

Table 10: Average and Total Spending by Staff in the UK, Sussex and East Grinstead

	UK	Local (Sussex)	East Grinstead
Average Spend per staff member	£355.85	£181.50	£132.29
Total Staff Spend	£195,288	£82,653	£52,863
Spend on Goods & Service by the Church	£3,753,078	£479,494	£212,215
Total Spend by the Church & Staff	£3,948,366	£562,147	£265,078

Staff spent an average of £355.85 on the Annual Event. An average of £181.50 of this was spent in or around Sussex (including East Grinstead) and an average of £132.29 of the UK spend was spent in East Grinstead itself. Once these are summed to the total number of staff (330), their total gross spend was £195,288. This includes £82,653 in and around Sussex (including East Grinstead), and £52.863 in East Grinstead itself. In other words, 42% of staff spend in the UK was spent in and around Sussex, and 27% was spent in East Grinstead.

The Church spent £3.75 million on goods and services in the UK in preparing for and hosting the event. This included £479,494 in and around Sussex and £212,215 in East Grinstead. Around 13% of the Church spending on goods and services was with organisations based in and around Sussex and around 6% was spent in East Grinstead, itself.

Together, the Church and the staff spent £3.95 million in the UK on the event, £0.56 million was spent in and around Sussex, and £0.27 million was spent in East Grinstead.

The table below shows the total gross benefits of the IAS Annual Event to the UK, Sussex (local) and East Grinstead. It includes the spend by overseas and domestic visitors, spend on goods and services by the Church, and spend by staff

Table 11: Total Direct Spending by Visitors, Church and Staff in the UK, Sussex and East Grinstead

	UK	Local (Sussex)	East Grinstead
Visitor Spend	£9,106,143	£7,628,830	£5,485,743
Church and Staff Spend	£3,948,366	£562,147	£265,078
Total Gross Benefit	£13,054,509	£8,190,977	£5,750,821

Total direct spending in the UK associated with the 2025 IAS Anniversary Annual Event was £13.05 million. Around £8.19 million (64%) was spent in and around Sussex (local) and around £5.75 million (44%) was spent in East Grinstead, itself.

An average of £289.34 per night of the UK spend by visitors was spent in Sussex or around (including East Grinstead) and £201.34 per night of the UK spend was spent in East Grinstead itself. Once these are summed to the total visitor nights by all visitors to the IAS event, the total gross spend associated with the event by all visitors was £9.11 million. This includes £7.63 million in and around Sussex (including East Grinstead), and £5.49 million in East Grinstead itself. In other words, 84% of visitor

spend in the UK that was associated with the event was spent in and around Sussex, and 60% was spent in East Grinstead.

6.2 Gross Indirect and Induced benefits – Multiplier Effects

Direct spending in the economy leads to further spending in local, regional and national supply chains. This is known as the ‘multiplier’ effect. The multiplier effects are likely to be less in smaller areas, like East Grinstead, than in larger areas, such as the UK. This is because much of the supply chain spending by businesses and their employees who have benefitted from spending associated with the IAS event ‘leaks’ out of local areas. Naturally, at UK level, this is less likely to occur, so the multiplier effects are likely to be greater.

The table below shows the gross direct benefits, multipliers that have been used for each spatial area and the resultant indirect and induced benefits to the UK, the local area (Sussex) and East Grinstead.

Table 12: Total Indirect and Induced Spending Benefit to the UK, Sussex and East Grinstead

	UK	Local (Sussex)	East Grinstead
Gross direct spending benefit	£13,054,509	£8,190,977	£5,750,821
Multiplier	1.66	1.38	1.21
Indirect & Induced benefit	£8,615,976	£3,112,571	£1,207,672

At UK level, a 1.66 multiplier has been applied. This means that for every £1.00 of direct spending, an additional £0.66 is generated in the UK economy. For local (Sussex), a 1.38 multiplier has been used. This means that for every £1.00 of direct spending, an additional £0.38 is generated in the local (Sussex) economy. For East Grinstead, a 1.21 multiplier has been used. This means that for every £1.00 of direct spending, an additional £0.21 is generated in the local (Sussex) economy.

Based on this, the indirect and induced benefits of the 2025 IAS Anniversary Annual Event at UK level was £8.62 million. The indirect and induced local (Sussex) benefits were £3.11 million; and the indirect and induced benefits to East Grinstead were £1.21 million.

6.3 Total Gross Spending Benefits

The total gross benefit is the sum of the gross direct and indirect & induced spending benefit, as shown in the table below.

Table 13: Total Gross Spending Benefits to the UK, Sussex and East Grinstead

	UK	Local (Sussex)	East Grinstead
Gross direct spending benefit	£13,054,509	£8,190,977	£5,750,821
Indirect & induced spending benefit	£8,615,976	£3,112,571	£1,207,672
Total Gross Benefit	£21,670,486	£11,303,548	£6,958,493

The overall gross benefit of the IAS Anniversary Annual Event in 2025 was £21.7 million. The overall gross benefit locally (Sussex) was £11.30 million and the overall gross benefit to East Grinstead was £6.96 million.

7. Net Spending Benefits

The net economic benefits include estimates of ‘additionality’. Additionality removes the amount that is likely to have been spent elsewhere at each spatial level if the IAS Anniversary Annual event did not occur. This is known as ‘displacement’. The approach that has been is set out in Section 4.4, above.

7.1 Net Direct Benefits

Table 14: Net Direct Spending Benefits to the UK, Sussex and East Grinstead

	UK	Local (Sussex)	East Grinstead
Gross direct benefits	£13,054,509	£8,190,977	£5,750,821
Visitor spend displacement	-£2,568,403	-£1,339,518	-£337,272
Net direct benefits	£10,486,107	£6,851,459	£5,413,549

The total net direct benefit to the UK of the 2025 IAS Annual event was £10.49 million. Most of this (£6.85 million) benefited the local area, in and around Sussex and just over half (£5.41 million) directly benefited East Grinstead.

7.2 Net Indirect and Induced Benefits – Multiplier Effects

The table below shows the net direct benefits, multipliers that have been used for each spatial area and the resultant indirect and induced benefits to the UK, the local area (Sussex) and East Grinstead. The same multiplier effects have been applied to the net direct pending benefits that were applied to the gross direct spending benefits.

Table 15: Net Indirect & Induced Spending Benefits to the UK, Sussex and East Grinstead

	UK	Local (Sussex)	East Grinstead
Net Benefit	£10,486,107	£6,851,459	£5,413,549
Multiplier	1.66	1.38	1.21
Indirect & Induced Benefit	£6,920,830	£2,603,555	£1,136,845

The indirect and induced benefits of the 2025 IAS Annual Event was £6.92 million. The indirect and induced local (Sussex) benefits were £2.60 million; and the indirect and induced benefits to East Grinstead were £1.14 million.

7.3 Total Net Economic Benefits

The total net economic benefits have been calculated by adding the net direct benefits to the net indirect and induced benefits for the UK, local (Sussex) and East Grinstead. These are shown in the table below.

Table 16: Total Net Spending Benefits to the UK, Sussex and East Grinstead

	UK	Local (Sussex)	East Grinstead
Net Benefit	£10,486,107	£6,851,459	£5,413,549
Indirect & Induced Benefit	£6,920,830	£2,603,555	£1,136,845
Total Benefit	£17,406,937	£9,455,014	£6,550,394

The total net benefit to the UK of the 2025 IAS Annual Event was £17.41 million. The total net benefit to Sussex was £9.46 million, and the total net benefit to East Grinstead was £6.55 million.

8. Spending by Theme

“As a local business near East Grinstead, we significantly benefit from the Church of Scientology’s Annual Event. We supply them with high quality flowers for the three-day event which really helps our business revenue during the autumn season”.

Local Business Owner - Florist

This section considers spending by visitors to the IAS Annual Event by area of expenditure in the UK, local (Sussex) and East Grinstead. The following expenditure areas are assessed: accommodation, transport, food & drink, shopping, leisure and other.

Spending by staff and the IAS is included in the assessment.

8.1 Accommodation Spending

Table 17: Spending on Accommodation in the UK, Local (Sussex) and East Grinstead

		UK	Local (Sussex)	East Grinstead
Overseas	Spend per night	£148.79	£135.34	£100.91
	Total spend	£2,712,510	£2,467,257	£1,839,545
Domestic	Spend per night	£54.78	£45.09	£24.93
	Total spend	£567,172	£466,837	£258,141
All Visitors	Spend per night	£123.43	£121.97	£80.41
	Total visitor spend	£3,279,682	£2,467,379	£2,097,686
Staff	Total spend	£0	£0	£0
Church of Scientology	Total spend	£143,959	£143,959	£60,612
All Spend	Total	£3,423,641	£2,611,338	£2,158,299

The 2025 IAS Annual Event generated £3.42 million of spending on accommodation, £2.61 million of which was spent in and around Sussex. Most of this spending (£2.16 million) occurred in East Grinstead.

Overseas visitors spent £2.71 million on accommodation, £2.47 million of which was spent in and around Sussex and £1.84 million was spent in East Grinstead. Domestic visitors spent £0.57 million on accommodation, £0.47 million of which was spent in and around Sussex, and £0.26 million was spent in and around East Grinstead.

The Church spent £143,059 on accommodation in the UK. All of this was spent locally in and around Sussex, including over £60,000 in East Grinstead.

8.2 Transport Spending

Table 18: Spending on Accommodation in the UK, Local (Sussex) and East Grinstead

		UK	Local (Sussex)	East Grinstead
Overseas	Spend per night	£54.76	£43.04	£27.25
	Total spend	£998,333	£784,581	£496,686
Domestic	Spend per night	£33.13	£29.54	£20.93
	Total spend	£343,024	£305,900	£216,723
All Visitors	Spend per night	£48.93	£39.40	£25.54
	Total visitor spend	£1,341,357	£1,090,481	£713,408
Staff	Total spend	£38,783	£35,366	£21,078
Church of Scientology	Total spend	£120,855	£90,272	£11,797
All Spend	Total	£1,500,994	£1,216,119	£746,284

The 2025 IAS Annual Event generated £1.5 million of spending on transport, £1.22 million of which was spent in and around Sussex. Just under £0.75 million of transport expenditure was spent in East Grinstead.

Overseas visitors spent just under £1.0 million on transport, £0.78 million of which was spent in and around Sussex and £0.5 million was spent in East Grinstead. Domestic visitors spent £0.34 million on transport, £0.31 million of which was spent in and around Sussex, and £0.22 million was spent in and around East Grinstead.

Staff spent a further £38,783 on transport, almost all (£35,366) of which was spent in and around Sussex and £21,078 of which was spent in East Grinstead.

The Church spent £120,855 on transport in the UK, £90,272 of which was spent in Sussex and £11,797 was spent in East Grinstead.

8.3 Food & Drink Spending

Table 19: Spending on food & drink in the UK, Local (Sussex) and East Grinstead

		UK	Local (Sussex)	East Grinstead
Overseas	Spend per night	£91.35	£76.37	£57.97
	Total spend	£1,665,373	£1,392,160	£1,056,817
Domestic	Spend per night	£63.97	£52.50	£38.45
	Total spend	£662,369	£543,573	£398,088
All Visitors	Spend per night	£83.97	£69.93	£52.70
	Total visitor spend	£2,327,742	£1,935,733	£1,454,905
Staff	Total spend	£0.00	£0.00	£0.00
Church of Scientology	Total spend	£1,226,203	£97,740	£62,095
All Spend	Total	£3,553,945	£2,033,474	£1,517,000

The 2025 IAS Annual Event generated £3.55 million of spending on food and drink, £2.03 million of which was spent in and around Sussex and £1.52 million of which was spent in East Grinstead.

Overseas visitors spent £1.67 million on food and drink, £1.39 million of which was spent in and around Sussex and £1.06 million was spent in East Grinstead. Domestic visitors spent £0.66 million on food and drink, £0.54 million of which was spent in and around Sussex, and just under £0.40 million was spent in and around East Grinstead.

The Church spent a further £1.23 million on food and drink. Most of this was spent on suppliers outside the local area. Only £97,740 was spent in and around Sussex, £62,095 of which was spent on suppliers in East Grinstead.

8.4 Shopping (Retail) Spending

Table 20: Spending on Shopping (Retail) in the UK, Local (Sussex) and East Grinstead

		UK	Local (Sussex)	East Grinstead
Overseas	Spend per night	£41.32	£32.24	£25.63
	Total spend	£753,336	£587,796	£467,246
Domestic	Spend per night	£50.18	£38.28	£25.84
	Total spend	£519,613	£396,322	£267,613
All Visitors	Spend per night	£43.71	£33.87	£25.69
	Total visitor spend	£1,272,949	£984,118	£734,859
Staff	Total spend	£91,249	£29,133	£19,041
Church of Scientology	Total spend	£0	£0	£0
All Spend	Total	£1,364,198	£1,013,251	£753,899

The 2025 IAS Annual Event generated £1.36 million of spending on shopping (retail), £1.01 million of which was spent in and around Sussex and £0.75 million of which was spent in East Grinstead.

Overseas visitors spent £0.75 million on shopping (retail), £0.59 million of which was spent in and around Sussex and £0.47 million of which was spent in East Grinstead. Domestic visitors spent £0.52 million on shopping (retail), just under £0.40 million of which was spent in and around Sussex, and just under £0.27 million of which was spent in and around East Grinstead.

Staff spent a further £91,249 on shopping (retail), £29,133 of which was spent in and around Sussex and £19,041 of which was spent in East Grinstead. There was no spending by the Church on shopping.

8.5 Leisure Spending

Table 21: Spending on Leisure in the UK, Local (Sussex) and East Grinstead

		UK	Local (Sussex)	East Grinstead
Overseas	Spend per night	£27.11	£19.98	£13.53
	Total spend	£494,238	£364,182	£246,738
Domestic	Spend per night	£12.50	£9.69	£6.40
	Total spend	£129,432	£100,335	£66,221
All Visitors	Spend per night	£23.17	£17.20	£11.61
	Total visitor spend	£623,669	£464,517	£312,959
Staff	Total spend	£0	£0	£0
Church of Scientology	Total spend	£0	£0	£0
All Spend	Total	£623,669	£464,517	£312,959

The 2025 IAS Annual Event generated £0.62 million of leisure spending, £0.46 million of which was spent in and around Sussex and £0.31 million of which was spent in East Grinstead.

Overseas visitors spent £0.49 million on leisure in the UK, including £0.36 million in and around Sussex and £0.25 million in East Grinstead. Domestic visitors spent £0.13 million on leisure, £0.10 million of which was spent in and around Sussex, and £66,221 of which was spent in East Grinstead. Neither the Church nor staff spent on leisure activities.

8.6 Other Spending

Table 22: Spending on 'Other' Items in the UK, Local (Sussex) and East Grinstead

		UK	Local (Sussex)	East Grinstead
Overseas	Spend per night	£5.99	£4.85	£3.54
	Total spend	£109,239	£88,449	£64,568
Domestic	Spend per night	£14.63	£12.69	£10.37
	Total spend	£151,505	£131,438	£107,358
All Visitors	Spend per night	£8.32	£6.97	£5.38
	Total visitor spend	£260,744	£219,887	£171,926
Staff	Total spend	£23,778	£18,154	£12,745
Church of Scientology	Total spend	£2,262,061	£147,523	£77,710
All Spend	Total	£2,546,584	£385,563	£262,381

The 2025 IAS Annual Event generated £2.55 million of other spending, £0.39 million of which was spent in and around Sussex and £0.26 million of which was spent in East Grinstead.

Overseas visitors spent £109,239 on ‘other’ in the UK, including £88,449 in and around Sussex and £64,568 in East Grinstead. Domestic visitors spent £151,505 on ‘other’, £131,438 of which was spent in and around Sussex, and £107,358 of which was spent in East Grinstead. Staff spent a further £23,778 on other items, £18,154 of which was spent in and around Sussex and £12,745 of which was spent in East Grinstead.

The Church spent £2.26 million on ‘other’ items in the UK, £147,523 of which was spent in Sussex and £77,710 of which was spent in East Grinstead. Church ‘other’ spending included ‘site preparation’ (£1.92 million); waste management (£161,011); health & safety, including security (£63,458); and professional services, including translation, finance, legal, design and PR (£59,579).

9. The Employment Benefits

Spending associated with the IAS Annual Event supports direct and indirect jobs within East Grinstead, across Sussex and throughout the UK. The figures shown below provide the gross and net FTE jobs in each of the spatial areas. The 2025 event only creates jobs for one year, but as the event is annual, it is not unreasonable to assume that these jobs are sustained over each year that the event takes place.

9.1 Gross Full-time Equivalent (FTE) Jobs

The table below shows the gross direct indirect and total gross jobs that are supported by the IAS Annual Event in East Grinstead, Sussex (including East Grinstead) and the UK (including Sussex).

Table 23: Gross FTE Jobs in the UK, Sussex and East Grinstead

	UK	Local (Sussex)	East Grinstead
Direct FTE Jobs	173	108	76
Indirect & Induced FTE Jobs	114	41	16
Total FTE Jobs	287	149	92

The IAS Annual Event supports 287 gross FTE jobs in the UK, 149 of which are in Sussex and 92 of which are in East Grinstead. This includes 173 FTE jobs in the UK as a direct result of visitor, volunteer and IAS spending associated with the event, 108 of which are in Sussex (including East Grinstead), and 76 of which are in East Grinstead. A further 114 FTE jobs are created through supply chain activity throughout the UK, 41 of which are in Sussex (including East Grinstead) and 16 of which are in East Grinstead.

9.2 Net Full-time Equivalent (FTE) Jobs

The table below shows the net direct, indirect and total FTE jobs that are supported by the event in the UK (including Sussex), Sussex (including East Grinstead) and East Grinstead.

Table 23: Net FTE Jobs in the UK, Sussex and East Grinstead

	UK	Local (Sussex)	East Grinstead
Direct JFTE jobs	139	91	72
Indirect & Induced FTE Jobs	92	34	15
Total FTE Jobs	231	125	87

The IAS Annual Event supports 231 net FTE jobs in the UK, 125 of which are in Sussex and 87 in East Grinstead. This includes 139 FTE jobs in the UK as a direct result of visitor, Church staff and Church spending associated with the event, 91 of which are in Sussex (including East Grinstead), and 72 of which are in East Grinstead. A further 92 FTE jobs are created through supply chain activity throughout the UK, 34 of which are in Sussex (including East Grinstead) and 15 of which are in East Grinstead.

10. Supporting the Local Community

“The generous IAS donation has been allocated towards the lifeguard service which operates from Chichester. This covers all established [REDACTED] lifeguarded beaches in West Sussex and the new service, launched in 2025, which covers Brighton and Hove.

The charity’s lifeguard services deliver water safety advice, first aid and in-water rescues at our beaches”.

Fundraising and Partnership Lead - [REDACTED]

The Annual Saint Hill Charity Concert was held on Sunday 2nd November. It was the 25th Charity Concert to be held at Saint Hill and it attracted over 1,500 local residents and dignitaries. The concert included presentations of donations to five local charities, with a combined value of £400,000.

Table 24: IAS Donations to Local Organisations

Organisation	Donation
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Total	£400,000

The donations will be used for a range of projects:

- The Friends of [REDACTED] Hospital will use the monies to buy equipment and to contribute to the costs of its fundraising fete;
- The [REDACTED] will allocate the donation towards the lifeguard service in Chichester, which covers all beaches in West Sussex and ten beaches in Brighton & Hove. The lifeguard services deliver water safety advice, first aid and in-water rescues on local beaches;
- [REDACTED] will use the monies to fund its core building and operational infrastructure, staff training and to fund activities for older people who cannot afford to pay themselves;
- [REDACTED] will use the donation to help fund the club's capital projects; and
- [REDACTED] will use the monies to purchase new assets that will have a lifespan of 10-20 years and enable the club to support youth and junior males and females to develop skills through [REDACTED]

"The incredible support generated through the Charity Concert and the monies raised has had a significant economic impact on our organisation, providing unrestricted funding that allows us to use it where we think it will make the greatest difference.

CEO - [REDACTED]

11. Summary & Conclusions

The IAS Anniversary Annual Event at Saint Hill Manor, East Grinstead makes a significant contribution to the local, sub-regional and UK economies. The three day event is held every October, outside the peak tourism season, when visitor spending in most parts of the country is subdued. It is an annual event, so its employment impacts can be considered to be sustainable.

The 2025 event attracted in the region of 6,500 visitors, just under half of whom were visitors to the UK from overseas and large numbers of visitors from other parts of the UK who spend money in the Sussex and East Grinstead economies. Including staff, the overall number of individuals who attended this event over three days exceeded 7,000.

Although many visitors came to East Grinstead exclusively for the Annual Event, many also used the event as an opportunity to extend their stays and to visit other parts of Sussex and the UK.

The event itself costs around £3.5 million to hold. This includes spending on erecting the marquee, ensuring that Saint Hill Manor is well-equipped to host such large numbers of people, spending transport, entertainment and food and drink.

Businesses clearly benefit from event, including in the form of noticeably higher bed occupancy at local hotels, increased bookings at restaurants and more intensive use of local taxis, for example.

Over half (£9.46 million) of the £17 million net benefit to the UK accrues to Sussex and the surrounding area and over a third (£6.55 million) benefits the local East Grinstead economy. This helps to sustain 230 net jobs across the UK, including 139 as a direct result of spending by visitors to the event and a further 92 as a result of supply chain activity. Half (125) of the jobs that are supported by the IAS Annual Event accrue to Sussex and it supports 87 jobs in East Grinstead.

The Charity Concert that was held on the final day of the Event is a community event that attracts around 1,500 local people. It raises money for good local causes. This year, five local organisations benefited from £400,000 of donations between them. These donations help to maintain vital community services in East Grinstead and across Sussex.

“Receiving an award from anyone is very encouraging for all the volunteers that support our [REDACTED] Club, but the one from the Church of Scientology is always special as it makes a difference.

The recent award will enable us to provide very good safe playing, practice and coaching facilities to support the juniors not available elsewhere in the town.

That is why the Church of Scientology award is so very, very, good for us and is greatly appreciated by the management and volunteers alike”.

President - East Grinstead [REDACTED] Club