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## HERITAGE COUNTS 2015: CARING FOR THE LOCAL HISTORIC ENVIRONMENT

### SUMMARY OF CARING FOR THE LOCAL HISTORIC ENVIRONMENT

- This year's edition of **Heritage Counts** reports on the views and experiences of those responsible for looking after the local historic environment.
- Research commissioned for **Heritage Counts 2015** has demonstrated that the vast majority of private residential owners and Preservation Trusts successfully care for and protect their listed buildings.
- The first ever survey of residential listed building owners provides evidence that listed building owners see themselves as custodians of history and take pleasure from living in a unique, architecturally or historically significant property. They recognise the need to conserve heritage for future generations. They feel strongly that their listed buildings are important to the character of the local area and are committed to their repair and maintenance.
- Similar findings emerge from the UK Association of Preservation Trusts' research. The research identifies historic and architectural character as the prime motivation for taking on a project and respondents demonstrate a strong commitment to the future upkeep of buildings in their care, with the majority setting aside funds for future maintenance.
- Owners and local communities have an important role to play in the conservation of our built heritage, but the role of government is also important. The heritage sector is concerned about the impact of uncertainty of the future funding of local authority services.

### INTRODUCTION

The historic environment shapes the character of many places. It can make an area more attractive to live in, work in and visit. On a more emotional level it can provide a community with a connection to its past – a tangible reminder of the lives and experiences of previous generations. This year's edition of **Heritage Counts** reports on the views and experience of those actually responsible for looking after the local historic environment. To date, there has been little evidence about the experience of listed building owners. A central piece of research commissioned by Historic England and reported on in this section is a listed building owners' survey. The survey had three key objectives: firstly, to understand the value owners place on owning a listed building; secondly, to explore owners' perceptions of the planning process and thirdly to provide greater insight into repairs and maintenance.

The section provides evidence for the value of heritage and reviews how heritage is cared for. After a brief description of designation, the section is structured as follows:

- The value of heritage
  - Economic value – the economic contribution heritage makes to both the national and local economy;
  - Conservation areas – their creation and value;
  - Place-shaping – the contribution heritage makes to the well-being of the local community;
  - Public engagement – the latest findings from the Taking Part Survey, an annual government funded survey of cultural and sport participation.
- Caring for heritage
  - Listed residential property owners – findings from a bespoke survey;
  - Conversion of heritage assets at risk for residential use – findings from a scoping exercise;
  - The community perspective – findings from research amongst building preservation trusts;
  - The role of government – trends in staffing levels amongst local authority specialists.

## OUR DESIGNATED HERITAGE

Since the Ancient Monuments Protection Act of 1882, the Government has recognised that important historic assets may be identified and protected by law; through 'scheduling' (1882), 'listing' (1947), 'designating' conservation areas (1967), 'protecting' wrecks (1973), and by 'registering' parks and gardens (1983) and battlefields (1995). There are now over 397,000 entries on the National Heritage List for England (NHLE), maintained by Historic England on behalf of the Department for Culture, Media and Sport (DCMS). Designation, combined with successful management, is a critically important tool for protection<sup>1</sup>.

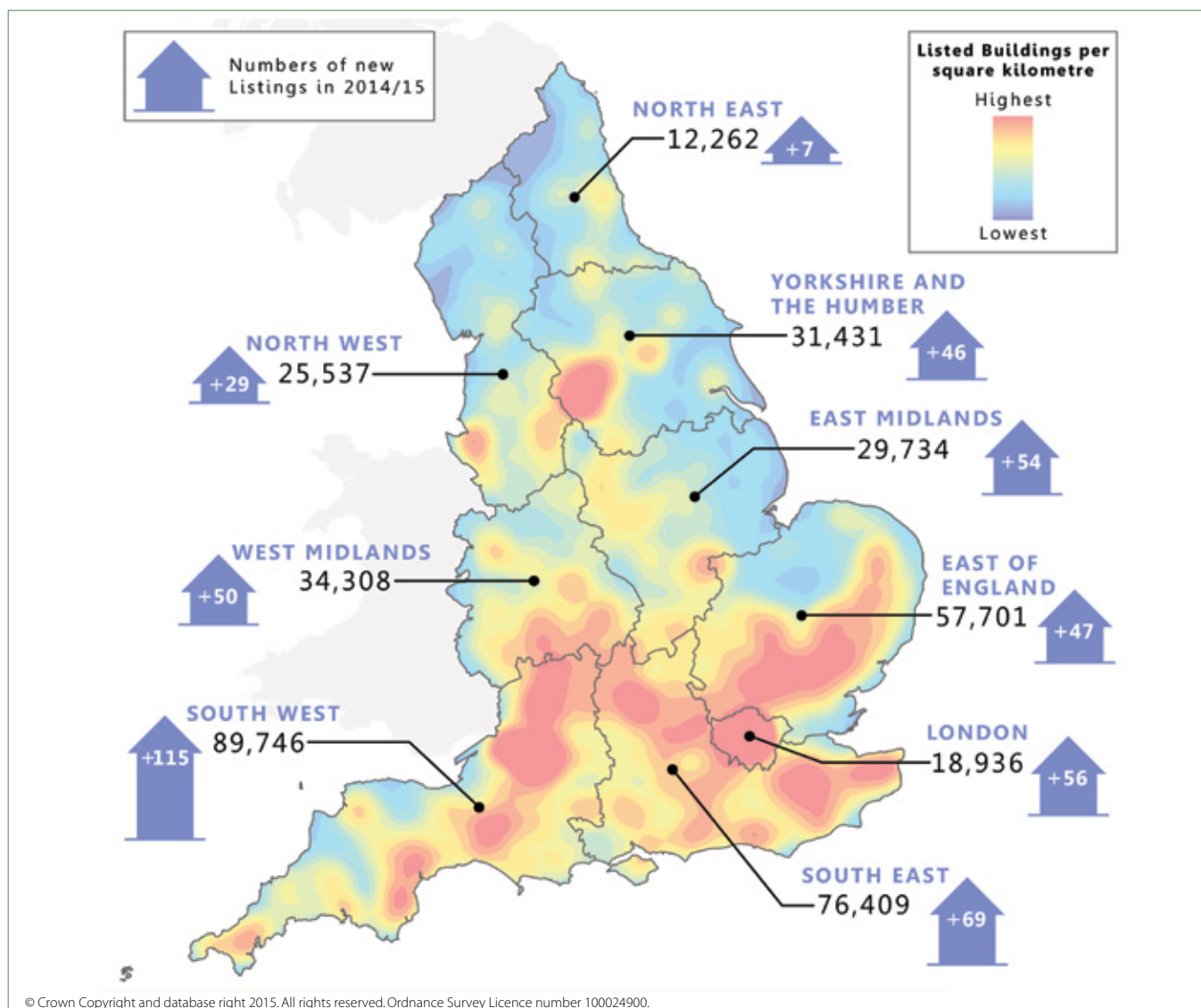
Designating an asset brings additional controls when changes to it are proposed. These are handled by local authorities and in some circumstances, Historic England.

Designation has consequences for its owners and users. Selecting what is to be nationally designated is carried out by Historic England<sup>2</sup>. The map below illustrates the regional spread of listed buildings across England, and the number of new listings.

Designation at the national level seeks to recognise and protect the most notable assets, but there is a considerable stock of buildings, structures, and parks and gardens in England that make a valuable contribution to the local historic environment despite not being formally designated.

In common with nationally listed buildings, many locally important historic buildings face conservation and maintenance issues. Recent studies have demonstrated how regular repair and maintenance can unlock economic benefits embedded in built heritage assets<sup>3</sup>.

## Listed Buildings in England 2014-15



<sup>1</sup> Historic England (2015) Designation Handbook 2014-15. Available at <https://content.historicengland.org.uk/images-books/publications/designation-yearbook-2014-15/designation-yearbook-2014-15.pdf/>

<sup>2</sup> Historic England has produced 20 thematic selection guides giving detailed guidance about what may be eligible for listing. Available at <https://historicengland.org.uk/listing/selection-criteria/listing-selection/>

<sup>3</sup> Ecorys (2012) The Economic Impact of Maintaining and Repairing Historic Buildings in England

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# THE VALUE OF HERITAGE

## Economic value

### Value to the national economy

Heritage makes a significant contribution to the UK economy, providing jobs and output across a number of industries. Heritage tourism represented 2% of the UK's gross domestic product (GDP) in 2011<sup>4</sup>; this is the direct, indirect and induced effect of both built heritage and natural heritage<sup>5</sup> tourism. It is estimated that built heritage tourism directly accounted for £5.1 billion in GDP in 2011. The combined direct, indirect and induced impact contributed £14 billion in GDP<sup>6</sup>. Including natural tourism, this figure increases to £26.4 billion GDP. Repair and maintenance on historic buildings<sup>7</sup> directly generated £4.1 billion GDP in England in 2010<sup>8</sup>. With indirect effects (those produced by purchases made from the supply chain) this increases to £11 billion. Repair and maintenance on historic buildings in England constituted 10% of the total value of the construction industry in 2010<sup>9</sup>.

Ecorys<sup>10</sup> estimated that there were just over 5.4 million traditional buildings in England, all of which require specialist knowledge and skills if they are to be maintained in good order and repaired. The built heritage construction sector directly supports around 180,000 full time equivalent jobs in England. Including indirect and induced effects<sup>11</sup>, they estimated that this figure rises to nearly 500,000 full time equivalent jobs. In terms of contribution to national income, England's built heritage construction sector is estimated to account for some £11 billion in GDP. At the regional level, the scale of built heritage construction is most marked in the South East, London and East of England.

### Value to the local economy

Over recent years, as the regeneration and renewal of our towns and city centres has gathered pace, the careful integration of historic buildings and areas has played an increasingly important role in major regeneration schemes and in creating significant benefits for local economies and communities<sup>12</sup>. Using the historic environment as an asset and giving it new life, has been one of the cornerstones of the economic and social revival of our towns and cities.

Research by Amion Consulting and Locum Consulting<sup>13</sup> commissioned for **Heritage Counts** 2010 provided insight into the role of the historic environment and quantified its impact on economic activity, job creation and perceptions of local areas. The work demonstrated how the historic environment can help stimulate economic activity by providing unique destinations which attract visitors and by encouraging new businesses. A number of reasons for investing in the historic environment were identified:

- *Attracting visitors to local areas* – One of the strongest arguments for investing and promoting the historic environment is its importance in affecting perceptions of how attractive a place is to visit. It was also an important factor in determining where people chose to live (74%) and work (63%)<sup>14</sup>;
- *Improving the overall appeal of places by providing a diverse leisure and retail experience* – By attracting independent businesses, the historic environment is often one of the deciding factors in making a place that is distinct from others;
- *Attracting independent businesses* – Property agents often state that one of the most useful functions of the historic environment is to offer accommodation for small businesses that is smaller, more flexible and cost-effective. In the Custard Factory, Birmingham, the basic refurbishment of the property allowed for cheap rentals to small businesses, creative industries and social enterprises;
- *The historic environment is a factor in business location* – A quarter of businesses surveyed as part of the research agreed that the heritage setting was an important factor in their decision to locate in an area. Though not the most important factor in determining where a business is located (availability of premises and proximity to customers were more important), it was ranked as being as important as road access<sup>15</sup>;
- *The impact of historic environment regeneration on economic activity* – Improvement in the historic environment delivers economic benefits by creating attractive spaces for people and businesses, while improving perceptions of local areas. This generates further economic activity in the local economy, which helps conserve the buildings for future generations.

<sup>4</sup> Calculated using Oxford Economics (2013) The Economic Impact of the UK Heritage Tourism Economy, and ONS statistics

<sup>5</sup> Natural heritage includes national parks, Areas of Outstanding Natural Beauty (AONB), parks and gardens

<sup>6</sup> Ibid

<sup>7</sup> Pre-1919, not necessarily listed

<sup>8</sup> Ecorys (2012) The Economic Impact of Maintaining and Repairing Historic Buildings in England

<sup>9</sup> Ibid

<sup>10</sup> Ibid

<sup>11</sup> Induced refers to those which accrue in the economy as a result of increased income and spending by people who work in the built heritage construction sector, together with those businesses that supply goods and services to these sectors

<sup>12</sup> English Heritage (2013) Heritage Works The Use of Historic Buildings in Regeneration. Available at <https://content.historicengland.org.uk/images-books/publications/heritage-works/heritage-works-2013.pdf/>

<sup>13</sup> Amion Consulting and Locum Consulting (2010) Impact of Historic Environment Regeneration

<sup>14</sup> Ibid

<sup>15</sup> Ibid

## CASE STUDY: NORTH EAST TOOLKIT

Historic England commissioned Trends Business Research Ltd (TBR) to produce a toolkit for the North East Historic Environment Forum. The rationale was to empower users to extract meaningful data relating to the economic impacts of heritage in North East England. One of the long term goals of the project was to create a sustainable tool that can be updated with new data when required. The key findings from the research are as follows:

- Heritage directly generated an estimated £1,499 million in Gross Value Added (GVA) to the North East economy in 2012, an increase of 3.7% since 2011.
- North East heritage indirectly generated an extra £450 million GVA in the supply chain in 2012 and supported a further £300 million in induced GVA in the wider North East economy.
- The value of heritage-related construction in the North East has decreased between 2010 and 2014 by £15.8million (a 6.6% drop). By comparison, the national heritage-related construction outputs increased by 18.3% in the same period.
- Heritage employment in the North East increased by 19.2% between 2011 and 2013, compared with an increase of 4.7% in heritage employment across England as a whole.
- The proportion of those who have visited a heritage site<sup>16</sup> in the North East in 2013/14 (77.6%) is above that of the national average (72.5%).
- Heritage-related tourism in the North East accounted for 551,000 domestic overnight trips, 11 million domestic day visits and 222,000 inbound (international) visits in 2013.
- £628 million was spent on heritage-related tourism in the North East in 2013, accounting for 18% of all tourism in the North East. (The figure incorporates domestic day visit, domestic overnight and inbound visit spend).
- The revenue total net cost of heritage services in the North East in 2013/14 was £2.56 million.
- Whilst total capital expenditure on culture & heritage<sup>17</sup> in England has continued to decline between 2012/13 and 2013/14, the North East has seen an increase in capital expenditure during this period.
- The decrease in revenue net total costs<sup>18</sup> for the total heritage sector (sum of heritage, museums & galleries, and archives) between 2012/13 and 2013/14 has been less severe in the North East than across England as a whole.
- Capital expenditure on all total culture and related services<sup>19</sup> in England as a whole has continued to decline between 2012/13 and 2013/14. Conversely, capital expenditure on total culture and related services has increased in the North East during this time period.

## Conservation Areas

Conservation areas are created where a local planning authority identifies an area of special architectural or historic interest which deserves careful management to protect that character. The first conservation areas were designated in 1967 under the Civic Amenities Act and there are now nearly 10,000 in England.

All local authorities have a conservation area within their boundaries and they are generally valued by those living and working in them as special places, creating a unique sense of place-identity, encouraging community cohesion and promoting regeneration<sup>20</sup>. Research carried out by the London School of Economics investigated the costs and benefits associated with a property located in a conservation area in England<sup>21</sup>. Commissioned by English Heritage in 2012, the study combined statistical analysis of existing data, a survey of residents in ten conservation areas and interviews with local planning officers.

<sup>16</sup> The definition used in Taking Part is adopted here and refers to a visit to one or more of the following over the last 12 months: a city or town with historic character; a historic building open to the public (non-religious); a historic park or garden open to the public; a place connected with industrial history (e.g. an old factory, dockyard or mine) or historic transport system (e.g. an old ship or railway); a historic place of worship attended as a visitor (not to worship); a monument such as a castle, fort or ruin; a site of archaeological interest (e.g. Roman villa, ancient burial site); a site connected with sports heritage (e.g. Wimbledon) (not visited for the purposes of watching sport)

<sup>17</sup> Total capital expenditure = total payments on fixed assets + expenditure on grants + expenditure on loans and other financial assistance. The figure includes museums and galleries, archives, heritage, arts development and support, theatres and public entertainment. Further information is available here <https://www.gov.uk/government/collections/local-authority-revenue-expenditure-and-financing>

<sup>18</sup> Net total cost = net current expenditure + capital charges. Further information is available here <https://www.gov.uk/government/collections/local-authority-revenue-expenditure-and-financing>

<sup>19</sup> This figure includes culture and heritage, recreation and sport, open spaces, tourism and library services

<sup>20</sup> English Heritage (undated) Heritage at Risk Conservation Areas. Available at [https://content.historicengland.org.uk/images-books/publications/Conservation\\_Areas\\_at\\_Risk/caar-booklet-acc.pdf/](https://content.historicengland.org.uk/images-books/publications/Conservation_Areas_at_Risk/caar-booklet-acc.pdf/)

<sup>21</sup> Ahlfed, G.M., Holman, N., Wendland, N. (2012) An Assessment of the Effects of Conservation Areas on Value

Over 1 million property transactions between 1995 and 2010 were analysed, together with data on the characteristics of over 8,000 conservation areas. The key findings include:

- Houses in conservation areas sell for a premium of 9% on average, after controlling for other factors;
- Property prices inside conservation areas have grown at a rate that exceeded comparable properties elsewhere by 0.2% a year;
- Property prices close to conservation areas increased at a relative rate of about 0.1% per year;
- Residents living in conservation areas expressed strong values attached to a green, peaceful residential environment. This finding held irrespective of property value or levels of deprivation;
- Residents living in areas of both high and low deprivation also frequently mentioned the proximity of their home to jobs and amenities as a strongly positive aspect of their area;
- Home owners who had applied for planning permission were generally more likely to have positive attitudes toward planning controls than those who had not applied<sup>22</sup>.

## Place-shaping

Place-shaping encompasses a wide range of activity which contributes to the well-being of the local community. Well-being in this context refers to the fostering of belonging and identity through the creation of successful places<sup>23</sup>. Beyond the provision of such services as health, economic development, education and environmental protection, successful place-shaping also includes good urban design, ensuring that new development fits within the historic context.

Research commissioned by ResPublica put forward the case for a 'community right to beauty', giving people the power and incentive to shape, enhance and create beautiful places<sup>24</sup>. A poll commissioned by ResPublica and conducted by Ipsos MORI demonstrated clear links between dilapidated buildings and perceptions of ugliness. Respondents also tended to associate anti-social behaviour and crime with the ugliness of a place. The authors argue that beauty is central to the concept of a just society contributing to well-being, economic growth and participation.

## CASE STUDY: HLF 20 YEARS IN 12 PLACES REPORT<sup>26</sup>

Since 1994, the Heritage Lottery Fund (HLF) has allocated more than £6 billion to nearly 40,000 projects. To celebrate this achievement, and to mark its 20th anniversary, HLF commissioned BritainThinks to conduct research in 12 locations across the UK. The aim of the research was to understand, from a public and local stakeholder point of view, the cumulative impact of HLF investment.

The research re-affirms that heritage is positively linked to local quality of life. For example, 80% of those spoken to think local heritage makes their area a better place to live. Furthermore, 81% see heritage as important to 'me personally'. When asked to rate the impact that local heritage sites have on their personal quality of life, half (50%) of residents give it a score of 7 or more out of 10.

The reasons why residents see heritage as having a range of benefits map on to the key criteria they use to assess local quality of life, including:

- Supporting local pride and encouraging social cohesion;
- Making local areas more visually attractive;
- Providing opportunities for leisure activities – particularly for families;
- Supporting local economies, by promoting tourism and creating employment opportunities.

The research shows us that people can connect with heritage in two ways, in transactional terms and/or emotionally. In the first instance a heritage project might be thought about in terms of the practical benefits it brings, for example supporting the local economy. In the second instance, where the connection is emotional, heritage has a deep, personal resonance and tells people something important about themselves, their family or their community. Through this emotional connection, heritage can provide a route to help us to better navigate the world and is able to deliver the benefits of strengthening local identity, encouraging local pride and fostering social cohesion.

The research provides a clear rationale for continuing to invest in heritage, and to keep searching for ways that connect heritage projects to local needs and aspirations.

<sup>22</sup> Ibid

<sup>23</sup> Ibid

<sup>24</sup> ResPublica (2015) A Community Right to Beauty

<sup>25</sup> Florida, R., Mellander, C., Stolarick, K. (2009) Beautiful Places: The Role of Perceived Aesthetic Beauty in Community Satisfaction, Working Paper Series: Martin Prosperity Research (Online). Available at <http://www.creativeclass.com/rfcgdb/articles/Beautiful%20places.pdf>

<sup>26</sup> HLF (2015) 20 Years in 12 Places: 20 Years of Lottery Funding for Heritage, A report prepared by BritainThinks for the Heritage Lottery Fund. Available at <http://www.hlf.org.uk/about-us/research-evaluation/20-years-heritage>

The findings correlate with ethnographic research carried out in Sheffield which concluded that beauty was important in terms of fostering civic pride and respect for places and the people that live there<sup>25</sup>.

The Heritage Index, launched in September 2015<sup>27</sup> was compiled by the Royal Society for the encouragement of Arts, Manufactures and Commerce (RSA) in collaboration with the HLF. Designed as a resource to forge stronger links between local heritage and the identity of residents in a place, its intention is to help places prosper both socially and economically. The starting point is defining heritage and, for the purpose of this piece of work, the definition is very broad:

*'We define heritage as anything inherited from the past that helps us, collectively or individually, to understand the present, and create a better future.'*<sup>28</sup>

To build the Heritage Index, collected data was ordered into seven different categories (including the historic built environment, industrial heritage, natural heritage and parks) and a distinction made between heritage assets and heritage activities. This allowed the overall heritage vitality – how heritage assets and activities improve life for the people living in the local area – to be calculated. The best way to explore the Heritage Index is through interactive on-line maps which are available at [www.thersa.org/heritage](http://www.thersa.org/heritage).

To mark the official launch of Historic England on 1st April 2015, the organisation commissioned YouGov to survey people in England about how they relate to their heritage. According to the survey, the most commonly-valued parts of England's historic environment are country houses and castles, closely followed by monuments, memorials and archaeological sites. However, a substantial proportion of people also consider places of worship, maritime history, parks and gardens, railway stations, shipyards and factories to be an important part of their heritage too. The research hints at a growing trend for people to recognise and appreciate the rich and varied types of heritage across England<sup>29</sup>. As part of the research, it was found that almost everyone in England (99.3%) lives less than a mile from a listed building, a scheduled monument, an archaeological site, a historic park or garden, a battlefield, a marine wreck or a conservation area.

A poll for the National Churches Trust conducted by ComRes<sup>30</sup> measured attitudes to church buildings amongst a representative sample of the population. The survey

found that four out of five people (79%) consider churches and chapels to be an important part of their heritage and history. Likewise, three-quarters (74%) believe church buildings play an important role for society, providing space for community activities.

Research into the social and economic benefits of cathedrals completed by Ecorys<sup>31</sup> found clear evidence that cathedrals are at the heart of their cities, a place for activities and events, a focus for commemoration and a centre for social regeneration and renewal. Economic impacts are generated directly as a result of the employment of staff and procurement of goods, in addition to the local spending of cathedral visitors. Social benefits include the positive impact cathedrals have on the well-being of participants and society. Specifically, the research revealed:

- 8.3 million people visited cathedrals in 2014 as tourists or visitors. This is in addition to the millions who attend services and the hundreds of thousands of children who visited as part of educational programmes;
- Cathedrals contribute £220 million annually to the national economy. £125 million of this comes directly from visitor-related spend;
- 14,760 people volunteer at cathedrals, in roles ranging from flower arranging and embroidery through to tour guiding and office support.

## Public engagement

Numerous studies have explored the benefits that individuals gain through their engagement with heritage and active participation in heritage projects. These range from enjoyment and a sense of fulfilment to the development of new skills and improved physical and mental health<sup>32</sup>. Some of the most detailed evidence in this area comes from the HLF. The HLF commissioned a three-year study to measure the impact of participating in heritage projects. They found that volunteers in HLF-funded projects reported higher levels of mental health and well-being than the general population or general volunteering population. This was most marked in terms of their ability to 'play a useful part in things', an indicator that combines a measure of self-worth with social connectedness. One in three (35%) volunteers report an increase in self-esteem and confidence in their abilities<sup>33</sup>.

<sup>27</sup> Schifferes, J. (2015) Heritage, Identity and Place, Seven Themes from the Heritage Index

<sup>28</sup> Ibid, page 2

<sup>29</sup> Historic England (2015) Exploring English Attitudes to Historic Places, YouGov Poll

<sup>30</sup> National Churches Trust (2015) ComRes Perceptions of Church Buildings Survey. Available at <http://comres.co.uk/polls/national-churches-trust/>

<sup>31</sup> Ecorys (2014) The Economic and Social Impact of England's Cathedrals, A report to the Association of English Cathedrals. Available at <http://www.englishcathedrals.co.uk/documents/2015/06/economic-social-impacts-englands-cathedrals.pdf>

<sup>32</sup> HLF (2015) Values and Benefits of Heritage A Research Review. Available at <http://www.hlf.org.uk/values-and-benefits-heritage>

<sup>33</sup> HLF (2011) Assessment of the Social Impact of Volunteering in HLF Projects: Year 3, BOP Consulting

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The Taking Part Survey, which began in 2006, has heightened awareness of participation in heritage through volunteering as well as visiting and is now ten years old. Taking Part collects data on many aspects of leisure, culture and sport in England, including heritage. Commissioned by DCMS in partnership with Arts Council England, Historic England and Sport England, the survey is a unique resource for understanding participation. In 2014/2015, 73% of adults had visited a heritage site in the last 12 months, a statistically significant increase since 2005/2006. The proportion of older people visiting heritage sites has increased since 2005/2006, with 77% of 65-74 year olds claiming to have visited a heritage site in the last 12 months and 57% of those over the age of 75. Nearly a quarter (24%) of adults have done voluntary work in the last 12 months and amongst this group, 5% have done voluntary work within the heritage sector.<sup>34</sup>

In recent years there has been a growing interest in understanding the relationship between culture and well-being. In 2014 **Heritage Counts** commissioned a study on the impact of visiting heritage on subjective well-being<sup>35</sup>. The research looked at the relationship between heritage visits and well-being, using data from the Understanding Society Survey, which is a large representative sample of the UK population.

The research assessed the impact on life satisfaction (a standard measure of well-being in the academic and policy literature) of visiting eight different types of heritage during the past year. Regression analysis was used and controlled for a range of factors known to be associated with individual well-being; household income, health status (including diet), marital status, employment status, social relationships, gender, age, geographic region, religion and education. The research found that once these variables are accounted for, visiting one or more heritage sites a year has a significant and independent positive relationship with life satisfaction. The impact of heritage visits on life satisfaction was found to be slightly higher than the impacts of participating in sport or the arts. Of the eight different types of heritage sites considered, visits to historic towns and historic buildings were found to have the greatest impact on well-being.

## CARING FOR HERITAGE

### Listed residential property owners

English Heritage commissioned Green Balance<sup>36</sup> to produce an analysis of trends in listed building consents over a three year period, March 2011–March 2014. The research analysed a sample of 936 applications for listed building consent. The sample of listed building consents was stratified by region, urban/rural authority and whether or not the local authority charged for pre-application advice. Cases were evenly distributed so far as practicable by time (demarking before and after legislation came into effect to reintroduce VAT at 20% on approved works to listed buildings).

Two key findings emerged from the analysis. The first finding was that fewer applicants seek pre-application advice in authorities which charge for pre-application advice. The second finding was that charities, private individuals and institutions applied for listed building consent less frequently after the increase in VAT came into effect. (An assumption has been made that the drop in listed building applications is the result of the VAT increase, although other changes between the two sampled periods cannot be ruled out)<sup>37</sup>.

The study prompted further research into the views of listed building owners about, amongst other things, the planning process. To date little evidence has been gathered about the experiences of listed residential building owners, and where evidence does exist it tends to be based on relatively small samples. One of the key reasons for this was the lack of a comprehensive data source identifying listed residential properties in England.

The NHLE provides spatial information, but was not set up to provide postcode information, a prerequisite for any postal questionnaire of owners. This was compounded by the nature of the List entries themselves because several individual addresses could be included within one single List entry (such as a house subdivided into flats). Ordnance Survey was commissioned to address these challenges and the resulting database enabled us to make contact with owners and occupiers.

Alastair Coey Architects and ECORYS (previously Ecotec) were appointed to undertake a survey of listed residential building owners. The survey was issued to a total sample of 10,500 listed building owners. Interlocking quotas were used for region and listing grade to ensure sufficient sample size for sub-group analysis.

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<sup>34</sup> TNS BMRB (2015) Taking Part Initial findings from the longitudinal survey

<sup>35</sup> Fujiwara et al. (2014) Heritage and Wellbeing for English Heritage

<sup>36</sup> Green Balance (2014) Listed Buildings Consents: A Review of Data

<sup>37</sup> Ibid

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The survey questions were developed around these areas:

- **Awareness and knowledge:** Familiarity with listed building consent requirements and the planning processes; engagement with heritage organisations; access to information and guidance.
- **Drivers and barriers for repair and maintenance:** The frequency and type of work undertaken; access to specialist workers; access to specialist materials.
- **Attitudes:** Understanding the value owners place on owning a listed building.

The number of respondents who completed the main survey was 1,002, which represents a ten per cent response rate. The numbers were sufficient to explore the response differences by region and grade, which are presented in the full report (found here: [www.heritagecounts.org.uk](http://www.heritagecounts.org.uk)).

The key findings from the research were as follows:

- More than half of listed building owners (55%) have lived in their property for over ten years and over the years have invested significant amounts of time and money in maintaining their property.
- For the majority of owners (89%) their property was listed when they bought or acquired it, but for eight per cent, their property was listed during their ownership.
- More than nine out of ten (93%) listed building owners consider their property to be very important or important to the character of the local area. Likewise, many owners (88%) recognise the importance of listed building consent when it comes to protecting the special architectural and historic character of their property.
- Whilst half (50%) of all respondents have a good or very good overall experience with the listed building consent process a significant proportion (34%) describe their experience as 'poor' or 'very poor'. A respondent's experience is dependent on their clarity of understanding about the kind of work that requires listed building consent and the ease of finding helpful information.
  - Amongst those that have a very good overall experience with the listed building consent process, 59% state that they are always clear about the kind of work that requires consent and 51% find it easy to find helpful information.
  - Amongst those that have a very poor experience, only 26% agree that they are always clear about the kind of work that requires listed building consent and only 12% find it easy to find helpful information.
- Over three-quarters (78%) of listed building owners always or sometimes feel clear about the kind of work that requires listed building consent and over a third (35%) have applied for listed building consent in the last 5 years.
  - Amongst those that applied for consent, more than four out of five were successful (84%).
  - Repairs (29%) and alterations (22%) are the largest categories of work that owners have cited when applying for listed building consent.
- Listed building owners are conscientious about repairs and maintenance to their property with over two-thirds (71%) painting or repairing their windows at least every two to five years.
- The main barrier cited by listed building owners in connection with repair and maintenance is affordable building materials. A third (33%) find it difficult or very difficult to find such materials.
- More than four out of five respondents (82%) were motivated to provide a response to the open ended survey question "Please can you describe in your own words what owning a listed building means to you?". This is indicative of the interest and passion people feel about being a listed building owner.
- Listed building owners felt privileged to own a listed building and demonstrated a real sense of pride. They see themselves as custodians of their property and enjoy being part of history.

*"Pride at living in a building with historical interest and happy to be its curators for future generations."* (Owner of a Grade II\* property in Yorkshire and Humber)
- Owners recognised the importance of conserving heritage for future generations. This was often coupled with an appreciation of how conserving a listed building enhances and brings benefits to the local area.

*"I love our beautiful home and I'm proud to be a custodian of a little bit of England's and our local community's heritage; it doesn't feel so much like we own our property, more that we're privileged to be part of its story."* (Owner of a Grade II property in the South East)
- Respondents believed that their listed property is expensive to maintain and would appreciate financial support either in the form of VAT exemption or through other sources.

*"I feel fortunate to live in such a special place, but there is a lot of responsibility and expense"* (Owner of a Grade I listed building in the West Midlands)



# LISTED RESIDENTIAL BUILDING OWNERS SURVEY, 2015

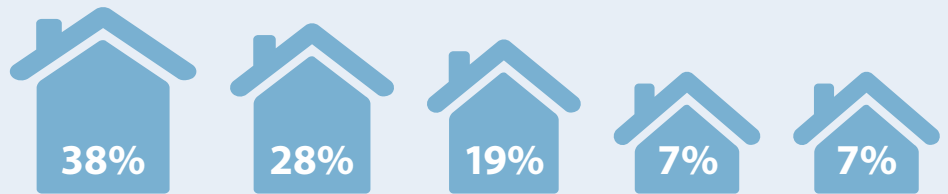
Alastair Coey & Ecorys UK, 2015

## WHAT DOES OWNING A LISTED PROPERTY MEAN TO YOU? (n=824)



## WHICH OF THESE PROPERTY TYPES BEST DESCRIBES YOUR PROPERTY?

Listed building owners (n=999)



English owner occupiers\*

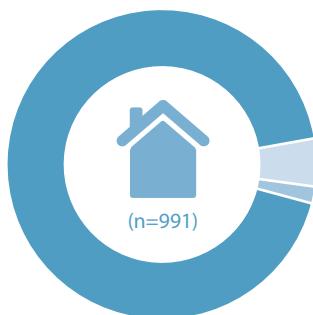


\*Source: English Housing Survey, HOUSEHOLDS, 2013-14, DCLG

## HOW IMPORTANT IS YOUR PROPERTY TO THE CHARACTER OF YOUR LOCAL AREA?

Listed Building Owners

Important/  
Very important  
**93%**



Not very/at  
all important  
**5%**  
Neither  
**2%**

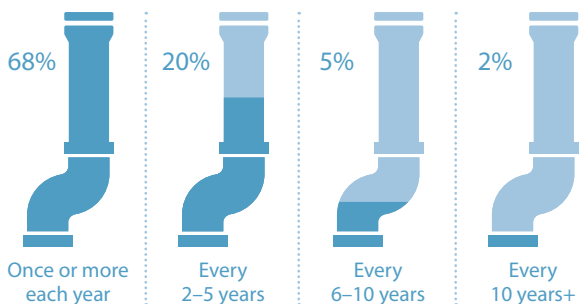
Living in Conservation Areas

Important/  
Very important  
**78%**

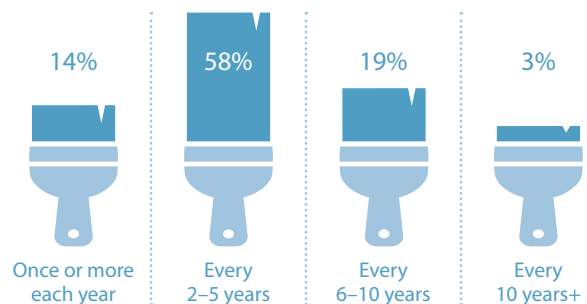


Not very/at  
all important  
**16%**  
Neither  
**6%**

## HOW OFTEN DO YOU CLEAR GUTTERS, DOWN PIPES & DRAINS COVERS? (n=981)



## HOW OFTEN DO YOU PAINT OR REPAIR WINDOWS & DOORS? (n=981)



## HAVE YOU HAD A POSITIVE PLANNING EXPERIENCE?

Thinking of your most recent application, how would you rate your overall planning experience?



**50%**  
Good/  
Very good

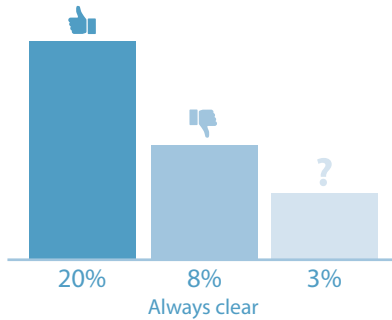


**34%**  
Poor/  
Very poor



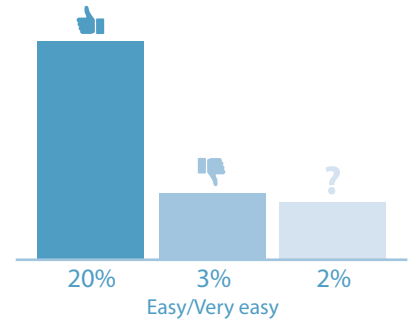
**16%**  
Neither  
good/poor

Is it clear to you what kind of work requires Listed building consent?



(n=347)

Is it easy/hard to find helpful information about repairing and maintaining listed properties?



## WHY DIDN'T YOU PROCEED WITH YOUR LBC APPLICATION? (n=120)



**21%**  
Application process  
was too complex



**23%**  
Skilled professionals  
were too expensive



**11%**  
Finding professionals  
was too difficult



**17%**  
Difficulty supplying  
supporting information



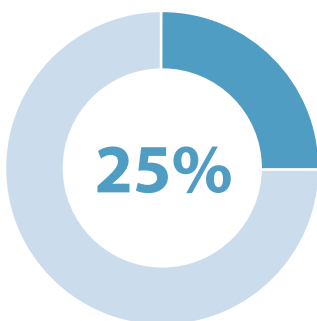
**6%**  
Got negative pre-  
application response



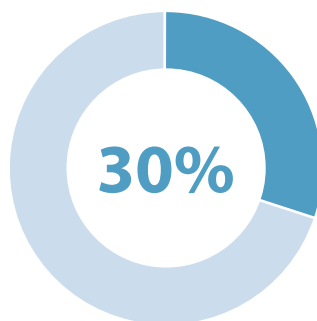
**2%**  
Because of the  
local opposition

21% DIDN'T APPLY FOR OTHER REASONS

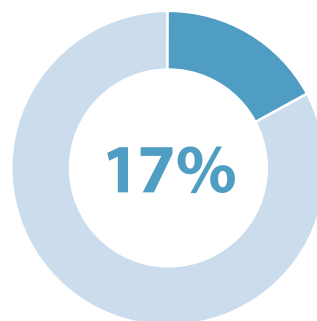
## WHAT WAS YOUR BUDGET FOR WORK ON YOUR PROPERTY REQUIRING LBC? (n=355)



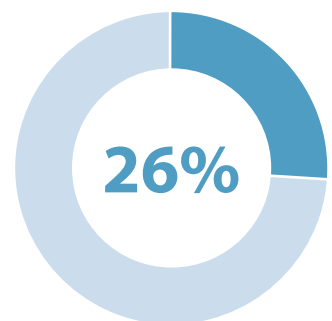
Less than £5,000



£5,001 - £25,000

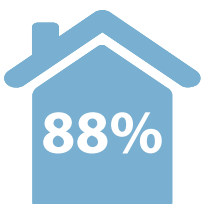


£25,001 - £50,000



Over £50,001

## OWNERS ATTITUDES TO CONSERVATION (n=987)



**LISTED  
BUILDING  
CONSENT**

of all listed building owners feel that LBC is either important or very important to protect the special architecture and historic character of the property

CASE STUDY: ROSIE MCTAVISH, OWNER OF GROVE HOUSE, GRADE II LISTED GEORGIAN HOUSE SITUATED ON THE HIGH STREET OF THE FENLAND MARKET TOWN OF CHATTERIS

*“What we fell in love with were the period features – the high ceilings, a beautiful moulded ceiling, staircase with curved continuous balustrade, functional shutters, stained glass windows and walled garden. We also love living in a building that has a story – it was just as well we fell in love with it because given the scale of the house and its listed nature it needed new owners that would look past its rotten windows, leaky roof and seemingly endless dirty carpets to see the potential of what it once was and could become again.*

*“I think the biggest challenge to owning a listed building is that you have to want the building for what it is. Listed buildings aren’t as easy to amend or extend as a non-listed house, and works are often on a longer timeframe to undertake, and limited to the summer periods due to traditional building materials and methods.*

*“A listed building has a story and a soul, and as an owner you need to work out how to respect its story and soul and bring out the best in it, whilst also giving you what you want.*

*“So yes, a listed building comes with more admin hassle, yes, it can be more expensive and yes it’s more restrictive to develop, but in our view it’s been well worth it. We have a house with a history, grandeur and story that no modern house could ever live up to.”*



(Photo: Rosie McTavish).

## Conversion of heritage assets at risk for residential use

Colliers were commissioned by Historic England to investigate what might be done by the public sector to encourage conversion of large heritage assets at risk to residential use<sup>38</sup>. Specific objectives of the work were to examine the characteristics of historic buildings that have been redeveloped for residential use, and to understand more about the underlying motivation and investment returns in the development of historic properties for residential purposes<sup>39</sup>. The key findings were as follows:

- The rise in residential values across most of the country has made converting historic buildings for residential purposes a more attractive option. However, values are still not always high enough to cover conservation deficit<sup>40</sup> especially outside London and the South East;
- Whilst a large number of developers are taking on heritage assets for conversion to residential, only a small number are specialising in them. Developers typically use a higher proportion of employees to contractors on their sites because their employees have developed specialist skills. They differ in their approach and the choice of building they take on, but each places great emphasis on quality of workmanship and respect for the integrity of the heritage assets they develop<sup>41</sup>;
- The development of historic buildings for residential purposes can make a valid contribution to the growing need for more housing and ensure historic buildings at risk are conserved. However, there can be a trade-off between public access and commercial viability. Private residential use with no public access will often be the most profitable use for a country house that had a period of institutional use.<sup>42</sup>

## The community perspective

An important community benefit of heritage is the potential to enhance the social capital of local communities. It does this by providing a tangible link to the past and reinforcing the sense of community identity. This enhanced sense of identity can contribute to social cohesion within the community through a common thread of understanding<sup>43</sup>.

Volunteering is one way in which people can feel connected to their community. Work carried out by the Churches Conservation Trust<sup>44</sup> concluded that for churches to thrive they must be rooted in the lives of local communities.

<sup>38</sup> Colliers International Property Consultants Ltd (2015) Use of Historic Buildings for Residential Purposes

<sup>39</sup> Ibid

<sup>40</sup> The term ‘conservation deficit’ describes a situation whereby the total project cost of restoring a building and returning it to productive use exceeds the market value of the building

<sup>41</sup> Ibid

<sup>42</sup> Ibid

<sup>43</sup> Australian Government Productivity Commission (2006) Conservation of Australia’s Historic Heritage Places, No. 37, 6 April 2006

<sup>44</sup> The Churches Conservation Trust (2015) Protect, Create and Inspire, the Impact of our Volunteers

The Institute for Volunteering (IVR)<sup>45</sup> has identified five key areas of capital which volunteering helps develop. Volunteers develop their personal confidence, knowledge and skills (human capital) whilst developing a sense of community, stronger social networks, trust, and citizenship (social capital). They develop an understanding of, and engagement with, local culture and heritage (cultural capital). The activities undertaken benefit the local economy, encouraging community regeneration (economic capital), and make a significant contribution to the development of local infrastructure (physical capital).

The UK Association of Preservation Trusts (UKAPT) was commissioned to undertake research amongst building preservation trusts. The aim was to provide insight into the motivation behind the adoption of particular projects, how work was financed, community involvement and the future maintenance of different projects. The key findings were as follows:

- Historic and architectural character is the prime motivation for trusts taking on a project (over 80%);
- Historic character is more important to trusts when selecting a project than the building being at risk (62%, in comparison to 35%);
- More than three-quarters of trusts (77%) contribute from their own resources to complete projects;
- Donations are also an important source of funding with 57% of trusts using donations to help fund the projects;
- Just over half of trusts surveyed are using Heritage Lottery Fund grants for project funding (52%) and 27% of trusts use Architectural Heritage Fund funding;
- The greatest current challenge for trusts is to secure funding, with over a third of trusts indicating that they found it very difficult;
- Trusts have little difficulty in getting heritage information and securing the services of suitably qualified professionals, reflecting the heritage knowledge embodied in the building preservation trust movement;
- The majority of trusts had few problems securing Listed Building and Planning Consents;
- Community involvement was high through volunteering (73%) and open days, events and visits;
- Over 73% of trusts have revenue income set aside for maintenance and 30% of trusts trained their volunteers to do routine maintenance;
- Over a quarter of trusts (26%) employ an architect or surveyor to do regular maintenance checks<sup>46</sup>.

When asked what the project meant to the local community, one trust commented:

*"The community have benefited from new jobs, training opportunities, extensive free community events, really exciting and useful volunteering opportunities and real economic benefit to the area. Cromford Village, once suffering from a high turnover of failed small businesses is now a thriving community with a number of successful high class outlets."<sup>47</sup>*

#### CASE STUDY: TYNE AND WEAR BUILDING PRESERVATION TRUST, BLACKFELL HAULER HOUSE, GATESHEAD, NEWCASTLE UPON TYNE

*Built in 1913, Blackfell Hauler House is one of two remaining hauler houses on the Bowes railway line, a scheduled monument and one of the earliest and best conserved rope haulage railways in the UK. Since the railway ceased carrying coal in the 1970s, the building and its surviving machinery gradually fell into disrepair and were the target of theft and vandalism.*

*The Tyne and Wear Building Preservation Trust worked with the Bowes Railway Trust and Gateshead Council to undertake a project to repair the building and to bring it back into sustainable use. Funding came from the Architectural Heritage Fund, Historic England, the Challenge Fund and the Pilgrim Trust, the Joicey Trust and the Lamsley Ward Fund.*

*Work began in May 2014 and consisted of a restored roof, 100% external re-pointing, consolidation of steelwork and new windows and doors to enable the building to be re-used. The main building works were complete in December 2014 and in March 2015 the building was leased to a local resident on a full repairing and insuring lease as a workshop.*

*In September 2015, the Trust won the "Best Rescue of a Historic Industrial Building or Site" for the project at the annual Historic England Angel Awards.*



(Photo: Tyne and Wear Building Preservation Trust).

<sup>45</sup> Ibid

<sup>46</sup> Ibid

<sup>47</sup> Ibid

## The role of Government

As described in the previous section, private and commercial owners and building preservation trusts and other voluntary sector bodies play a fundamentally important part in caring for the historic environment, but of course there are some roles they cannot perform. Local government plays a key role in considering the large majority of all planning applications which affect heritage assets. National government and its agencies also have an important role, in setting legislation and policy, assessing heritage significance, and contributing to the impartial assessment of proposals which impact upon heritage. This contribution is crucial in providing clarity and improving decision making.

Responsibilities for the historic environment in England fall principally into three different government departments:

- **Planning:** Department for Communities and Local Government (DCLG)
- **Culture:** Department for Culture, Media and Sport (DCMS)
- **Environment:** Department for Environment, Food and Rural Affairs (DEFRA)

At a local level, local authorities play a major role in heritage protection and in ensuring heritage contributes to the growth and regeneration of local areas. Their responsibilities include ensuring that local planning policy and development takes the historic environment properly into account; protecting heritage through appropriate management; promoting awareness and public enjoyment of the historic environment; and developing and maintaining the local Historic Environment Record<sup>48</sup>.

### PROFILE: KEVIN MORRIS, ENVIRONMENT, COMMUNITY AND COMMISSIONED SERVICES MANAGER, NORTH DORSET COUNTY COUNCIL

*"Despite the often negative comments we receive, working with others and in partnership to secure a shared outcome which safeguards a heritage asset is extremely satisfying. This can range from the production of a conservation area appraisal to identifying solutions to secure re-use and restoration of a derelict farm building. Opening people's eyes and enabling them to appreciate and value a previously unloved building or object is very rewarding and reminds me why I chose to work within the heritage industry."*

### PROFILE: NAIRITA CHAKRABORTY, PRINCIPAL CONSERVATION OFFICER, HARINGEY COUNCIL, LONDON

*"One of the most pleasing aspects of my job is to be able to work with architects in finding creative solutions towards adapting listed buildings in a manner sensitive to their fabric."*

*"I think in-house conservation advice is essential in local authorities. I also think that working positively with the architects and coming up with solutions is equally important. At its purest, conservation philosophy may dictate that certain proposals are not acceptable. But we need to come up with alternatives when we say 'no' so that our advice is taken as 'positive feedback' instead of 'negative criticism'. We need to become 'catalysts' in development management."*

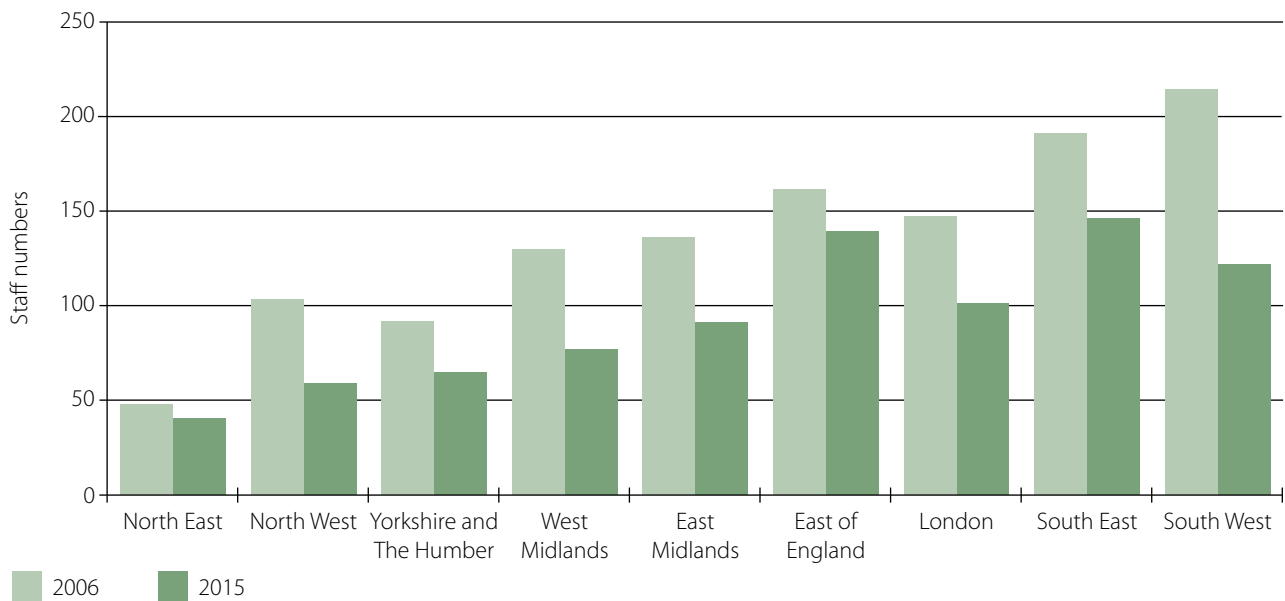
In July 2015, Historic England, the Association of Local Government Archaeological Officers and the Institute of Historic Building Conservation produced a seventh report on Local Authority Staff Resources<sup>49</sup>. Since July 2006 the number of archaeological specialists advising local authorities in England has fallen by 23% and the number of conservation specialists has fallen by 35%. The falls are not uniform across the country and the South West region has experienced the greatest drop in combined specialist staff numbers followed by the West Midlands, London and the South East. In the last 12 months, against a backdrop of a very small increase (0.8% overall) in specialist advisers, the number of planning application decisions (an indicator of workload) has decreased by 3.9% whilst Listed Building Consent decisions (also an indicator of workload) increased by 3%. The changes in the type of work local authority planning officers are dealing with (i.e. more Listed Building Consent decisions) demonstrates the ongoing need for specialist advisers.

The graph on the next page summarises trends in the numbers of specialist advisers combining conservation and archaeological FTE (full time equivalent) posts broken down by Historic England local office area.

<sup>48</sup> Available at <http://www.archaeologyuk.org/conservation/whoprotects#local>

<sup>49</sup> Available at <https://historicengland.org.uk/images-books/publications/seventh-report-la-staff-resources/>

## Trends in Local Authority Specialist Advisers by Region (2006 and 2015) -



All political parties recognise the need to reduce public expenditure to eradicate the budget deficit. If some areas of public spending are protected, this will mean even greater cuts in other areas. Cuts will put heritage at risk if there is a breakdown in effective heritage protection. This could lead to the inappropriate alteration of historic buildings and unauthorised damage. Professional planning advice and a well maintained Historic Environment Record are critical for local economic development, allowing commercial firms to meet statutory requirements promptly and specialists to provide an early indication of the impact on heritage assets.

The long term consequences of a breakdown in effective heritage protection would be: the loss of finite resources, a fall in investment and confidence in the area, and a poorer quality of life for residents and workers.

The national Historic Environment Forum has, for some time, prioritised analysing the problems and devising new solutions to resourcing heritage issues, especially in local authorities. It is pro-actively working with Government and heritage stakeholders on a range of constructive proposals.

### CASE STUDY: ALDWYCK HOUSING GROUP, 1-4 ST PAUL'S SQUARE, BEDFORD

The project aimed to rescue a terrace of four historic buildings from dereliction and re-use the floor space to provide affordable town centre accommodation. The buildings trace over 555 years of Bedford's architectural and civic history. The buildings had fallen out of use in 1969, narrowly avoiding demolition. Over the next 46 years the condition of the properties declined, threatening the historic fabric.

The project was led by Aldwyck Housing Group, who were originally approached by Bedford Borough Council with a proposed scheme to bring the buildings back into use for affordable housing. Given the high cost of repair, grant and public funding sources played a significant part in achieving a viable scheme, with funding from Bedford High Street Townscape Heritage Initiative (a Heritage Lottery Fund scheme, managed by the Council), the Homes and Communities Agency Empty Homes Initiative (secured by Aldwyck) and the Council's own

affordable housing budget. The remainder of the project was funded by Aldwyck who purchased the buildings in July 2014. Work started on site in August 2014 to create nine flats and one three bedroom house. The project was completed in June 2015.



(Photo: Adam Smyth)