

**Successes and failures of
heritage protection - a survey of
members who own or manage
heritage**

**Historic Houses and Country
Land and Business Association
(CLA)**

Final Report

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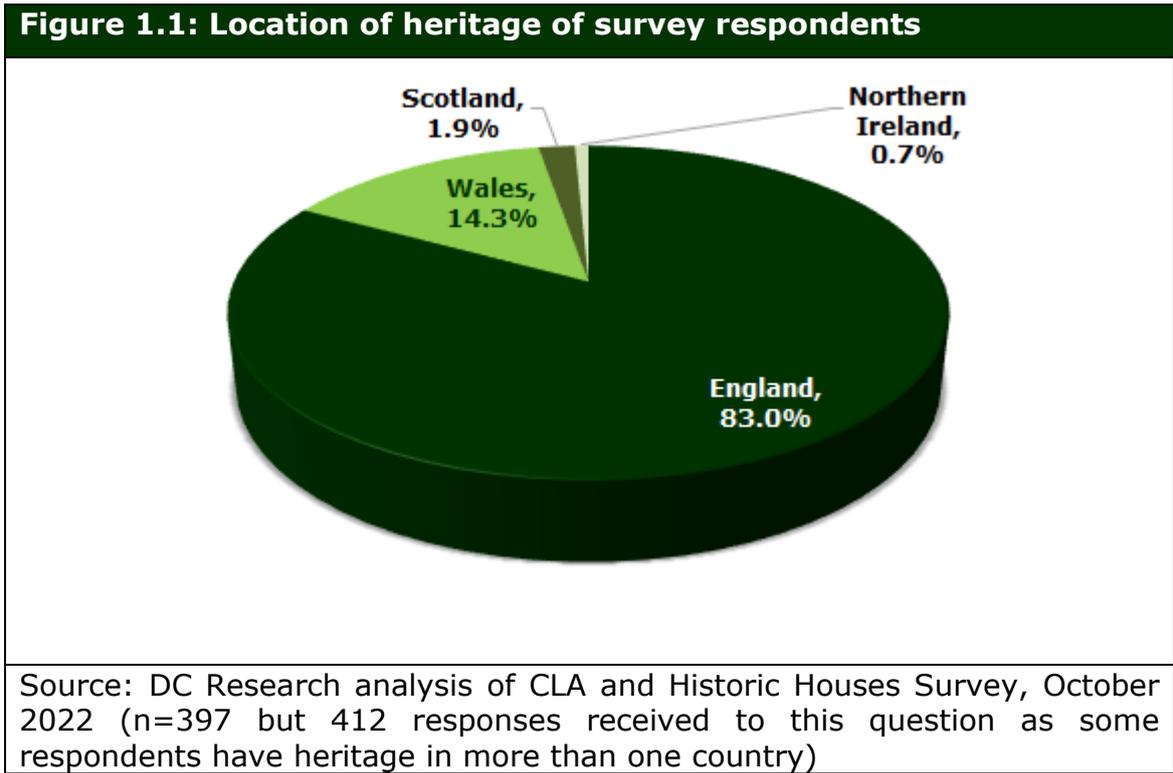
SUMMARY OF KEY FINDINGS

- A total of **399 survey replies** were received – **83% of respondents report having heritage located in England, 14% in Wales, 2% in Scotland, and 0.7% in Northern Ireland.**
- **56%** of respondents **are members of the CLA, 31% are a member of both the CLA and Historic Houses, and 13% are members of Historic Houses.**
- The **most common heritage assets** owned or looked after are **Listed Buildings (Grade II)** with 68% of respondents owning or looking after these assets. This is **followed by Listed Buildings (Grade I and II*)** with more than half (52%) reporting they own or look after these types of heritage assets.
- **The most common commercial use of heritage assets is Residential letting with 64%** of respondents using their heritage assets in this way. This is **followed by Accommodation (holiday lets/hotel) at 38%**, and then **Office/industrial/workshop space at 36%**. Around one-third of respondents open their heritage assets for day visitors (33%), use them for Weddings or Events Business (33%), or as a Filming Location (30%).
- **Almost half of respondents describe the physical condition of the heritage as being in 'Good repair' (46%), with a further 37% describing their heritage as being in 'Reasonable repair'.**
- **Half of respondents (49%) report spending less than £25,000 per annum on repairs, maintenance etc. for the heritage they own.** Nearly one-fifth (17%) report spending between £25,000 and £50,000 per annum, whilst around one in seven (14%) spend between £100,000 and £0.5million.
- If the midpoints of each category of spend are used, multiplied by the number of respondents for that category, this **suggests that the total spend per year on heritage by the 396 respondents to this survey is in the region of £42.9million.**
- When asked to estimate the total **amount that would need to be spent on repairs and maintenance to clear any backlog and ensure their heritage asset(s) were in good repair, 66% would need to spend less than £500,000.** At the other end of the scale, **6% of respondents report that they would need to spend more than £5million.**
- If the midpoints of each category of spend are used and multiplied by the number of respondents for that category, this **suggests that the estimate of the spend that would be required by the 393 respondents on repairs and maintenance to clear any backlog and ensure that their heritage asset(s) were in good repair is in the region of £393.5million.**
- **On heritage in the planning system, 61% feel that it is 'important but other considerations, such as financial viability, should be given considerable weight'.**
- Respondents were asked about their experience of having any property they own or manage newly designated or of any official changes to existing listings/schedulings/other designation(s). Of those that answered this question (n=45) the majority (73%) report specific examples of both new designations as well as changes to or extensions to existing designations. Whilst some (a minority of respondents) reflect on these experiences positively, **in many instances there are concerns reported around the scale and type of consultation carried out for any such changes.**

- There were also general comments about frustrations when dealing with the processes around new designations or changes to existing designations, with **poor communication and lack of effective consultation** being the most commonly reported issues by respondents.
- 41% describe how well the heritage protection system works in practice as 'adequate', more than one-third (36%) describe it as 'poor', with a further 12% describing it as 'very poor'. Conversely, whilst one in ten (10%) regard it as good, less than 1% describe it as 'excellent'. Overall, the **consensus is clearly towards issues with the heritage protection system, with it being described as 'poor' or 'very poor' by almost half (48%) of respondents.**
- On the Government's current Energy Security Strategy plans to review planning permission and listed building consent for decarbonisation/energy efficiency works, **87% of those that want to carry out decarbonisation/energy efficiency works report that planning permission/listed building consent are a barrier to these.**
- There is **clearly very strong support for streamlining building consent/planning permission for heritage, with 75% of respondents stating that it would be a good idea** to streamline listed building consent/planning permission for heritage for a much wider range of works with careful safeguards. Only 8% do not think this would be a good idea, with the remaining 17% unsure.
- **60% of respondents have** (in the last 10 years) **considered carrying out work to their heritage asset(s) which required planning or listed building consents.**
- **62% of those that did consider works but did not apply for consent, and/or applied but subsequently withdrew their application, report that the heritage consent system was a major factor.**
- The survey asked those that felt their proposal(s) were defeated by the heritage consent system, to reflect on the consequences of this – the most common of which was that *'the heritage building/asset could have been repaired and/or safeguarded for the future, but wasn't'* (64%).
- In terms of applications for **Listed Building Consent, 292 respondents provided answers to this question, reporting a total of 1,054 applications** – an **average of just over 3 applications per respondent** (3.06), although the actual number of applications per respondent varied between 0 and 60.
- A total of **882 of these Listed Building Consent applications are reported to have been successful** – showing an **overall success rate of 84%.**
- In terms of applications for **Planning Permission, 261 respondents provided answers to this question, reporting a total of 1,771 applications** – an **average of almost 7 applications per respondent** (6.78), although the actual number of applications per respondent varied between 0 and 500.
- A total of **1,454 of these Planning Permission applications are reported to have been successful** – an **overall success rate of 82%.**

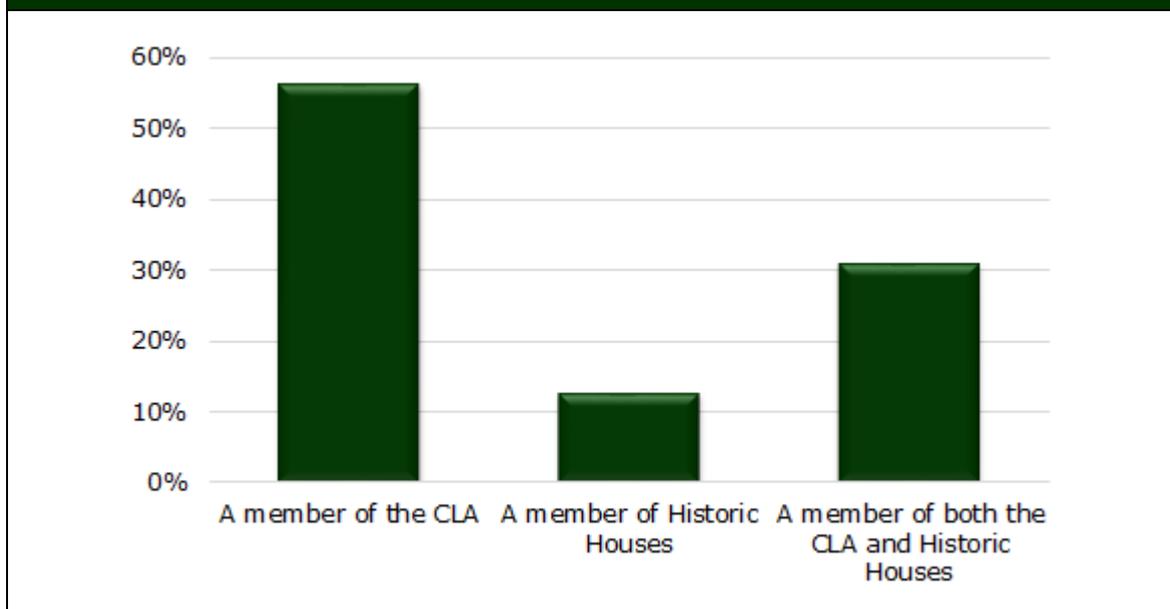
1. INTRODUCTION

- 1.1 In summer 2022, Historic Houses and the Country Land and Business Association (CLA) commissioned DC Research to carry out analysis of the results of a joint survey about the **successes and failures of heritage protection**.
- 1.2 This work follows on from previous research carried out by DC Research for Historic Houses – including a 2015 study about the economic and social contribution of historic houses and gardens, member survey research in 2018 and 2019, research to support advocacy around Heritage Maintenance Funds in 2018, work in early 2020 to assess the impact of Coronavirus on the Historic Houses membership and the 2020 and 2021 Policy Surveys.
- 1.3 This joint survey was carried out by Historic Houses and CLA as an online survey of their respective memberships during the Summer and Autumn of 2022.
- 1.4 A total of 399 replies were received to the surveys and, as Figure 1.1 shows, members from across the UK responded.



- 1.5 Figure 1.1 shows that 83% of responses are from members who have heritage located in England, 14% in Wales, 2% in Scotland, and 0.7% in Northern Ireland. The smaller number of responses from Scotland and Northern Ireland may reflect the fact that the CLA covers only England and Wales.
- 1.6 Figure 1.2 shows that 56% of respondents are members of the CLA, 31% are a member of both the CLA and Historic Houses, and 13% are a member of Historic Houses.

Figure 1.2: Membership status of respondents



Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=393)

- 1.7 This report presents a summary of the findings from the analysis of the survey results. The structure of the report follows the main themes and questions from the survey.

2. SURVEY FINDINGS

2.1 This section sets out the findings from the analysis of the survey results, covering each of the questions from the survey in turn. In each instance, the percentages reported relate to the proportion of respondents who provided an answer to each particular question.

Types of Heritage Assets

2.2 In terms of the types of heritage assets, Table 2.1 shows that the most common heritage assets owned or looked after are Listed Buildings (Grade II) with more than two-thirds (68%) of respondents owning or looking after these assets. This is followed by Listed Buildings (Grade I and II*) with more than half of respondents (52%) reporting they own or look after these types of heritage assets.

Table 2.1: What heritage assets do you own or look after for others (tick all which are relevant)?

	Percent	Replies
Listed Buildings (Grade I and II*)	52%	205
Listed Buildings (Grade II)	68%	271
Buildings/land within Conservation Areas / World Heritage Sites / Registered Parks & Gardens	42%	168
Scheduled monuments	26%	103
Other heritage	12%	47

Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=396, but respondents could tick multiple options, so totals do not sum to 100%)

Commercial Uses of Heritage Assets

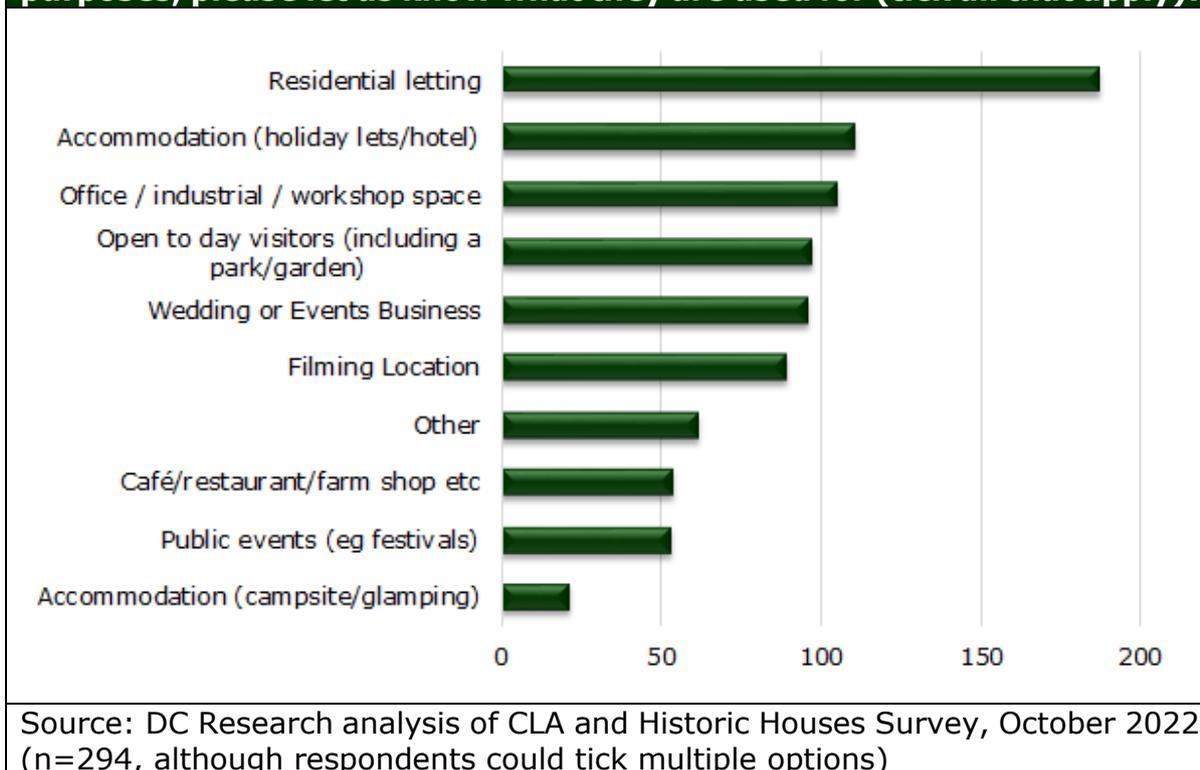
2.3 Respondents were asked if any of their heritage assets were used for commercial purposes, and to identify what they are used for. Table 2.2 below and Figure 2.1 show that the most common commercial use of heritage assets is clearly Residential letting with almost two-thirds of respondents (64%) using their heritage assets for this commercial use. This is followed by Accommodation (holiday lets/hotel) at 38%, and then Office/industrial/workshop space at 36%. Around one-third of respondents open their heritage assets for day visitors (33%), use them for Weddings of Events Business (33%), or as a Filming Location (30%).

Table 2.2: If any of your heritage assets are used for commercial purposes, please let us know what they are used for (tick all that apply):

	Percent	Replies
Residential letting	64%	187
Office / industrial / workshop space	36%	105
Wedding or Events Business	33%	96
Open to day visitors (including a park/garden)	33%	97
Accommodation (holiday lets/hotel)	38%	111
Accommodation (campsite/glamping)	7%	21
Filming Location	30%	89
Café/restaurant/farm shop etc	18%	54
Public events (eg festivals)	18%	53
Other	21%	62

Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=294, although respondents could tick multiple options)

Figure 2.1: If any of your heritage assets are used for commercial purposes, please let us know what they are used for (tick all that apply):



Physical Condition of Heritage Assets

- 2.4 Respondents were asked to report, overall, the physical condition of their heritage, and almost half of respondents describe the physical condition of the heritage as being in 'Good repair' (46%), with a further 37% describing their heritage as being in 'Reasonable repair' – see Table 2.3.
- 2.5 Almost one third report their heritage assets as being of Mixed repair, and around one in twelve (8%) of respondents report the physical condition of their heritage as being of 'Poor repair or unusable'.

Table 2.3: Overall, what is the physical condition of this heritage? (Where relevant, you can tick more than one box)

	Percent	Replies
Good repair	45.9%	181
Reasonable repair	37.3%	147
Mixed repair	29.2%	115
Poor repair / unusable	8.1%	32

Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=394, although respondents could tick multiple options)

Spend on Heritage Assets

- 2.6 When asked to categorise the annual value of spend on the heritage they own (including all repairs, maintenance, fees, insurance, an allowance for longer-term events like reroofing, and management - including monetising any unpaid time commitment), almost half of respondents (49%) report spending less than £25,000 per annum (see Table 2.4). Almost one-fifth (17%) report spending between £25,000 and £50,000 per annum, whilst around one in seven (14%) spend between £100,000 and £0.5million.

Table 2.4: Roughly how much do you actually spend each year, on average, on the heritage you own (or manage for others)?

	Percent	Replies
£0 to £10,000 pa	24.0%	95
£10,001 to £25,000 pa	24.8%	98
£25,001 to £50,000 pa	16.9%	67
£50,001 to £100,000 pa	13.9%	55
£100,001 to £500,000 pa	14.1%	56
£500,001 to £1m pa	4.8%	19
Over £1m pa	1.5%	6
Total	100%	396

Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=396)

Backlog of Repair Spend

- 2.7 If the midpoints of each category¹ of spend are used, and multiplied by the number of respondents for that category, this **suggests that the total spend per year on heritage by the 396 respondents to this survey is in the region of £42.9million.**
- 2.8 Table 2.5 shows the results for the question that asked respondents to estimate the total amount that would need to be spent on repairs and maintenance to clear any backlog and ensure that their heritage asset(s) were in good repair.
- 2.9 The results show that almost two-thirds (66%) of respondents estimate that they would need to spend less than £500,000 to ensure that their heritage assets are in good repair. At the other end of the scale, 6% of respondents report that they would need to spend in excess of £5million on repairs and maintenance to ensure that their heritage assets were in good repair.

Table 2.5: What do you estimate is the total amount you would need to spend on repairs and maintenance to clear any backlog and ensure that your heritage asset(s) were in good repair? Tick one box only.

	Percent	Replies
Under £100,000	40.2%	158
£100,001 - £500,000	25.7%	101
£500,001 - £1 million	15.0%	59
£1 million - £5 million	13.2%	52
£5 million - £10 million	4.1%	16
Over £10 million	1.8%	7
Total	100%	393

Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=393)

- 2.10 Once again, if the midpoints of each category² of spend are used, and multiplied by the number of respondents, this suggests that the **estimate of the spend that would be required by the 393 respondents on repairs and maintenance to clear any backlog and ensure that their heritage asset(s) were in good repair is in the region of £393.5million.**

Designation of Heritage Assets

- 2.11 Respondents were asked whether, in the last 10 years, they had experience of having any property they own or manage newly designated by Historic England/Cadw/Historic Environment Scotland/the local authority, or if there had been official changes to existing listings/schedulings/other designation(s).

¹ The lower end of the final category is used (£1million), which mean that these figures will be an underestimate.

² The lower end of the final category is used (£10million), which mean that these figures will be an underestimate.

- 2.12 87 respondents (22% - i.e., more than one-in-five of those that replied) answered this question, suggesting that the remaining 312 (i.e., 78% of respondents) did not feel it was relevant to them.
- 2.13 Of those that did reply, 15 respondents described the question as 'not applicable' in various ways, and a further 27 respondents said they had not had experience of any new designations or changes to existing designations over the last 10 years.
- 2.14 Of the remainder (i.e., 45 replies) the majority (almost three-quarters – 73%) report specific examples of both new designations as well as changes to or extensions to existing designations. Whilst some (a minority of respondents) reflect on these experiences positively, in many instances there are concerns reported around the scale and type of consultation that was carried out for any such changes. Examples (some of which may be older than the 10-year timescale asked in the question) include both not being consulted, or dissatisfaction with the consultation process:
- *"20 years ago?: Virtually fully made grade II, and extra buildings 100 yds away added without consultation."*
 - *"2012. Grade 2 listing imposed on commercially let building"*
 - *"Agricultural field designated as a scheduled ancient monument. Not consulted and should not have been designated"*
 - *"CADW extended Parkland without consultation"*
 - *"Expanded conservation area. Was unnecessary and consultation exercise was irrelevant to outcome"*
 - *"HES extended designation to two ruins about ten years ago. I was consulted but do not consider my points were adequately taken into account"*
 - *"I was notified that a building within the curtilage was to be included. I had no chance to object; the listing description was amateur and inaccurate."*
 - *"Summer 2022 new ancient monument. No consultation"*
 - *"We found that our main residence had become classified as Grade 1 when previously we understood it as grade 2. We never received any notification of this. Another building elsewhere...got included in a conservation area, again without our knowledge."*
 - *"Yes - the creation of the South Downs National Park in 2010. we felt we were not adequately consulted in relation to the boundaries which make a specific detour to take in our land."*
 - *"Yes, 18th Century Ice House, Grade 2, not adequately consulted"*
 - *"Yes, were consulted but this did not change the outcome...A wall we built 9 years ago to look original was then listed."*
- 2.15 Beyond these specific examples, there were also some general comments about frustrations when dealing with the processes around new designations or changes to existing designations, with **poor**

communication and lack of effective consultation being the most commonly reported issues by respondents.

Views on Heritage Protection

- 2.16 The survey also asked respondents how they feel about heritage in the planning system, and it is clear from Table 2.6 that the majority of respondents (61%) feel that it is 'important but other considerations, such as financial viability, should be given considerable weight'.
- 2.17 Almost one-quarter (24%) describe heritage in the planning system as very important, with a further one-in-eight (13%) describing it as important. A very small minority (2%) feel that heritage in the planning system is not important at all.

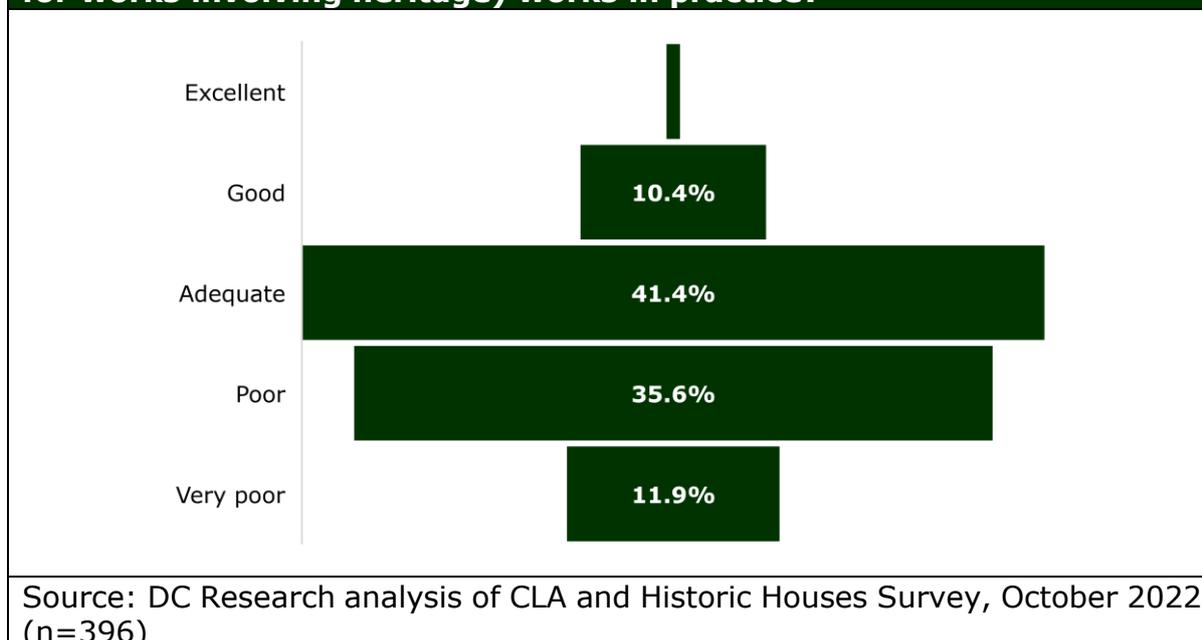
Table 2.6: Do you feel heritage in the planning system is? Tick one box only.		
	Percent	Replies
Very important	24.3%	97
Important	12.8%	51
Important but other considerations, such as financial viability, should be given considerable weight	61.2%	244
Not important at all	1.8%	7
Total	100%	399
Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=399)		

Listed Building Consent and Planning Permission

- 2.18 Table 2.7 shows the results in terms of how well respondents think the heritage protection system works in practice. Whilst the most common response category is 'adequate' with 41% describing the heritage protection system in this way, more than one-third (36%) describe the heritage protection system as 'poor', with a further 12% describing it as 'very poor'. Conversely, whilst one in ten (10%) regard it as good, less than 1% describe it as 'excellent'. Overall, as shown in Figure 2.2, the consensus is clearly towards issues with the heritage protection system, with it being described as 'poor' or 'very poor' for almost half (48%) of respondents.

Table 2.7 How well do you think the heritage protection system (listed building consent, scheduled monument consent, planning permission for works involving heritage) works in practice? Tick one box only.		
	Percent	Replies
Excellent	0.8%	3
Good	10.4%	41
Adequate	41.4%	164
Poor	35.6%	141
Very poor	11.9%	47
Total	100%	396
Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=396)		

Figure 2.2: How well do you think the heritage protection system (listed building consent, scheduled monument consent, planning permission for works involving heritage) works in practice?



2.19 Respondents were asked about the Government’s current Energy Security Strategy plans to review planning permission and listed building consent for decarbonisation/energy efficiency works (see Table 2.8), and **the vast majority of respondents (75%) report that whilst they do want to carry out decarbonisation/energy efficiency works, they think that planning permission/listed building consent are a barrier to these.**

Table 2.8 The Government’s current Energy Security Strategy plans to review planning permission and listed building consent for decarbonisation/energy efficiency works. It would be helpful to know your views on this:

	Percent	Replies
I do want to carry out decarbonisation/energy efficiency works, but I think planning permission/listed building consent are a barrier to these	74.9%	289
I do want to carry out decarbonisation/energy efficiency works, and I don’t think planning permission/listed building consent are a barrier to these	10.9%	42
I do not want to carry out decarbonisation/energy efficiency works, so this is not an issue	14.3%	55
Total	100%	386

Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=386)

2.20 Furthermore, if those that do not want to carry out decarbonisation/energy efficiency works are excluded (i.e., the 55 in Table 2.8 representing 14% of respondents to this question), the results show that **87% of those that want to carry out decarbonisation/energy efficiency works report**

that planning permission/listed building consent are a barrier to these; only 13% do not.

- 2.21 As shown in Table 2.9, there is **clearly very strong support for streamlining building consent/planning permission for heritage**, with three-quarters of **respondents (75%) stating that it would be a good idea to streamline listed building consent/planning permission for heritage** for a much wider range of works with careful safeguards. Only 8% do not think this would be a good idea, with the remaining 17% unsure.

Table 2.9: Do you think it would be a good idea to streamline listed building consent/planning permission for heritage for a much wider range of works (i.e. not just for decarbonisation/energy efficiency works), with careful safeguards?

	Percent	Replies
Yes	75.0%	297
No	7.6%	30
Don't know	17.4%	69
Total	100%	396

Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=396)

Works to Heritage Assets

- 2.22 Tables 2.10 shows that **60% of respondents have (in the last 10 years) considered carrying out any work to their heritage asset(s) which required planning or listed building consents**, with more than a further one-quarter (27%) report that they considered but did not apply. 14% of respondents have not considered nor applied.

Table 2.10: Have you, in the last 10 years, considered carrying out any work to your heritage asset(s) which required planning or listed building consents?

	Percent	Replies
Yes – considered and applied	59.8%	238
Yes – considered but did not apply	26.6%	106
No – did not consider or apply	13.6%	54
Total	100%	398

Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=398)

- 2.23 As shown in Table 2.11, for those that did consider works but did not apply for consent, and/or applied but subsequently withdrew their application, for the majority of respondents (62%) the heritage consent system was a major factor.
- 2.24 If the 22% of respondents that did not contemplate any works (or who marked this question as not applicable) are excluded from the responses, this shows that 79% of respondents report that the heritage consent system

was a major factor, with 14% reporting it as a minor factor, and just 7% saying it was not a factor – see Table 2.12.

Table 2.11: If you did consider works but did not apply for consent, or did apply but then withdrew your application, was that decision influenced by the heritage consent system (i.e. because getting consent(s) was too expensive or seemed like too much of an obstacle)?

	Percent	Replies
The heritage consent system was a major factor	61.5%	153
The heritage consent system was a minor factor	11.2%	28
The heritage consent system was not a factor	5.6%	14
Didn't contemplate any works/not applicable	21.7%	54
Total	100%	249

Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=249)

Table 2.12: If you did consider works but did not apply for consent, or did apply but then withdrew your application, was that decision influenced by the heritage consent system (i.e. because getting consent(s) was too expensive or seemed like too much of an obstacle)? – excluding those that did not contemplate any works/not applicable

	Percent	Replies
The heritage consent system was a major factor	78.5%	153
The heritage consent system was a minor factor	14.4%	28
The heritage consent system was not a factor	7.2%	14
Total	100%	195

Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=195)

2.25 The survey asked those that felt their proposal(s) were defeated by the heritage consent system to reflect on the consequences of this. Table 2.13 shows that the most common consequence was that *'the heritage building/asset could have been repaired and/or safeguarded for the future, but wasn't'* with 64% reporting this as a consequence.

Table 2.13: If you feel your proposals were defeated by the heritage consent system, did the consequences include (tick any/all that apply):

	Percent	Replies
The heritage building/asset could have been repaired and/or safeguarded for the future, but wasn't	63.5%	113
Jobs could have been created, but weren't	38.2%	68
New housing could have been created, but wasn't	21.3%	38
Business/economic opportunities missed	46.6%	83
Other (please specify)	27.0%	48

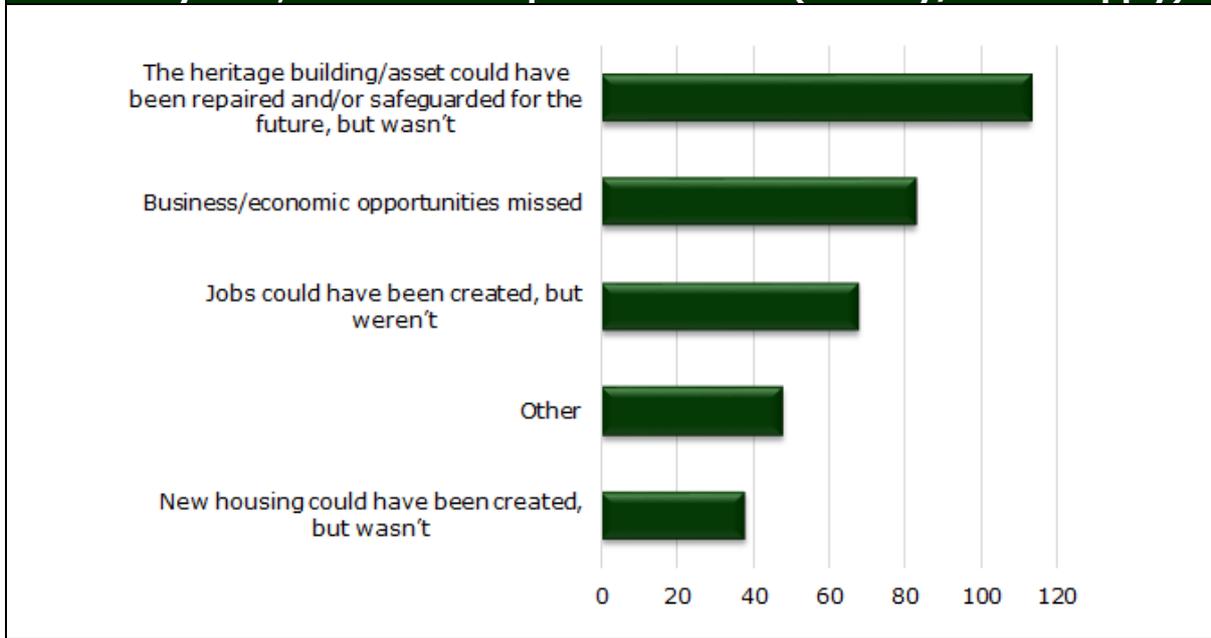
Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=178)

2.26 Almost half (47%) of respondents to this question reported that *'business/economic opportunities being missed'* was also a consequence of proposals being defeated. In addition, 38% report that *'jobs could have*

been created but weren't, and more than one-fifth (21%) report that 'new housing could have been created but wasn't'.

- 2.27 The most common themes from those that said 'other' (more than one-quarter of those that replied to this question – 27%) included additional consequences such as the safety and integrity of buildings being put at risk, missed energy conservation/green energy developments, delays to repairs and/or delays to developments, as well as additional financial costs, with some respondents acknowledging that they carried on without consent.
- 2.28 These same results are presented in Figure 2.3 below where the actual number of respondents are reported for each category.

Figure 2.3: If you feel your proposals were defeated by the heritage consent system, did the consequences include (tick any/all that apply):



Source: DC Research analysis of CLA and Historic Houses Survey, October 2022 (n=178)

- 2.29 Respondents were then asked to report on any heritage-relevant Planning and Listed Building Consent applications they had made, and to report on the success (or otherwise) of these applications, and the key results are summarised below.
- In terms of applications for **Listed Building Consent, 292 respondents provided answers to this question, reporting a total of 1,054 applications** – an **average of just over 3 applications per respondent** (3.06), although the actual number of applications per respondent varied between 0 and 60.
 - A total of **882 of these Listed Building Consent applications** are reported by respondents to **have been successful** – **showing an overall average success rate of 84%**.
 - 29 Listed Building Consent applications are reported to have been initially unsuccessful but were then successful on appeal. 98 are reported to be still pending.

- In terms of **applications for Planning Permission, 261 respondents provided answers to this question, reporting a total of 1,771 applications** – an **average of almost 7 applications per respondent** (6.78), although the actual number of applications per respondent varied between 0 and 500.
 - A total of **1,454 of these Planning Permission applications are reported by respondents to have been successful – showing an overall success rate of 82%**.
 - 108 Planning Permission applications are reported to have been initially unsuccessful but were then successful on appeal. 139 are reported to be still pending.
- 2.30 Finally, respondents were asked for any further comments on heritage protection and planning, and 129 respondents provided some level of response to this question.
- 2.31 The key themes that emerged are summarised below, and example quotes for each are presented (anonymised where required). The order, and the number of sample quotes provided, reflects the scale of comments received about each respective theme.
- 2.32 It should be noted that as well as the issues noted below, some consultees also used this opportunity for providing further comments to reinforce the issues around communication (or the lack of effective or any communication) around new designations or official changes to existing designations noted earlier in this report.

A lack of appreciation from planning systems and process - and some issues around the scale of bureaucracy required

"While owners have to think holistically and long term, the planning system appears completely blinkered and focussed exclusively on preservation"

"The aims of the heritage protection and the conservation officers roles are not in doubt. It is the speed of the process and the amount of paperwork which is unreasonable"

"Each application was very expensive, tedious and long winded. Constant compromise for little gain."

"There is a need to protect our national built heritage, but it needs to be done by people who properly understand how such structures are constructed, perform and can be used. It should not be on the basis of everything need to be protected unless proven otherwise."

"The system is so slow and inhibits progress that many are inclined to ignore it. This is ultimately to the detriment of the heritage. The character of a building can be protected better by using carefully, modern techniques and materials, whilst enabling them to be kept maintained and up to modern standards."

"There seems to be a lack of common sense and joined up thinking. It is difficult to get access to someone in authority to give advice and offer a sensible solution."

"It is all about communication - we are not ignorant and the planners or HE etc are not inexperienced in heritage protection and diversification - but so many of both sides think that the relevant one to them is true..."

Perceptions of a lack of capacity and capability in planning systems – some key issues (and some positives)

"The planning system is incredibly slow in our experience + is rarely completed within the statutory timeframes. It feels like the sector needs more funding: people have large workloads + are working on reduced hours."

"There needs to be considerably more consistency, accountability and transparency. Individuals who flaunt the law must be appropriately sanctioned. The credibility of the planning system is dependent on appropriate enforcement procedures where necessary and a consistent approach. Hiding questionable decision making behind claims of each application/ decision being unique"

"We tend to steer clear of any development including heating, energy, septic tanks etc rather than get involved with council officers who usually have very limited knowledge of listed buildings resulting in overzealous demands to be on the "safe side"

"Re Listed Building Consent you are totally dependant on the view and ideas of one Listed Building Officer...there is little continuity between different officers."

"...There needs to be far more flexibility of thought in dealing with the built heritage by the planners, we are not living in a museum."

"Improved communication and a wider understanding from planning officers as to how a successful business can be the key to building conservation and the wider benefits that conservation brings to the local community in terms of employment, wellbeing, tourism etc."

"We need more planning officers who are empathetic toward Heritage Conservation."

"Improve funding and training for planning departments (and introduce financial penalties for poor performance and missing deadlines on determination where there is administrative incompetence)."

"The people involved have little or no knowledge of traditional building technologies. Their involvement is of little or no use, just an additional expense."

"Now taking well over a year to get planning permission which is stopping us investing in new projects..."

"A responsive thoughtful problem-solving service requires proper resourcing - our Council has no full-time conservation officer now."

In addition to the above, some feedback reflected more positive aspects:

"Our conservation officer in [specific place name] is good and helpful. Unlike his predecessor."

"We have worked successfully with 2 local conservation officers (in succession) as they both understood the projected have work economically while preserving they heritage asset. Previous to this we had failed to get their predecessors to understand this. Hence it appears the process is largely guided by the individual, which cannot be right"

"We have been fortunate enough to be supported by both our Conservation Officer and Heritage England [Historic England] officers in the renovation works undertaken over the last 12 years. A level of trust built up which made navigating the system really quite straight forward. I think there is an element of postcode lottery in this issue."

Calls for greater flexibility in heritage protection and planning systems and a more proportionate approach to heritage protection and planning

"We would like to see heritage protection measures made more proportionate to other, equally important considerations, notably the viable economic future of building and the demands of climate change."

"Protecting our Heritage is hugely important but a balanced approach needs to be taken..."

"Economic regeneration, residential supply and long term protection should all be major factors weighed in decisions. Independent recognised accredited consultants should be able to make recommendations that carry significant weight. Public good test should be abolished."

"I think the planning system should look more favourably where owners of listed buildings want to undertake commercial, diversification or energy schemes as this will be in most cases to reduce costs and increase income to spend more money on maintenance of the listed buildings and make it more viable."

"There needs to be an understanding that for heritage to survive, very often is needs a new purpose and requires alteration accordingly but taking into account the sensitive character of the building."

"Clearly a difficult balance for government to strike; heritage needs protection, but a greater emphasis on the sympathetic evolution of buildings so that they continue to be relevant and viable, rather than a dogmatic insistence on preservation above all else, would be helpful (and ultimately good for the heritage)."

Issues around improving energy efficiency, addressing energy challenges, and supporting decarbonisation

"Make presumption in favour of measures designed to improve the energy efficiency even if that means people putting in uPVC windows for instance."

"There is an energy crisis and to retain inefficient windows etc when there are really high quality replacements is pointless. Houses are for living in."

"The scaling up of EPC levels to C is a major concern because of the very high cost of insulating old traditional stone and slated buildings"

"The cost of owning and running a listed building/home/house are very big and more flexibility is required to improve these costs – e.g., solar panels, wind turbines etc."

"English Heritage [Historic England] should relax recommendations to local authorities such that listed buildings can be made more energy efficient more cost effectively otherwise they will decay and/or become uninhabitable and eventually unsellable."

"There is a serious disconnect between heritage priorities and the decarbonisation targets when it comes to residential properties."

"We should give more weight behind the CO2 savings in determining planning apps. It's just not reasonable to forbid uPVC double or triple glazed windows for instance. Ditto solar"

"Much more flexibility needed for minor changes to improve insulation carbon efficiency and renewable energy"

Calls for more support and resources for heritage asset owners and managers

"More protection is needed. Probably in terms of grants, advisory support from planning departments."

"Costs of listed improvements and upkeep prohibitive. Owners often far more knowledgeable re their buildings than heritage officers"

ANNEX 1: ADDITIONAL ANALYSIS OF WALES RESPONSES

This annex presents the results from an additional strand to the analysis of the survey results which looked only at responses from those that reported they had heritage in Wales (i.e., they ticked the box indicating this in their response to the question 'In which country is your heritage?'). Please note, these results include those respondents that ticked Wales as well as other countries in their response to this question.

Overall, the **results for Wales are broadly consistent** with the responses from the rest of the UK, and the results in the tables below allow direct comparisons to be made to the findings in the main report – they present the Wales responses in the same tabular format as the tables in the main report.

The results for Wales show that 44% of respondents are members of the CLA, 44% are a member of both the CLA and Historic Houses, and 12% are a member of Historic Houses. This compares to 56%, 31% and 13% respectively from the overall survey results.

Beyond this, the areas where the results for Wales differ from the overall results (by 9% or more either way) are identified in the tables below by the **boldening** of the relevant category. Those categories in *italics* represent those where the difference is more than 5% (but less than 9%).

The tables that include a variance of 9% or more for at least one category are: Tables A2.1; A2.2; A2.5; A2.11 and A2.13.

The tables that include no/low variances (of 5% or less) for all categories are: Tables A2.8; A2.9 and A2.12.

The remaining tables have variances of between 5% and 9% for at least one category – i.e., Tables A2.3; A2.4; A2.6; A2.7 and A2.10.

Table A2.1: What heritage assets do you own or look after for others (tick all which are relevant)?		
	Percent	Replies
Listed Buildings (Grade I and II*)	66%	38
<i>Listed Buildings (Grade II)</i>	60%	35
<i>Buildings/land within Conservation Areas / World Heritage Sites / Registered Parks & Gardens</i>	50%	29
<i>Scheduled monuments</i>	33%	19
Other heritage	12%	7
Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=58, but respondents could tick multiple options, so totals do not sum to 100%)		

Table A2.2: If any of your heritage assets are used for commercial purposes, please let us know what they are used for (tick all that apply):

	Percent	Replies
Residential letting	55%	26
<i>Office / industrial / workshop space</i>	30%	14
Wedding or Events Business	32%	15
Open to day visitors (including a park/garden)	32%	15
Accommodation (holiday lets/hotel)	55%	26
Accommodation (campsite/glamping)	6%	3
Filming Location	34%	16
Café/restaurant/farm shop etc	15%	7
Public events (eg festivals)	15%	7
Other	23%	11

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=47, although respondents could tick multiple options)

Table A2.3: Overall, what is the physical condition of this heritage? (Where relevant, you can tick more than one box)

	Percent	Replies
<i>Good repair</i>	39.7%	23
<i>Reasonable repair</i>	44.8%	26
Mixed repair	27.6%	16
Poor repair / unusable	8.6%	5

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=58, although respondents could tick multiple options)

Table A2.4: Roughly how much do you actually spend each year, on average, on the heritage you own (or manage for others)?

	Percent	Replies
<i>£0 to £10,000 pa</i>	15.8%	9
<i>£10,001 to £25,000 pa</i>	31.6%	18
<i>£25,001 to £50,000 pa</i>	14.0%	8
<i>£50,001 to £100,000 pa</i>	21.1%	12
<i>£100,001 to £500,000 pa</i>	10.5%	6
<i>£500,001 to £1m pa</i>	7.0%	4
<i>Over £1m pa</i>	0.0%	0
Total	100%	57

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=57)

Table A2.5: What do you estimate is the total amount you would need to spend on repairs and maintenance to clear any backlog and ensure that your heritage asset(s) were in good repair? Tick one box only.

	Percent	Replies
Under £100,000	36.2%	21
£100,001 - £500,000	25.9%	15
£500,001 - £1 million	24.1%	14
£1 million - £5 million	12.1%	7
£5 million - £10 million	0.0%	0
Over £10 million	1.7%	1
Total	100%	58

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=58)

Table A2.6: Do you feel heritage in the planning system is? Tick one box only.

	Percent	Replies
Very important	23.7%	14
<i>Important</i>	6.8%	4
<i>Important but other considerations, such as financial viability, should be given considerable weight</i>	69.5%	41
Not important at all	0.0%	0
Total	100%	59

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=59)

Table A2.7 How well do you think the heritage protection system (listed building consent, scheduled monument consent, planning permission for works involving heritage) works in practice? Tick one box only.

	Percent	Replies
Excellent	0.0%	0
Good	10.2%	6
Adequate	44.1%	26
<i>Poor</i>	28.8%	17
<i>Very poor</i>	16.9%	10
Total	100%	59

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=59)

Table A2.8 The Government’s current Energy Security Strategy plans to review planning permission and listed building consent for decarbonisation/energy efficiency works. It would be helpful to know your views on this:

	Percent	Replies
I do want to carry out decarbonisation/energy efficiency works, but I think planning permission/listed building consent are a barrier to these	74.1%	43
I do want to carry out decarbonisation/energy efficiency works, and I don’t think planning permission/listed building consent are a barrier to these	13.8%	8
I do not want to carry out decarbonisation/energy efficiency works, so this is not an issue	12.1%	7
Total	100%	58

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=58)

Table A2.9: Do you think it would be a good idea to streamline listed building consent/planning permission for heritage for a much wider range of works (i.e. not just for decarbonisation/energy efficiency works), with careful safeguards?

	Percent	Replies
Yes	72.9%	43
No	6.8%	4
Don’t know	20.3%	12
Total	100%	59

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=59)

Table A2.10: Have you, in the last 10 years, considered carrying out any work to your heritage asset(s) which required planning or listed building consents?

	Percent	Replies
Yes – considered and applied	55.9%	33
Yes – considered but did not apply	25.4%	15
<i>No – did not consider or apply</i>	<i>18.6%</i>	<i>11</i>
Total	100%	59

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=59)

Table A2.11: If you did consider works but did not apply for consent, or did apply but then withdrew your application, was that decision influenced by the heritage consent system (i.e. because getting consent(s) was too expensive or seemed like too much of an obstacle)?

	Percent	Replies
<i>The heritage consent system was a major factor</i>	54.3%	19
The heritage consent system was a minor factor	11.4%	4
The heritage consent system was not a factor	2.9%	1
Didn't contemplate any works/not applicable	31.4%	11
Total	100%	35

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=35)

Table A2.12: If you did consider works but did not apply for consent, or did apply but then withdrew your application, was that decision influenced by the heritage consent system (i.e. because getting consent(s) was too expensive or seemed like too much of an obstacle)? – excluding those that did not contemplate any works/not applicable

	Percent	Replies
The heritage consent system was a major factor	79.2%	19
The heritage consent system was a minor factor	16.7%	4
The heritage consent system was not a factor	4.2%	1
Total	100%	24

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=24)

Table A2.13: If you feel your proposals were defeated by the heritage consent system, did the consequences include (tick any/all that apply):

	Percent	Replies
The heritage building/asset could have been repaired and/or safeguarded for the future, but wasn't	25.0%	10
Jobs could have been created, but weren't	20.0%	8
New housing could have been created, but wasn't	17.5%	7
Business/economic opportunities missed	32.5%	13
Other (please specify)	10.0%	4

Source: DC Research analysis of CLA and Historic Houses Survey, November 2022 (n=40)