

# Cost, Quality, Seclusion and Time

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What do UK customers want from a cremation funeral?



A report by  
**TRAJECTORY**



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*At a time of unprecedented choice over many aspects of life this important research clearly maps many contemporary attitudes to funerals. In pinpointing the image of the 'conveyor belt' as a popular expression of how mourners can feel too processed at crematoria it brings statistical weight to my own observations of some thirty years ago that it was not actual machinery but that sense of being processed that made many unhappy.*

Douglas Davies; Professor in the study of religion, Department of Theology and Religion, The University of Durham

If you would like to comment on the report content or provide alternative evidence, please contact us on [insight@dignityuk.co.uk](mailto:insight@dignityuk.co.uk)

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## Foreword by Simon Cox

Time is a precious commodity, ask anyone that has lost someone, or indeed someone being told they have a terminal or life limiting diagnosis.

Time is also important to mourners at a cremation funeral.

In the following pages, our research provides qualitative and quantitative evidence illustrating that what UK customer's value most about a cremation funeral is enough time to have a private and secluded moment in which to remember the person they have lost.

This research started its journey in March 2017 with an initial brief to independent research consultancy Trajectory. The intent behind this work was to understand what customers valued most about a cremation funeral.

Having created market leading funeral cost reports at Sun Life and Royal London from 2004-2016, Dignity challenged me to determine "whether it was just about cost? did quality matter? and if so, what does quality look like?"

At that time there was no certainty this research would proceed nor did I expect (as Trajectory were concluding and pulling together all the various strands of research) that the Competition and Markets Authority (CMA) would announce a study into the funeral and crematoria sectors. The research started in July 2017 and concluded in May this year. With recent announcements, inadvertently, this research is both highly relevant and timely.

This work has a personal relevance for two reasons:

- I constructed a detailed look at crematoria with the Institute of Cemetery and Crematoria Management (ICCM) while at Sun Life which, for various reasons, went unpublished. The work contained rich market data about UK crematoria. Among the aspects covered was time offered at the crematorium, not simply cost
- In a packed crematorium in Bristol in March 1995, my father's funeral was abruptly halted, as the allotted time had been used up, and the next funeral was imminent. My memory of this returned on hearing testimony of customers in qualitative interviews mentioning, unprompted, the feeling of being on a conveyor belt and "one in – one out"

We witnessed many more customer experiences during our research, but what is most striking, yet not surprising, is that what customers want most is a private, secluded moment without seeing mourners from another funeral.

This is not to undermine the service delivered by the sector, indeed the logistics involved for crematoria

operators and funeral directors are significant in order to meet the needs of the customer and to get it right (because you don't get a second chance) and most of the time they do.

Furthermore, every funeral is different, with an ever-increasing choice of cremation funerals from DIY, direct cremation (witnessed and unwitnessed), early morning / evening and weekend services, visual tributes, musical tributes, webcasting, with/without funeral directors, ministers/celebrants. Customers therefore have more choice than ever, but don't always know what is available to them and that is something that the sector as a whole needs to improve upon (in particular we found customers were unaware of the ability to book more time where short slots were offered)

With an ambition to be the standards leader in the sector, we will use this body of evidence to:

- Enhance customer experience by sharing this work with crematoria operators, funeral directors, policymakers and commentators to raise standards, improve education and better meet the needs of the UK's bereaved
- Publish clear and simple crematoria prices online by the end of July 2018
- Crematoria prices will be held for 2018 with the next review in 2019
- Invest several million pounds in further enhancing infrastructure, facilities and grounds

In addition, we would like to work collaboratively across the industry to:

- **Ensure slot lengths are a minimum of 45 minutes to enable customers a respectful time to mourn**
- **Instigate a pricing system where all the mandatory elements (e.g. Crematoria Abatement of Mercury Emissions Organisations (CAMEO) fee, cremation certificate) and everything required to carry out a respectful cremation (e.g. scattering of ashes or an ashes container) are included in a single quoted price**

We are committed to having the highest standards in the industry, while providing the widest choice and value for money for customers.

Cost is important, of course, but our research shows customers consider value for time more as the key measure of value. The message from Britain's mourners is that its time to call an end to conveyor belt funerals with 45 minutes as the minimum for a normal service.

## Executive Summary

### Introduction

The social and cultural practices around funerals and cremations are changing rapidly. Today 77% of all funerals are cremations (rather than burials). In over 80% of all cremation funerals the whole service now takes place at the crematorium. Only one in six crematorium funerals follow the traditional model of a religious service conducted elsewhere followed by a committal at the crematorium.

Because crematoria are being used differently over time what people need from crematoria is also changing. In-depth, comprehensive research has been undertaken for this report to explore customer needs from crematoria and to identify how well, or otherwise, crematoria in the UK meet those needs.

The research underpinning this report is thorough and rigorous. Commencing in July 2017 it includes qualitative and quantitative research with customers, qualitative and quantitative research with funeral directors, qualitative research with representatives of industry bodies and local authority crematoria representatives, plus an audit of the service standards and practices of 292 crematoria in the UK.

### What do people want?

Fundamentally, customers want cremation services to be a private, secluded and uninterrupted moment in which they can remember and pay tribute to their loved one in their way. By and large their experiences at cremations have provided this but feeling rushed or 'on a conveyor belt', not having a long enough slot all undermine this. More than one in three (36%) customers report experiencing the 'conveyor belt' feeling.

Demand for longer slots is evident, both in terms of length of service and avoiding the 'conveyor belt' feeling: Almost 3 in 10 customers (29%) feel they did not have enough time at the crematorium. 78% of customers and 90% of funeral directors say there should be enough time to ensure you don't see other mourners.

Ultimately, having enough time at the crematorium is more important to most people than the cost. The cost of a cremation had little impact on perception of value. For example, 67% of those that paid £500-599 for the cremation felt they got good value, compared to 65% who paid £900-999.

However, length of slot had a much greater impact on perceptions of value for money. Over two-thirds of people who had slots longer than 30 minutes felt the cremation cost was good value for money, whereas less than half of those with slots shorter than 30 minutes felt the cost was good value for money. Value for time is more important than value for money.

### Drivers of customer decision making

Practicality and location are the key drivers of customer choice with price relegated for the majority - 60% say that managing cost was not a consideration when arranging the day/time of cremation. 46% did not know what they paid for the cremation, either because they can't remember (17%) or never knew the fee (29%).

The funeral director is the key intermediary in determining choice. 82% of customers saying that they received help or advice from the funeral director in choosing the crematorium. This made the funeral director the most common source of advice or help (even more common than friends or family, for example).

Crematoria are generally perceived to be of consistent quality, and some people also believed that pricing was consistent – this incorrect assumption of consistent quality and pricing, along with the funeral director's advice mean that for many the local crematoria is the default choice. However, after the event customers do notice factors such as the attentiveness and professionalism of staff, the maintenance and upkeep of grounds and buildings. They are also more aware of the implications of shorter slot times after the event. This suggests that there is a role for crematoria and funeral directors to better inform and educate customers. For example, only 8% of customers were aware of the option to book longer slots. This is particularly unfortunate when the 'conveyor belt feeling is a problem for one in three customers. Our research suggests funeral directors over estimate customer knowledge.

Further education is also required about what is and isn't standard operational practice as there is widespread confusion among customers. 43% have some concern that more than one coffin is cremated at once, 29% have some concern that coffins are re-used and 44% have some concern that cremations do not take place on the day of the funeral (holding over).

### Six core customer needs

The research identifies six core customer needs from a cremation service:

- having space so that everyone who wants to attend can attend
- finding a convenient time slot
- not seeing mourners from other services
- keeping costs within budget
- making sure that the service delivers value (i.e. the desired experience in terms of having sufficient time to remember their loved one in their way)
- the ability to tailor and personalise the service.

### Are needs being met?

Through our audit of the service standards and practices of the 292 crematoria in the UK, we can identify how well or otherwise different providers (Dignity, other private providers and local authority crematoria) deliver against these core customer needs.

There is very little difference between the providers when it comes to providing space, as average chapel sizes are very similar. There is more difference in the number of chapels provided and the size of second chapels. However, customer needs in both these regards are subtle and complex. Whilst larger, multiple chapels help to meet demand, some smaller funerals can feel overwhelmed in larger chapels, and some customers find multi-chapel crematoria too 'chaotic'. Multiple chapels obviously increase the chance of seeing mourners from other funerals, something that most customers are keen to avoid.

When it comes to finding a slot, privately run crematoria offer more flexibility than local authority crematoria. They are more likely to offer flexible opening hours and cremation services at weekends.

Based on slot length, Dignity provides a longer average slot than other providers and matches almost exactly the slot length (54 minutes) that funeral directors describe as ideal. Slot length facilitates the ability to

avoid other mourners, with longer slots more likely to offer the capacity to deliver the length of service people want, plus time at the beginning and end to enter and leave the crematorium and pay respects meaning that other mourners can be avoided.

Based on 'standardised cost'<sup>1</sup> alone, Dignity are more expensive than their competitors. Local authorities provide the cheapest cremation services on average, with other private providers operating at around the average for the overall market.

Using a blend of time offered and standard cost to represent a measure of value, price per minute shows Dignity provide better value for time than the market average (because of their longer slot lengths). Local authorities provide least value because of their generally shorter slot lengths compared to the private providers.

Personalisation is facilitated by the provision of the latest music systems and visual tribute displays. Although Dignity widely offer modern music systems, their crematoria are currently less likely to offer visual tributes or live streaming. For these items other private providers lead the way with Dignity and Local Authorities providing a similar, lower level of provision.

### The UK crematoria scorecard

Trajectory created a scorecard and used this data to rank 292 crematoria on their ability to meet the core six customer needs. Local authority crematoria account for half of the top 20, but this might be expected because, with 182 crematoria, they represent more than 60% of the market.

Local authority crematoria account for 16 of the bottom 20 and, as such, they are over represented based on their market share.

Dignity are well represented in the best tertile with 36% of Dignity crematoria in the top third, and their overall rating influenced by their slot lengths. No Dignity crematoria appear in the 20 lowest ranking crematoria.

<sup>1</sup> To allow for like for like cost comparisons across crematoria we have created a 'standardised cost' for a package of services necessary to carry out a respectful cremation funeral. These are: the administration fee, cremation certificate, environment protection fee, provision of music, scattering of ashes, ashes container and one month's ashes storage.

### Implications and actions

The research identifies several recommendations the sector could take to improve mourner experience including the need for a long enough gap between parties and greater price transparency (including slot length and price per minute). All crematoria prices should be published online. All mandatory costs should be included in the quoted standard price; there is a need to educate customers so that they are better able to make choices that deliver the service they want and it is important for the whole sector to recognise coming trends. These trends include personalisation, tailoring and flexibility – all of which can be assisted by the adoption of new technologies.

Dignity are calling for the introduction of a minimum slot length of 45 minutes across the sector.

Dignity also believes the sector should have a consistent approach to prices; prices should include everything required to undertake a respectful service that meets customer expectations. This includes everything from mandatory charges such as for cremation certificates and CAMEO but also the means to memorialise the deceased such as the inclusion of scattering of ashes or an ashes container and a reasonable period of time (at least a month) for customers to reflect on this decision.

Overall, there is a need to encourage choice and empower the customer. Funeral directors and crematoria need to put options to customers to help them make active choices that deliver the service the customer wants.

## Introduction and summary of methodology

This report is being published at a time of great change in the funeral and cremation sectors. Social and cultural practices around funerals and cremations are changing rapidly. As the comprehensive and in-depth research commissioned for this report will illustrate, changing practices - in favour of cremations over burials and crematoria as the sole location for services, rather than a religious service followed by a committal - mean that customers have new sets of needs from crematoria.

In addition, the costs of funerals and the cost of the cremation element of a funeral are also coming under scrutiny. Many commentators believe funeral cost inflation to be a problem. At the same time, we are seeing the industry innovate to provide greater customer choice. The emergence of direct cremation as a low-cost “mainstream” funeral option being a good example of this. Introduced to the UK in the mid 2000’s direct cremation has become mainstream following the nationwide provision of this service by Dignity in 2016 and, more recently, Co-Op.

This report examines crematoria customer needs in detail and identifies how well, or otherwise, the crematoria in the UK are meeting those needs. To do this we have carried out what we believe to be the widest ranging and most rigorous research on the UK cremation sector ever conducted. The research includes several elements as follows:

### Customer research

- **Qualitative research:** Two friendship focus groups were used to inform the wording and content of our quantitative survey. These groups took place in London and Manchester. All respondents were people who had arranged a cremation funeral in the last two years
- **Quantitative research:** An online survey of 2,022 people across UK, all of whom had arranged a cremation funeral in the last 3 years

### Funeral director research

- **Qualitative research:** 15 in-depth telephone interviews with funeral directors representing Dignity, the Co-op and independents
- **Quantitative research:** A survey of 1,500 funeral directors that yielded 106 responses (28 online and 78 by post). The survey included a mix of Dignity, Co-op and independent funeral directors

### Industry research

- Expert interviews with representatives of the Federation of Burial and Cremation Authorities (FBCA), ICCM and Cremation Society
- An audit of the facilities and services offered by 292 crematoria in the UK (the data was mainly gathered by Dignity, with a small amount of additional data gathered by mystery shopping)
- 5 telephone interviews conducted with crematoria managers at local authority owned facilities

This comprehensive research approach, undertaken by independent strategic research consultancy Trajectory, has allowed us to look at the needs of crematoria customers, and how well they are being met, from a wide range of perspectives. The research findings are presented in Chapters 4, 5 and 6 of this report, but first we look at the evolving role of cremation and crematoria, which sets the important historical and current context for this research.

## Crematoria today - how did we get here?

### A brief history

In 2017, there were 467,748 cremations (77% of all funerals)<sup>1</sup> carried out in 289 crematoria in the UK. A century before in 1917, there were 14 crematoria and just 1,504 cremations (around 0.3% of all funerals)<sup>2</sup>. And when the first cremations took place, 32 years before in 1885, there were 3 only cremations out of over 597,357 deaths<sup>3</sup>.

This shows how over the course of 133 years in the UK, cremation has switched from being almost non-existent to the established norm. Today, three times as many people say they want to be cremated than buried<sup>4</sup>.

But how have we got here? Cremation isn't new - it has a long and ancient history. In Europe there is evidence that cremations took place in the Bronze Age (c2000 BC) and it was practiced by the ancient Roman and Greek civilisations. But with the rise of Christianity, the influence of the church, the belief of the impossibility of resurrecting a body after a cremation and its association with paganism by the Middle Ages it was not practiced, or was illegal, across most of Europe. Until relatively recently, in Christian societies the proper place for a dead body was in sacred ground after proper burial rites.

By late Victorian times, the industrial revolution produced a huge increase in the urban population. Disease outbreaks overwhelmed the burial system. Mortality rates were high and inner city burial grounds became overcrowded and chaotic. Coffins were stacked, and decomposing bodies disturbed and mutilated to make room for the more recent dead<sup>5</sup>. Cities were running out of burial space – the London Necropolis Railway opened in 1854 to take the dead (and their mourners) by train from London Waterloo out to Brookwood in Surrey. The burial system was overwhelmed to breaking point and alternatives were needed.

The road to widespread acceptance and legalisation of cremation is bizarre involving Italian professors, Druids, the Queen's Surgeon, leading figures in London's scientific and literary circles, archbishops, Popes, ex-Prime Ministers and a horse.

While British cities were grappling with their burial problem and building large cemeteries in the suburbs, (Arnos Vale in Bristol), Necropolis in Glasgow, and the 'Magnificent Seven' in London) meanwhile in Italy, modern progressives were advocating cremation and seizing the technological challenge.

In 1873, Sir Henry Thompson, Surgeon to Queen Victoria, saw a demonstration of Professor Brunetti of Padua's cremating apparatus (and the resulting ashes) exhibited at the Vienna Exposition. This convinced him of the benefits of cremation. The following year, he and several notable Victorian luminaries from scientific, literary and artistic circles formed the Cremation Society of Great Britain with its intention of promoting cremation as an alternative to burial, developing the process and getting the law changed to allow it. Cremation was modern, sanitary and progressive. By 1879 the Society had bought land in Woking, built a cremator and carried out its first cremation – of a horse. Unfortunately, after objections from its Woking neighbours the Home Secretary banned it – on the basis that cremation could be used to dispose of a body that was evidence of murder.

In 1884, a Welsh speaking Neo-Druid, Dr William Price, attempted to cremate the body of his 5-month-old child Iesu Grist (Jesus Christ). Believing that his dead body would pollute the earth, he set out to burn his body on a pyre on a nearby hill. Set upon by an angry mob, the child's body was removed from the fire and Dr Price arrested and charged with illegal cremation. In court, Dr Price argued that the law didn't state that cremation was either legal or illegal. The judge agreed and said that cremation should be legal as long it as was not a nuisance<sup>67</sup>.

This legal precedent led to the cremation of Mrs Jeanette Caroline Pickersgill at Woking Crematorium in March 1885. A well-known painter she had specified in her Will that she wished to be cremated. Because of concerns about being burnt alive, two doctors certified that Mrs Pickersgill was dead. The first legal cremation had taken place. Only two more bodies were cremated that year but by 1888 the number of cremations had crept up to 28.

1 <http://www.cremation.org.uk/content/files/2018%20stats.pdf>

2 <http://www.cremation.org.uk/progress-of-cremation-united-kingdom>

3 ibid

4 YouGov August 2016 [https://d25d2506sfb94s.cloudfront.net/cumulus\\_uploads/document/k6eo7r4fv0/InternalResults\\_160815\\_Death\\_W.pdf](https://d25d2506sfb94s.cloudfront.net/cumulus_uploads/document/k6eo7r4fv0/InternalResults_160815_Death_W.pdf) found at <https://yougov.co.uk/news/2016/08/16/majority-people-want-be-cremated-when-they-die/>

5 <https://www.theguardian.com/cities/2015/jan/22/death-city-grisly-secrets-victorian-london-dead>

6 Hutton, Ronald (2009). Blood and Mistletoe: The History of the Druids in Britain. New Haven: Yale University Press cited in [https://en.wikipedia.org/wiki/William\\_Price\\_\(physician\)#Hut09](https://en.wikipedia.org/wiki/William_Price_(physician)#Hut09)

7 Financial Times Magazine. 21 May 2010 found at <https://www.ft.com/content/3a92fdaf-6233-11df-998c-00144feab49a>

Attitudes to cremation were changing and its acceptance was becoming more widespread. Private crematoria were built in Manchester in 1892, Glasgow in 1895, Liverpool in 1896 and Golders Green in 1902. A significant build was the first municipal crematorium at Hull in 1901. In 1902 The Cremation Act was passed for the "regulation of the burning of Human Remains, and to enable Burial Authorities to establish Crematoria" and by 1911 there were over one thousand cremations.

After the huge losses in the First World War and the Spanish flu pandemic in 1918 attitudes to cremation changed enormously. Between the wars many more crematoria were built primarily by local authorities from Aberdeen to Weymouth (the first Welsh crematorium was in Pontypridd in 1923 but Northern Ireland did not get one until 1961). Several high-profile people including ex-Prime Ministers, Neville Chamberlain in 1940 and Ramsay MacDonald in 1937 chose to be cremated (the first member of the Royal family, Queen Victoria's daughter in law was cremated in 1917).

Social attitudes to and acceptance of cremation had changed. And change was afoot in the church too. The first burial of cremated remains in Westminster Abbey (Sir Henry Irving's) was in 1905 (now all internees must be cremated). In 1944 the Archbishop of Canterbury was cremated. In 1963 the Pope ended the ban on Roman Catholics being cremated and in 1966 Catholic priests were allowed to attend and conduct services in crematoria. Today most religious groups allow cremations (Orthodox Jews, Muslims, Parsee and the Greek and Russian Orthodox churches still only allow burial) and recent legal challenges have focused on the rights of Hindus to have open air cremations.

In the 1990s research by Professor Douglas Davies of the University of Durham<sup>8</sup> identified changing practices around cremation funerals. In particular, this research associated crematoria funerals with the term 'conveyor belt' for the first time...

"The phrase 'conveyor belt' is an expression about being processed and, I think, describes the way people feel as they first queue in cars, then queue outside the crematorium, then move to their seats, then move out from a different door into yet another area before finding their cars and joining the queue to leave the crematorium grounds...The phrase 'conveyor belt' is an idiom for a sense of being personally processed."

As you will see below, our research suggests that the 'conveyor belt' feeling is still an unwelcome part of the modern crematorium experience for many people.

### Where are we now?

As mentioned above, there were 289 crematoria in 2017, with new crematoria being built all the time. Section 6 of this report provides the results of an audit of the services offered by 292 crematoria operating in the UK in 2018. Of these, 182 are operated by local authorities, reflecting the shift away from private sector ownership and towards local authorities over the course of the 20th Century. However, new building today is once again led by the private sector. There are currently 110 (38% of the market) privately run crematoria in the UK, and this number is growing. Dignity run 46 of the privately run crematoria.

Quantitative research conducted specially for this report confirms the official statistic quoted above, that 77% of all funerals are cremation funerals. However, we have more detail on the nature of those funerals. This sheds additional light on the emerging needs that crematoria customers now have. Chart 3.1 shows that for almost two thirds of funerals (62%) the whole of the service takes place at a crematorium. That is, no other service took place away from the crematorium. Indeed, only 13% of funerals were cremations with a religious service beforehand.

Chart 3.1 also highlights the emergence of direct cremation (a cremation with no service at the crematorium). These funerals may involve a wake for the deceased somewhere else, or no funeral gathering at all. This type of funeral is relatively new and currently stands at 2% of all funerals. However, it is increasingly available and likely to grow in importance in future.

8 Douglas Davies (1995). British Crematoria in Public Profile. Published by The Cremation Society of Great Britain

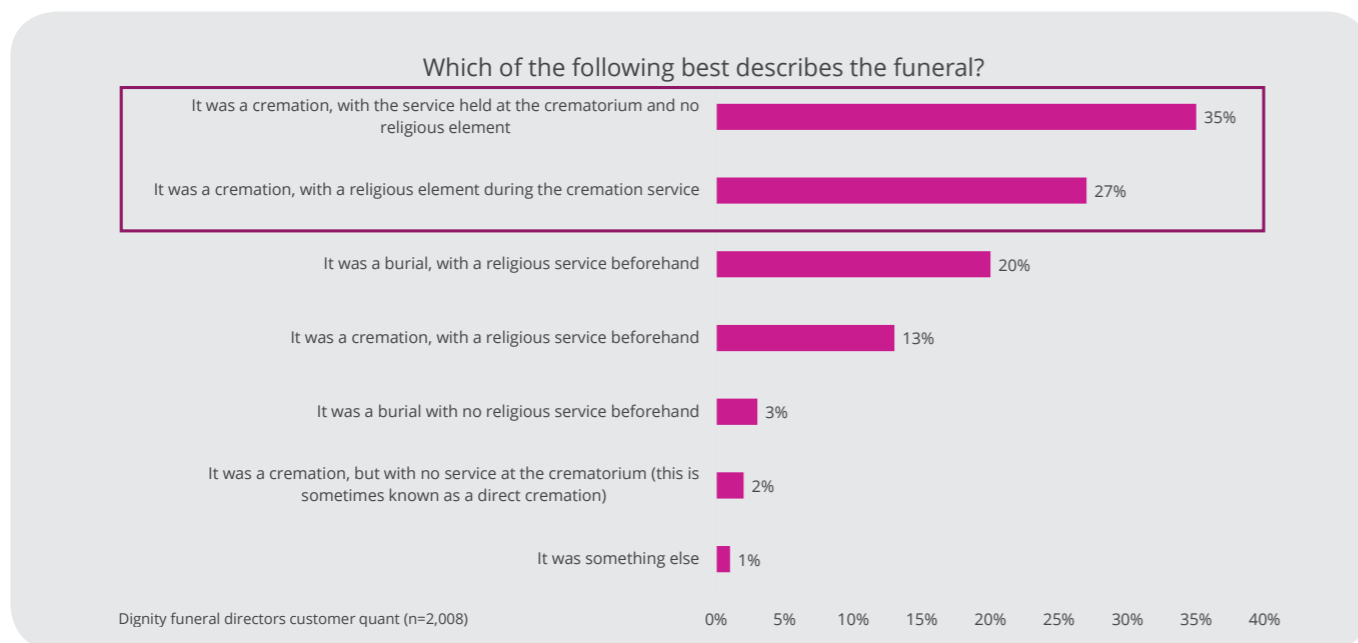


Chart 3.1 For almost two thirds of all funerals, the whole service takes place at the crematorium

Chart 3.2 highlights the same data, but with the burials removed. It shows that over 80% of cremation funerals take place at the crematorium only. Only one in six cremation funerals now involve a religious service before cremation.

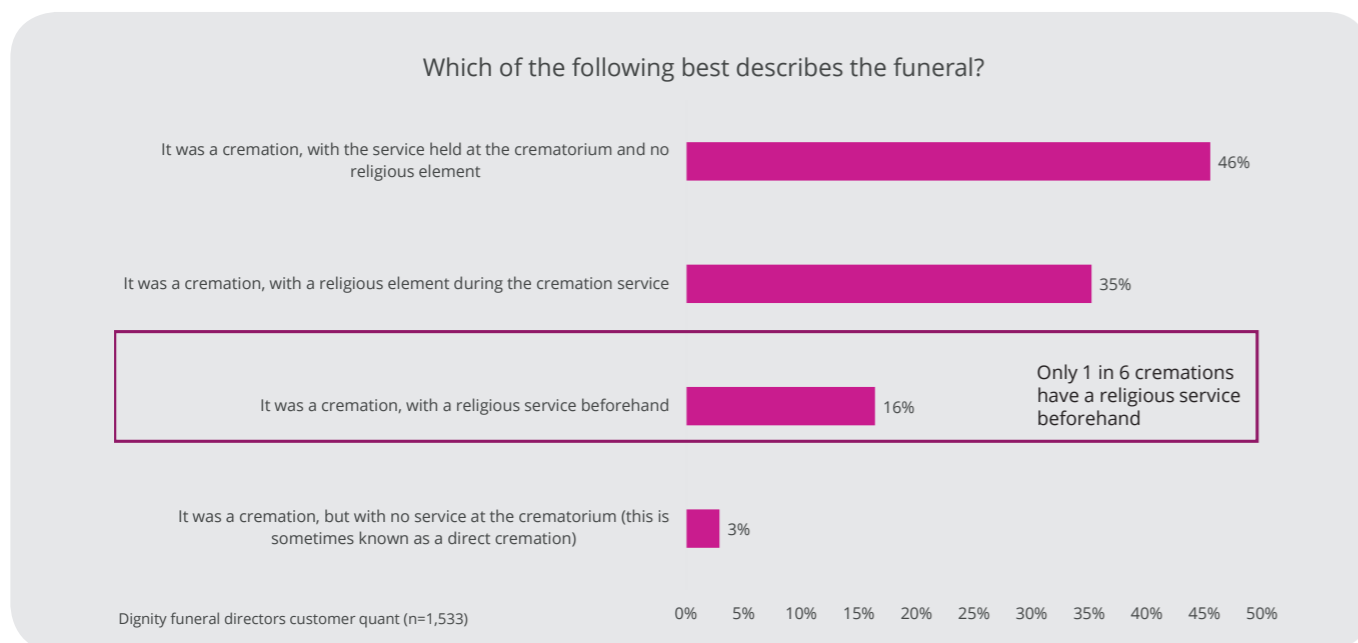


Chart 3.1 For 80% of all cremation funerals the whole service takes place at the crematorium

The transition away from the historical norm of a church service plus committal to a cremation only service means that customer and funeral director needs at the crematorium are likely to be changing. For example, when the whole service is taking place at the crematorium it seems highly likely that the ability of the crematorium to provide both the time and facilities associated with a full service will be important. At a more basic level, the crematorium chapel will have to be large enough to accommodate all mourners, rather than just the close family and friends that tended to be present at committals. Put simply, the crematorium and the crematorium chapel are now routinely the singular venue for funerals in a way they were not in days gone by.

The remainder of this report provides the findings from our customer and funeral director research (both qualitative and quantitative) that explores what both want from a cremation funeral. We then go on to explore how well, or otherwise, different crematoria across the country currently meet these needs.

## What do people want?

### Summary of Key Findings

#### Customer research key findings

**Fundamentally, customers want crematoria services to be a private and secluded moment in which they can remember and say goodbye to their loved one in their way:** Feeling rushed or 'on a conveyor belt', and not having a long enough slot all undermine this. More than one in three (36%) respondents in our customer research said they felt as though they were 'on a conveyor belt'. This equates to c. 166,000 cremation funeral organisers feeling this way (based on provisional ONS, NISRA and NRS data for 2017). Availability of slots is important, but so is privacy, so busy multi-chapel crematoria are not always ideal.

**Demand for longer slots is evident, both in terms of length of service and avoiding the 'conveyor belt' feeling:** Almost 3 in 10 customers (29%) feel they did not have enough time at the crematorium. 78% say there should be enough time to ensure you do not see other mourners.

**Practicality and location are the default drivers of choice, with price less of a priority:** 60% say that cost wasn't a consideration when arranging the day/time of cremation. 46% of customers either cannot remember or never knew the fee. Crematoria are generally perceived or assumed to be of consistent quality, and some people also believed that pricing was consistent - this incorrect assumption of consistent quality and pricing mean that for some the local crematoria is the default choice.

**Ultimately, having enough time at the crematorium is more important to most people than the cost. Value for time is more important than value for money:** The cost of a cremation had little impact on perception of value. For example, 67% of those that paid £500-599 for the cremation felt they got good value, compared to 65% who paid £900-999. However, length of slot had a much greater impact on perceptions of value for money. Over two thirds of people who had slots longer than 30 minutes felt the cremation fee was good value for money, whereas less than half of those with slots shorter than 30 minutes felt the fee was good value for money.

#### Funeral director research key findings

**Funeral directors strongly support longer slots (of at least 45 minutes) and measures to avoid the 'conveyor belt' effect.** Overall, they feel more strongly about this than customers. Our quantitative research found that funeral directors' views on the ideal slot length aligned most closely to Dignity crematoria average slot length.

**Customer preference is said to be the main driver of 'choice' of crematorium by funeral directors.** However, the funeral director is the key intermediary in determining choice. 82% of customers saying that they received help or advice from the funeral director in choosing the crematorium. This made the funeral director the most common source of advice or help (even more common than friends or family, for example).

Our funeral directors survey suggests that, on average funeral directors use 3.2 crematoria. Customer 'choice', such as it is, is driven by practical considerations such as proximity to their or the deceased's home. Despite this it was generally seen as positive for customers to have options

**Funeral directors assess crematoria on a wide range of issues.** Funeral directors often feel there is consistency in all aspects of crematoria services except for price. They view ability to personalise as key - so visual tributes and modern music systems are an asset. Funeral directors also recognise practical and logistical benefits - good road signage, online slot booking and so on.

**There is a role for funeral directors to educate customers.** Funeral directors typically report being led by their customers in the choice of crematorium. Yet customers have very little knowledge of them. Funeral directors are experts. We found many examples of things that customers would have liked to have known at the arrangement stage (actual slot lengths, the ability to pay for additional time etc), but only found out after the cremation service which may not have met their needs and expectations.

### Time more important than cost

Before designing our quantitative survey, we conducted focus groups that allowed the research participants to make open ended and spontaneous comments about their experiences of cremation funerals. This was to make sure that in the quantitative survey we were asking questions on the topics that mattered most to customers, and in the language that they use. The focus groups emphatically suggested that privacy was of the utmost importance. People want to be able to remember their loved one in their chosen way without interruption. It emerged that time and slot length were crucial to this because seeing mourners from other funeral services was particularly unwelcome and intrusive.

These findings were borne out by the quantitative research. Chart 4.1 shows support for a range of statements about cremation service lengths. A clear majority of people agree both that 30 minutes is not long enough for a cremation service (59%), and that services should last at least 45 minutes (also 59%). The more general question, that does not focus on specific slot lengths in minutes but emphasises the importance of not seeing mourners from earlier or later services received even more support with almost four out of five (78%) agreeing with the statement.

“We didn't want it to be rushed... we were keen to have the time we needed” - Customer  
 “For me it felt very, very rushed and not dignified.” - Customer  
 “30 minutes just isn't long enough. The families are stressed, we're sometimes stressed. It is just not long enough.” - Funeral Director

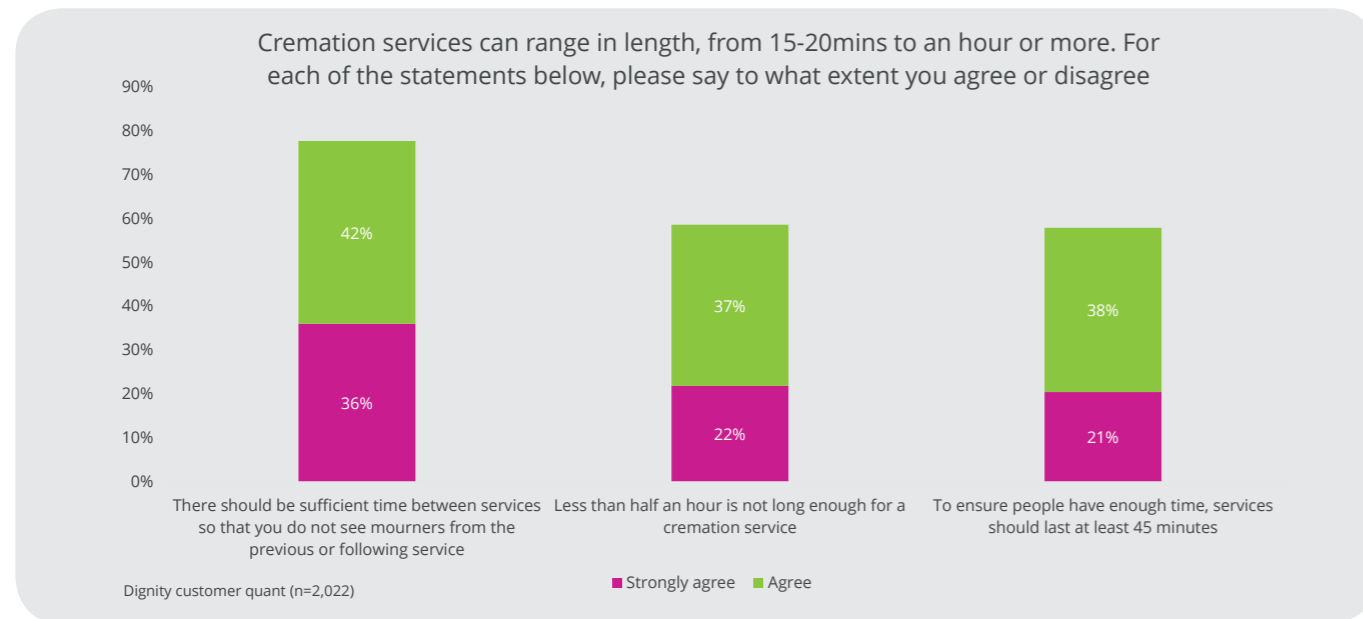


Chart 4.1 Customers support longer service times

A further question about a wider range of aspects of the cremation service, such as ‘making sure there is space for everyone who wants to attend’ as well as slot length, also suggests the importance of having uninterrupted time either side of the service. All these elements were seen as being important by relatively large numbers of respondents but having time after the service to pay respects and lay flowers was particularly important. From the qualitative research we also learned that it was particularly disappointing on occasions when this did not happen.

“When we got there, there were people coming out from the earlier one ... and at the end there was another waiting to be done, so it was like, “get out of the chapel now” ... Afterwards we were standing around talking and you really don't want to leave .... They were sort of ushering you out, the people who work there. Come on they're getting rid of you, cos they want someone else to come in” - Customer

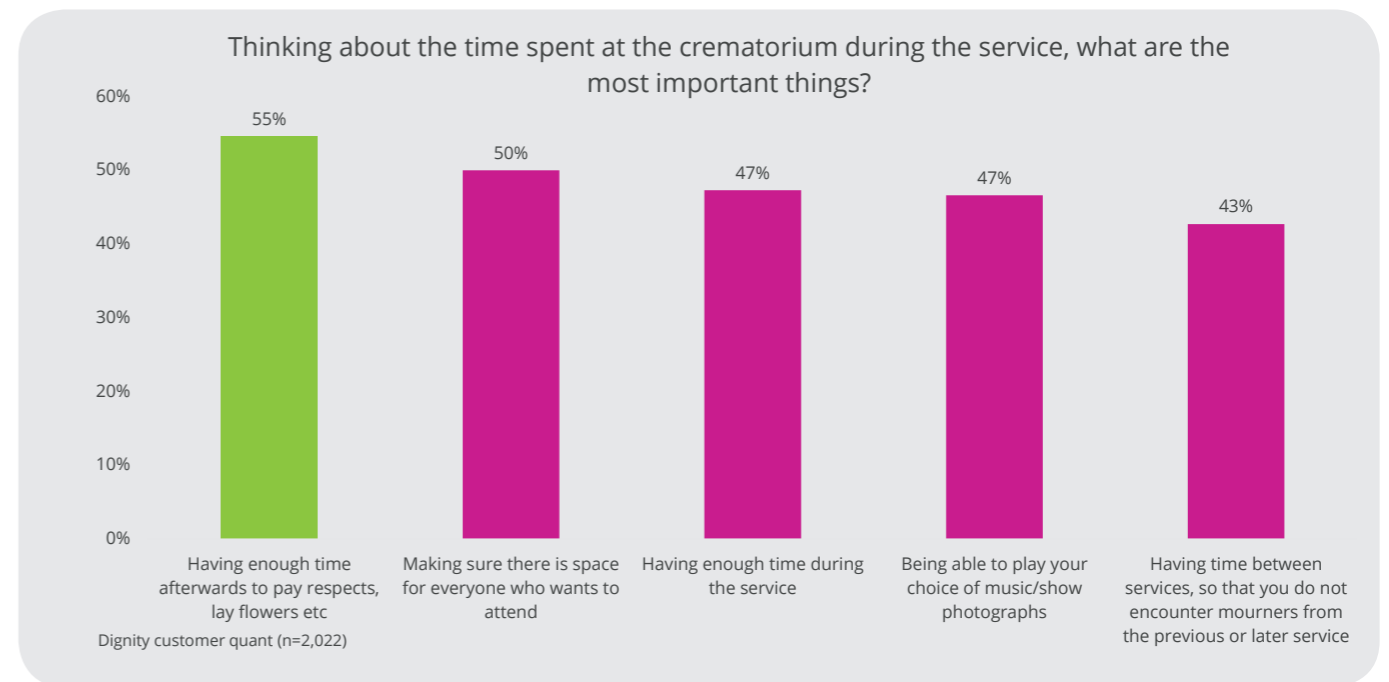


Chart 4.2 Time either side of the service is critical to the experience (Please note: for this chart research participants could select the three most important factors from this list. As a result, responses do not add up to 100%.)

As Chart 4.3 illustrates, more than one in three (36%) described their cremation service as feeling like they were ‘on a conveyor belt’ (a phrase that was often used spontaneously in the focus groups). Essentially, this means that a third of cremation services customers are unhappy with their experience. As we saw above, this notion of many cremation funerals feeling like a conveyor belt extends as far back as the 1990s according to research by Professor Douglas Davies.



Chart 4.3 More than one in three people feel like they were on a conveyor belt

More detailed analysis of this question reveals that:

- Almost 70% of those people who felt like they were on a conveyor belt would have liked more time at the crematorium (compared to only 25% of people who did not feel they were on a conveyor belt)
- 46% of people who used a local authority crematorium (which on average have shorter slot lengths) felt like there were on a conveyor belt (compared to 40% of those who used a private sector crematorium)

This all points to the importance of slot length and not feeling rushed. However, as shown in Chart 4.4, it is seeing other mourners that contributes most to the perception of being on a conveyor belt. This question was only asked of those people who said that they'd had a conveyor belt experience. Of course, there is also a link between overall slot length and not seeing other mourners. The longer the slot length the greater chance that people can have the length and type of service they want. For most people this would involve a length of slot that allows a period of time either side of the actual service so that they can pay their respects, speak to friends and relatives (who may often not have seen each other for a long time) and still not encounter other mourners.

“My cousin was walking off and we hadn't spoken to him....They don't play the whole song....It is a conveyor belt unfortunately... it's like one after the other, it's not personalised, that's what the problem is...as you're going out, someone is coming in, they are every half an hour”  
- Customer

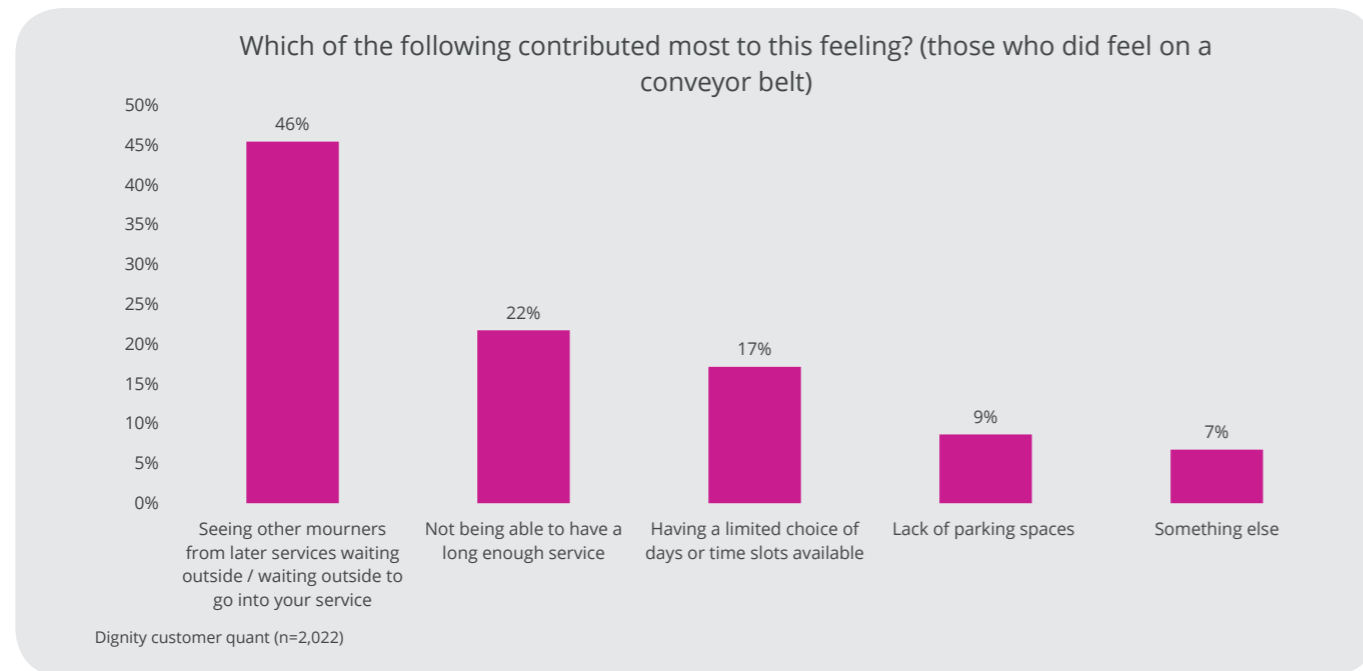


Chart 4.4 Seeing other mourners contributes most to the 'conveyor belt' feeling

Given the fundamental importance of having a private and uninterrupted experience that people want, it is perhaps not surprising that time emerged as a much more discriminating factor in determining whether people felt they had received value for money for their cremation service than the actual cost paid. The relatively low emphasis placed on cost is also revealed by the fact that almost half (46%) of the respondents did not know how much they had paid for the cremation element of the overall funeral service (this divides into people who cannot remember and those who claim never to have known how much they paid).

Chart 4.5 shows that perceptions of value for money are remarkably consistent regardless of how much people paid for the cremation service. Approximately, two thirds of people say they received good value for money regardless of whether they paid £500 or more than £1000. However, perceptions of value for money were much more strongly driven by the length of time spent at the crematorium. Overall, there was a stronger correlation between increasing length of time spent at the crematorium and increased perceptions of value for money. More specifically, 70% of those who spent more than an hour at the crematorium felt they received good value for money compared to less than half of those who spent fewer than 30 minutes at the crematorium.



Chart 4.5 Value for time more important than value for money

Our research among funeral directors also emphasised the importance of time. If anything, funeral directors feel even more strongly about slot length than customers. Chart 4.6 presents the results from the same questions about a range of potential pros and cons associated with short or long cremation slot lengths. Overall there tends to be more support for longer slot lengths among funeral directors and customers, but the responses among funeral directors are even more emphatic than those of customers. No matter what the question, be that a potential benefit of shorter slot lengths, or a potential benefit of longer slot lengths, funeral directors are more likely to answer more affirmatively in favour of longer slot lengths. Two responses are particularly striking:

“We had extra funds reserved for her and we wanted to remember her really well, the way she wanted it...It was a good ceremony, but it was pricey...I'd rather spend and have quality time with a person that was so important in my life than rushing it, it's not on, you can't be rushing it, if you have to stay an hour you stay an hour, you're paying for it” - Customer

- That 90% of funeral directors believe that there should be sufficient time so that mourners from other services are not seen
- And that so few funeral directors (28%) agree that there is a link between shorter slots and more slots being available



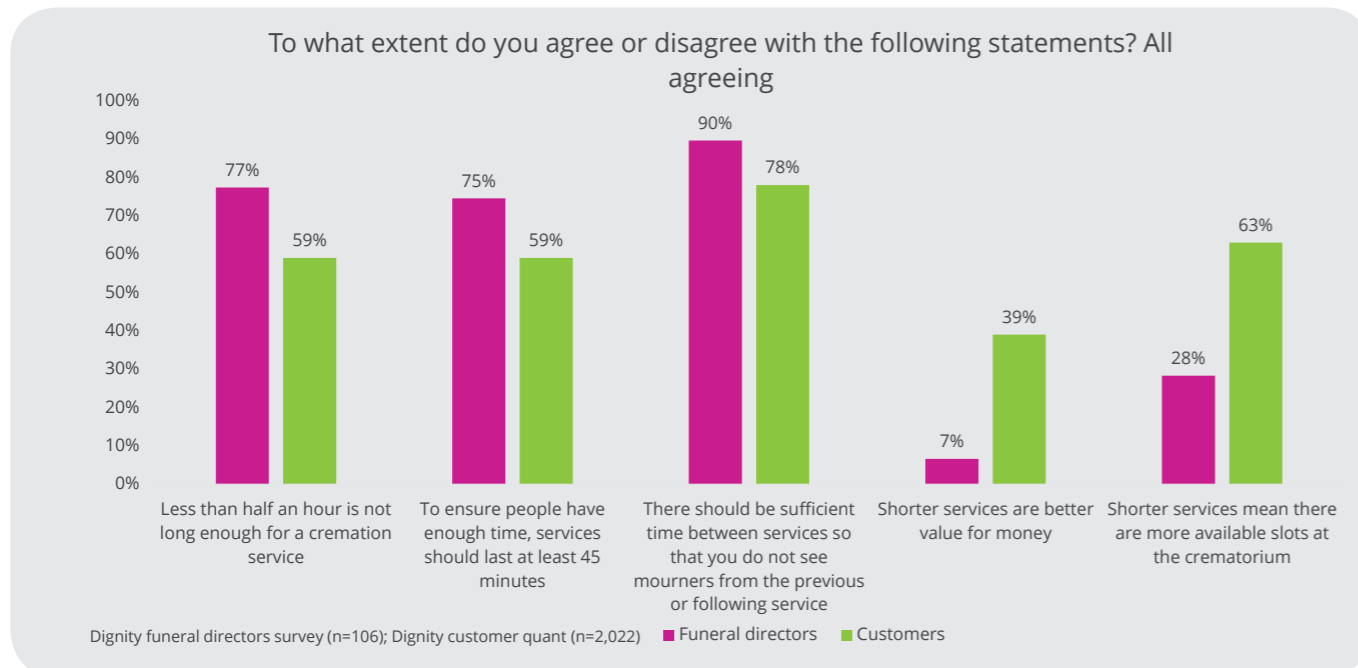


Chart 4.6 Funeral directors feel even more strongly about slot length than customers

The strength of this funeral director endorsement of customer needs is particularly powerful if we keep in mind that funeral directors typically attend tens, if not hundreds, of cremation funerals per year and receive feedback from their customers.

### Tailoring and personalisation

The fact funerals in general are becoming more personalised and tailored to the individual is a well established and much commented upon trend. Our interviews with funeral directors suggested that customers increasingly demand specific music choices and want to have the opportunity to display visual tributes as part of funeral services, for example.

If crematoria are the singular location for more funerals they too will have to meet the need for greater tailoring and personalisation of services. Chart 4.2 above, whilst illustrating the importance of time and slot length, also shows that around half (47%) of customers believe that it is important to be able to play music or display photographs at a crematorium.

“It was not a pre-planned package. Everything was open to be tailored, and that gave me great satisfaction.”  
- Customer

### Drivers of customer decision making

In our focus groups we asked customers to describe their decision-making process when choosing a crematorium. It became apparent that this was no ordinary ‘customer’ purchase. Perceptions of choice were limited either because people believe crematoria offer the same quality of service or because the family had a ‘default option’, a crematorium that they always use. Those who sought help and advice in selecting a crematorium most commonly turned either to their funeral director (82%) or to family and friends (80%). We know from our funeral director survey that, on average, funeral directors use 3.2 crematoria. But overall, there was little sense of an ‘active’ customer choice being made in most cases. Perhaps this is because, as the qualitative research suggests, someone close has died, some people feel it inappropriate to negotiate, ask questions too many questions, compare different offers and or ‘push’ for a better deal. Therefore, they need to be encouraged and reassured that is alright to do so. Funeral directors have a key role to play in this regard.

Currently, very practical considerations are top of mind when arranging a cremation. As chart 4.7 illustrates, making sure that everyone who wants to attend can attend and holding the cremation locally were the most common considerations. However, the data from this question also illustrates the importance of having sufficient time to pay respects as an important factor once the practicalities have been dealt with.

Finding the right slot was also important, with 39% of customers saying that they had a strong preference for the service to be held at a particular time of day and 37% saying that they had a strong preference for the service to be held on a particular day of the week. Almost a third of customers (29%) said that they ‘had to wait a long time (more than two weeks) for their preferred time and day.

In our interviews with funeral directors, however, they often suggested that it was their own availability rather than availability of slots at the crematoria that conditioned the timing of the funeral. Independent funeral directors were resistant to working extended hours (not unreasonably, they felt they did a demanding job and ‘need the weekends off’) to increase the slots open to customers. However, larger funeral operators were more open to the idea because they had sufficient staff numbers to mean that the weekend or extended weekday slots could be fitted in to a rota that did not place excessive demands on any one individual.

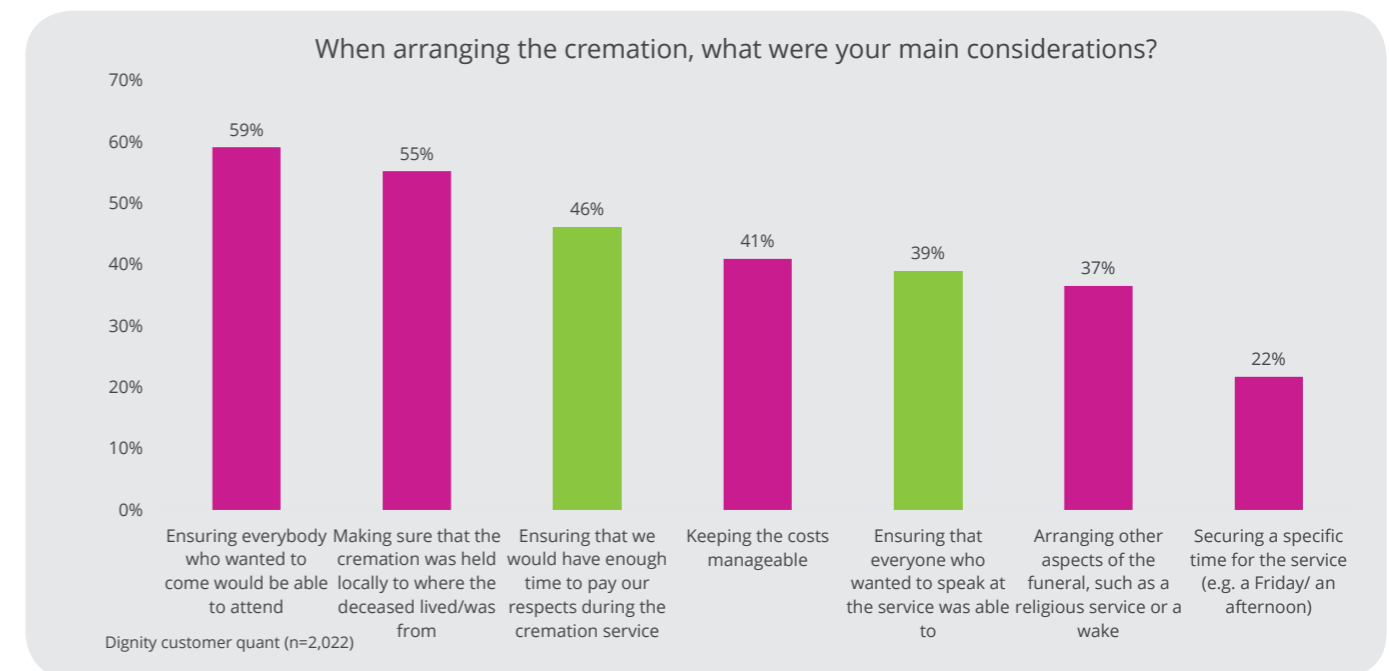


Chart 4.7 Practicality is biggest priority when arranging, followed by amount of time

We asked customers to rank twelve different aspects of a cremation service in order of importance. The percentage of respondents that placed each item in their top 3 most important aspects is illustrated in chart 4.8. This data highlights several important points:

- It clearly reinforces the importance of having sufficient time and feeling unhurried during the service
- Keeping costs manageable is an important consideration for some people, with about one in three people placing cost in their top 3
- Different people clearly emphasise different things. All twelve aspects appeared in the top 3 of some people (the lowest score for a top 3 ranking was 13%). There is no 'one size fits all' option when it comes to needs and wants around a cremation service. If people have mobility difficulties, for example, they are likely to emphasise the importance of adequate parking and so on

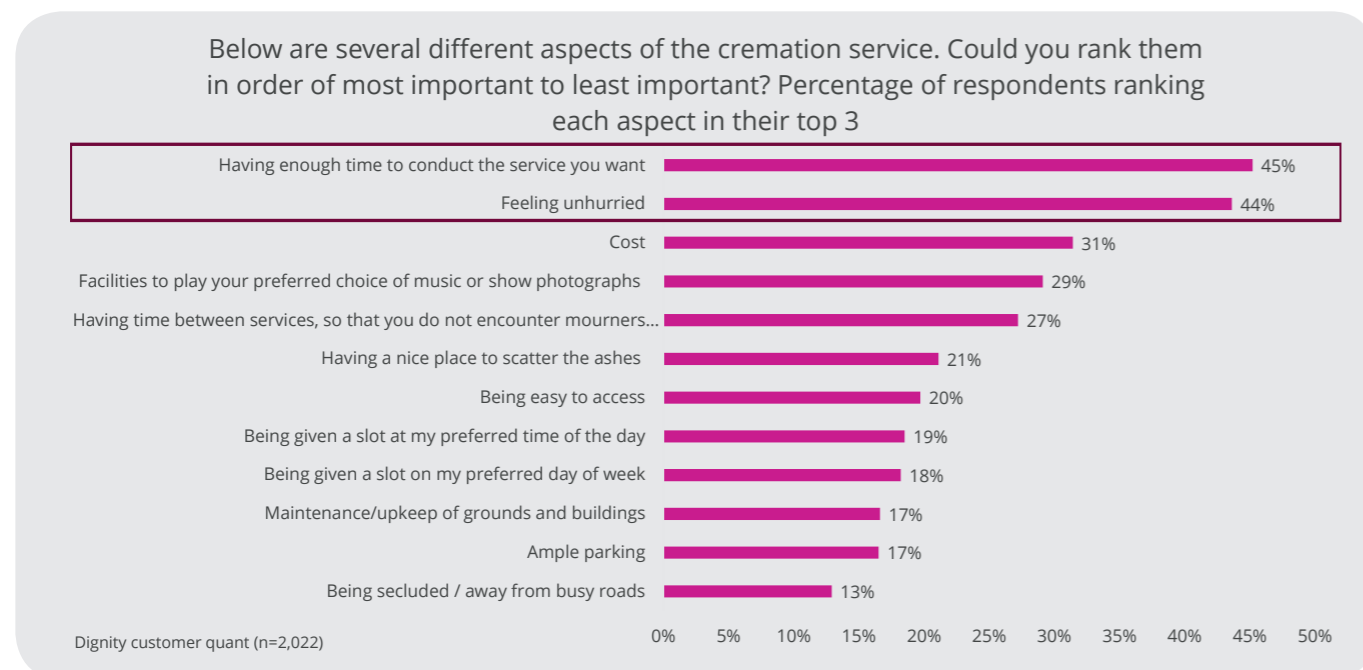


Chart 4.8 Customers clearly rank having enough time and feeling unhurried ahead of cost

For the same question we were also able to identify customers' 3 least important aspects of a cremation service. This further served to illustrate the fact that different people have different priorities and needs from a cremation service. For example, as we saw above, one in three people put cost in their top 3, but we also found that one in four people (23%) put cost in their bottom 3. In a different question on our survey 60% of customers said that cost was not a consideration. Similarly, there was a small minority of people (14%) who put 'having enough time' in their bottom 3.

### Education and the role of the funeral director

Funeral directors clearly have an important role in decision making around cremation services. As we saw above, 82% of customers said that they sought the funeral director's advice on their choice of crematorium. And, as we will see below, funeral directors are quite closely aligned with customers in terms of understanding what they want. However, as we see in chart 4.9 overleaf funeral directors feel that they are most often led by the customers' preference when it comes to choice of crematorium. At 76% 'customer preference/choice' is the overwhelmingly most important factor influencing a funeral director's choice of crematorium. All other factors are much less likely to be thought of as important by funeral directors.

- “It didn't register with me what it (the time slot) was going to be. They didn't offer us anything different (re time slot). I never thought to say, how long have we actually got.”  
- Customer
- “I wasn't offered I was told (it would be a 30 minute slot). It was only afterwards I realised you could have longer slots.”  
- Customer
- “It's obviously down to the families and what they want.”  
- Funeral Director

We were also able to ask funeral directors for their views on what drives client choice. This reinforced the findings from the customer research with funeral directors agreeing that practical considerations (such as a nearby location) and tradition are the main drivers of customer choice.

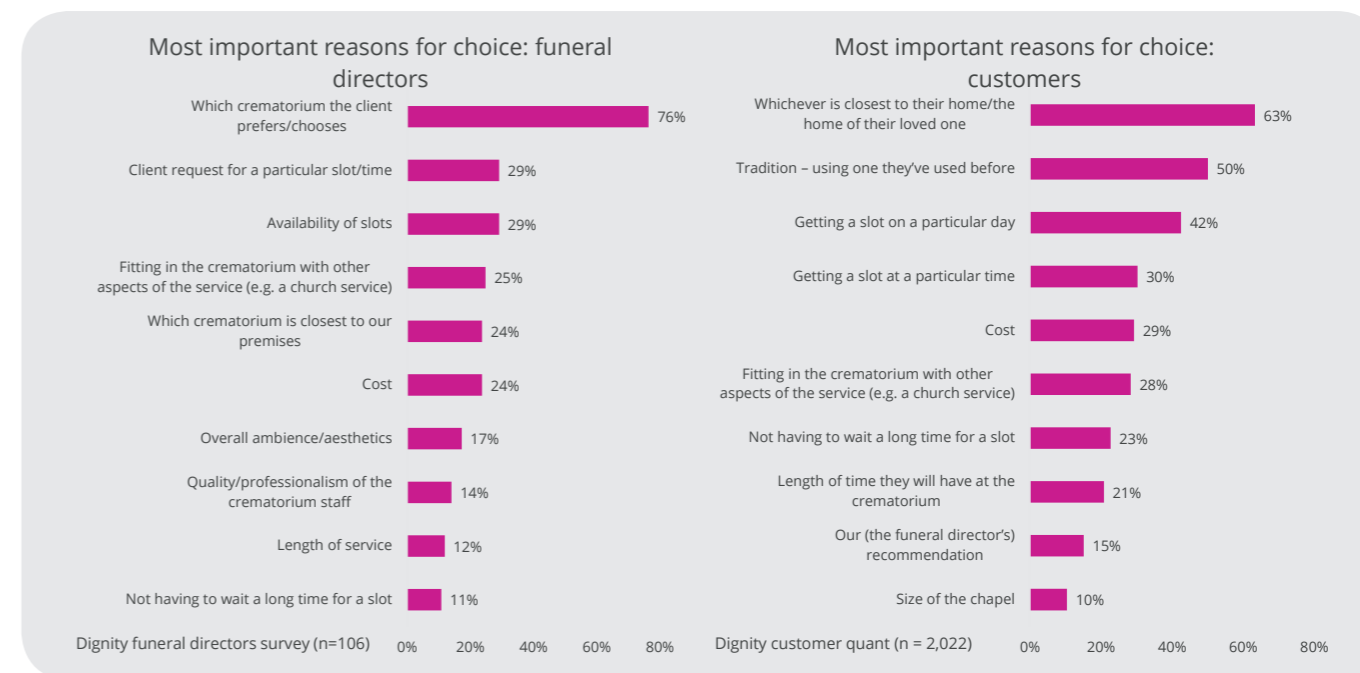


Chart 4.9 Practical reasons govern crematoria choice and funeral directors are led by clients

These findings suggest that there is something of a missed opportunity here for funeral directors to play a more active role in advising and educating customers about their options. As we have seen, customers do not behave like 'customers' when making these decisions and often do not believe they have choice or understand the choices open to them. For example, in our research we asked about awareness of being able to book longer or double slots. 60% of funeral directors believed that clients were aware that they can book double slots. However, our customer research found that only 8% of customers knew about double slots. Similarly, 96% of customers who visited a crematorium in advance said that they found it useful, yet only 13% of funeral directors said that they often or mostly advised customers to visit the crematorium in advance.

As shown in Chart 4.10, there is also widespread concern about mythical crematoria practices such as more than one coffin being cremated at the same time, coffins being re-used and 'holding over' (the cremation not taking place on the same day as the funeral). Funeral directors also mentioned that it is not uncommon for customers to have misconceptions about operational practices at crematoria. This suggests that there is also a requirement to educate and inform customers about some of the myths around cremation practice. Funeral directors and crematoria could work more closely together to address this. For example, we know that virtually all those customers that visit the crematorium in advance of their service (96%) find the experience useful.

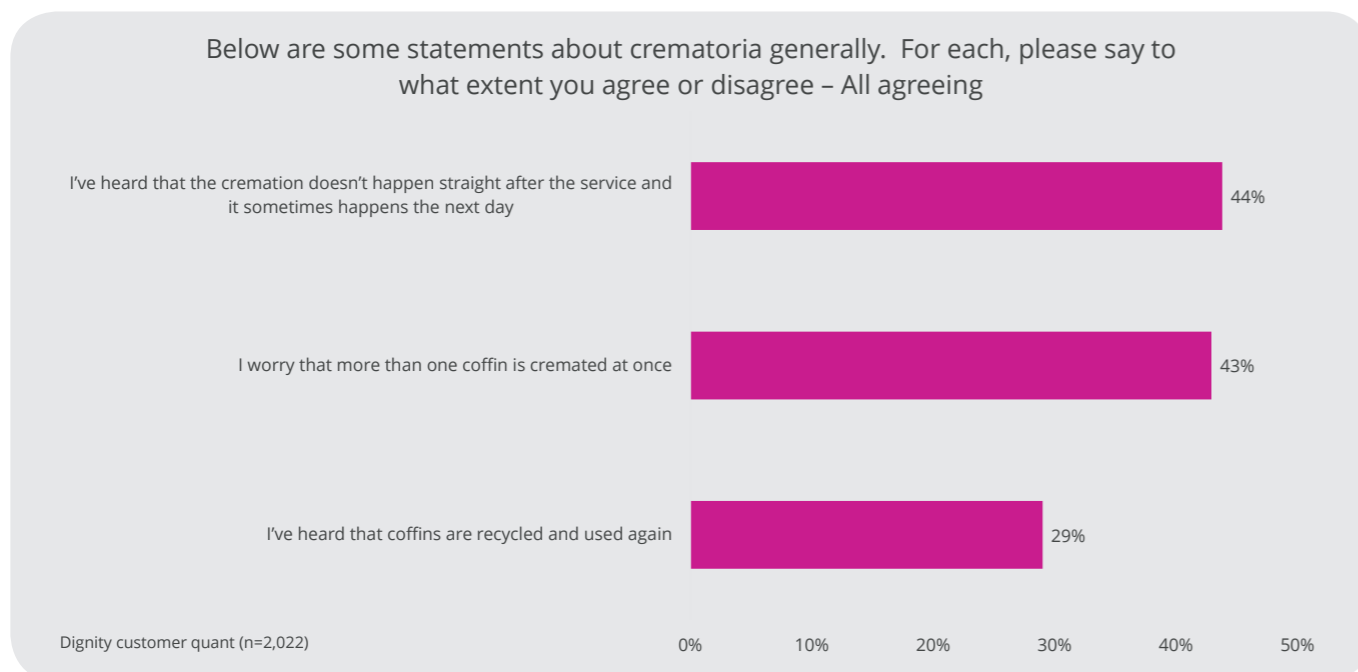


Chart 4.10 Widespread concern about 'mythical' crematoria practices

As frequent visitors and customers of crematoria, funeral directors are well placed to understand the factors that make a good crematorium and are better placed to do this than their customers who are infrequent visitors. They have knowledge of and can consider a host of things that would not necessarily occur to customers as the following quote illustrates...

“(Crematoria X) should improve its toilet facilities. They only have them in the chapel, so you can't go in if a service is on. And there should be a covered area outside for flowers in case it rains. If you come out the chapel and it is pouring down, there's nowhere for families to stand. Oh, and in the winter, the lighting over there is quite poor as well.”  
- Funeral Director

Chart 4.10 above shows which factors funeral directors believe to be important in a good crematorium.

Although, as we have seen, practical factors determine the choice of crematorium, these are not the factors highlighted below which determine quality. Funeral directors are much more likely to say that factors such as the quality and professionalism of the staff and the maintenance of the chapel and grounds are important indicators of quality, for example.

From our qualitative research we know that these issues matter very much to customers too. The smooth running of the service (linked to the quality and professionalism of the staff) is the main thing people notice at cremation services. Other facets on the day are also noticed and important to customers, such as:

- Upkeep and condition of building, including recency of renovations
- Attentiveness and appropriateness of staff
- External noise and interruptions
- Ease of access and parking

However, none of these are routinely in the customer consideration set when the choice of crematorium is being made. Some customers in our qualitative research went further and suggested that they 'had been told' what was available (in terms of length of slot in particular), rather than being offered options and some regretted not asking more questions after the event.

It is an unusual feature of any market that the factors that determine quality have little or no role in shaping the initial customer choice. This disconnect suggests there is scope for funeral directors to educate and pass on more of their knowledge of crematoria to customers to make them fully aware of their options or encourage customers to visit the crematoria in advance.

“The staff over there (Crematoria X) are absolutely brilliant. They are always available to help. The chapel itself is lovely. It's bright and airy and the grounds are fantastic.”  
- Funeral Director

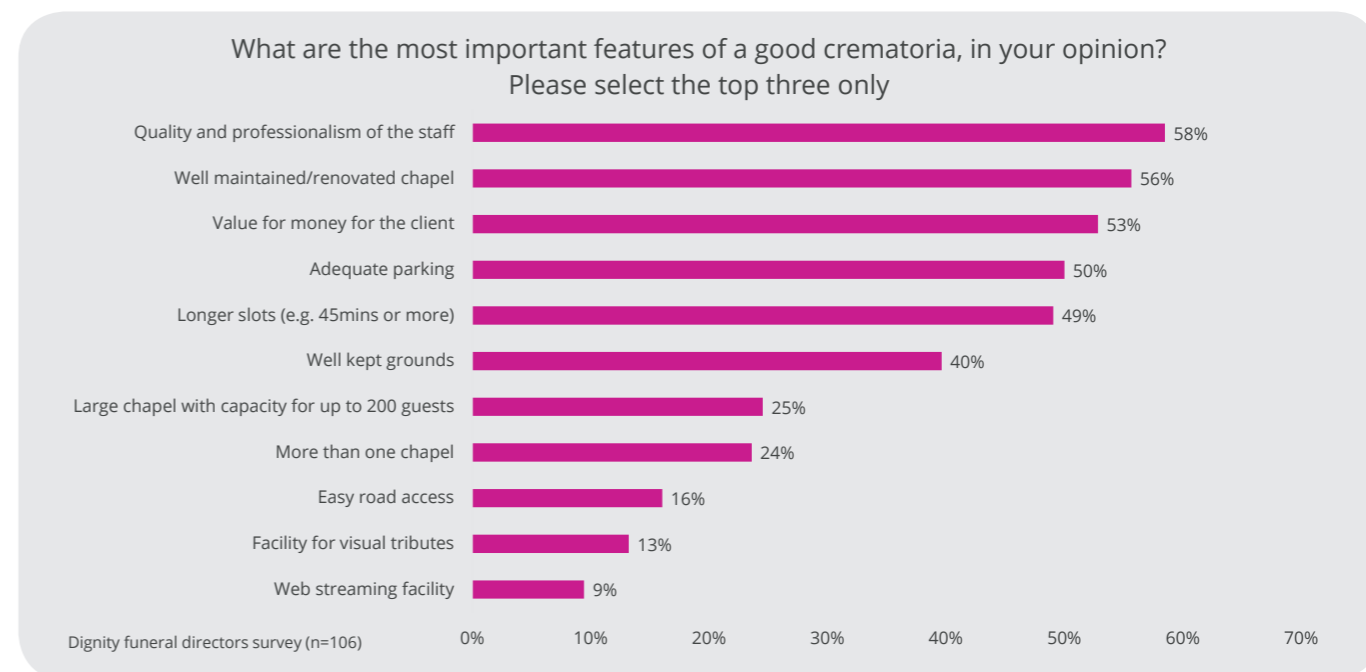


Chart 4.11 The drivers of choice are not the ones that influence overall quality

We describe this as a missed opportunity for the industry to deliver a better customer service because our research suggests that funeral directors are very much in tune with their customers when it comes to understanding their needs and priorities. For example, as chart 4.12 shows, funeral directors like customers are supportive of longer slots to allow for a time gap between services. Funeral directors also want investment in crematoria that would make them better placed to meet customer needs, but they often fail to pass on their in depth knowledge which would be helpful to the customer.

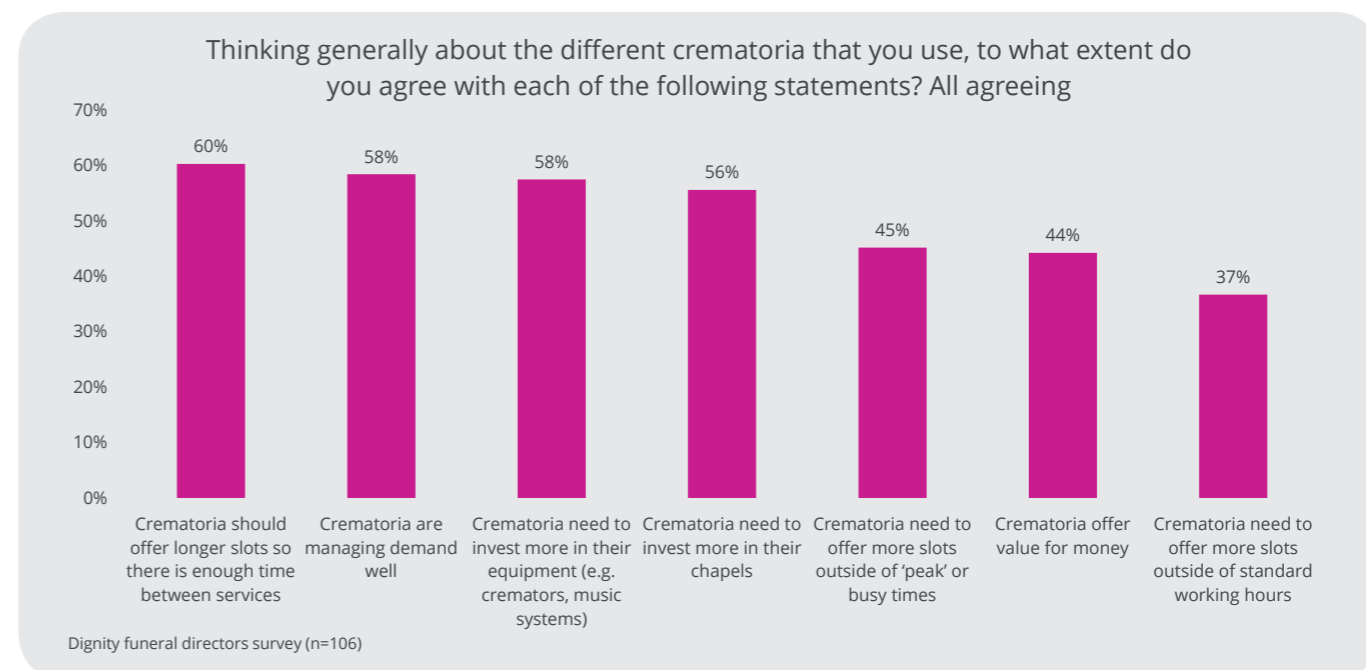


Chart 4.12 Funeral directors want to see more investment and longer slots

The quote to the right is indicative of the good, instinctive understanding that funeral directors have of their customer needs.

“We tend to recommend (Crematoria X) because it doesn't have that conveyor belt feel that the other ones have. The other ones near us all have more than one chapel. They rotate every half hour. So there is always a funeral coming in and out. So we suggest that one so that families get to feel that it is theirs for an hour.”  
- Funeral Director

### Customer needs summary

Overall, our research suggests that there is a core set of six customer needs from a cremation funeral as follows:

- Making sure that all the people who want to attend can attend
- Finding a convenient slot
- Not seeing other mourners - enough time in the chapel and a period of time around the service
- Keeping the absolute cost within budget
- Value – aside from cost, making sure that the service delivers the desired experience in terms of having sufficient time to remember their loved one in their way
- Personalisation

## Are needs being met?

In this chapter we explore how well different providers – Local Authorities, Dignity and other private sector providers – are delivering against these customer needs. The information presented in this chapter is based on our audit of 292 crematoria in the UK. Most of this information was gathered directly by Dignity, but a mystery shopping approach was used when data was not otherwise available. The audit data was analysed by the independent research team at Trajectory.

### Making sure all can attend

One of the key challenges facing crematoria, as they are increasingly the only venue for the whole funeral, is accommodating all mourners. In the past, when religious services were followed by a committal at the crematorium, often only family members and close friends attended the committal. This suggests that crematoria may need to work towards increasing chapel capacity in future. In the qualitative research, several of our research participants commented on funerals where there was ‘standing room only’, people were spilling out of the doors or standing outside listening on speakers.

However, getting chapel capacity right is not easy because we also heard stories of smaller groups of mourners feeling swamped in large chapels. Flexible spaces with screening that can be tailored to different groups sizes is a potential solution.

Customers also expressed mixed views about multi-chapel crematoria. They obviously help to increase the number of slots available and manage demand. However, multi-chapel crematoria were also described as confusing and ‘chaotic’ in the qualitative research. There were also reports of people walking into the wrong service. Of course, in multi-chapel crematoria where services are happening simultaneously it is less likely that customers manage to avoid mourners from other services.

Chart 5.1 presents the audit data on chapels, both for chapel sizes and the number of chapels. It shows that there is very little difference in the average size of first chapels across the different providers. Dignity tend to have smaller second chapel sizes, but as we observed above this could meet the needs of customers arranging smaller funerals, whereas other private providers and local authorities have similar sized second chapels.

Overall, Dignity crematoria tend to have fewer chapels. At busy times this might mean less availability, but it also means a less crowded or ‘chaotic’ crematorium which from the qualitative research we know would suit many customers.

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“It (chapel) felt massively small. There should be an option for having a few more...We were clueless (about number who might attend). We had a 100, 150...we had people spilling out in the foyer at the front.”  
- Customer

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“There was about three (chapels). People could walk in to the wrong one! It's happened a few times. If it's the funeral of a friend and you don't know anyone”  
- Customer

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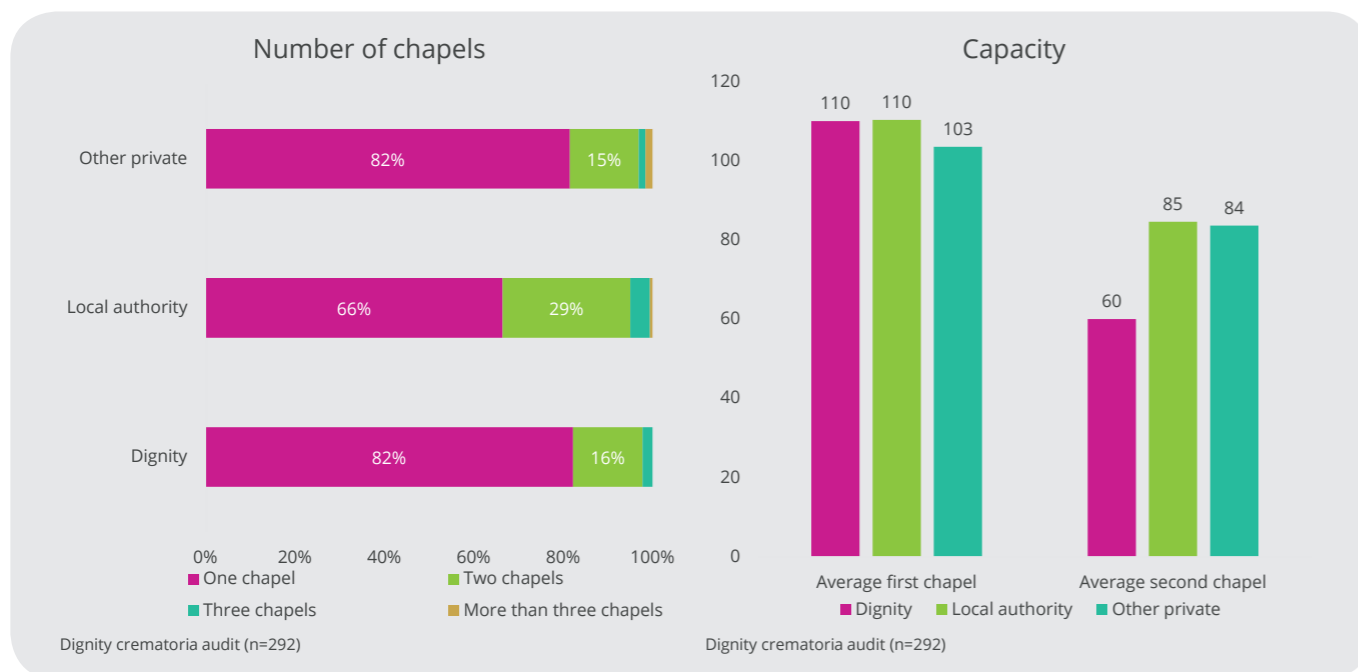


Chart 5.1 Chapel sizes and numbers

**Finding a convenient slot**

Finding a convenient slot is an essential part of a good crematorium service. Availability of slots is obviously linked to opening hours (it is also linked to the number of chapels per crematorium, with the attendant ‘cons’ as well as ‘pros’ of multi-chapel crematoria discussed above). As mentioned earlier, timing is also often determined by funeral director availability.

Chart 5.2 shows that private sector providers tend to have slightly longer opening hours than local authority crematoria. Local authority crematoria are also much more likely to never open at weekends. Where they do open there can often be limitations, for example, insisting that the first booking made is the 9am slot, the next booking made at 9.30 and so on, meaning there is no choice of time. In our in-depth interviews various industry figures reported that local authorities had less scope to be flexible in their opening hours because this might involve paying staff over time payments for which there is no budget available.

The data for operational hours are skewed by the fact that many crematoria do not have ‘regular’ weekend hours. Rather, they open at weekends by request, therefore it’s not included in our operational hours data for example, it is possible to have a weekend service at any Dignity crematorium, which is reflected in chart 5.2 weekend opening, but because they do not have regular hours this is not reflected in the operational hours, other operators may be in a similar position.

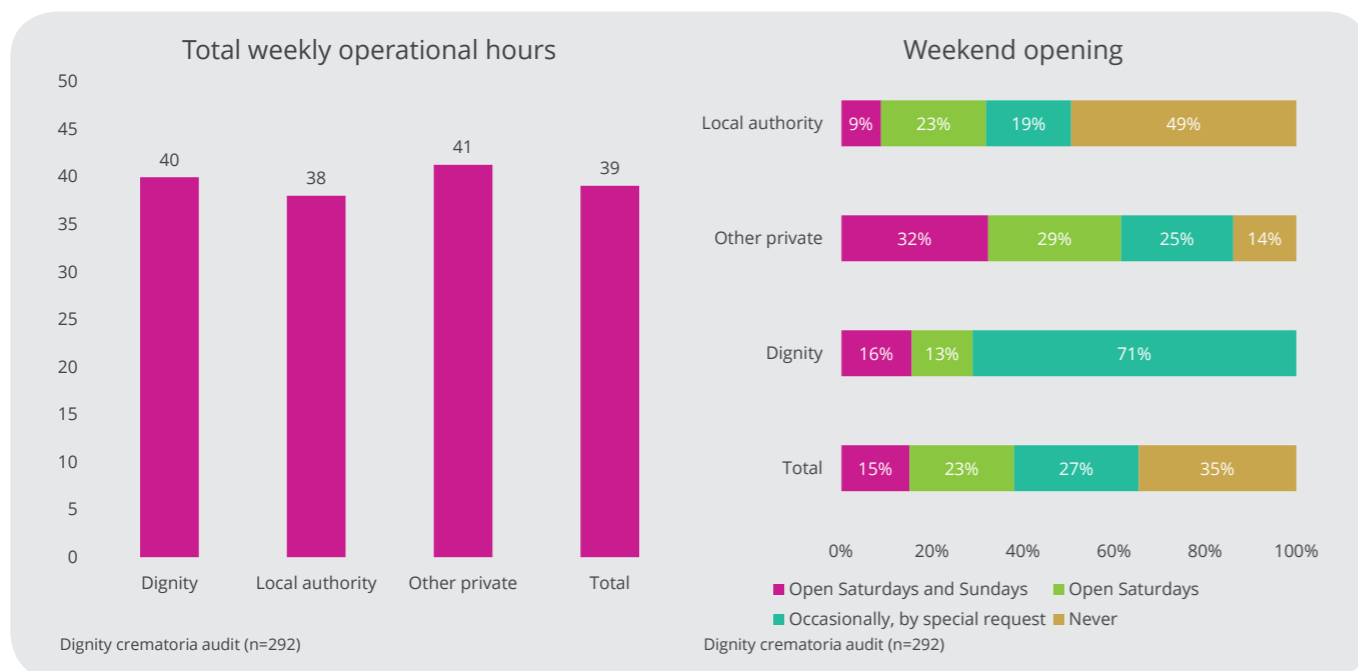


Chart 5.2 Opening hours

**Not seeing other mourners**

The desire to not see mourners from other services came out as a very strong need in the customer research. The likelihood of this being achieved is linked to slot length, with longer slot lengths increasing the chances of customers having the type of service they require whilst also creating the period of time for entering and leaving the chapel so that other mourners are not encountered.

The data in chart 5.3 shows the average slot and service length for each provider. This research has revealed that there is wide variation in how crematoria report the time available to customers, with some stating the gap between services, some stating the time in chapel and others providing both slot and service lengths. It is clear that each funeral is different and that the time a funeral party takes to enter the chapel, leave at the end of the service and pay their respects, will have multiple variables, such as the size and mobility of the congregation and the number of doors available to use, amongst other things, but this lack of clarity adds another layer of uncertainty for customers who just want their own time to say goodbye.

In our research with funeral directors we also asked them about the ideal length of service and overall slot. The data shows that Dignity offer both the longest average slot and service lengths. Dignity’s slot and service length averages also mirror the ideal slot and services lengths suggested by the funeral directors research. In fact, Dignity’s average service length is slightly longer than the ideal suggested by funeral directors.

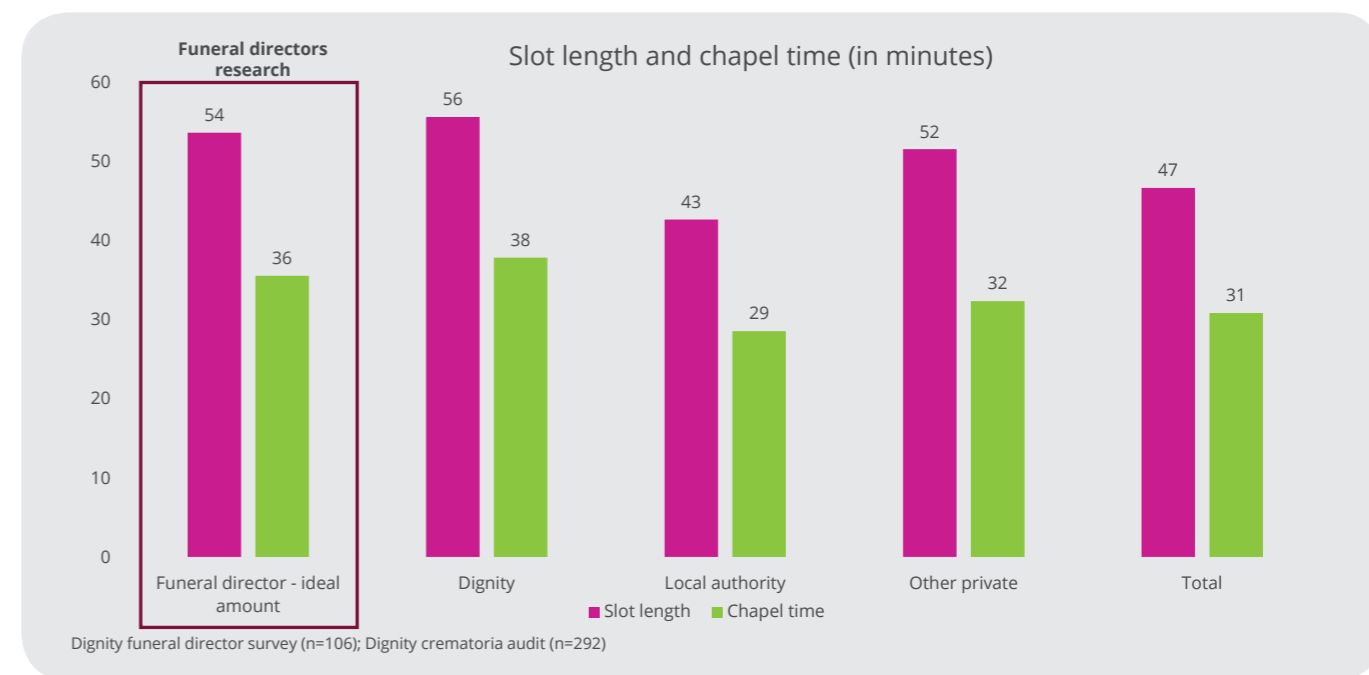


Chart 5.3 Slot Length

We understand that in some parts of the country, because of the levels of demand relative to slots available, it is not possible to extend slot lengths. Doing so, and reducing the number of slots available, could result in unacceptable waiting times for cremation funeral services. For example, Dignity would ideally like to offer 60-minute slots in all their crematoria, but some of their crematoria cover a wide geographic area and would be unable to offer enough service slots to meet the needs of the bereaved without unreasonable delay if 60 minute slots were adopted across all crematoria. Other providers face similar issues.

### Costs

As we saw from the customer research, the cost of the cremation is a top three consideration for one third of customers. It is also a lower order (bottom three consideration) for almost one in four customers. This reflects the fact that funeral costs are a significant expense for any family, but some families are much better placed to cover this expense than others. For a significant minority of customers (29%) cost would be the key consideration in their choice. For the majority, this is not the case, however, and other considerations appear to be much more important than cost.

Based on our defined 'standardised price'<sup>1</sup>, Dignity are more expensive than competitors. Local authorities provide the cheapest cremation services on average, with other private providers operating at around the average for the overall market.



Chart 5.4 Cost: standard price and extras<sup>1</sup>

### Value

Our customer research found that service length was a much better determinant of perceptions of value for money than cost. There was clearly a correlation between time spent at the crematorium and perceptions of value for money.

If we take price per minute as a measure of value, then local authorities provide least value because of their generally shorter slot lengths compared to the private providers.

On this measure Dignity provide better value than the market average. This picture changes if we add in the costs for extra time or a double slot. Dignity's extra time costs are higher than the market average. However, because Dignity offer some of the longest slot lengths in the sector as standard, extra time is less likely to be required.

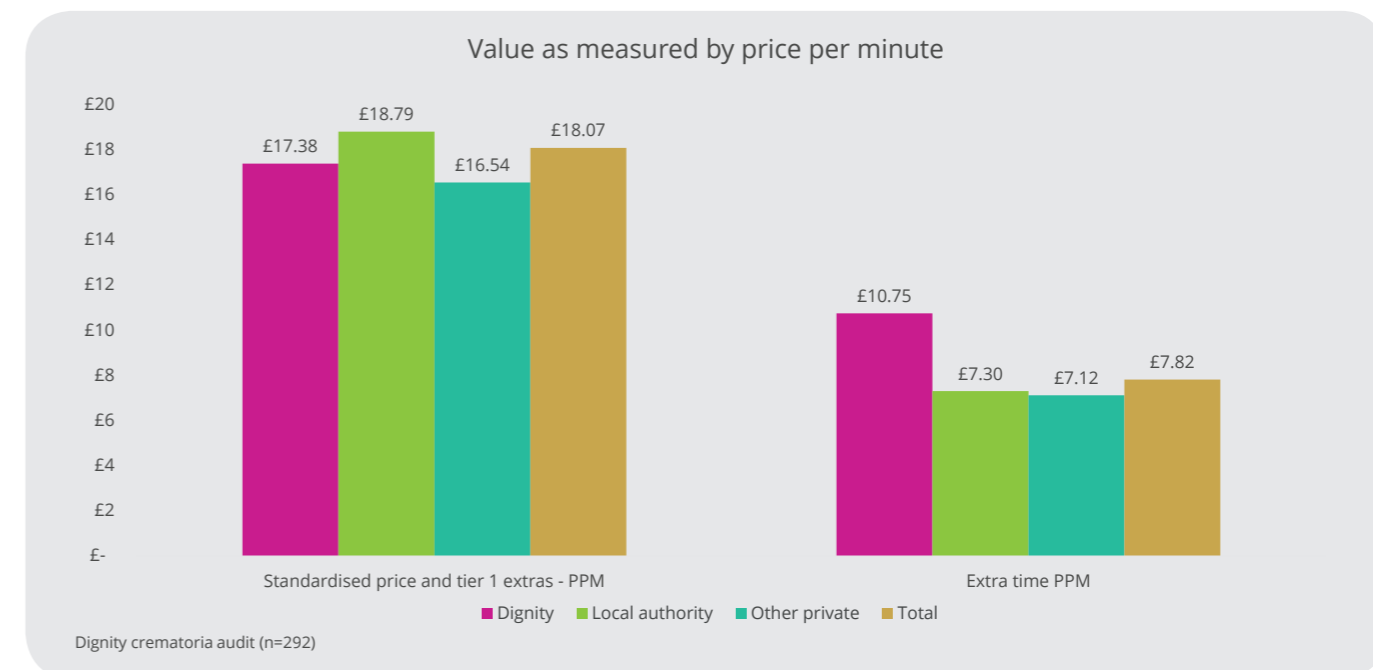


Chart 5.5 Value as measured by price per minute

<sup>1</sup> As mentioned above, to allow for like for like cost comparisons across crematoria we have created a 'standardised cost' for a package of services necessary to carry out a respectful cremation funeral. These are largely what is referred to in the sector as 'Tier 1 fees'. They are items that would usually be required in a cremation funeral including music system fee, cremation certificate, environment protection fee, administration fee, and scattering of ashes, ashes container, plus one month's ashes storage. There may also be additional charges for 'Tier 2' items such as live streaming, visual tributes, overseas fees, duplicate certificates etc. We have taken the view that Tier 2 items are not essential to a cremation funeral and therefore have not included in the standardised fee used here.

Chart 5.6 shows the proportion of Dignity crematoria represented in each tertile (for all crematoria) for both standardised price and price per minute. If Dignity crematoria prices and price per minute exactly reflected profile of prices throughout the market you would expect see 33% of Dignity crematoria in each tertile. In the event, the distribution is much more skewed than this.

On standard price, Dignity crematoria are at the more expensive end of the market with 78% falling in the most expensive tertile. However, as can be seen in chart 5.6, Dignity have the largest proportion of crematoria offering 60 minutes and offer no slots less than 45 minutes compared to other private operators which offer shorter slots and local authority who offer 60 minute slots in just 12% of cases. When we look at price per minute (a blend of time and cost, our measure of value, rather than cost), the picture is radically changed. Over 38% of Dignity crematoria fall into the best value tertile, and representation in the poorest value is roughly in line with the overall market distribution at 31%.

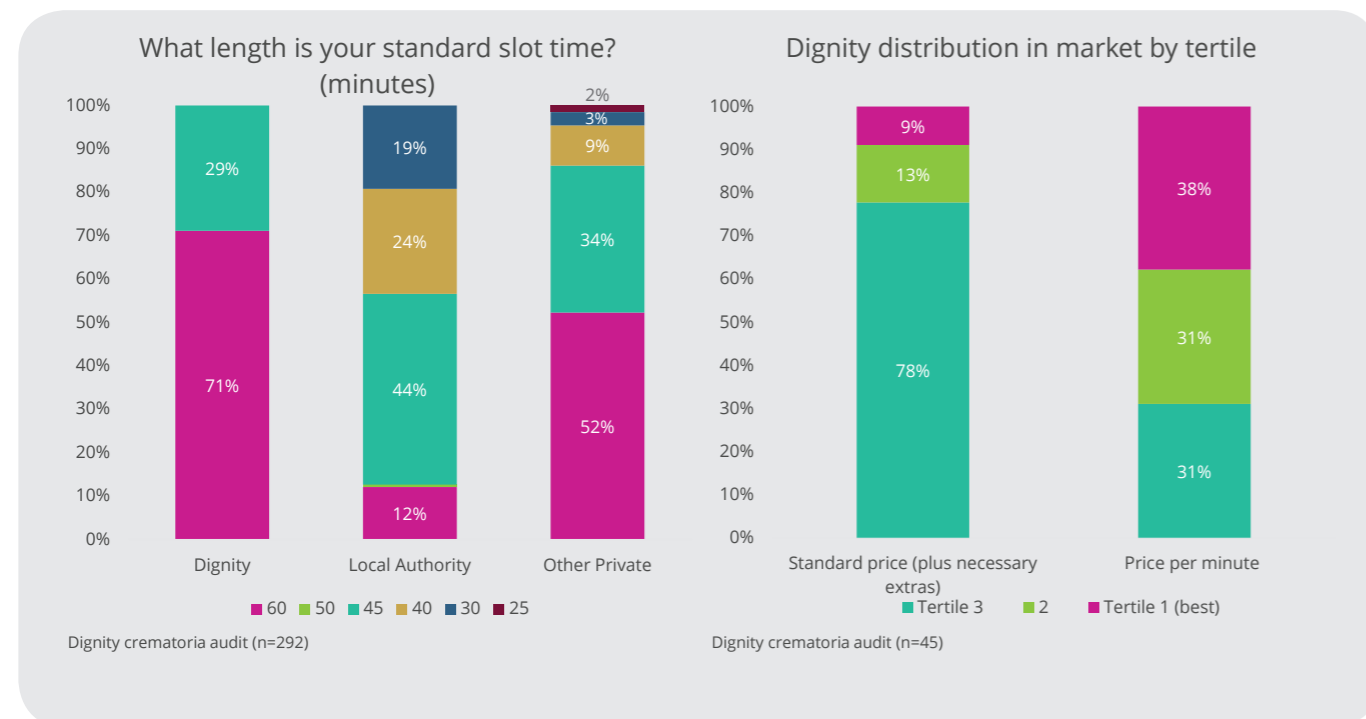


Chart 5.6 Dignity price rankings

### Personalisation

Several relatively new technological developments are making it possible for cremation services to be increasingly tailored and personalised. These include modern music systems, equipment for visual tributes, and the opportunity for streaming services online. Our research found that live streaming of funerals is welcomed by a minority of people who require them, and suggested that the need and demand for this type of service could grow in the future.

Although Dignity widely offer modern music systems, their crematoria are less likely to offer visual tributes or live streaming. For these items other private providers lead the way with Dignity and Local Authorities providing a similar, lower level of provision.

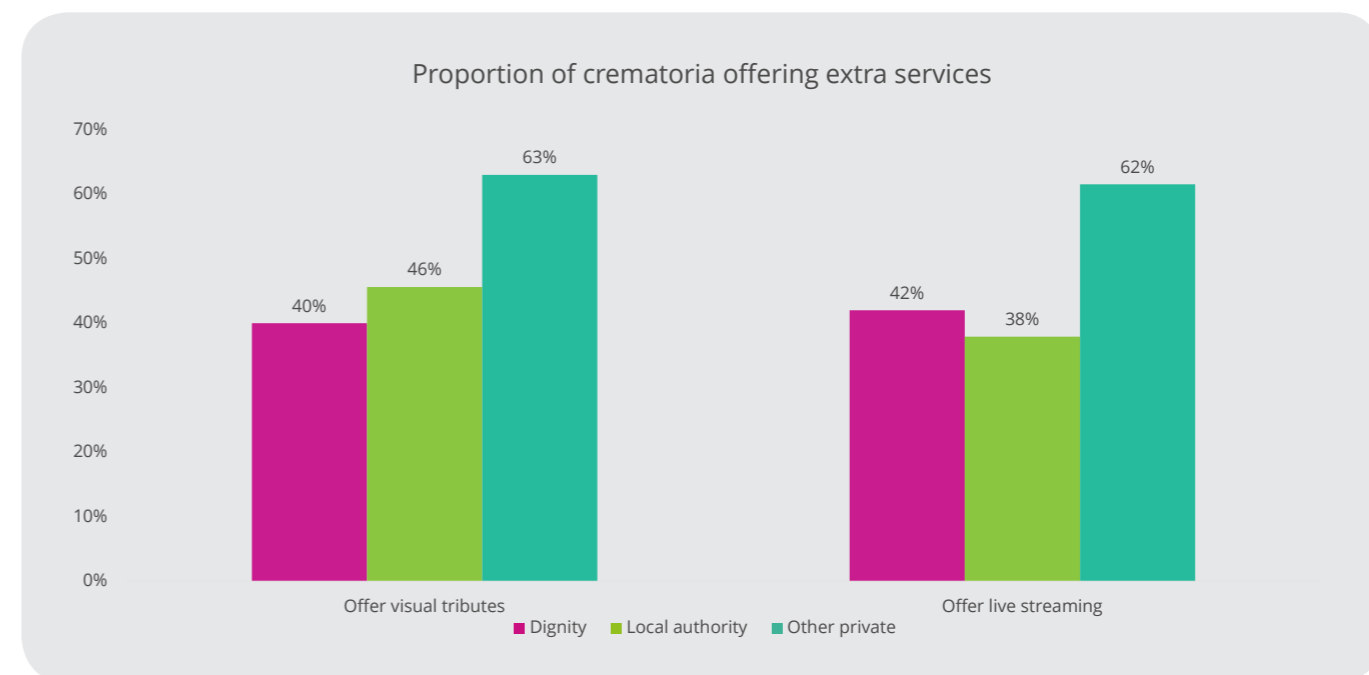


Chart 5.7 Visual tributes

## The UK crematoria score card

Using the data described in the previous chapters we have developed a scorecard to rate each crematorium in the UK against its ability to deliver against the six core customer needs identified in the research. Table 6.1 lists the customer needs and provides the rationale for their inclusion in the scorecard ratings.

	Need	Rationale
1	Making sure everyone who wants to come can	Primary customer concern when planning cremation. Mix of both time and capacity based. Reflects growing importance of cremation in overall funeral
2	Not seeing other mourners	Clear demand for avoiding conveyor belt feeling and having a 'buffer zone' between services. Reflects time taken to get mourners in and out of chapel and the importance of this time (laying flowers etc)
3	Keeping costs low	Funerals are expensive, and customers are often keen to keep costs manageable
4	Getting value	Value for money and time is important to customers to ensure that they get the right service for their needs
5	Finding a time for the service	Availability of slots reduces chances of customers waiting for a slot at the time they want
6	Facilities to play music or show photographs	Important to families to be able to remember their loved one in the way they want, reflects greater personalisation of services

Table 6.1 Approach to assessing crematoria

For each of the customer need criteria described above we have attributed a Red, Amber, Green rating to each crematorium. The definitions and criteria for allocating these ratings are described in table 6.2 below.

	Need	Criteria	Red	Amber	Green
1	Making sure everyone who wants to come can	Chapel size	Less than 90	90-119	120+
2	Not seeing other mourners	Slot length	34 minutes or less	35-44 mins	45+ mins or more
3	Keeping cost low	Cost	Lowest 33%	Middle 33%	Highest 33%
4	Getting value	Price per minute	Lowest 33%	Middle 33%	Highest 33%
5	Finding a time for the service	Opening hours	Not available weekends or evenings	Available weekends or evenings	Available weekends and evenings
6	Facilities to play music or show photographs	Visual tributes	Has no music system or visual tributes	Has either music system or visual tributes	Has music system and visual tributes

Table 6.2 Scorecard rating definitions

On this basis crematoria have been allocated 3 points for a green rating, 2 points for an amber rating and 1 point for a red rating. This creates a maximum score of 18 and a minimum score of 6 for each crematorium. All six factors are weighted equally. These scores are the basis of the rankings shown below.

Table 6.3 shows the top 20 best performing crematoria in the UK, based on our customer needs scorecard.

		Operator	Standard price	Value (PPM)	Not seeing other mourners	Finding a time	Facilities	Capacity
Daldowie	Scotland	Local Authority	£681	£11.35	60	0	0	180
The Linn	Scotland	Local Authority	£681	£11.35	60	0	0	180
Amersham	England	Local Authority	£495	£11.00	45	1	0	150
Bramcote	England	Local Authority	£700	£15.56	45	1	0	123
Cardiff		Local Authority	£685	£11.42	60	1	0	170
Craigton	Scotland	Dignity	£730	£12.17	60	0	0	104
Gedling	England	Other Private	£695	£11.58	60	0	0	96
Gravesend Thamesview	England	Other Private	£703	£11.71	60	1	0	120
Grenoside	England	Dignity	£740	£12.33	60	0	1	120
Manchester Chorlton cum Hardy	England	Other Private	£740	£12.33	60	0	1	120
Rugby	England	Local Authority	£799	£13.32	60	0	0	120
Warriston	Scotland	Other Private	£815	£13.58	60	0	0	250
Alfreton	England	Other Private	£810	£13.50	60	0	0	95
Bretby	England	Other Private	£705	£15.67	45	2	0	150
Cardross	Scotland	Local Authority	£735	£16.33	45	1	0	160
Clydebank	Scotland	Local Authority	£668	£14.84	45	1	1	266
Golders Green	England	Other Private	£690	£11.50	60	1	1	120
Greenock	Scotland	Local Authority	£681	£11.35	60	1	1	120
Hazel Head	Scotland	Local Authority	£693	£15.40	45	1	0	96
Lichfield and District	England	Dignity	£685	£11.42	60	0	0	76

Table 6.3 Highest ranking crematoria

Local authority crematoria account for half of the top 20, but this might be expected because, with 182 crematoria, they represent more than 60% of the market.

Table 6.4 shows the 20 lowest ranking crematoria in the UK, based on our customer needs scorecard.

		Operator	Standard Price	Value (PPM)	Not seeing other mourners	Finding a time	Facilities	Capacity
Darlington	England	Local Authority	£896	£29.87	30	2	1	60
Woking	England	Other Private	£890	£35.60	25	0	2	70
Ruislip	England	Local Authority	£649	£21.63	30	2	2	80
Jersey	Channel Islands	Local Authority	£979	£32.63	30	2	2	150
Hastings	England	Local Authority	£735	£24.50	30	2	2	85
Wrexham	Isle of Man	Local Authority	£752	£25.07	30	2	2	120
Thornton (Crosby)	Wales	Local Authority	£855	£21.38	40	1	2	80
Teeside	England	Local Authority	£795	£26.50	30	1	1	80
Sunderland	England	Local Authority	£780	£26.00	30	1	1	70
Stourbridge	England	Local Authority	£877	£21.93	40	2	0	72
St Helens	England	Local Authority	£700	£23.33	30	2	2	108
Solihull Robin Hood	England	Local Authority	£740	£24.67	30	2	1	70
Scholemoor	England	Local Authority	£914	£22.85	40	2	0	80
Poole	England	Local Authority	£854	£28.47	30	2	0	80
Lytham St Annes Park	England	Local Authority	£689	£22.97	30	2	1	80
Dukinfield	England	Local Authority	£771	£25.70	30	2	1	90
Dudley Gornal Wood	England	Local Authority	£877	£21.93	40	2	1	100
Carlisle	England	Local Authority	£892	£22.30	40	2	2	120
Bolton Overdale	England	Local Authority	£760	£25.33	30	1	1	70
Stonefall	England	Local Authority	£859	£21.48	40	2	2	161

Table 6.4 Lowest ranking crematoria<sup>1</sup>

Local authority crematoria account for 19 of the bottom 20, and as such are over represented here based on their market share.

<sup>1</sup> Lowest ranking at the top of this table



Chart 6.1 shows the distribution of Dignity crematoria through the overall rankings by tertile. As before, if Dignity's distribution was reflective of standards in the overall market you would expect to see 33% of Dignity crematoria represented in each tertile. Dignity are well represented in the highest tertile at 42%, and under-represented in the lowest, largely due to offering longer slot lengths (as seen in chart 5.6); no Dignity crematoria appear in the 20 lowest ranking table.

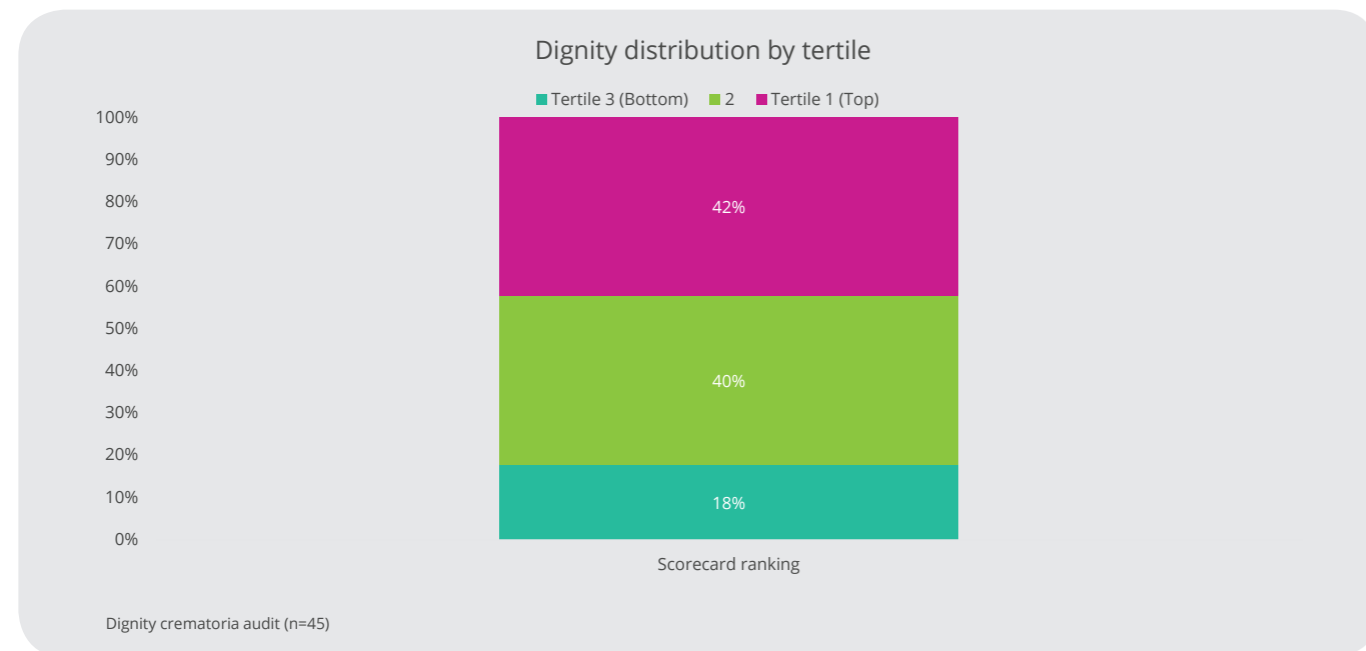


Chart 6.1 Dignity crematoria rankings

## Where next? The future of crematoria?

The role of the crematorium within the overall funeral service is evolving over time. The likelihood that this evolution would result in changes to customer needs was one of the main premises for commissioning the research that underpins this report. Dignity were keen to understand changing needs so that they are well placed to consistently meet them. Of course, with an eye on the future, it is almost certain that this evolution will continue.

### Future demand

We have already highlighted the demand pressure on some crematoria in different parts of the country that is restricting their ability to offer longer slots. These demand pressures are being felt at a time when there are approximately 600,000 deaths per year in the UK. Because of changes to the demographic structure of the UK population this figure is forecast to rise to 750,000 deaths per year within a generation. This increase in demand is likely to be a key driver of the future evolution of the crematoria sector. It implies that more crematoria will have to be built to meet this demand.

This is a huge opportunity for the sector to drive up standards. We have seen from this research that funeral directors believe that competition and the introduction of new crematoria has served to increase standards overall. New crematoria can be built to the latest standards and designs, better managing the flow of mourners between services, provide purpose-built grounds, car parks and so on. All this could serve to address the 'conveyor belt' challenge (both through better design and increased capacity). New builds can also easily incorporate the technology needed for visual tributes and state of the art music systems that help to deliver the personalised services that people now want, as well as the live streaming that will enable a wider audience to witness the funeral service. Increasing the number of crematoria would also serve to make them more 'local' and reduce drive times for services.

Of course, we know that local communities do not always welcome new crematoria being built in their vicinity. This is obviously a challenge, but one the sector could meet head on by seeking to change the way that crematoria are perceived. The latest crematoria, built to high standards with pleasant grounds and buildings, could come to be seen as a community facility. For example, some crematoria already offer some catering

facilities for visitors. This idea could be extended to include cafés and coffee shops for use by the local community. It is possible to envisage a future in which the creation of new, high quality local facilities serve to 'normalise' the presence of a crematorium for local populations. Customer research suggests that this would be welcomed by 76% of people who agree that death should be more talked about and normalised in society.

### Diversity of service type

As we have seen, new types of service such as direct cremation (a cremation where mourners do not attend the crematorium) are increasingly being made available. It is still early days for direct cremation, but Dignity's own forecasts suggest that they will account for 10% of the market by 2030. Where this option is being offered, the funeral directors involved in this research have suggested that take up is gradually increasing. Ultimately, this could have big implications for the operating model of crematoria. For example, direct cremations could fill the less popular early morning slots and leave more popular slots later in the day free for full service funerals.

Going forward, it looks as though crematoria should be prepared to offer a diversity of service type, from direct cremations, services that take place primarily at the crematorium and the minority of services involving a religious element somewhere else and a committal at the crematorium. For some of these models the crematorium will be 'centre stage' and choice will be determined by the quality of the services on offer. For others, the crematorium will simply have to be a convenient location for where other elements of the funeral day considered to be more central or important by the customer (such as a wake where the life of the deceased is celebrated) are taking place.

### Direct customer service

It also seems likely that crematoria should start preparing for a future when they engage more directly with customers, rather than via funeral directors as is the norm today. Digital technology has disrupted the traditional commercial models of virtually every sector of the economy. There is no reason to assume that funerals and cremations will be an exception. Signs of change are already visible as prices are made available online, increasing transparency.

It is not too fanciful to imagine a future in which some customers choose to book a cremation slot online themselves, rather than take the full-service model offered by funeral directors today. Other elements of the funeral director offer are already subject to this type of 'disintermediation'. For example, it is already possible to buy a coffin on Amazon!

These direct relationships might have benefits for all concerned. For example, a direct relationship and a direct line of communication between the customer and the crematorium, perhaps working alongside the funeral director would help to ensure that more ashes are put in a final resting place than is the case today. If this resting place happens to be the grounds of a well-maintained crematorium, we could see a 'virtuous circle' in which more and more local people have a reason to visit their crematorium for memorial purposes and so further aid the process of normalising the presence of a crematorium in a local community as described above.

## Implications and actions

Some clear messages and calls for action emerge from this research:

- There is a need to ensure the conveyor belt feeling is avoided. Dignity are calling for a minimum slot length of 45 minutes, facilitating the creation of a time gap between parties
- Price visibility is currently very low. There is a need for greater price transparency (including slot length and price per minute). All crematoria prices should be published online. All costs should be included in the quoted standard price. That is to say, all fees required to carry out a cremation such as the CAMEO fee, the cost of the cremation certificate. Funeral directors should, as the norm, itemise the crematorium fee in invoices and when making the arrangements initially
- There is a need to educate customers so that they are better able to make choices that deliver the service they want. For example, funeral directors should encourage crematorium visits and make customers aware of extra time and double slot options
- It is important for the whole sector to recognise coming trends. These include personalisation, tailoring and flexibility – all of which can be assisted by the adoption of new technologies
- Overall, there is a need to encourage choice and empower the customer. Funeral directors and crematoria need to put options to customers to help them make active choices that deliver the service the customer wants

## Dignity response by Steve Gant

I welcome the findings in this report which helps us better understand what customers seek from their cremation service. We set high standards for ourselves and we have learnt from this report that whilst we do well in some areas there is plenty of room for improvement. It also provides some clear guidelines for the sector as a whole to improve the cremation funeral customer experience.

Service slot length is something we believe to be critically important to enable customers to have the time to arrive, pay their respects and depart without being rushed or seeing other mourners, this report finds that this need is resoundingly recognised by all of our customers (end consumers and all types of funeral directors).

What is also clear from this work is that whilst value for money is a significant factor in customer satisfaction Dignity should also recognise the need of customers to manage costs and to be able to tailor their service. We now have a variety of service options ranging from DIY, direct cremation and early morning slots to cater for a variety of needs and budgets, and will continue to listen to our customers to guide us in the future.

Our pricing ensures that customers are provided with everything they need to carry out what most would consider a “standard” cremation funeral service and that no ‘extras’ are required; environment protection fee, administration fee, cremation certificate, the provision of music and scattering of ashes fee or ashes container and unlimited ashes storage, are all included as standard. We also offer optional chargeable extras to further personalise a service such as live streaming and visual tributes although our provision of tributes is clearly an area where we can and will do more.

Recognising the findings in this report we will:

- Publish our crematoria prices online by the end of July 2018, clearly detailing what is included, and chargeable extras
- Hold our crematoria prices for 2018 with the next review in 2019
- Improve communication of our hours of operation and availability in evenings and on weekends, to improve customer and funeral directors awareness of these options
- Complete the installation of digital music and visual tribute systems across all of our crematoria by the end of November 2018

By sharing this research, we will work across the sector including funeral directors, encouraging customers to more proactively engage directly with crematoria in advance of their service to help them fully understand what is available, and in doing so help the sector to better meet customer requirements;

Finally, we call for a minimum slot length of 45 minutes for a “standard service” to enable customers to pay their respects in their own time, and an industry-wide approach to clear pricing which covers everything customers consider essential to deliver a respectful cremation funeral as well as all the mandatory compliance elements associated with a cremation.

We will revisit this work in 2019, but in the meantime, we encourage stakeholders across the sector to take up the themes in this report and progress the debate about how we can improve standards for all of our consumers.

Steve Gant

**Director of Crematoria**

## Detailed research methodology

The findings in this report are based on the following research elements:

### Customer research

- 2 x Friendship focus groups
  - In London and Manchester with people who had arranged a cremation funeral in the last two years.
  - Dates: w/c 28th August 2017
- Quantitative survey
  - Online
  - 2,022 people across UK, all of whom had arranged a cremation funeral in the last 3 years
  - Dates 15th Sept-25th September 2017

### Industry research

- Expert interviews
  - FCBA, ICCM and Cremation Society
  - Conducted August and September 2017
- Audit Stage 1
  - Data collected by Dignity on 286 crematoria
  - Data collected between August-October 2017
  - Analysed by Trajectory
- Audit Stage 2
  - Data collected by phone by Dignity, Trajectory and through Mystery Shopping on 292 crematoria
  - Collected April-May 2018
  - Analysed by Trajectory
- Local Authority Interviews
  - 5 telephone interviews conducted with crematoria managers at local authorities
  - Conducted by Trajectory March-June 2018

### Funeral director research

- Qualitative research
  - 15 telephone interviews with funeral directors
  - Conducted by Trajectory March-May 2018
- Quantitative research
  - Survey sent to c.1500 funeral directors
  - 106 responses received (28 online, 78 by post)
  - Conducted by Trajectory April-May 2018
  - Analysed by Trajectory

Initial request for data was carried out by Dignity Crematoria; it was not possible to collect all the data requested via this method so a small amount of it was collected by mystery shopping. All analysis is based on the information we were told from these collection exercises. A validation exercise shortly before publication tested a subset of 60 crematoria and revealed some differences, which we have corrected. We welcome any contributions from operating crematoria to supplement or correct any stated data for future analysis.

This is v2.0 of the report following a number of improvements to services and amendments to costs made by Dignity and some other crematoria operators.

Trajectory Limited is a strategic research consultancy established in 2008. This report was prepared by Paul Flatters (Trajectory's Chief Executive) and Tom Johnson (Managing Director), with support from Dr Jane O'Brien (Research Director) and Harry Baker (Analyst). Trajectory Limited is a Market Research Society Company Partner.

## About the authors

### Paul Flatters – Chief Executive, Trajectory

Paul has almost 30 years experience as a trends analyst and social research practitioner, advising clients on the strategic implications of social and economic change. His career has also included roles as Head of Research for BBC News, where he was a member of the Corporation's Editorial Board, and Director of Research for Which?/Consumers Association.

At Trajectory his clients include Bacardi, BBC, Big Lottery Fund, General Medical Council, Heineken, O2, Royal, VisitEngland and Waitrose. Paul has a wealth of research experience researching end of life finances and funeral planning. His clients include Dying Matters, RIAS, Royal London, Sun Life and now, of course, Dignity.

Paul is a regular conference speaker and commentator. He has written for the FT and Harvard Business Review and presented BBC Radio 4's Four Thought. Paul was previously CEO of the Future Foundation and a Director of The Henley Centre for Forecasting.

Paul has an MA in Philosophy, Politics and Economics from the University of Oxford.

### Tom Johnson – Managing Director, Trajectory

Having joined Trajectory after completing his Masters degree at Kings College, London in 2009, Tom's clients include Greene King, WRAP, Big Lottery Fund, O2 and Royal London.

Tom also oversees our proprietary trends monitor, Global Foresight, and our programme of monthly Trends Breakfasts. Additionally to his consultancy work, Tom led Trajectory's pan-European Time Use study, having run our ground-breaking Geography of Time study.

Tom has worked with Paul on all of Trajectory's work on end of life financial planning and funeral planning research.

### Steve Gant – Crematoria Director, Dignity

Steve is the Crematoria Director at Dignity in a career within the funeral industry that has spanned over 35 years. A widely respected figure within the industry, he is an Executive Committee Member of the FBCA, and regularly sits on national working consultation groups for the Ministry of Justice and Scottish Government, where he works passionately to ensure the bereaved are offered the very best experience at one of the most difficult times of their life.

Steve has been working in the cremation industry since February 1983 starting at a local authority run crematorium where he spent 5 years working as a Crematoria Operator / Attendant, then moving into the private sector in 1988 when he progressed to Crematoria Director. He has had responsibility for not just the management and development of crematoria throughout his career, developing brand new crematoria, acquisitions and management contracts for local authority owned crematoria, but also burials, cemeteries and memorial gardens.

Dignity has expanded its crematoria portfolio from 21 to 46 since 2003 under Steve's leadership and is now responsible for over 63,000 cremations annually representing around 11% of the cremations in the UK.

### Simon Cox – Head of Insight, Dignity

Simon is Head of Insight and External Affairs at Dignity, and one of the UK's leading authorities on funeral research, responsible for successive commercial and academic studies spanning nearly 15 years.

Simon scoped and commissioned the UK's two most authoritative works on funeral costs starting in 2004 and every year up to and including 2016. His first published report on funeral costs and related topics came in 2010 entitled The Ultimate Distress Purchase while at Sun Life. His final published report on this topic "Signs of Life" was his 13th successive research study and published while at Royal London.

In addition to funeral costs, his research studies have included

- Inadequacies of state funeral benefits
- Implications of losing a partner
- Value of faith and community in funerals
- Funeral Plans - the need for stronger regulation
- Direct cremation and possible impact on grief

This latest work is the first of two reports looking at quality and standards in the funeral industry.

Simon has spent over 30 years in the Life Insurance and funeral sectors, and sits on various funeral working groups in Westminster and Holyrood.

### Yvette-Louise Smith – Research Manager, Dignity

With fifteen years experience in research across a range of roles starting with shopper insight at Britvic soft drinks through to Brand Insight Partner at Molson Coors and most recently as Research Manager at Dignity Yvette has managed a wide range of complex research projects. These vary from understanding in-store shopping behaviour to advertising and product testing and delivering consumer insight for numerous FMCG brands. Her latest work has been shaping and co-ordinating the diverse aspects of the research with Trajectory to deliver the two reports looking at quality and standards in the funeral sector and crematoria.

## Glossary

**Catafalque** – the wooden platform on which the coffin rests during the service

**Committal** – when the coffin is received on the catafalque in preparation for the cremation, normally at the end of the service

**Competition and Markets Authority (CMA)** – a non-ministerial government department responsible for strengthening business competition and reducing anti-competitive activities to make markets work well for consumers, businesses and the economy

**Conveyor-belt feeling** – a term used by customers to describe either feeling rushed or encountering mourners from other funerals either before or after the service

**Cremation funeral** – where a funeral service is held at the crematorium prior to the coffin being committed

**Crematoria Abatement of Mercury Emissions Organisation (CAMEO)** – CAMEO was set up in response to the 2005 Defra requirement for the cremation industry to remove mercury from 50% of cremations. It is designed to be a burden sharing scheme to enable the removal of mercury from cremations, whilst not impacting upon the bereaved with excessive cost and the possibility of closing of local crematoria due to the high costs of installing abatement equipment. Crematoria who can fully abate mercury assist those who cannot

**Cremation certificate** – a legal document confirming the basic details and identification of the deceased and the ashes, and the location of the cremation

**Cremation Society (The Cremation Society of Great Britain)** – The Cremation Society promotes the practice of cremation for the respectful disposal of the deceased

**Direct cremation** – direct cremation is where the provider takes the deceased into care and organises the cremation for you, without a full funeral service. These can be unwitnessed, where the cremation takes place and the ashes are returned to the bereaved without attendance, or witnessed, where close family and friends can attend the brief committal

**DIY cremation** – where family or friends arrange the cremation of the deceased without the services of a funeral director

**Environmental fee** – also known as CAMEO fee

**Federation of Burial and Cremation Authorities (FBCA)** – a link between Government Departments in England, Scotland and Wales and Burial and Cremation Authorities throughout the UK. An organisation that provides services, support and guidance to the owners and operators of crematoria in the UK

**Holding over** – where a cremation service is held on a stated day, and the deceased is taken into care at the crematorium with the actual cremation taking place the following day

**Institute of Cemetery and Crematorium Management (ICCM)** – Founded in 1913 the aim of the ICCM is to raise standards for bereaved people through the promotion of education and training opportunities for its Professional members and to provide policy and best practice guidance to Burial and Cremation authorities

**Live streaming** – sharing a video broadcast of the funeral over the internet at the time of the event

**Mandatory costs** – costs that are a basic requirement to carry out a cremation; these include the cremation certificate and environment protection fee

**Musical tributes** – the playing of music or singing of hymns or songs during the funeral service

**Northern Ireland Statistics and Research Agency (NISRA)** – collects and publishes demographic and statistical information for Northern Ireland

**National Records of Scotland (NRS)** – collects and publishes demographic and statistical information for Scotland

**Office for National Statistics (ONS)** – collects and publishes demographic and statistical information for England and Wales

**Overseas fees** – a small fee that is payable to generate an 'out of country' certificate for transporting ashes internationally

**Slot length** – the length of time between the start of two consecutive funerals

**Standardised cost** – the total price for each crematoria to provide all the elements of tier 1 costs and provide comparable like for like costs for analysis

**Standardised pricing** – see standardised cost

**Streaming** – video broadcasting of the funeral service over the internet, this can either be live or recorded to be watched on demand. See also live streaming

**Tertile** – Division of an ordered distribution (list / ranking) into three parts, each containing a third of the population

**Tier 1 costs** – costs that we have identified as necessary to carry out a cremation funeral (administration fee, cremation certificate, environment protection fee, provision of music, scattering of ashes, ashes container and one month's ashes storage)

**Tier 2 costs** – costs which are not the required in majority of cremation funerals but which might be needed or desired due to personal circumstances such as live streaming, visual tributes, overseas fees or duplicate certificates

**Tribute** – the playing of music, singing, display of objects or photographs in honour of the person who has passed

**Visual tributes** – the display of photographs, videos and other pictures to attending mourners on display screens during the service

**Webcast** – see streaming

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