

Listed Building Business Occupiers Survey 2018



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Qa Research

27th Nov 2018

Draft report V2



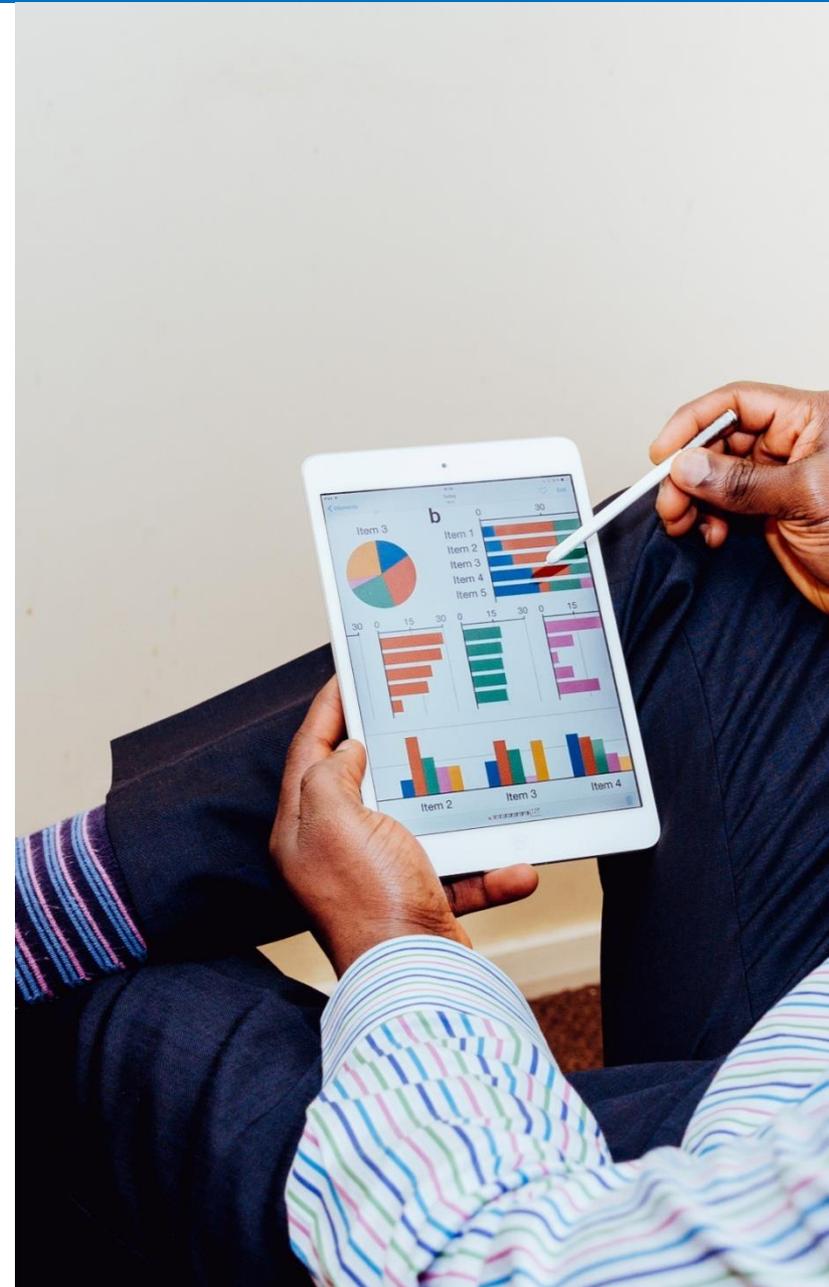
Historic England



- **The research aims were to:**
 - Identify the benefits & issues or challenges of working in & occupying a historic building
 - Investigate experiences & opinions of the Listed Building consent process
 - Establish perceptions on business risks & insurance choices
 - Provide compelling research findings for media dissemination
 - Add to the existing evidence base from previous research

Method summary

- **509 surveys were conducted from the database provided by Historic England, mostly by telephone**
- **Fieldwork was conducted in Sept & Oct 18**
- **Selected cross-tabulations were undertaken by:**
 - Intensity of Heritage Buildings
 - Geographical region
 - Standard Industry Classification (SIC)
 - Legal status
 - Chain / independent
 - Owner / renter
- **15 in-depth qualitative telephone interviews were undertaken with a cross-section of businesses that completed the quantitative survey, in order to provide further insight**



Method

- **509 surveys were conducted: 500 by telephone & 9 online**
- **The fieldwork was conducted between 19th Sept & 30th Oct 18 at Qa's in-house CATI centre in York**
- **A pilot of 59 completed surveys was undertaken between 19th & 28th Sept 18 after which a number of slight changes were made to the questionnaire. Both pilot & main survey data was used in the final dataset**
- **The business contact data was provided by Historic England from the OS Points of Interest Database, matched to the Historic England National Heritage List. In total, details of 6,165 businesses were provided**
- **Quotas were set for heritage intensity area (A–high intensity/B-medium intensity/C-low intensity/Other) & region. No weighting of the final data was deemed necessary**
- **No contact names were provided, so interviewers asked for the most appropriate person who was responsible for decisions regarding business location & premises**
- **Interviewees had the option to complete over the telephone or via online survey**
- **15 in-depth telephone interviews were conducted with a mix of business types & geography. These were offered a £75 incentive to take part & the interviews lasted up to 45 mins. Findings were used to supplement the quantitative results with additional verbatim quotes & possible insight into the reasons why questions were answered as they were**

Sample sizes & how to read this report

Cross-tabulation	Base	Error +/-
Heritage intensity		
A - High heritage intensity	260	5.9%
B - Medium heritage intensity	137	8.3%
C - Low heritage intensity	37	16.1%
Other	75	11.2%
Region		
London & SE	122	8.8%
Midlands & East	146	8.0%
North	189	7.0%
South West	52	13.5%
Standard Industry Classification		
G. Retail trade	134	8.4%
I. Accommodation & Food Service	118	8.9%
M. Professional, Scientific, Tech	79	11.0%
S. Other Service Activities	47	14.2%
N. Administrative	23	20.4%
Other	108	9.3%
Legal / Company Status		
Sole Trader	78	11.0%
Partnership	50	13.8%
Public Ltd Company	45	14.6%
Private Ltd Company	291	5.6%
Charity/Not for Profit	41	15.3%
Chain or Independent		
Chain	159	7.7%
Independent	337	5.2%
Tenancy		
Own	120	8.9%
Rent	374	4.9%
Total	509	4.2%

With a target sample of 6,165 businesses & based on a sample of 509 survey completions, the findings have a margin of error of +/- 4.2% when based on the total sample. Where questions are based on smaller sub-samples the margin of error will be greater.

The base size for each question is clearly displayed at the bottom of the slide – in most instances responses are based on the full sample of 509 surveys, but where questions are routed based on answers to previous questions the base size will be smaller.

Where questions allowed multiple responses the sum of all answers may be greater than 100%. Where questions did not allow multiple responses, the sum of answers may still be 1-2 percentage points greater than 100% due to the effect of 'rounding'.

Cross-tabulations on sub-samples are shown in the findings where there is a statistically valid variation. Other cross-tabs are included from selected data already held on the database provided. Care needs to be taken as some sub-samples are relatively small.

Verbatim comments from the quantitative survey & qualitative telephone interviews have been presented in the report to provide insight into some of the likely reasons behind the figures

Findings sections

1. **Benefits of occupying a historic premises**
2. **Drawbacks of a historic building**
3. **Listed building consent feedback**
4. **Building care & experience of skilled tradespeople**
5. **Building & liability insurance**
6. **Business continuity**
7. **Respondent profile**
8. **Final points**

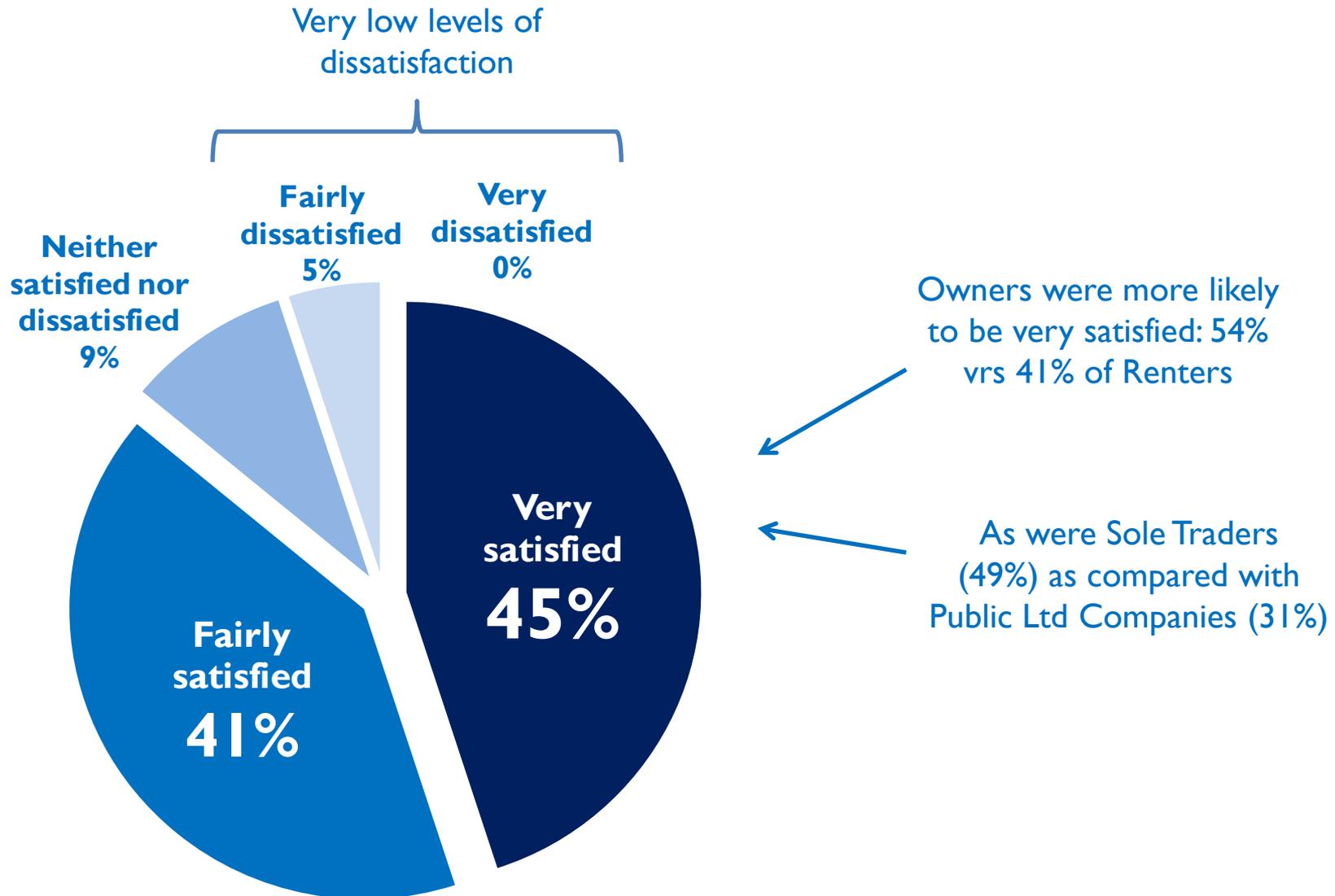


I. Benefits of occupying a historic premises summary

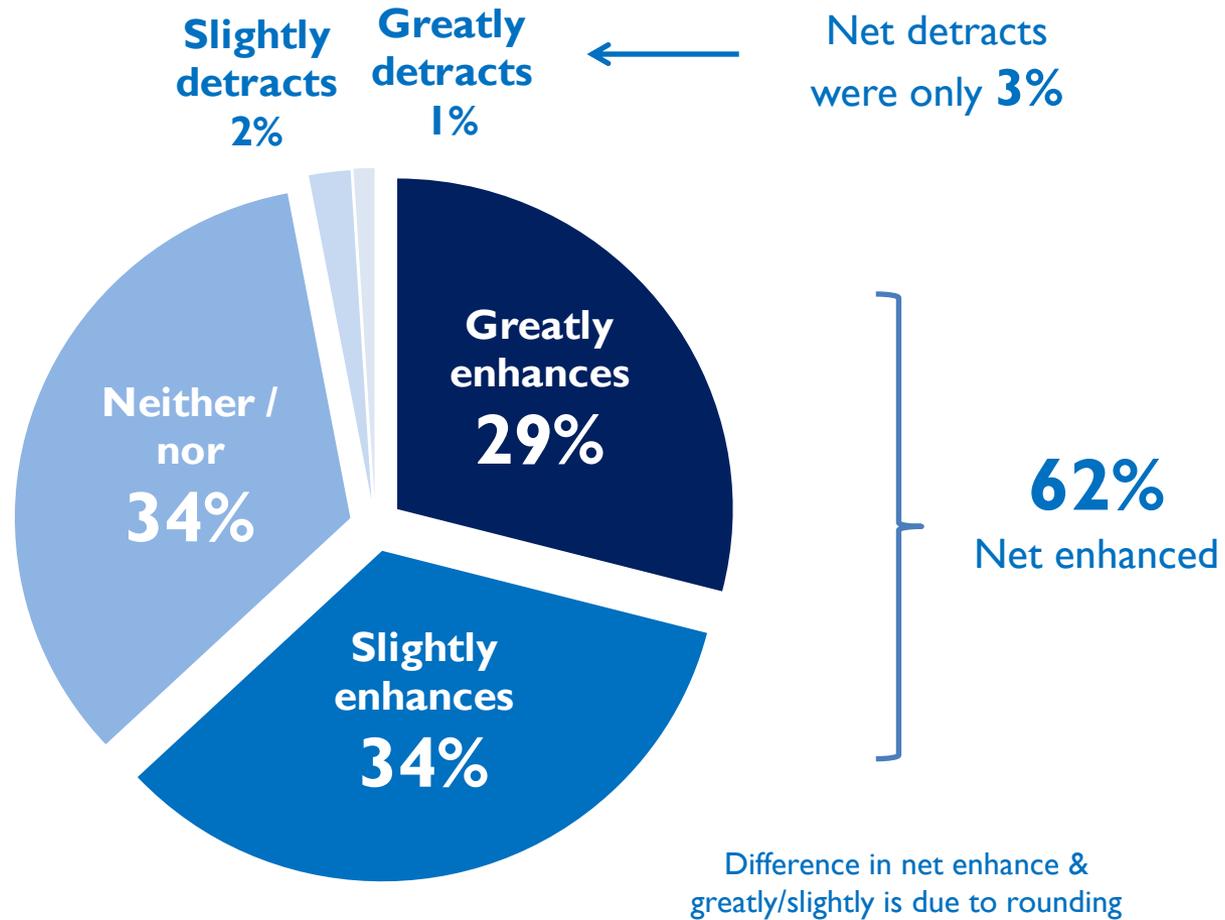
- There was generally high overall satisfaction with their business premises, with nearly 9 out of 10 (86%) feeling they were satisfied; owners tended to be more satisfied than renters, as did sole traders compared with public ltd companies
- Nearly $\frac{2}{3}$ (62%) felt the historic nature of their building enhanced their business; accommodation / food providers & those lower heritage intensity areas were most positive
- Only a relatively small 3% felt this historic nature detracted from the operation of their business
- The collective impact of historic buildings on the surrounding area was a highly rated benefit by occupiers. Many fed off other businesses & benefitted from the collective appeal of the historic area for visitors; some even talked of a community spirit
- Direct commercial benefits & adding value to products was less highly rated in the quant data. However, the qual research suggested that historic buildings can give a competitive advantage & add value by being an important part of the experience in sectors such as hospitality
- Intangible benefits around atmosphere, feel, charm, character, soul, etc were regularly mentioned. Many felt pride & genuine affection towards their building, but it still had to perform functionally for the business



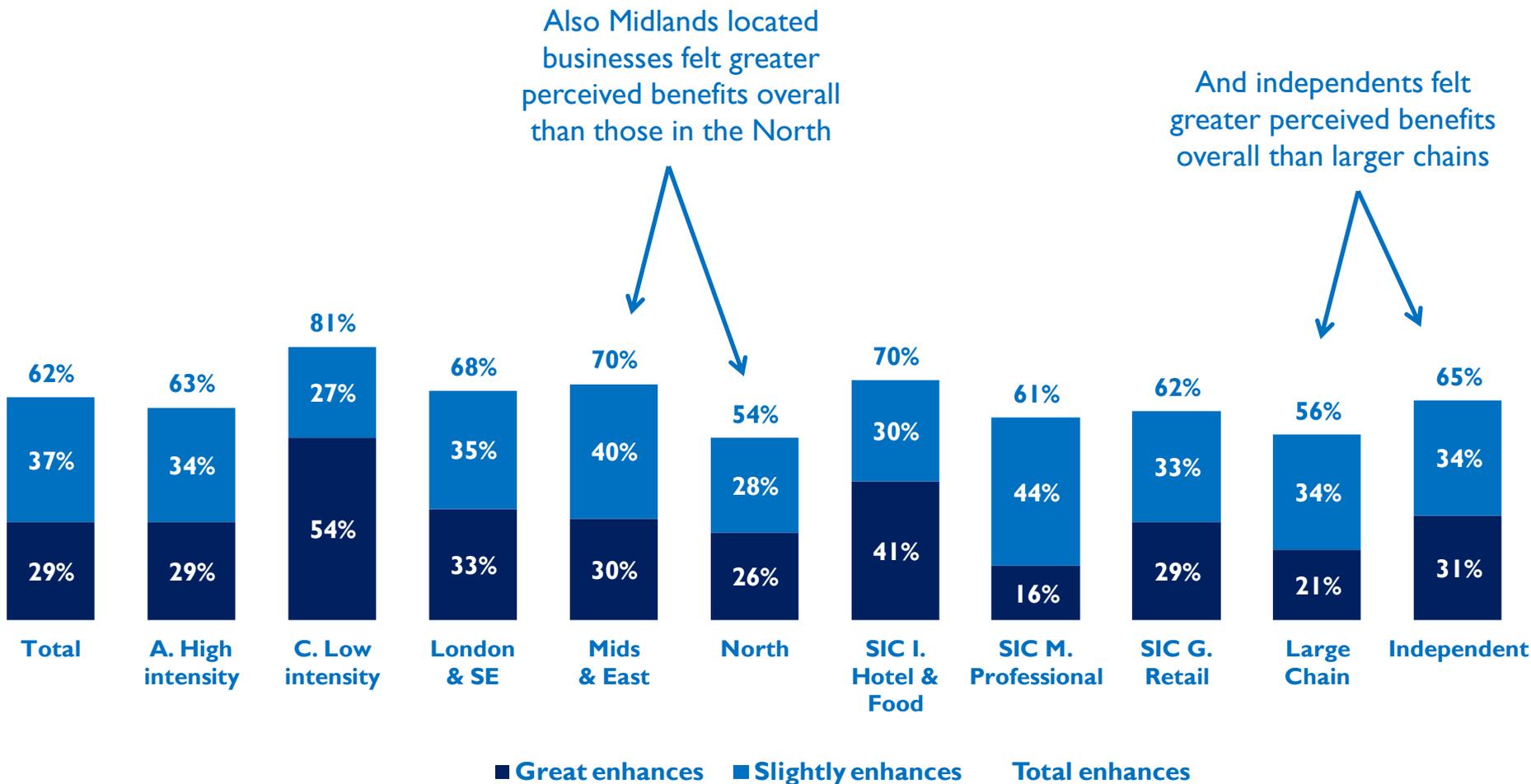
Nearly 9 out of 10 (86%) felt 'satisfied' overall with their premises



Nearly $\frac{2}{3}$ felt the historic nature enhanced their business



Perceived enhancement was higher in lower heritage intensity areas & accommodation / food providers

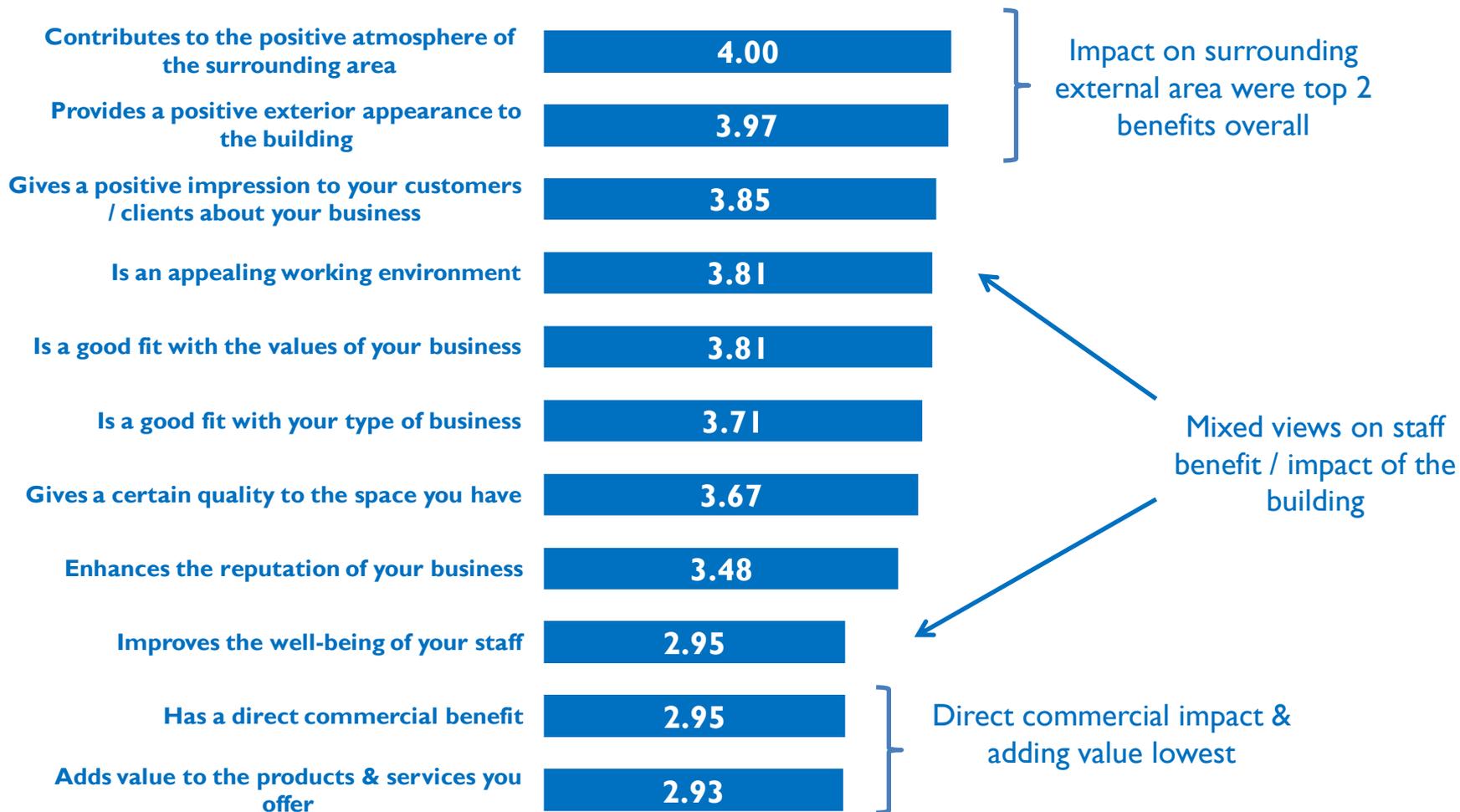


Feedback on potential specific benefits of occupying a historic building

- **When asked to score specific prompted potential benefits, all were near or above the mid-point of 3 out of 5 emphasising the general positive view towards their historical premises**
- **The exterior appearance & collective impact of historic buildings in a historic area was seen as a key benefit to occupying a historic building**
- **However, the direct commercial benefits & adding value to products were less highly rated than other potential benefits in the quantitative survey**
- **There were mixed views on the positive benefits for staff working in historical buildings; while generally positive especially for those in offices & sole traders, retail sectors were less positive**

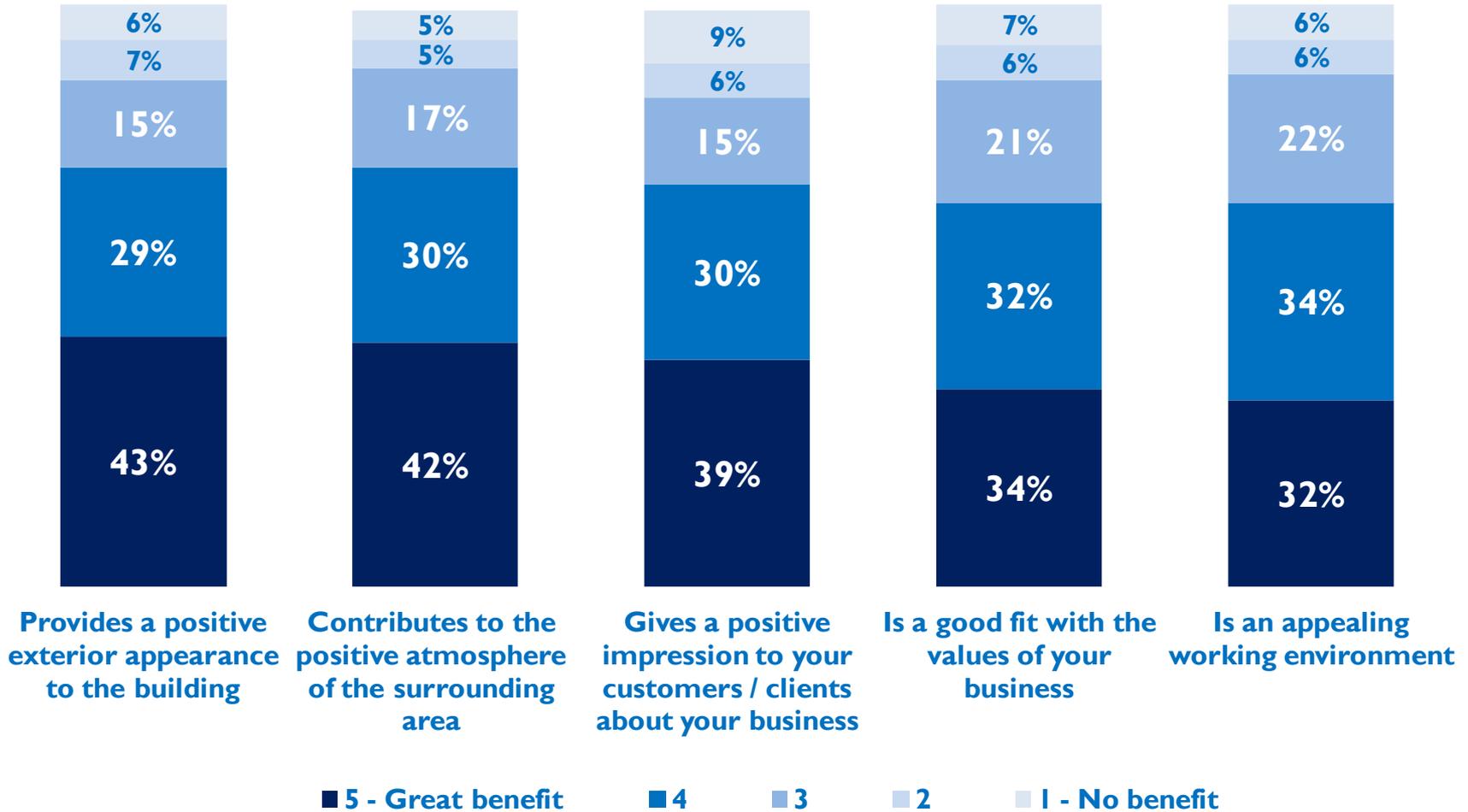
Impact on surrounding area & exterior seen as overall top benefits

When asked to rate prompted benefits on a 1 to 5 scale with 5 being great benefit to their business



Q14. To what extent does your business experience the following potential benefits FROM BEING LOCATED IN YOUR HISTORIC BUILDING? Please use the scale of 1 to 5 with 1 being not at all and 5 being greatly. Mean average excluding don't knows Base 509

Full scores for the top 5 benefits

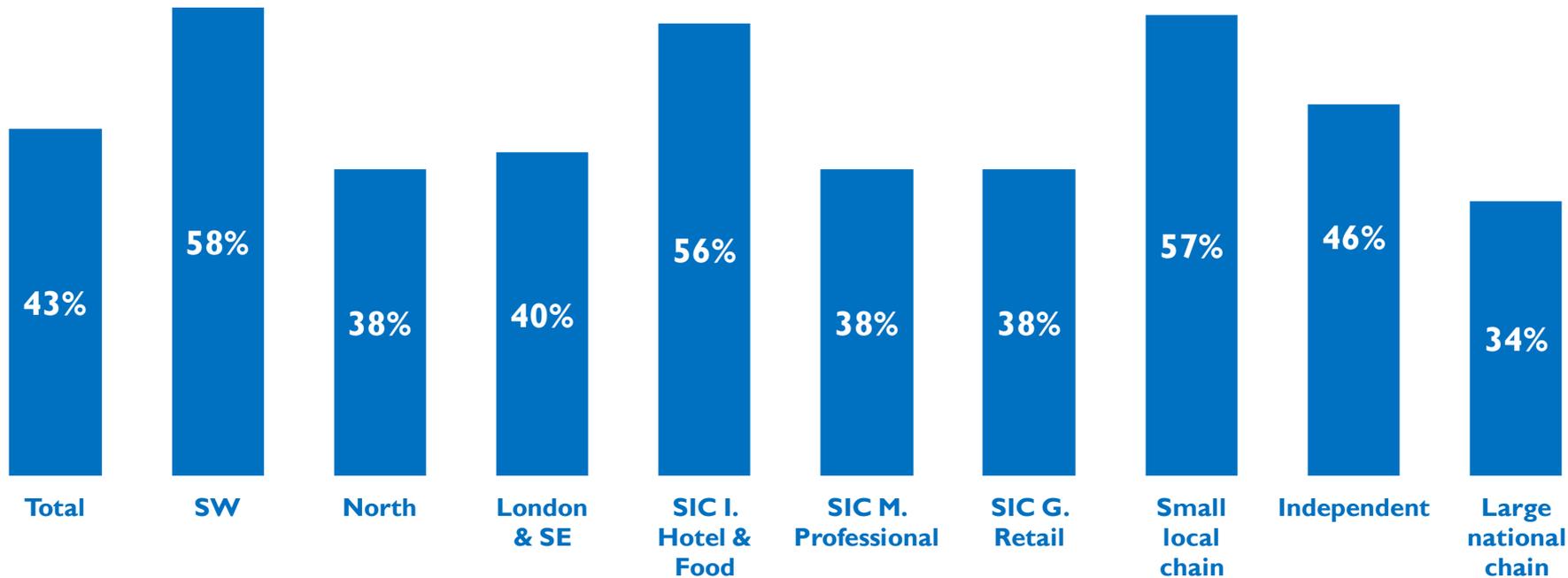


Q14. To what extent does your business experience the following potential benefits FROM BEING LOCATED IN YOUR HISTORIC BUILDING? Please use the scale of 1 to 5 with 1 being not at all and 5 being greatly Base 509

Those in SW, small local chains & hotels/food were more likely to give highest score

Those shown scored 5: great benefit to their business for:

‘Provides a positive exterior appearance to the building’



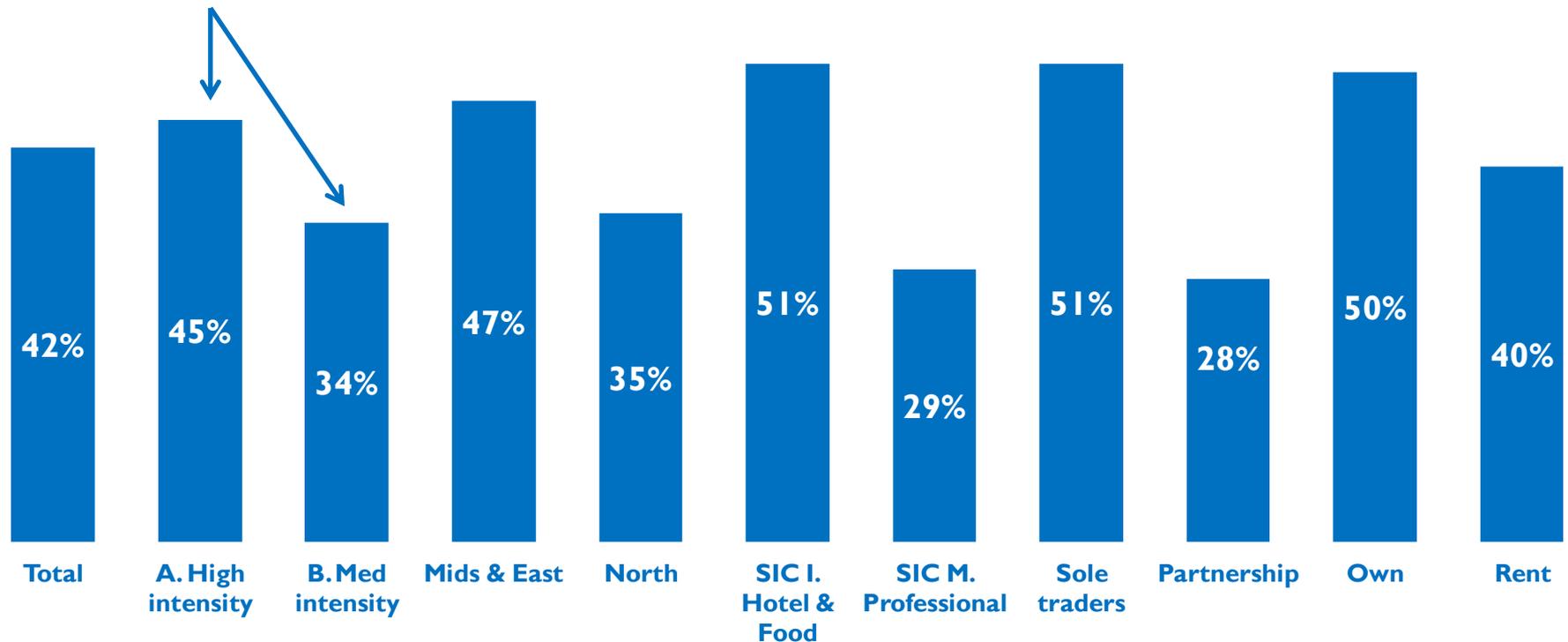
Q14. To what extent does your business experience the following potential benefits FROM BEING LOCATED IN YOUR HISTORIC BUILDING? Please use the scale of 1 to 5 with 1 being not at all and 5 being greatly Total Base 509 Others vary

Hotel/food, owners & sole traders gave highest score

Those shown scored 5: great benefit to their business for:

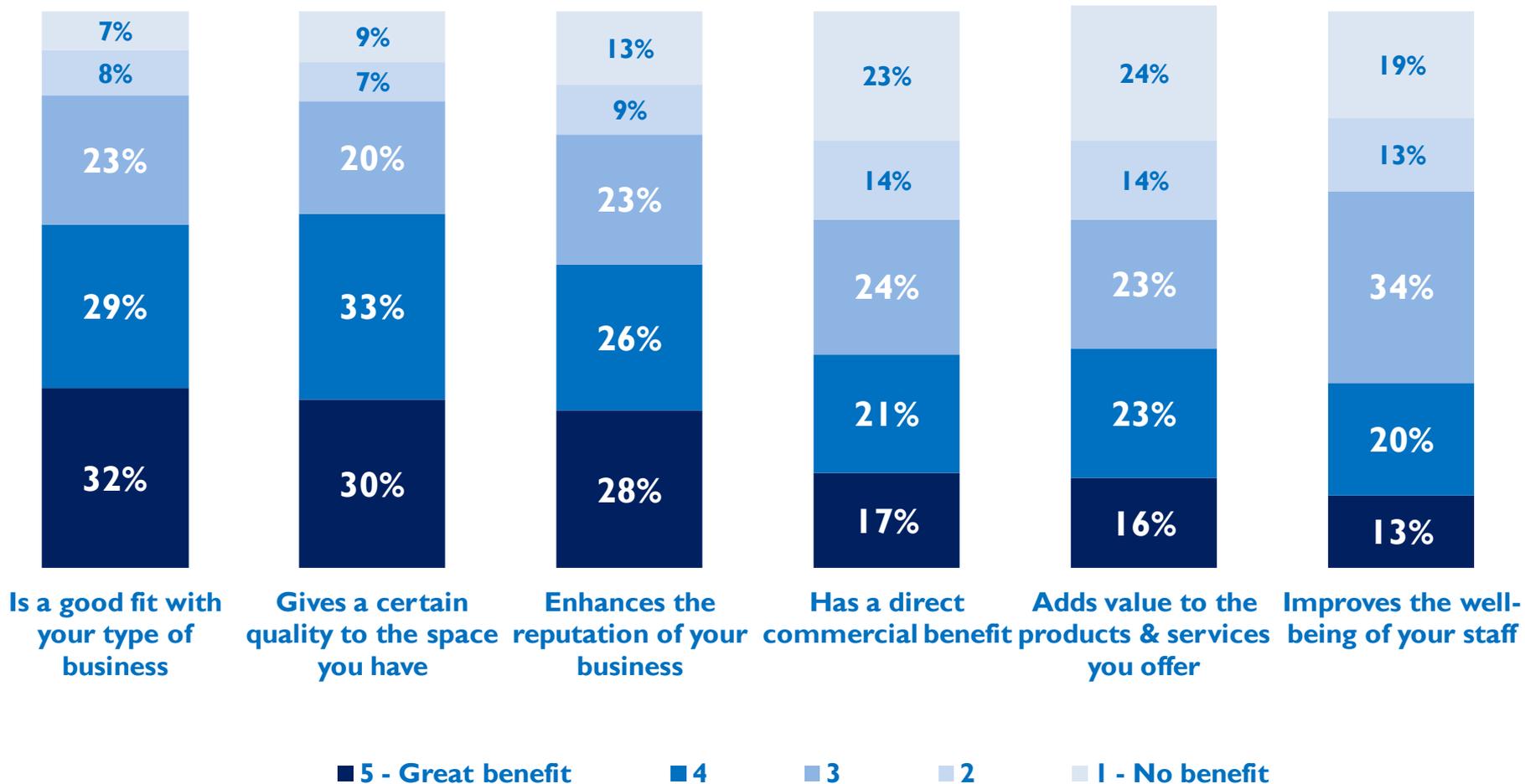
'Contributes to the positive atmosphere of the surrounding area'

Those in high intensity heritage areas more likely than medium intensity



Q14. To what extent does your business experience the following potential benefits FROM BEING LOCATED IN YOUR HISTORIC BUILDING? Please use the scale of 1 to 5 with 1 being not at all and 5 being greatly Total Base 509 Others vary

Full scores for the bottom 6 benefits



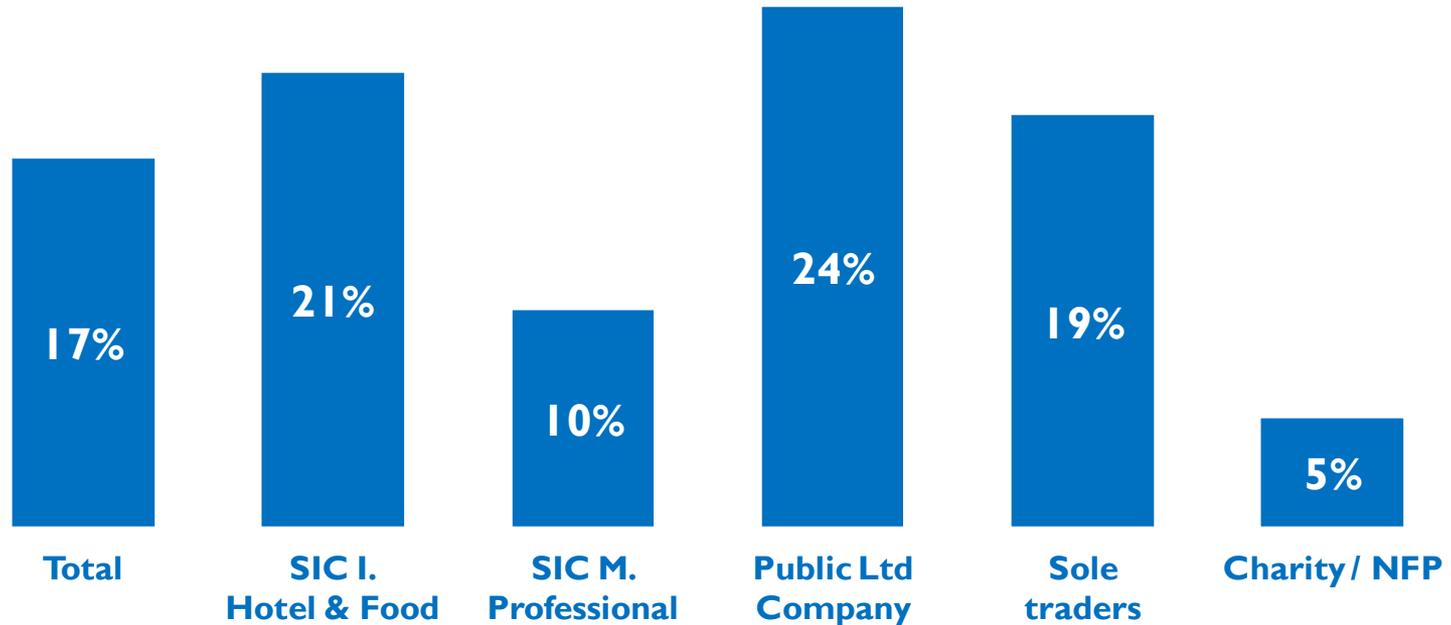
Q14. To what extent does your business experience the following potential benefits FROM BEING LOCATED IN YOUR HISTORIC BUILDING?
Please use the scale of 1 to 5 with 1 being not at all and 5 being greatly Base 509



Hotel/food & Public Ltd Companies were more likely to give highest score

Those shown scored 5: great benefit to their business for:

‘Has a direct commercial benefit’



Q14. To what extent does your business experience the following potential benefits FROM BEING LOCATED IN YOUR HISTORIC BUILDING? Please use the scale of 1 to 5 with 1 being not at all and 5 being greatly Total Base 509 Others vary

The collective impact of exteriors was emphasised in the qual

- **The importance of being part of a bigger heritage offer was generally understood & appreciated**
- **A cumulative impact was noted beyond just the businesses own building & a realisation that their own building & business cannot be seen in isolation**
- **That collective pull for customers & their associated footfall was important, especially for retail, food & drink**
- **The bigger picture was clearly understood & appreciated by many**

“I think it’s part of the bigger picture, in other words people will come down this street they’ll come to Whitby they’ll come to the area because of the history, the heritage, it’s wrapped up in a bigger parcel, it’s not so much the shop” (Shop)

“Benefit is that we do get a lot of pedestrian traffic because people come to look at the buildings in the street. There is a parade of historic buildings.”
(Shop)

“Being in a historical place we get local traders & additional tourist trade”
(Shop)

“The building has a lot of character, it’s part of the fabric the old streets of London. It doesn’t look like a glassy, bland corporate street.” (Shop)

A degree of responsibility felt for the building & their role in the town

- **Most appeared conscious of their place & role within an often concentrated historic area or at least with close by historic neighbours**
- **Fitting in with local 'aesthetic' appeared important to many**
- **Some were often quick to point out buildings in their area that weren't playing their part & maintaining look of the area**
- **There often seemed to be the collective peer pressure & a responsibility to 'keep up appearances'**
- **But this does mean change is difficult, but most appeared to accept this was one of the prices they had to pay**

“To change it [building] would be totally out of place & character with the nature of York, we couldn't do that”
(Food/drink)

“This building & this business & this whole area have a kind of attitude of being part of the better parts of Winchester, now this means that no-body's in charge, because everyone thinks they have a sense of ownership here, & you're not allowed to change anything because no-one else would like it & they'd tut-tut, so there is a sense of being in the public view a bit” (Shop)

The community aspect seemed important to some

- **Being within a concentration of like minded businesses, it can give some historic areas a community feel & mentality**
- **There was a sense of shared values & a complementary offer**
- **Creative industries & professional services seem to feel this particularly if located in such a historical area**
- **This community aspect adds to the feeling for some businesses of being in a special place**

“Nice views, Being on the square it has its own little community”
(Office)

“The location is near lots of other legal practices and near courts” (Office)

“Convenient, in the heart of the jewelry trade & right in the heart of the facilities”
(Creative)

“The fact that it’s an old building is part of the community values of this quarter of Winchester, and we complement the other commercial places nearby, & we complement some of the other academic institutions” (Shop)

Benefits of a central location clearly expressed by many

- **Whilst not necessarily directly related to their historical nature, most are centrally located within a town or city**
- **This means that businesses in historical buildings profit from the associated benefits such as good transport links, large footfall & good access for staff, customers & visitors**
- **The concentration of businesses also means they can feed off each other for mutual benefit**
- **However, this also means that the associated negative challenges are also present, such as potential access restrictions, congestion, parking issues, etc**

“It is a great location, it has lots of character. It is structurally sound. The location & character are the biggest selling points“ (Food/drink)

“Its in a good location as its located near many businesses so its convenient for workers to come & grab their lunch & prescriptions” (Shop)

“Location as we are right in the middle of the town so easy access” (Office)

“People can find us easily, all the buses stop outside” (Shop)

“The location is excellent as a business base as it is very central” (Shop)

“We get a lot more footfall from tourists due to our location” (Shop)

The tourist trade is essential for many

- **Again, by the nature of a central location & appealing nature of a historical area, these areas often attract a lot of tourists, to which businesses orientate, especially shops, accommodation food & drink businesses**
- **Many appear to be on well trodden tourist trails, whether that be formal tourist groups on coach trips or independent travellers**
- **In addition, the historical nature of the buildings they are based in themselves can also act as a specific attraction that encourages tourists & is integral to the product the business is offering**
- **This has a direct commercial benefit for these types of businesses & is sometimes their raison d'être**

“Being located close to Lincoln cathedral brings a lot of business our way” (Food/Drink)

“As it was part of the kings mill area it is on the tour guides routes so we get a lot of passing trade due to its historical relevance” (Food/Drink)

“We get a lot of coach parties in this area, bringing tourists as it is a historical area of Norwich. As such a lot come in our cafe”
(Eat/drink)

“We get a lot of tourist business & tour party visits as is it is an old building with lots of character & architectural features. This also creates a nice atmosphere to dine in”
(Eat/drink)

“The whole area is a tourist area & a lot tourists walk around, to see the buildings in the area, all the buildings have character.” (Shop)

“The location is good as we attract a lot of tourists” (Shop)

The business's buildings are sometimes landmarks in their own right

- **The buildings themselves can be significant local attractions in their own right for tourists & local residents, irrespective of the businesses that occupy them**
- **Some even claimed to be landmarks in their town or city: often well known & well loved by visitors & locals alike**
- **This can bring status, extra visibility & competitive advantage, but it can also bring additional pressure especially on keeping the building aesthetics**
- **Additionally, some people will just come to look at the building rather than to spend money**

“It is stunningly beautiful, it is a landmark. It is interesting & outstanding in appearance.” (Office)

“A lot of people come & have a look at the hotel & many come & stay simply for the historical aspect. We even have architects who come just to have a look.” (Hotel)

“It's [building] old, people like it & come to see us, They come to see our building.” (Hotel)

“We are a landmark, everyone knows where we are in Bristol” (Shop)

“It stands out well due to its physical appearance & people tend to notice the building.” (Shop)

“A listed building attracts attention.” (Food/drink)

“Very prominent building that can even be seen from the end of the high street. So it tends to be seen & attracts attention..” (Food/drink)

Many of the buildings have specific appeal for customers

- **Drawing customers to the business can be assisted by the historic buildings themselves**
- **Often the building is part of the experience & product offering, especially with accommodation, food, drink, & retail**
- **The uniqueness & idiosyncratic nature of many of the buildings adds to the appeal**
- **Many of the buildings offer interesting stories & appear to be able to create memorable experiences**
- **Although, some businesses seemed to find it difficult to directly track back to specific commercial benefits**

“It's a nice quirky old building that draws customers in”
(Food/drink)

“People come in to see what it is like because each business is unique. This one has beams & an un-straight floor ”
(Shop)

“We get a lot of compliments on the building & how pretty it is.” (Retail)

“It suits our needs, it is the right size & has character - the clients we have coming into the office like the building, e.g. it has uneven beams & wooden floors which make it characterful.”
(Workshop)

“It benefits quite a lot because it's got character, & when we have guests stay, that just adds to their stay really, it makes their stay a little bit more special”
(Hotel)

Sometimes there is a direct link with the product offering

- **Some businesses have very obvious links between product & building i.e. Traditional products, English icons**
- **Sometimes the building fits the business or sometimes the business will adapt to fit the building's style**
- **Often the building can add-value to the product or service being offered**
- **Adding an additional 'authenticity' to their offering**
- **The building can also give a competitive advantage to the business by making it stand out & add to uniqueness**

“We produce a hand produced old English product & it is therefore good to be in an old quirky building. It gives us an edge” (Shop)

“Sell some vintage clothes which fit well with the building.” (Shop)

“The style of the building, which was built in 1609; we have wood paneling & old beams. We are a furniture company with a country classical look. It fits well with our image.” (Shop)

“I have always picked buildings that creates what the business is. It adds tenfold to the business.”
(Food/drink)

“It makes a positive difference to the business. It makes us stand out from others in the same market”
(Food/drink)

“The building's got fantastic character ... the building dictates a flamboyant style”
(Hotel)

Offices & professional services can also see benefits

- **The link between historic buildings & sectors such as accommodation, retail & food is fairly obvious**
- **However, many businesses using historic buildings as offices were also keen to share the benefits**
- **Some also had direct links to the product or service they offered i.e. architects, engineers, etc**
- **Others expressed more general benefits such as impressing clients, providing a creative space, being in a generally historic area, etc**
- **Although there was clearly a balance between character & operating a functional modern office, which can be a challenge in a historic building**

“As civil engineers, we do a lot of repairs of historic property so it promotes our work. Also being in the town centre is helpful for staff”
(Office)

“We are aware it has a lot of charm & complements our ethos” (Office)

“The location is perfect & the building adds prestige to this business“ (Office)

“It [building] is impressive & people say 'wow' when they come in!” (Office)

“A very nice open plan office that still has traditional features. Original beams, it has refashioned windows. The whole area has been cleverly refashioned retaining the old retains & character“ (Office)

Quirks add character as well as challenges

- **Many historic buildings seem to often offer charm & character, such as wooden beams, vaulted ceilings, wonky floors, etc.**
- **These quirks can often inspire, motivate & encourage creativity**
- **However, these benefits are often having to be balanced with the practical issues with functionality, which can be constraining on business**
- **The layout, shapes of rooms, steep steps, narrow corridors, etc. can all cause challenges operating their business, especially those in hospitality & retail**
- **Despite this, businesses often appear to try to adapt to these inherent challenges & quirks**
- **Overall, most felt their building was worth the hassle**

“Because we’re a creative company we liked the, sort of quirkiness .” (Creative)

“Its a talking point for customers, customers like the quirkiness & the angles of the stairs.”
(Shop)

“I like the building with its uneven floors, creaky staircases, crooked door frames etc. I like its history & prefer to work in an older building than a modern box.” (Service)

“It is quite a quirky place, everyone who comes in says ‘oh wow I didn’t realise it was this big’ or you know ‘it’s a lovely space’ ... it’s benefitted us more than the downfalls.”
(Food/drink)

Intangible benefits were also regularly expressed

- **Many felt their building was a good fit with the values & ethos of the businesses**
- **Even if there wasn't a direct link with their product or service, the general feel & positioning of a historic building fitted the image they wanted to project**
- **Whilst these could be expressed, these were difficult for the businesses to quantify & measure**

“It [building] gives it soul & character“
(Shop)

“Suits a long established business to be in a long established building, parts of the building are about 350 years old” (Shop)

“It's photogenic, & it kind of fits & has the right narrative” (Food/drink)

“We are based in an old building but it matches the old-fashioned ethos of our company” (Retail)

“The atmosphere & theme of salon is homely & cosy, it used to be a Georgian house so lends itself well to that style.” (Service)

“The building is the business, & a key part of what makes us what we are as a business. It is our identity” (Food/drink)

“It has a poetic charm”
(Food/drink)

Pride & genuine affection for the buildings often came through

- **Many of the interviewees readily & happily talked about their buildings & there was felt to be genuine affection for their building despite the challenges & issues they may have faced**
- **Often keen to share the stories of their buildings & sometimes personally interested in its history**
- **A degree of pride in their building: that their business was operating from such a historical building**
- **Few, if any, seemed to be locked into an unwanted building that was damaging to their business**
- **But it was clear that their historic building had to work functionally for their business: although often not perfect, there seemed to be compromises that most could work with**

“I take pride in the historic building. The business takes pride in the building & it fits brand & identity.” (Office)

“I do love the history of the building.” Shop)

“I’m in love with the building because of its history & character” (Hotel)

“Central location is good for us, the learners feel sense of pride when they come in to see us.”
(Education)

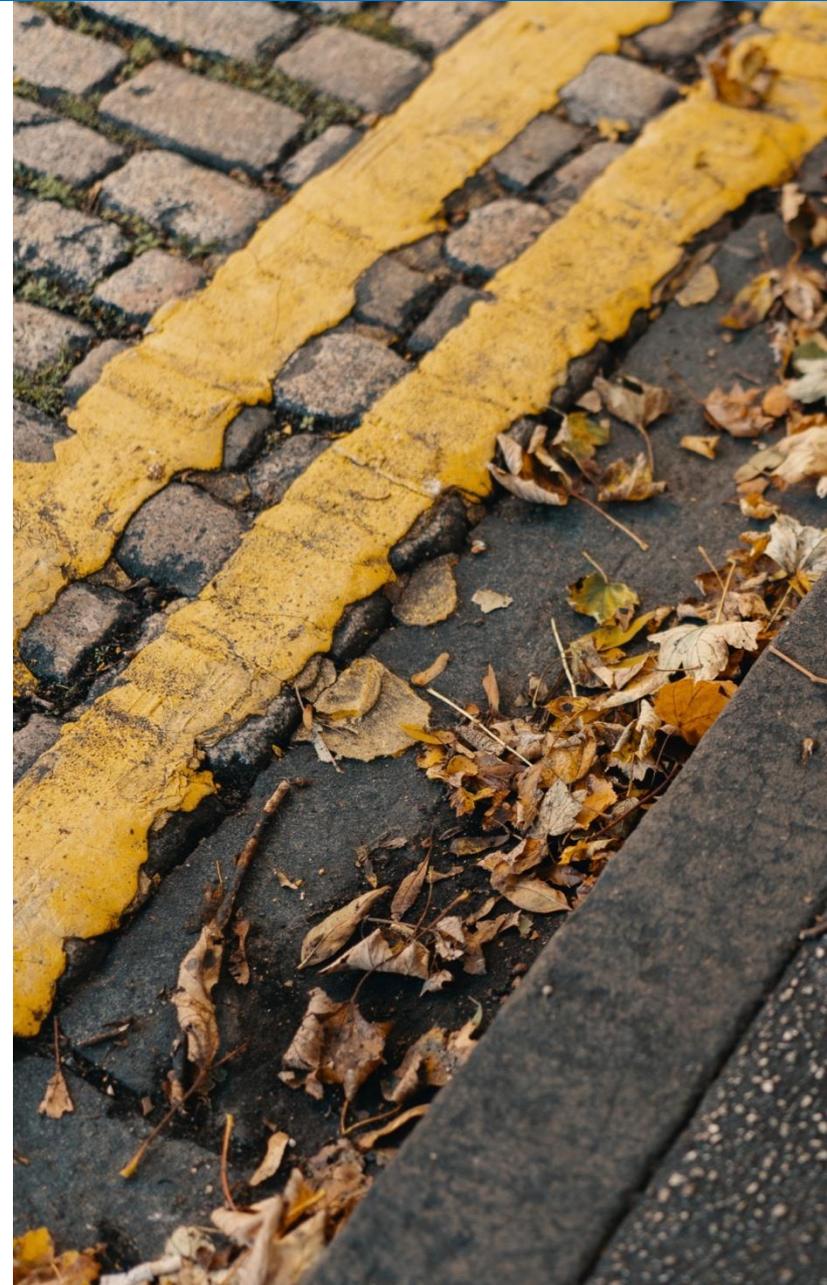
“Beautiful old building with a beautiful atmosphere inside“ (Hotel)

“The history & heritage is a talking point. I always take the clients down & show them the space, tell them the story, I am interested so I feel everyone else should be too.“ (Office)

“Love the history of the house, I love the house & everything about it & our customers love it, it brings in our customers.” (Food/drink)

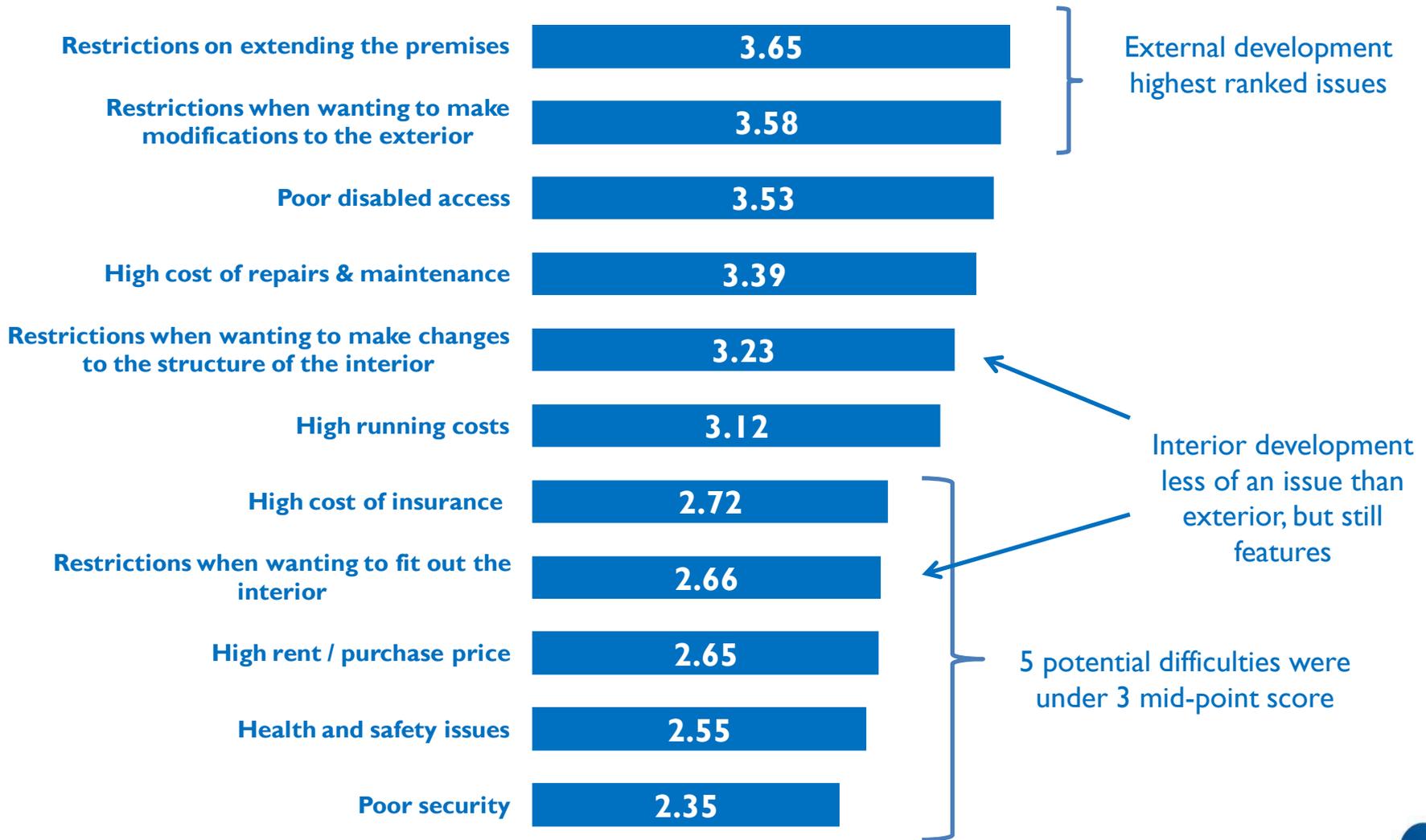
2. Drawbacks of a historic building summary

- **Whilst the feedback on their historical buildings was generally positive, businesses readily pointed out & scored the challenges & issues they faced**
- **With the list of prompted issues, the highest tended to be focused on the challenges of external development, both extensions & modifications to the exterior of their buildings**
- **Disabled access was also a highly rated issue & frustration**
- **Less of an issue were areas such as security & health & safety**
- **General access for staff & customers & parking restrictions were additional difficulties mentioned**



Restrictions on external development were top ranked issues

When asked to rate prompted difficulties on a 1 to 5 with 5 being greatest difficulty



Q16. To what extent does your business experience the following potential issues/difficulties DUE TO BEING LOCATED IN YOUR HISTORIC BUILDING? Please use a scale of 1 to 5 with 1 being no issue/difficulty at all and 5 being a large issue/difficulty. Mean averages excluding don't knows

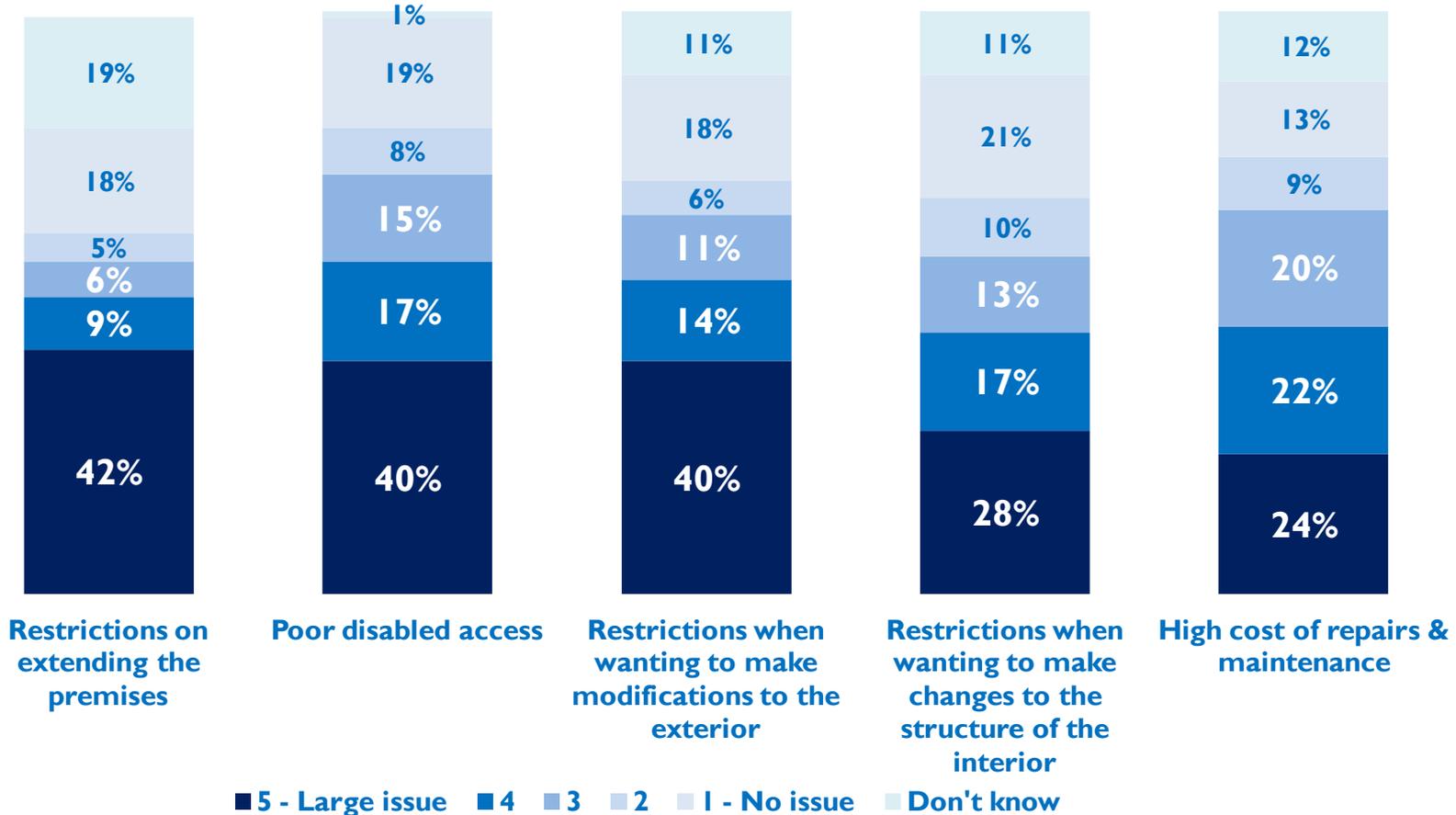
Base 509

Highest scoring difficulties

Nearly 1 in 5 couldn't comment on extensions



Nearly all businesses could make comments on disabled access

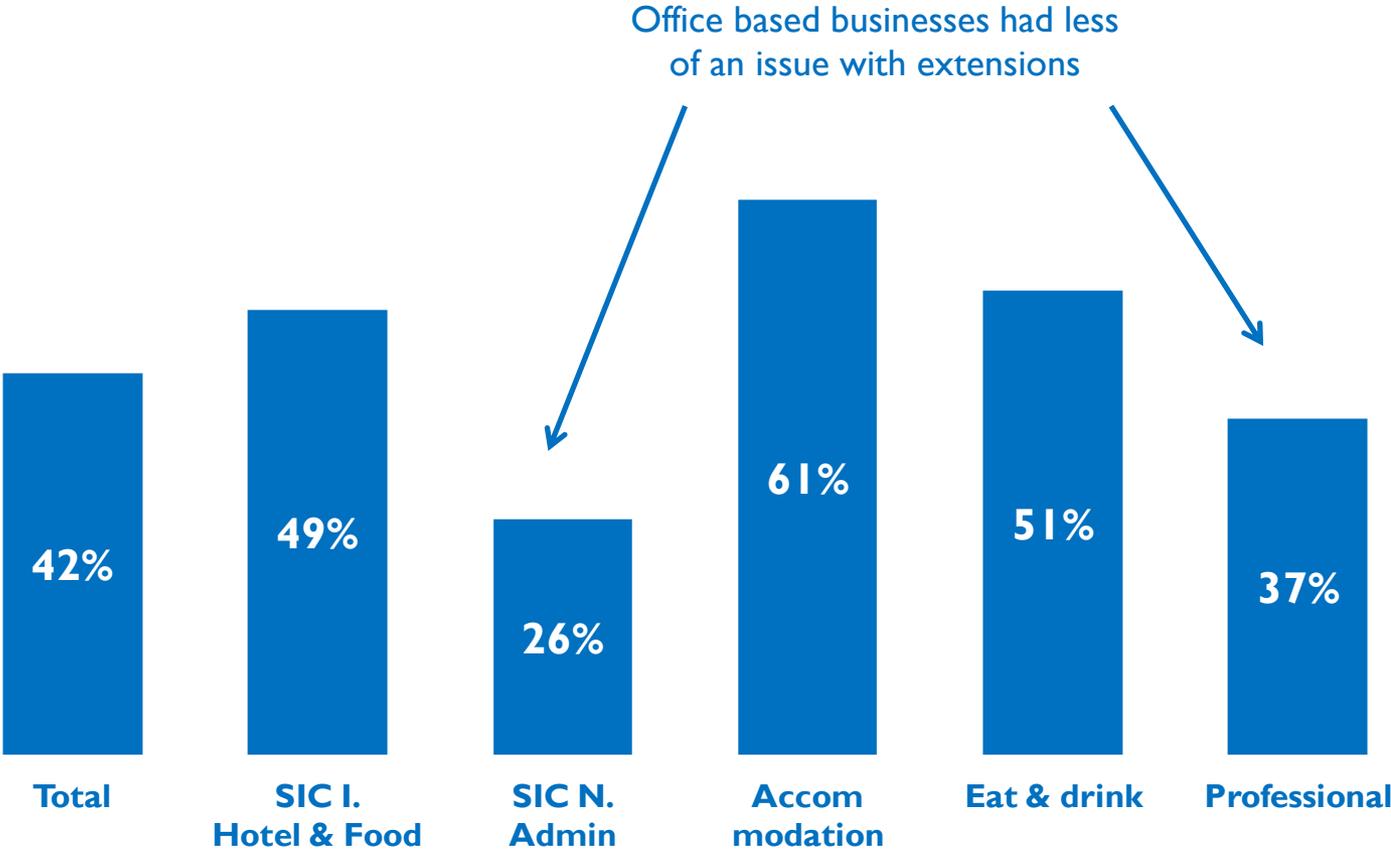


Q16. To what extent does your business experience the following potential issues/difficulties DUE TO BEING LOCATED IN YOUR HISTORIC BUILDING? Please use a scale of 1 to 5 with 1 being no issue/difficulty at all and 5 being a large issue/difficulty. Base 509

Hotels clearly had the biggest issues with extending, followed by food/drink

Those shown scored 5: greatest challenge to their business for:

'Restrictions on extending the premises'

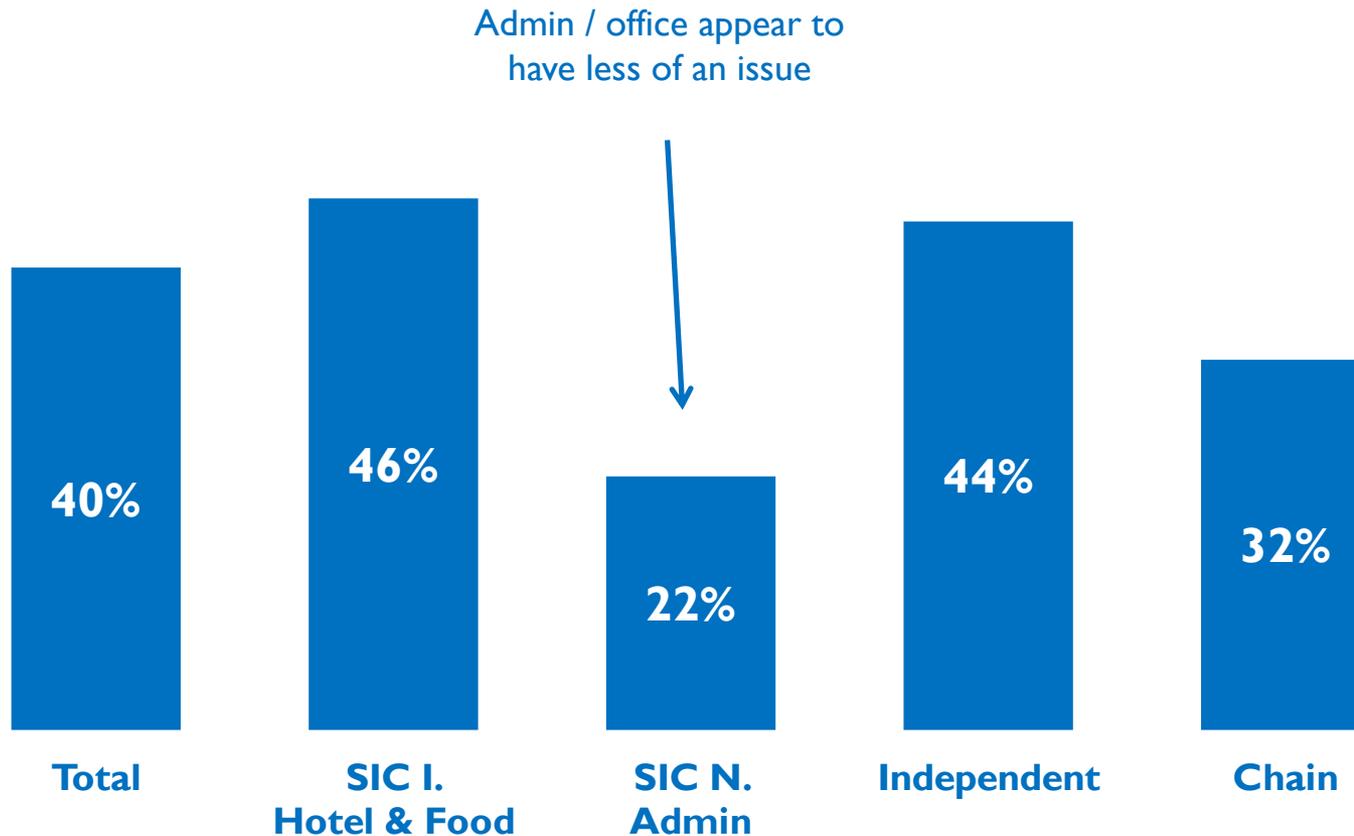


Q16. To what extent does your business experience the following potential issues/difficulties DUE TO BEING LOCATED IN YOUR HISTORIC BUILDING? Please use a scale of 1 to 5 with 1 being no issue/difficulty at all and 5 being a large issue/difficulty. Total base 509 Other vary

Hotel/food & independents were more concerned

Those shown scored 5: greatest challenge to their business for:

‘Restrictions when wanting to make modifications to the exterior’

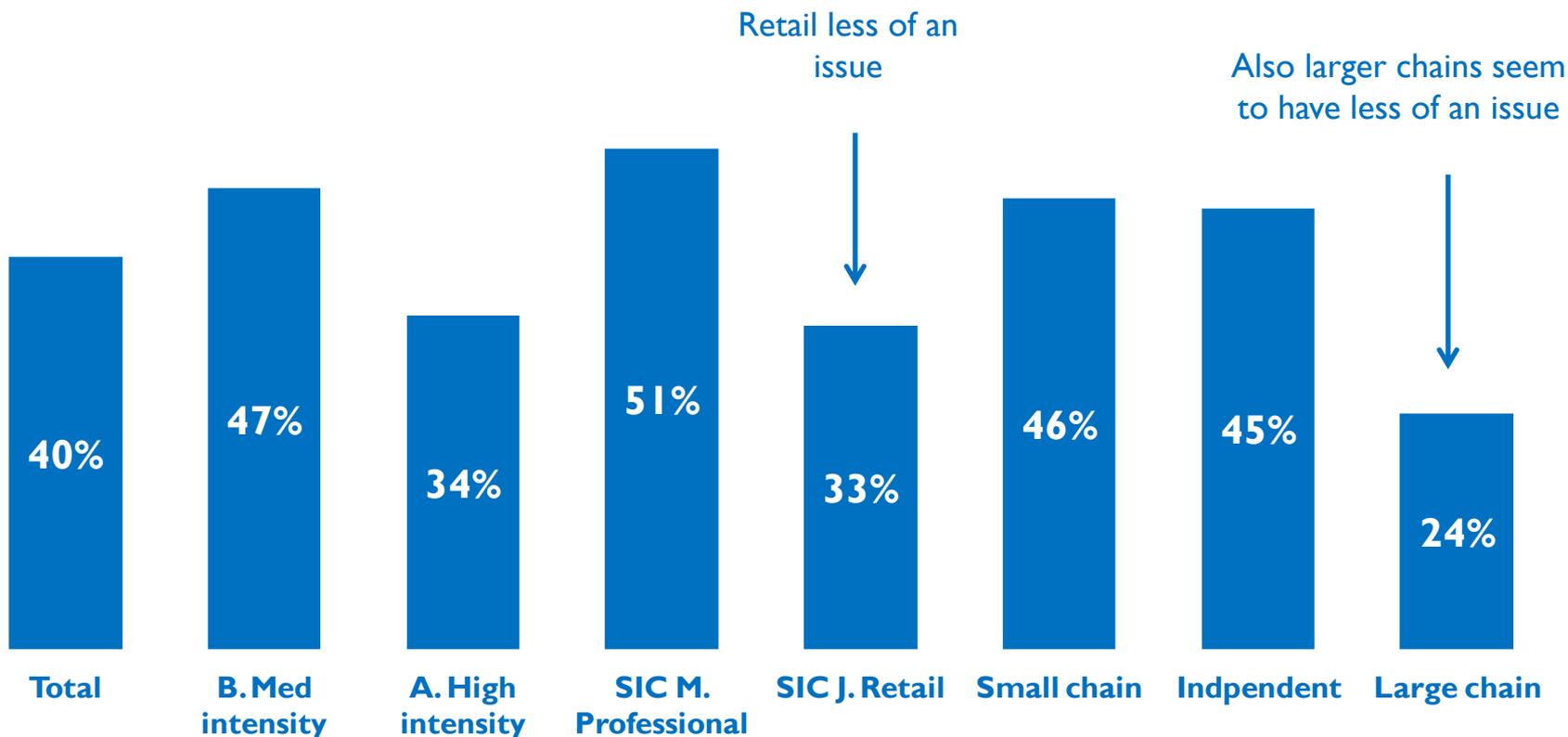


Q16. To what extent does your business experience the following potential issues/difficulties DUE TO BEING LOCATED IN YOUR HISTORIC BUILDING? Please use a scale of 1 to 5 with 1 being no issue/difficulty at all and 5 being a large issue/difficulty. Total base 509 Other vary

Professionals, med density areas & small chains biggest issue with disabled access

Those shown scored 5: greatest challenge to their business for:

'Poor disabled access'

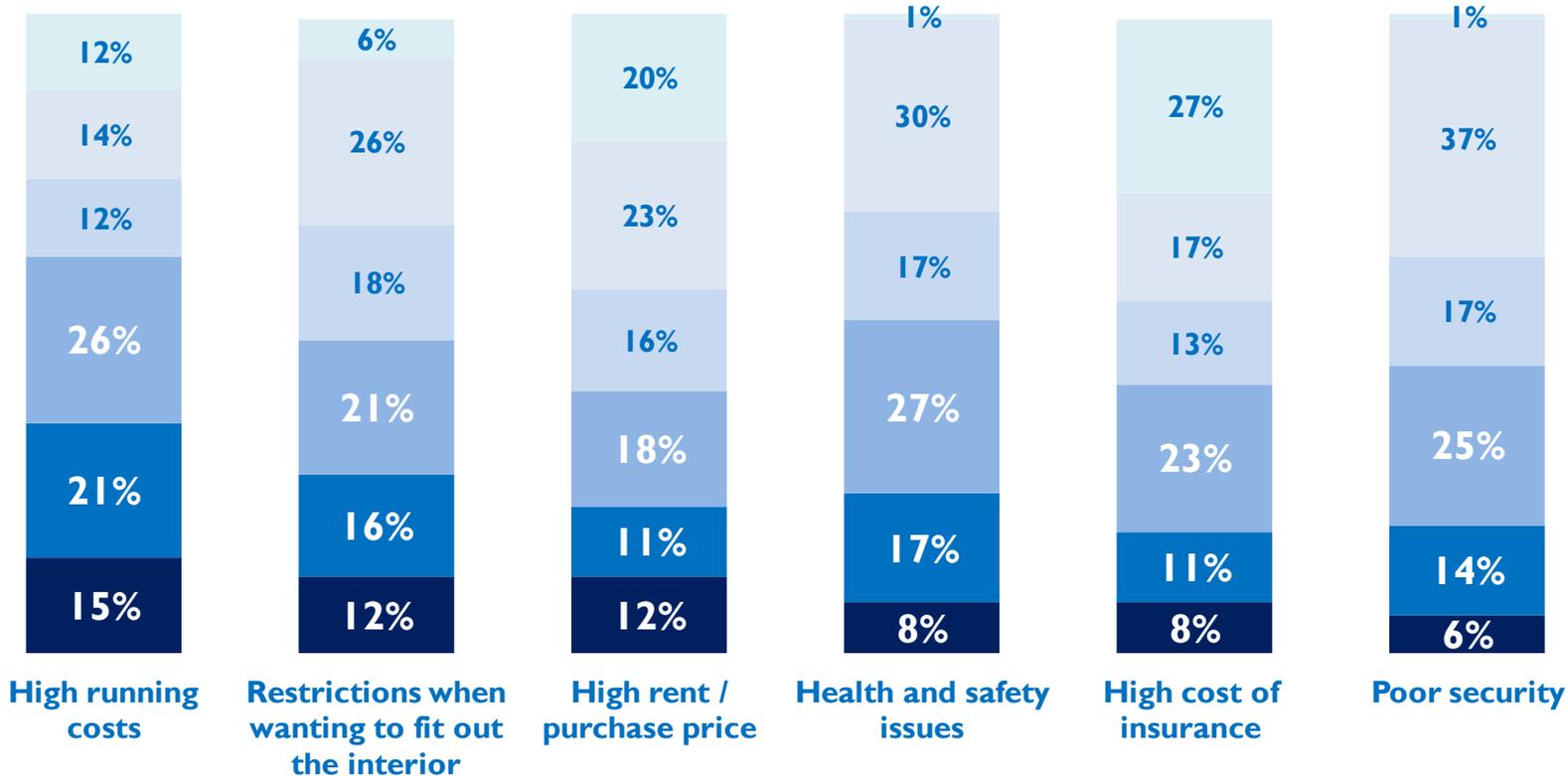


Q16. To what extent does your business experience the following potential issues/difficulties DUE TO BEING LOCATED IN YOUR HISTORIC BUILDING? Please use a scale of 1 to 5 with 1 being no issue/difficulty at all and 5 being a large issue/difficulty. Total base 509 Other vary

Lowest scoring difficulties

Over 1/4 couldn't comment on insurance costs

Over 1/3 claimed no issues with security



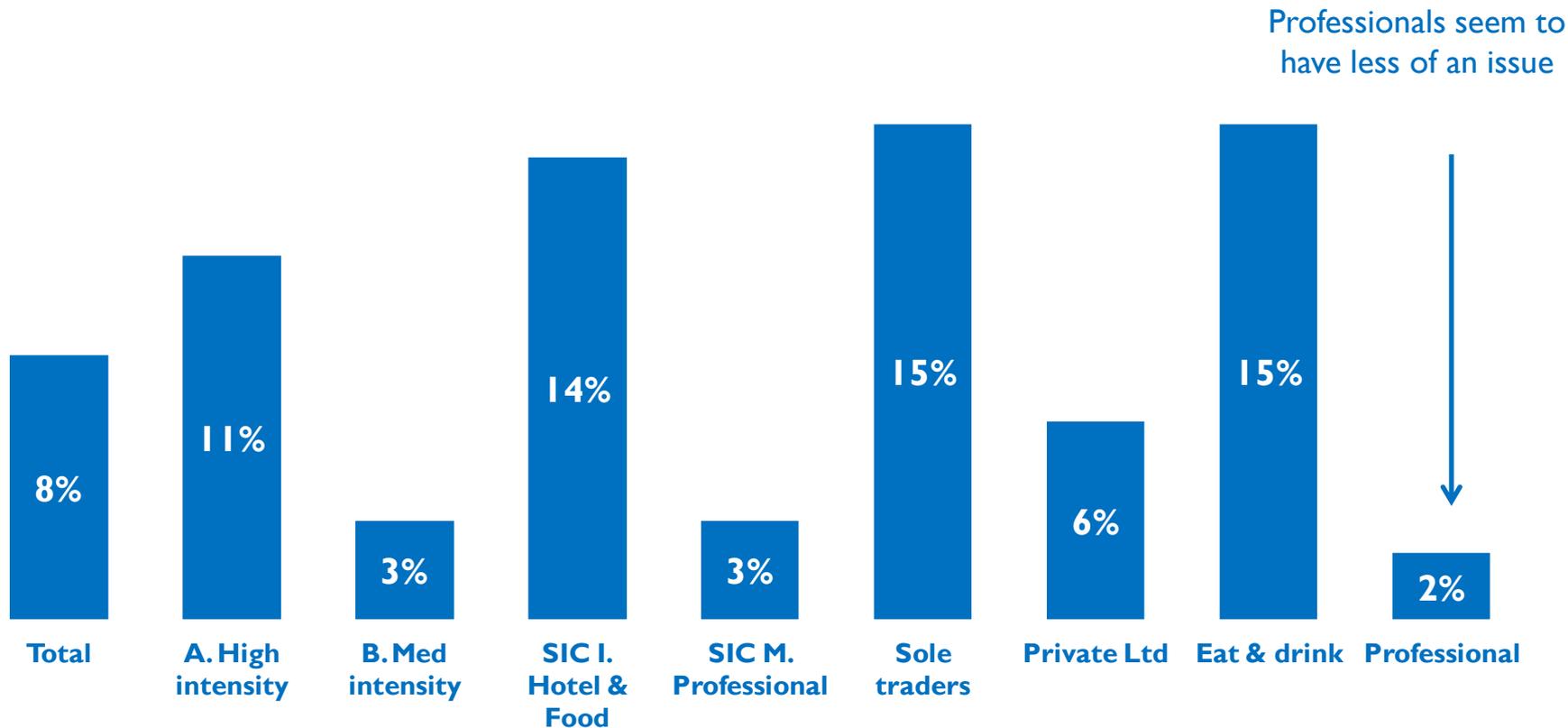
■ 5 - Large issue ■ 4 ■ 3 ■ 2 ■ 1 - No issue ■ Don't know



Hotel, food & drink, sole trader & high intensity area have more of an issue

Those shown scored 5: greatest challenge to their business for:

'High cost of insurance'



Q16. To what extent does your business experience the following potential issues/difficulties DUE TO BEING LOCATED IN YOUR HISTORIC BUILDING? Please use a scale of 1 to 5 with 1 being no issue/difficulty at all and 5 being a large issue/difficulty. Total base 509 Other vary

Access & parking restrictions can be an issue

- **Due to many being in city or town centre locations & in a concentration of historic buildings & roads, car parking as well as vehicle access times can be restricted**
- **This can be an issue for staff, customers & deliveries**
- **Other issues such as cobbled streets, narrow roads & entrances all added to the access challenges**
- **Parking & access restrictions appear to be getting more restrictive as time goes on & seems to be an increasing challenge for businesses in historic buildings**
- **Most work around these as best they can, but some do blame the local authorities for making it too restrictive**

“There are parking restrictions. This is because historic buildings tend to be in areas with restricted vehicle access” (Shop)

“Because of the parking businesses are being forced out” (Office)

“Access- as a retail property it is not the best, it is a cobbled market place and there is no rear access” (Shop)

“Draconian measures were put in place from the local authorities regarding car parking, so now there is no parking here for businesses and clients. There used to be street side parking when we bought the premises. (Office)

“Location: the time scale for deliveries & access has to be before 10.30 & after 16.30pm” (Office)

Inherent issues with layout & configuration appeared common

- **Layout can be a challenge with the functional operation of their business**
- **Restaurants & cafes appear to especially struggle**
- **Storage & stairs appear to be main issues with difficulties for staff to work in the awkward spaces**
- **For many, these issues can have commercial impacts; e.g. more staff needed to cover all floors**
- **However, it is often seen as the ‘luck of the draw’ to how their building is configured & were generally seen as ‘nuisances’ rather than ‘deal breakers’ with their occupancy of their historic building**

The building is not really suited to being a cafe. There are difficult stairs and sloping floors” (Food/drink)

“It is a difficult place to work in because of layout” (Shop)

“On balance, it’s more awkward for us ... practically wise to store things, there isn’t enough space, ... it’s an oddly shaped building, effectively it’s awkward to try & fit in kegs in certain places or cases of bottles” (Food/drink)

“It’s an old building, it’s a bit of a mish mash, some infrastructure doesn’t fit what we need it to do” (Food/drink)

“The shape of the building doesn’t lend itself positively to being a club, the layout of the building doesn’t suit the purpose” (Food/drink)

Difficult internal layouts can also impact other sectors

- **Other sectors such as manufacturing, services, education & offices can also experience limitation & restrictions due to the layouts of their building and the barriers to change**
- **This can mean that some parts of the building are not used due to the practical issues**
- **Moving around the building for staff & visitors can be tricky due to the nature of the buildings**
- **Contemporary working layouts, such as open plan, are often difficult in historic building**

“Too many levels , laid out incorrectly for manufacturing” (Creative)

“The layout is not ideal & you have restrictions on what can change.”
(Education)

“Half the property is a historic water mill. The historic part of the building is not suitable for an office space.” (Offices)

“Stairs again are small steep and twisty.”
(Shop)

“Inside the building, it is higgledy piggeldy rather than straight lines.” (Shop)

“Issues due to being in a listed building as this is not as suitable for office work. Being an old house it is not open plan so hard to do collaborative work” (Offices)

The importance of a good landlord was often emphasised

- **The role of the landlord in supporting the business & the building was clearly emphasised**
- **The importance of pro-active building maintenance was also emphasised**
- **Leases obviously varied & as such the role of the landlord varied regarding their maintenance role**
- **Most seemed to feel they have a responsible & responsive landlord who were pro-active & supportive**
- **A few were less satisfied & they were struggling to get their landlords to take action on the building**

“No issues with the building, landlord is very good with upkeep & everything is well maintained” (Food/drink)

“No problems, it is well maintained by the brewery” (Food/drink)

“We are on an old lease so I only do internal repairs and the landlord looks after the outside of the building. It's a private landlord not a commercial one. We have a very good relationship with the private landlord” (Retail)

“We have a new landlord in the last few years and they do not look after the premises at all, we have to chase them for refurbishments, being an old building problems do crop out & they are not very good at maintaining the building. They also do not get qualified people to fix things they just try to do it themselves. The last landlord was a lot better & he would fix the issues the next day” (Retail)

Council landlords were frequently complained about

- **Businesses with their local council as their landlord, were often quick to complain about the help they provided in keeping up with the maintenance of their building**
- **Many were reactive & slow to deal with issues**
- **This appears to have got worse since the reduction in general local government spending & continued perceived tightening of council spending**

“The council have no money to live up to their end of the lease. This is a large difficulty to me, For example when it rains, water runs down the walls because the gutters and downpipes have not been cleaned. The council can't seem to realise that if they don't deal with things like this, it will cost them more in the long run..” (Shop)

“With regards to the city council being the landlord they are not very good at repairs & upkeep.”
(Museum)

“The council is short of money & not repairing old properties as they should do. The result is that many look worse for wear.”
(Shop)

“We would probably move if we could afford it, as the rent has gone up & the Landlord does not do any maintenance”
(Manufacturing)

Maintenance & upkeep was a worry & concern for many

- **Many were concerned about the amount & cost of maintenance of their historic building, especially as repairs & replacements have to be like for like, or reused materials**
- **But most of these maintenance issues were not unexpected & were seen as part & parcel of occupying a historical building**
- **Many are happy to put up with some of the on-going issues & often work around them. Or wait until they feel they can afford them.**
- **A few also had concerns about the potential dilapidations bill at the end of their tenancy due to the cost of work on historic buildings**

“It’s old & things do wear out, so not everything works really properly”
(Shop)

“Old building which can be difficult to maintain”
(Offices)

“Maintenance issues regarding the age of the building & we have restrictions because of the age of the building. we are a cafe but we cannot fry in the building because of the restrictions” (Food/drink)

“There is a problem with the roof and leaks. We are on a corner block, with a very small ceiling on top of the shop & all the water drains onto our shop. There have been leaks in the past. It is a bad design that can't be rectified & it requires constant work.” (Shop)

“There has been a number of floods which have caused huge disruption to our business. Piping and plumbing is an issue” (Creative)

Leaks were a common complaint

- **Water leaks & plumbing appear to be common issues with historic buildings**
- **Many appear to be expensive & difficult to remedy, with some continuing to have on-going problems**
- **Leaks can be due to a variety of issues including old roofs, uneven flooring, unusual configuration, etc. many of which seem to directly relate to occupying a historical building**
- **Particularly seems to be an issue with food & drink businesses; for obvious reasons**
- **Some commented on reluctance for landlords to sort out these difficult repairs especially if the landlord's are responsible & liable**

“It is an old building with lots of repairs so we have to wait ages for repairs. We had a window repair & it took months because it is an old window. There are disadvantages such as old walls and an old ceiling & leaks”
(Food/drink)

“The disadvantages are that the roof leaks, the stairs need major work, the rent is very high. There are building issues” (Shop)

“Occasionally when it rains very heavily we get a leaking roof and being listed there are issues with fixing it.”
(Food/drink)

“The premises are old & there has been a water leak above staircases for several years & landlord just doesn't action repairs”
(Food/drink)

“The repairs are difficult, we have a good landlord, but we often have repetitive issues, such as leaks in the same place”
(Office)

Poor disabled access is a frustration for many occupiers

- **Businesses generally want to fulfil their obligations to provide universal access**
- **This is especially an issue for those that are consumer facing such as food & drink or those that deal with older people e.g. charity, medical, community facilities, etc.**
- **They want to make changes to allow better access, but due to nature of their historic building they are unable due to planning restrictions or the quirky nature of their building**
- **Where possible creative solutions have been found with portable ramps, separate entrances, working with neighbours to provide toilets, etc**
- **Some are still trying to work on practical solutions many years after they moved in!**

“Lack of disabled access & the grading of the building makes this impossible to see how we can provide this” (Shop)

“It could be better but with being an old building there are some issues, the step at the front isn't very good for access.” (Shop)

“Just the issue of not being able to provide disabled persons access , as the geographical location prevents this & also as is a listed building.” (Medical)

“By law we have to provide equal access but Historic England will not let us, we have a front entrance with steps & there is no way it can be equal access, Historic England need to know that old buildings need to be brought up to date.”

(Community)

“Only the disability issues as we are on several levels it is not suitable for disabled people to use ” (Hotel)

Temperature control appears a common challenge

- **Cold winter & hot summer temperatures seem to be an issue with many historic buildings**
- **Historic buildings appear not to be up to modern standards with regards to insulation**
- **Complaints about drafty windows & doors were fairly common**
- **Offices seem most vulnerable to cold as most workers are sedentary**
- **For most there appeared to be no obvious remedy especially with associated listed building restrictions**
- **However, most occupiers seem to put up with it as one of the drawbacks of historic buildings**

“Winters can be grim as we're sat down all the time & the premises aren't insulated” (Office)

“It's absolutely freezing” (Office)

“There is an issue with the general warmth of the shop. It gets cold because the building does not have modern insulation.”
(Shop)

“Heating could be better, it's very cold.” (Shop)

“In the summer gets very hot & uncomfortable as there is poor insulation .We have to use portable air conditioning units, which are inadequate, as we are not allowed to install permanent ones as it is a listed building. In winter it is very, very cold due to poor insulation levels again & it is difficult to heat it.” (Warehouse)

“Office not well insulated, it is very hot in summer & cold in winter” (Office)

Health & safety is a concern for many

- **By their nature, historic buildings can have a number of inherent potential health & safety issues that business worry about i.e. low beams, steep stairs, uneven floors, narrow corridors, etc.**
- **This concern is for both staff & customers**
- **Meeting the various regulations can be a strain on businesses both in terms of cost & what is allowed**
- **Restrictions also mean that some parts of the historical buildings cannot be safely used or particular equipment is not allowed i.e. deep fat fryers in small areas**
- **Also there are the practical challenges of working with historical building e.g. getting fire doors to fit on uneven floors**

“We have stairs at the back that are a fire exit however with a pushchair or with limited mobility they would be hard to navigate & due to the listed nature of the building we cannot change them.” (Office)

“The premises are hot in summer & cold in winter. One of our volunteers has a lung condition.” (Shop)

“We are in an old building, we run between various floors. It is an old structure & it is a bit risky. I am the only person allowed to go into the attic or cellar; it is very dark & I have broken a few toes in the process!” (Shop)

“The low beams are a hazard” (Food/Drink)

“It’s a little bit difficult to make things fit the (H&S) regulations” (Food/drink)

Difficulties reacting to changing demands

- **Demands from customers & markets are constantly changing & businesses need to be able to react to remain competitive**
- **Some businesses are finding it difficult to react to these changing demands due to the restrictions imposed by occupying a historic building**
- **Whether this be expanding their business, providing new products, using new equipment, utilising new technology, etc**
- **Customers expectations are constantly rising & businesses want to be able to meet them**
- **Business needs are also constantly changing especially with regards to new technology, which historical buildings & areas sometimes find difficult to adapt to**

“We are a fast moving restaurant & we change things a lot. We are limited in what we can & cant do, especially with large equipment & Air Conditioning.” (Food/Drink)

“We can't get fibre broadband, which is quite inconvenient in 2018” (Office)

“There is no room for improvement.” (Office)

“Our main issues are education which is a changing environment, so the building needs to match the changing educational needs. This is not a problem, but a challenge” (Education)

“We can't have double glazing & air conditioning that is one of the luxuries that you would expect hotels like ours to have” (Hotel)

“We had issues with broadband in and out of the building. Virgin had to lift the cobbles in the street & put them back as they were because we are in a conservation area..” (Office)

Some underlying anxiety

- **Despite generally being positive about their historic premises, there was the occasional undercurrent of unease & concern about their future & their building**
- **The liability if things go wrong can be a worry for some because of the challenge of getting their building fixed & the perceived high costs & inherent difficulties, especially if own or have full-maintenance lease**
- **These building worries are additional concerns on businesses that already have a range of challenges in the current business environment**

“I have curved windows if they were damaged I think finding someone to replace them would be hard.” (Shop)

“It takes too much money to maintain.” (Shop)

“Insurance costs are too high.” (Office)

“Our rent and rates are very high as its a really hard & competitive market” (Shop)

“If I am wanting to change something, for example a new window, the whole frame could not be replaced as I would need planning permission. It would cost £1000 for a single pane of glass.” (Shop)

“We have a big problem with business rates as we can not divide the property & so are having to pay huge business rates.” (Office)

On balance ...

- **Despite readily identifying the down sides to occupying a historic building, most still felt the positives clearly outweighed the negatives by some way**
- **Many felt it was a privilege running their business in historic buildings & fortunate to have such a business asset**
- **Most issues were generally seen as ‘nuisances’ rather than deal-breakers**
- **Apart from a few, most saw their future in their historic buildings as it was often integral to their business**

“It is a great talking point, people always seem interested in the building. ..we also have a bit of damp from the basement, but all adds to the character.” (Office)

“You must respect being in a historic building. It is a privilege to work in one. Open plan offices are sterile & miserable” (Office)

“It is a pleasure to be in an historic building but there are advantages for business weighed up against old historic buildings” (Shop)

“We accept that any medieval building has it's drawbacks for working or living in” (Shop)

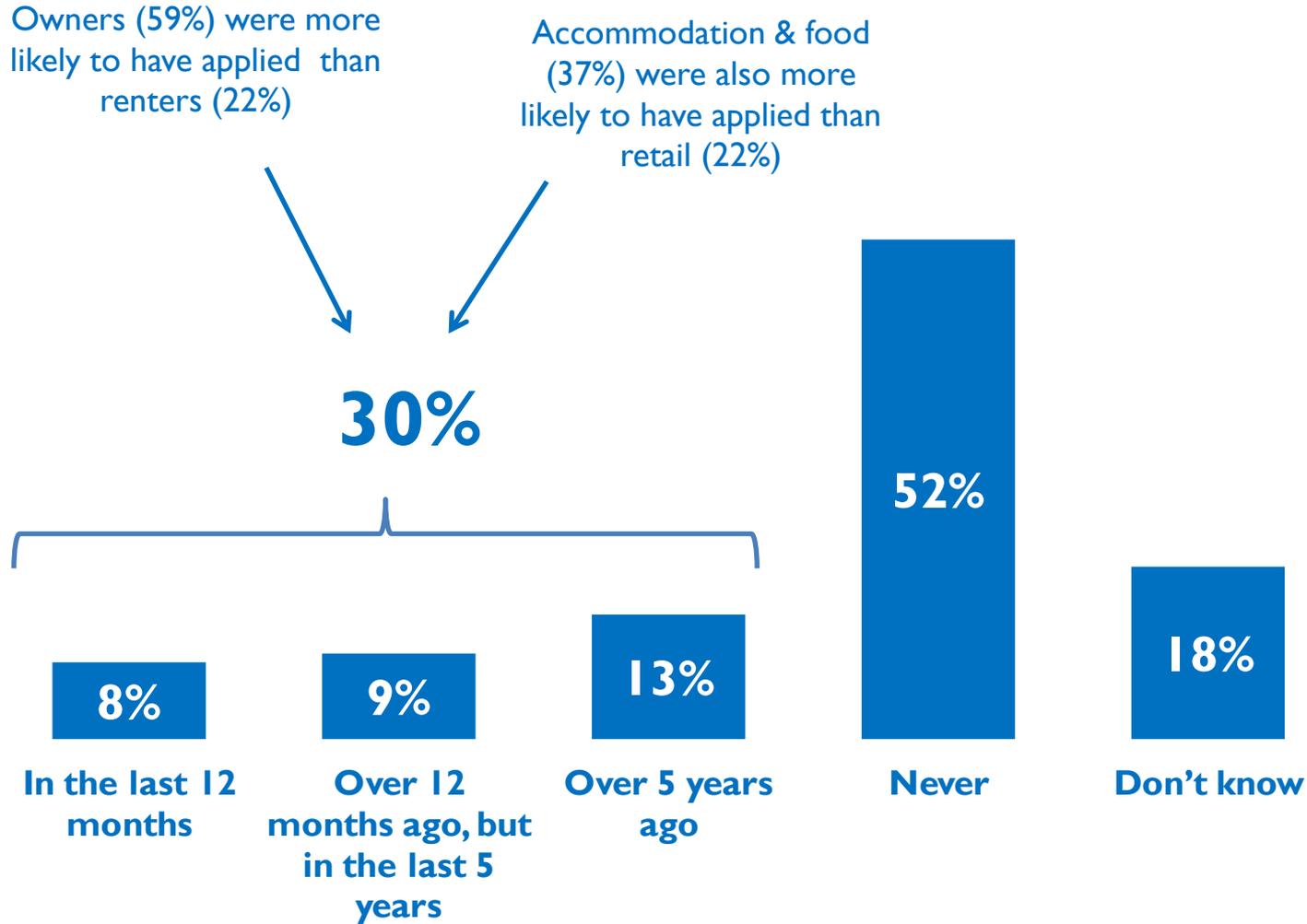
“We could have moved into the new build offices over the road but I wanted to move into this one as I like listed buildings, this one has lots of character.” (Office)

3. Listed building consent feedback summary

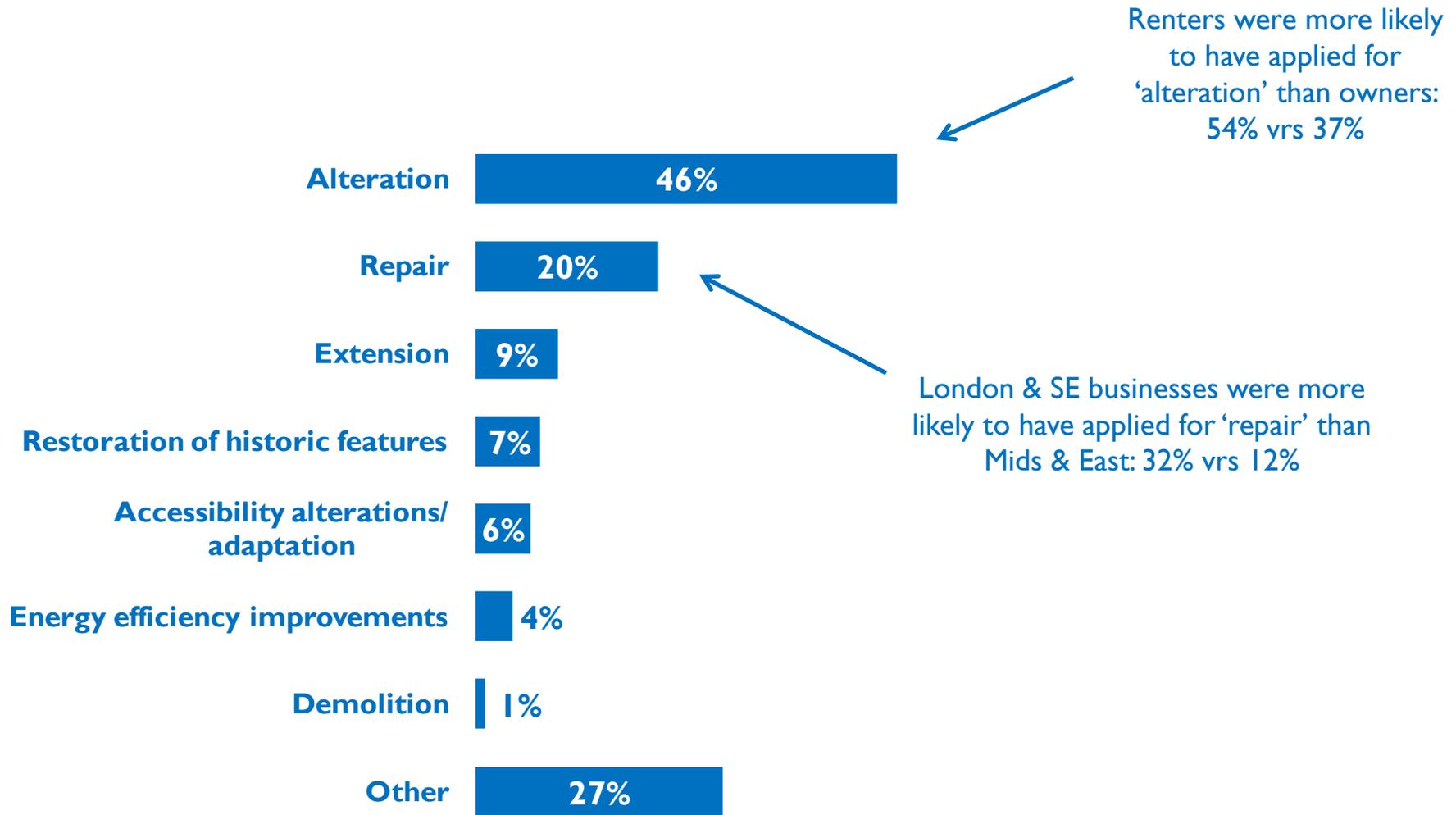
- 3 out of 10 had ever sought listed building consent; owners of buildings & those in the hospitality industry were most likely to
- Alteration was the most common consent with nearly ½ of applicants
- However, about 1 in 5 of applicants weren't able to make comment on the process
- Just over ½ felt it helped them make changes & avoid damaging the significance of the building
- But just over ½ claimed the process was 'important but burdensome', & just over 1 in 5 felt it was an unnecessary waste of time
- There were many comments made related to the inherent difficulties in making changes to their historic building
- Most appeared to want to do the right thing by the building, but found the process a bit of a minefield: a frequent complaint was perceived inconsistent & subjective advice



3 out of 10 had ever sought listed building consent

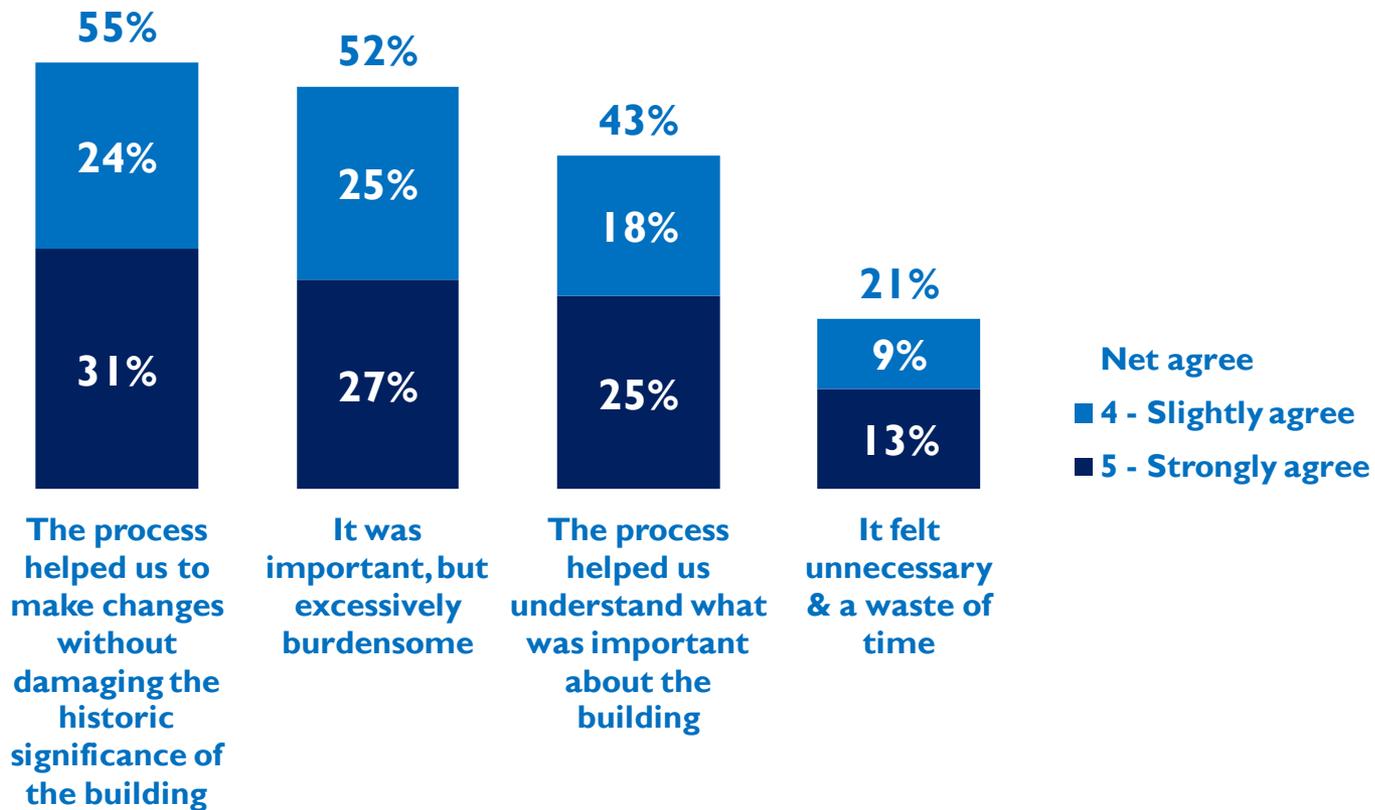


Nearly ½ who asked for consent applied for an ‘alteration’



Opinions were mixed about the consent process

N.B. The sample size is relatively small at 126 businesses & after 'don't knows' have been excluded



Q20. To what extent do you agree or disagree with the following statements about your last experience of the consent process?
Base 126 excluding don't knows

The difficult challenge of making changes

- **The perceived issues & challenges of making changes to their building were frequently mentioned**
- **As well as the regulations & restrictions, there were physical challenges with the buildings & the associated costs that limited change**
- **Many businesses seemed to accept that this was one of the prices that they had to pay for being located in an historic building**
- **When changes took place, most were keen to keep the character that originally attracted them to the building**

“It is harder to make changes, otherwise it is a lovely building to work in”
(Dentist)

We cannot change the interior. Also we are limited to how much we can do maintenance & the building looks old and shabby.”
(Education)

“The struggle of adapting the building, we can't really change much” (Hotel)

“Excellent space but we're finding it hard to improve because of heritage England” (Community Hall)

“Because the age of and nature of the building, restrictions prevent us making improvements” (Hotel)

Some frustration expressed with the bureaucracy

- **Comments were made on the challenges of making changes to their building & most were generally negative**
- **Some complained of a lack of understanding & help from local authorities**
- **Much of the advice on changes appeared to be subjective / personal opinion rather than objective & evidence based**
- **This made understanding the decisions sometimes difficult & added to the frustration**

“The conservation officer can say you are not allowed to make changes & it can go on for years” (Food/Drink)

“The city council officials have no idea how to run a business” (Food/Drink)

“Having to get permission to prune trees in the garden” (Office)

“Before we had the annex we were told we could not build better access to the main building. We had a meeting with the council who told us we could not do this ... there was way too much bureaucracy” (Manufacturing)

“Local councils are ridiculously incompetent, you can't get through on the phone, and they are very incompetent in dealing with applications, there is no customer service or advice” (Hotel)

“The issues as a listed building don't actually identify the features they are trying to protect as they are not specified anywhere. So we get inconsistent decisions when applying for any changes and are at the whim of the listings officer who can be "Bloody minded" .eg. not allowed to change ordinary wooden skirting boards.” (Office)

The process was often seen as challenging

- **Few commercial considerations or understanding of running a business was present from the advisors & there was little perceived compromise**
- **Advice was also sometimes seen as inconsistent at times, which made it difficult to understand the decisions & the best way to progress the application**
- **Protection of previous alterations was a particular frustration for some**
- **Practical considerations were rarely taken into account & the process was generally seen as lengthy**
- **For some, the language & jargon was difficult to understand & navigate**
- **Some tried to find their own workarounds for the issues in order to avoid the process**

“We can’t do any adjustments to the front of the building because of its listed status, so we’re always working around the parameters of what is viable” (Food/drink)

“None of us are stupid, none of us are trying to harm the building with what we’re doing, we’re just after a constructive framework”
(Food/drink)

“You have to prepare well in advance, & we have found that if we haven’t then we have to delay it for a year”
(Hotel)

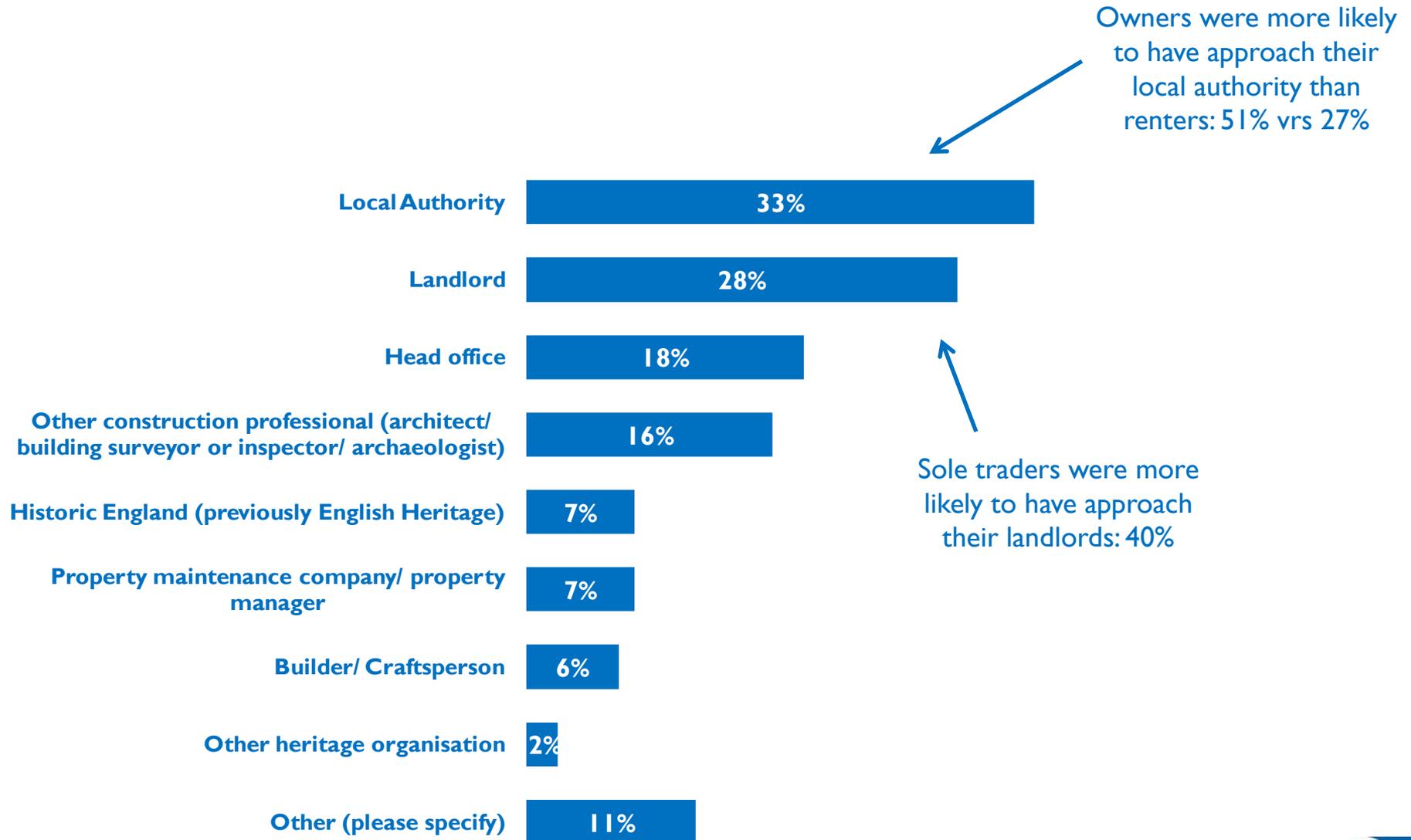
“We put in an application that copied what next door had done, because next door were successful, & then we got told that that wasn’t acceptable, it needed to be less like that & more like this” (Food/drink)

4. Building care & experience of skilled tradespeople summary

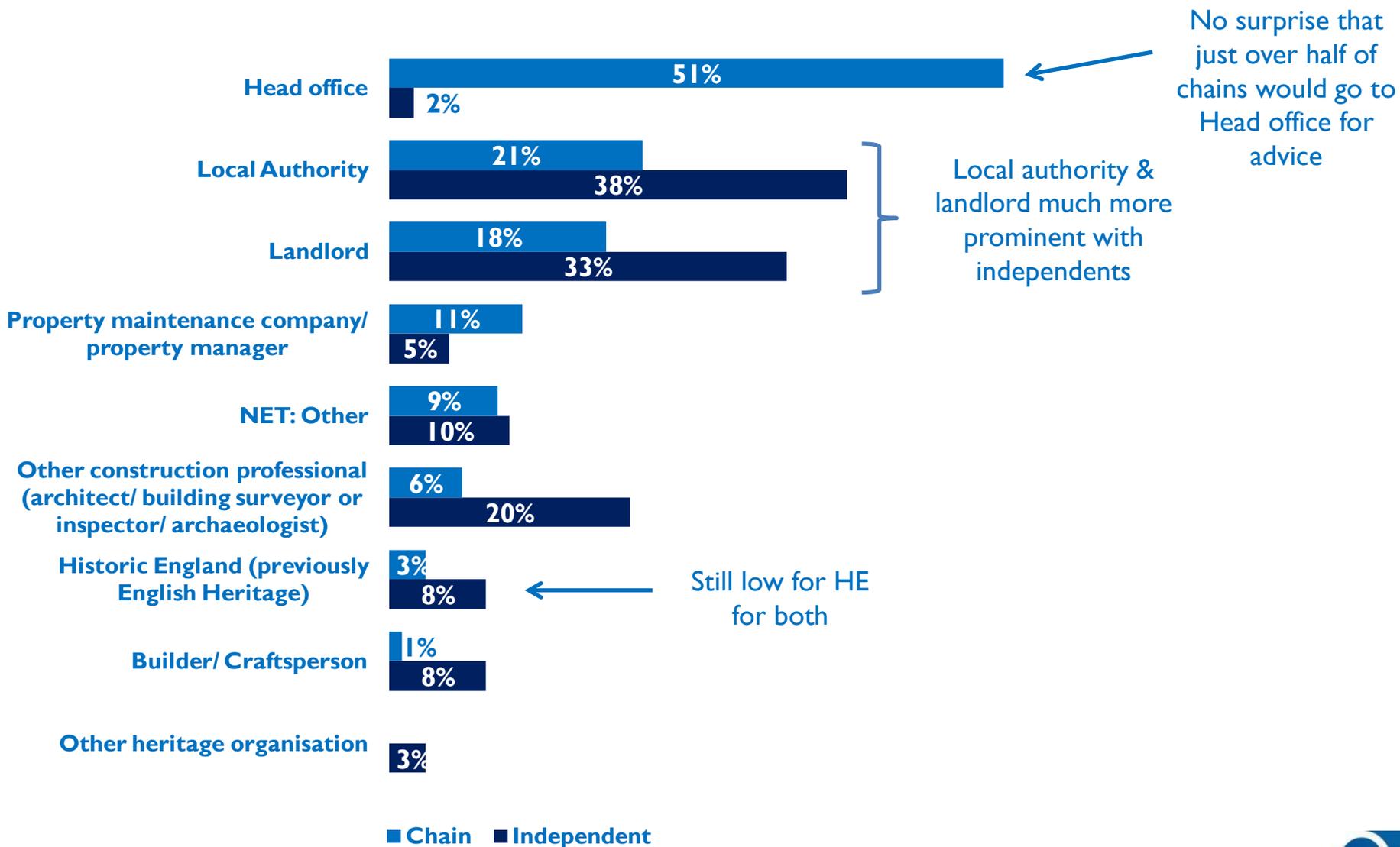
- **Third would go to their local authority for advice on caring for their building & 28% their landlord**
- **Just over 8 out 10 always considers using skilled tradespeople on their building. Especially those in the pub & restaurant trade, owners of buildings & those in London & SE**
- **Just over $\frac{3}{4}$ know skilled tradespeople to work on their building. Again, the hospitality industry & owners are more likely to know skilled tradespeople**
- **Just over $\frac{1}{4}$ admitted to finding it difficult finding these skilled tradespeople to work on their building. Especially owners & those in lower intensity heritage areas**
- **Higher concentration of historic buildings seems to mean there are suitable tradepeople that are known, it just seems an issue getting work done in a timely manner & at a reasonable cost for some**
- **Renters often seem to go through their landlords for repairs**



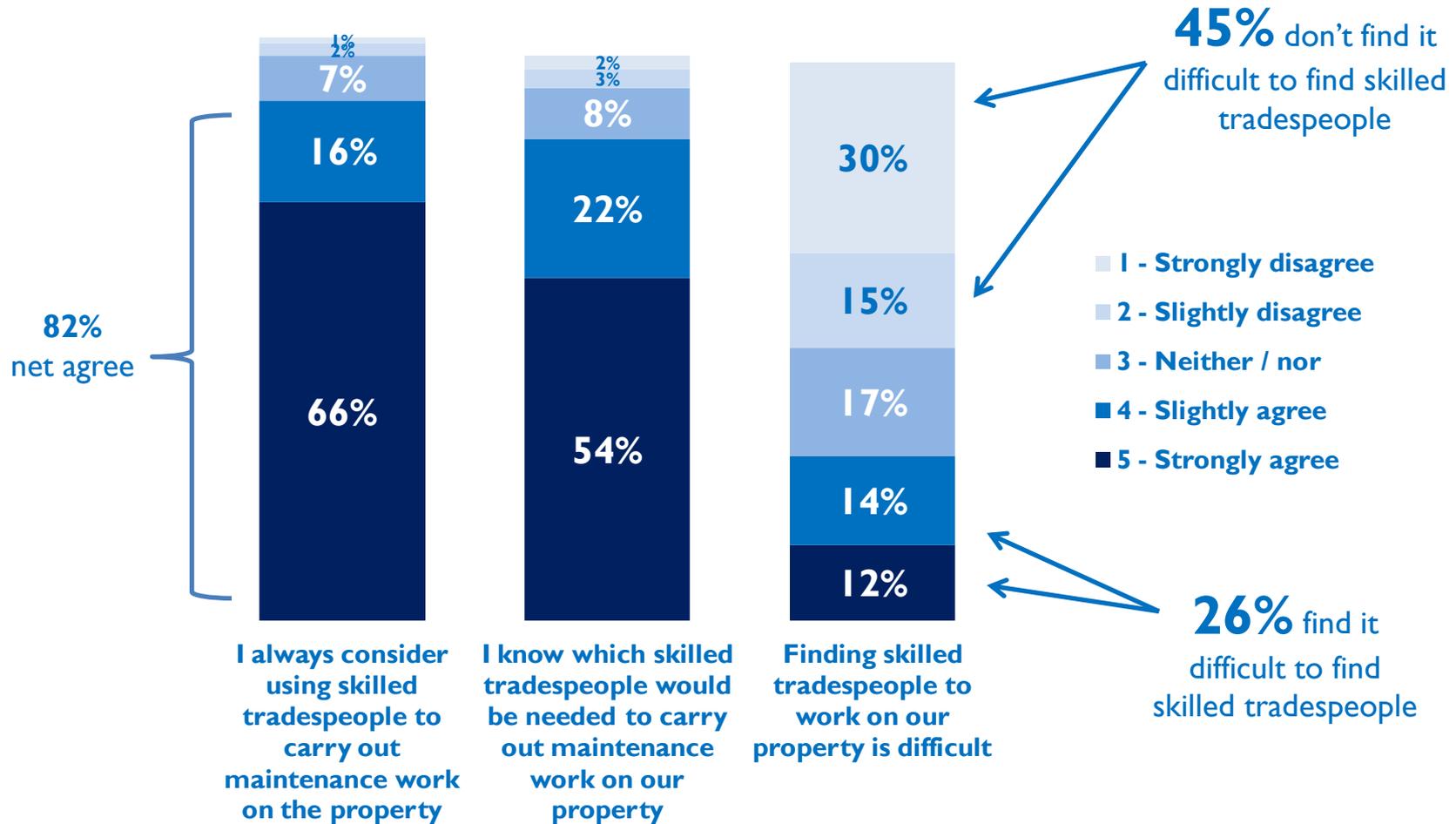
Local authority most frequent source of advice on care of building



Clear variation where 'chains' & 'independents' would go for help



Most don't appear to have an issue finding suitable tradespeople



Pubs, restaurants & hotels most likely to use skilled trades people

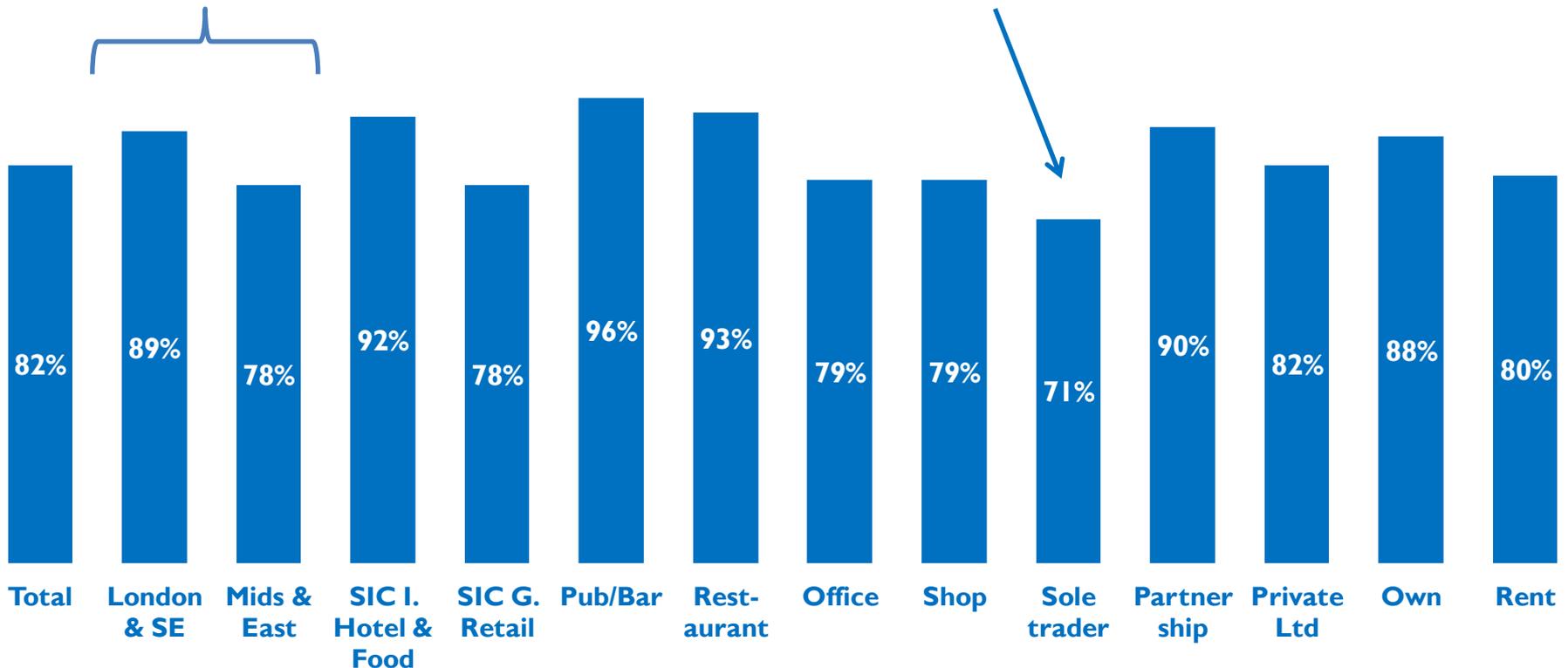
Net agree percentages

Statement tested & percentage that agreed shown below

“I always consider using skilled trades people to carry out maintenance work on the property”

London & SE more likely to use than Midlands & East England

Sole traders least likely



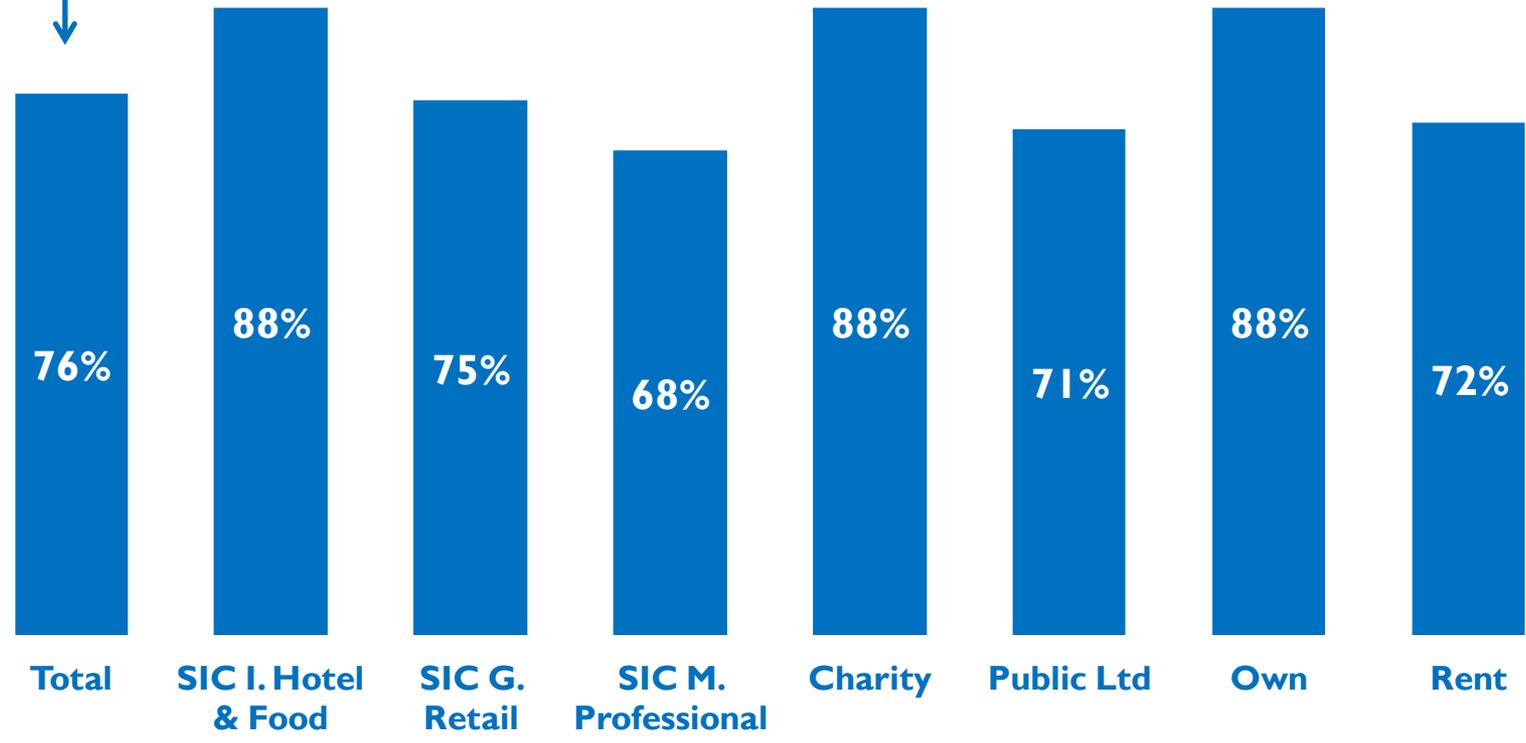
Hotel/food, charities & owners more likely to know trades people to use

Net agree percentages

Statement tested & percentage that agreed shown below

“I know which skilled tradespeople would be needed to carry out maintenance work on our property”

Just over ¾ know skilled trades people

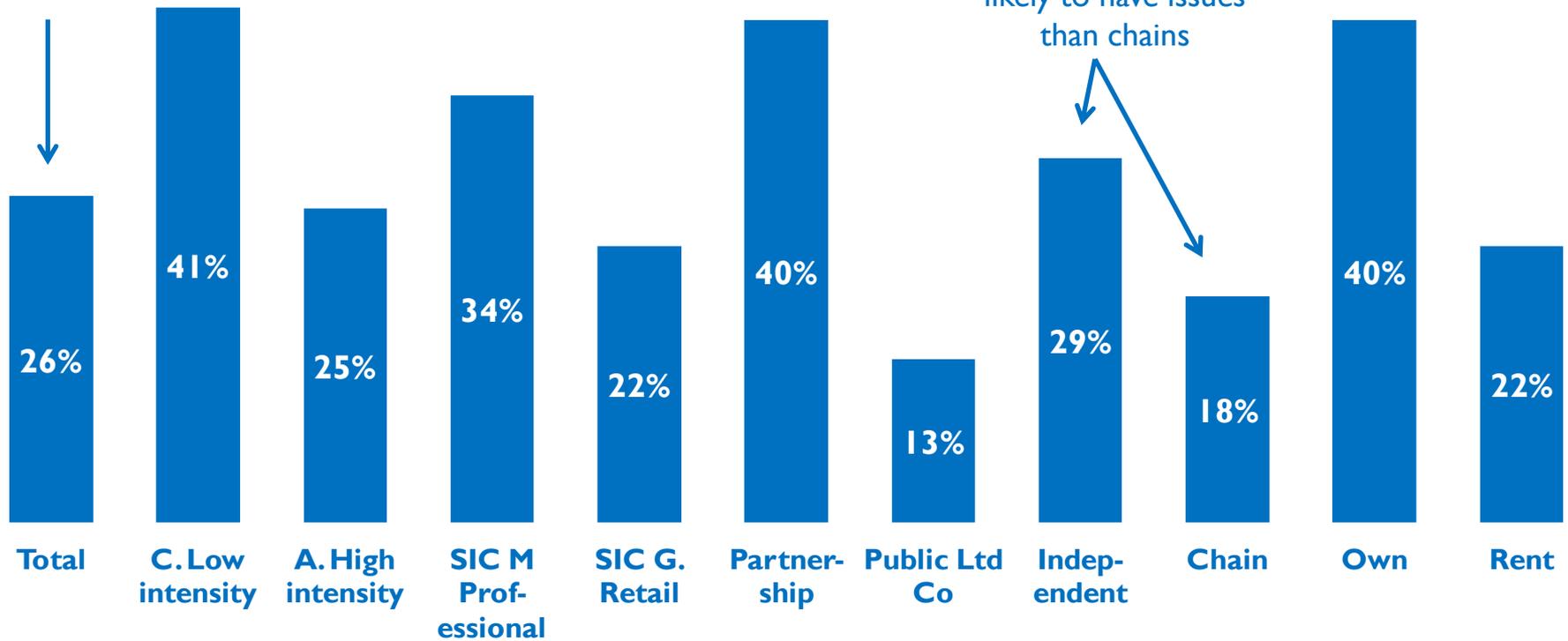


Low intensity areas, partnerships & owners more likely to find issues finding skilled trades people

Net agree percentages

“Finding skilled trades people to work on our property is difficult”

Just over ¼ have difficulties finding skilled trades people



Most seem to have developed a network of tradespeople over the years

- **Many businesses seemed to have built up a list of local tradespeople to help out: often through ‘trail & error’ until they find trusted contacts**
- **Also due to often the concentration of historic buildings in these towns & cities, many of the local tradespeople are well used to working on historic buildings**
- **For some, their landlords sort out repairs & maintenance; all depends on the conditions of their lease**
- **Timing & cost of repairs can be an issue due to the nature of their historic buildings & the inherent challenges**

“The builders round here know perfectly well what the local regulations are & what is the correct way of doing things” (Shop)

“Yes well at the beginning it was hard [to find tradespeople] ... there’s not a lot of carpenters out there who can do it” (Hotel)

“It would be the landlord’s responsibility (to find tradespeople), we don’t kind of get involved with that really” (Creative)

“Getting trades people for repairs isn't always that easy within a reasonable period of time, so we have to plan to get them in advance for repairs & maintenance” (Office)

5. Building & liability insurance summary

- **Around half of interviewees were unable to comment on insurance matters**
- **This was because for chains (i.e. pubs, retail, food & drink, etc) insurance was often handled centrally at their head office**
- **Also with those that were renting their offices some insurances, such as building insurance, was sourced by their landlord: although probably paid by the tenant**
- **Only 1/3 (35%) could name their insurer for buildings & liability insurance & a wide variety of insurers were mentioned with no obvious concentrations**
- **When deciding on insurance, extent of product cover was the most important factor, followed by claims handling reputation & a low price.**
- **The impact of a major fire was the most concerning business risk, especially for accommodation/food businesses & if they owned their premises**
- **Terrorism was the least concerning risk with nearly 1/2 not being concerned at all**



Insurance company	Counts	Percentage
Allianz	23	4.5%
Aviva	22	4.3%
Hiscox	11	2.2%
NFU	11	2.2%
Axa	8	1.6%
Lloyds	6	1.2%
Zurich	6	1.2%
Liverpool Victoria	5	1.0%
Legal and General	4	0.8%
Ecclesiastical	3	0.6%
Towergate	3	0.6%
Aeon	2	0.4%
Barbican	2	0.4%
Blue Fin	2	0.4%
Congregational	2	0.4%
Regency	2	0.4%
TH March	2	0.4%
Royal and Sun Alliance	2	0.4%
Other	63	12%
Don't know	185	36%
Do not know - dealt with by landlord	29	6%
Do not know - dealt with by head office	29	6%
Do not know - dealt with elsewhere	7	1%
Refused / no answer	80	16%
Base	509	

Current Insurer

When asked who they are currently insured with, a variety of companies were mentioned with no obvious concentration

Generally, there was a lack of awareness or reluctance to say who the organisation & building was insured with

Just over 1/3 (35%) could name their insurer



65% didn't know or refused to answer

Q29. Which company is your building and liability insurance with?

'Cover scope' clearly most important factor for choosing provider

When asked to rate the importance of factors when choosing insurer on a 1 to 5 with 5 being most important



All factor scored over the mid-point score showing that all those prompted were important & the variations between the score were not huge

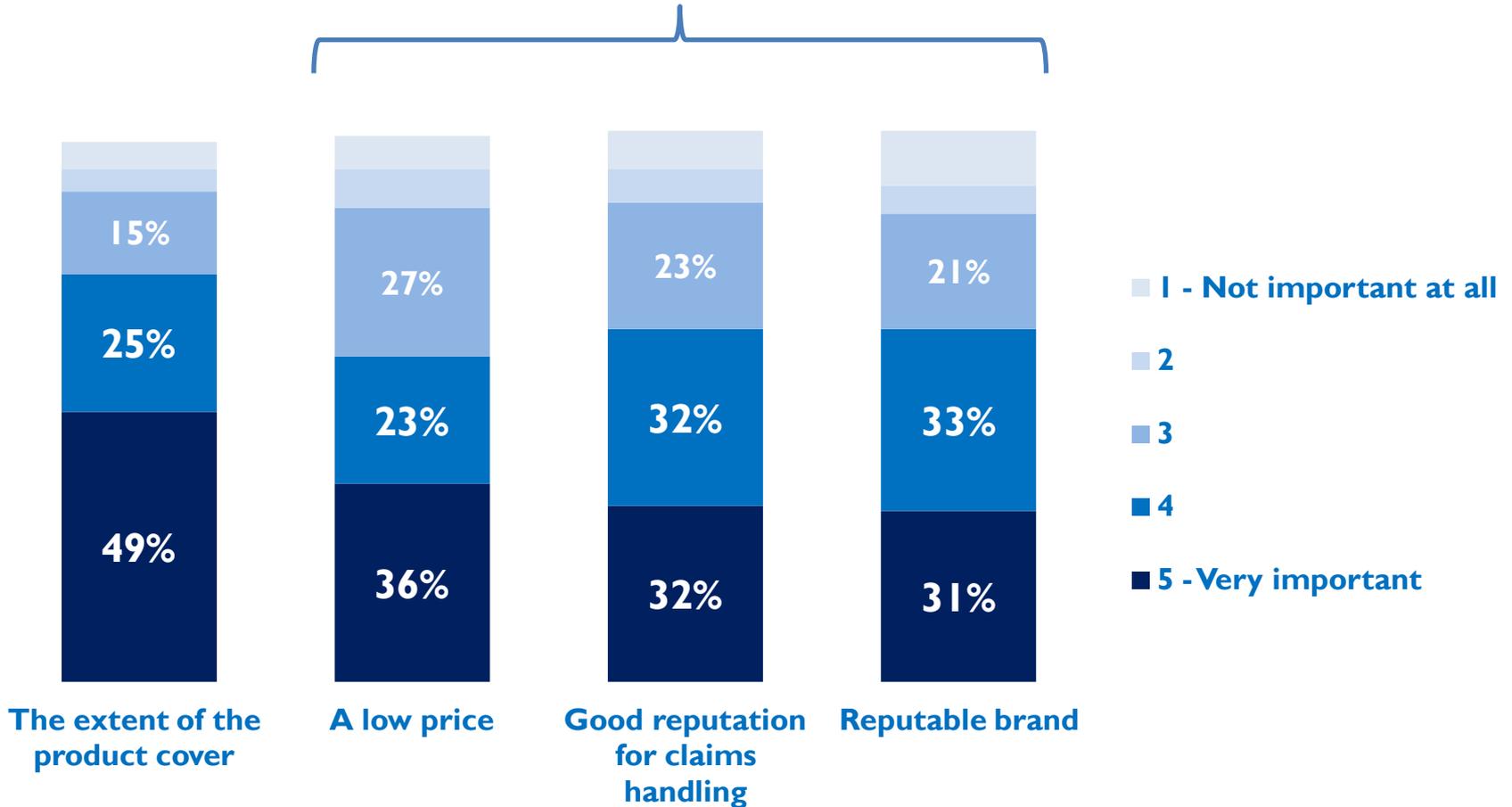
Between 15-20% claimed it was their head office & around 15% their landlord that made this decision

Q23. How important are the following factors when choosing your insurer?

On a scale of 1 to 5 with 1 being not important at all and 5 being very important.? Excluding don't knows, head office & landlord Bases vary

Nearly ½ felt extent of cover was ‘very important’ in their decision

Similar importance scores for these 3 factors with around 6 out of 10 feeling they were important

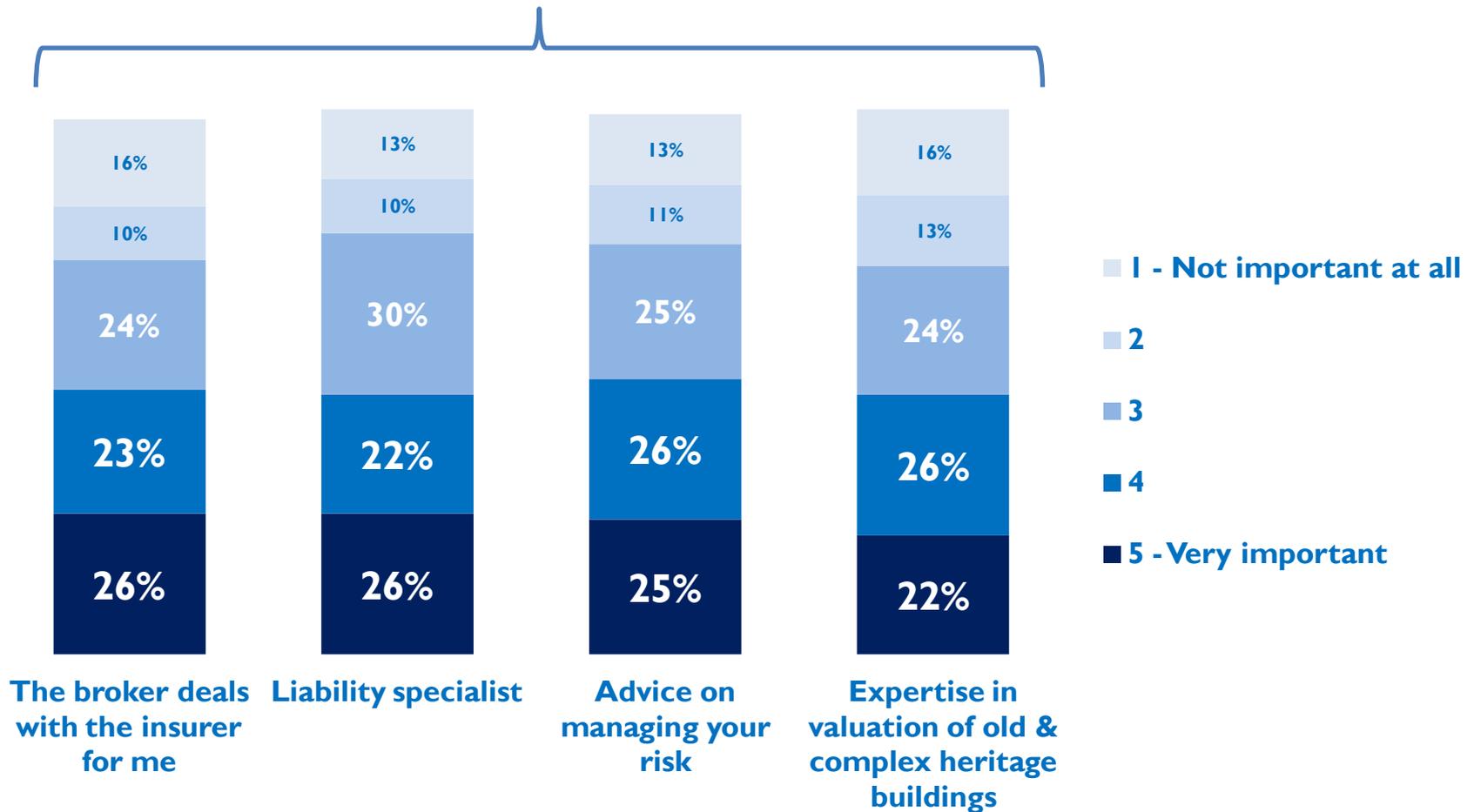


Q23. How important are the following factors when choosing your insurer?

On a scale of 1 to 5 with 1 being not important at all and 5 being very important.? Excluding don't knows, head office & landlord Bases vary

Least important factor was expertise in valuing old & complex buildings

Similar importance scores for these 4 factors with around 1/2 feeling they were important

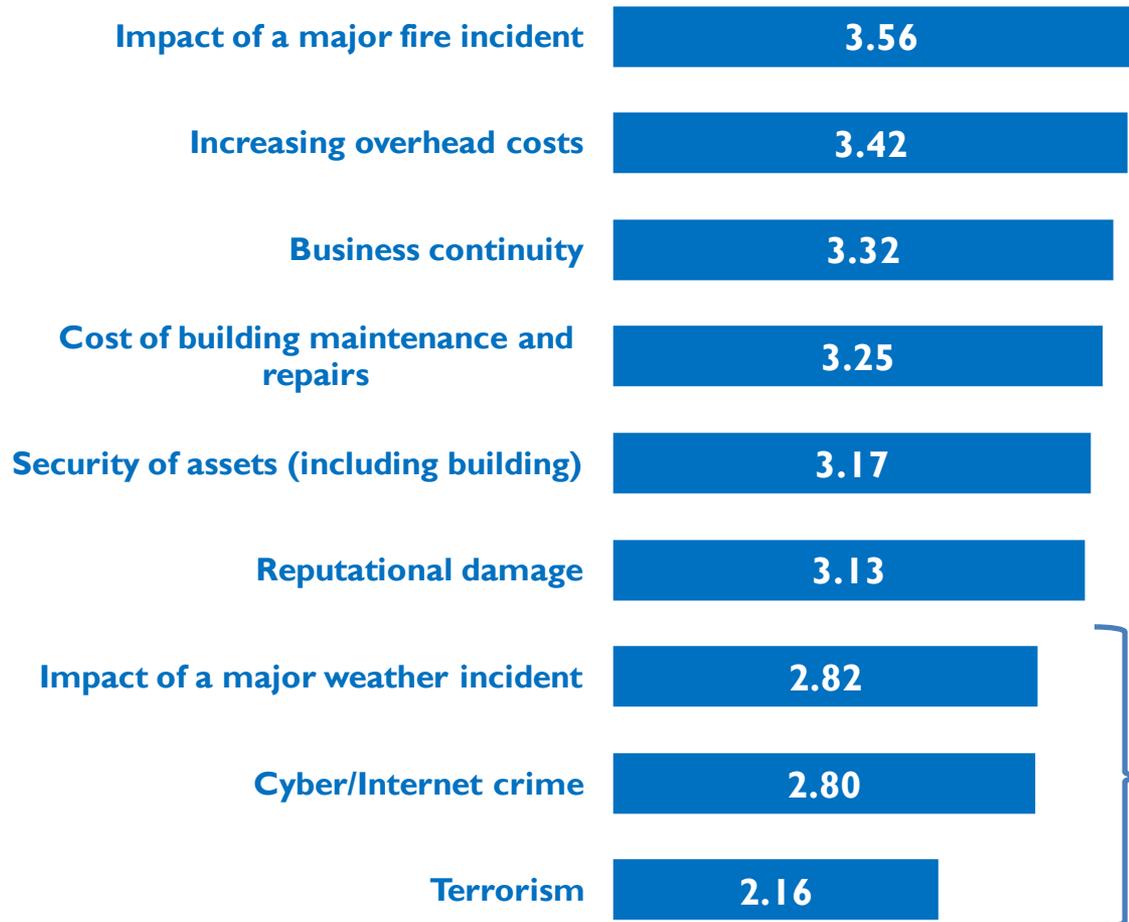


Q23. How important are the following factors when choosing your insurer?

On a scale of 1 to 5 with 1 being not important at all and 5 being very important.? Excluding don't knows, head office & landlord Bases vary

A major fire & its impact most concerning risk

When asked to rate concern of business risk on a 1 to 5 scale with 5 being very concerned



“The biggest fear is a fire. With a flood you can pump it out”
(Shop)

These 3 concerns were under the 3 mid-point suggesting lowest concern

Q24 How concerned are you about the following business risks?

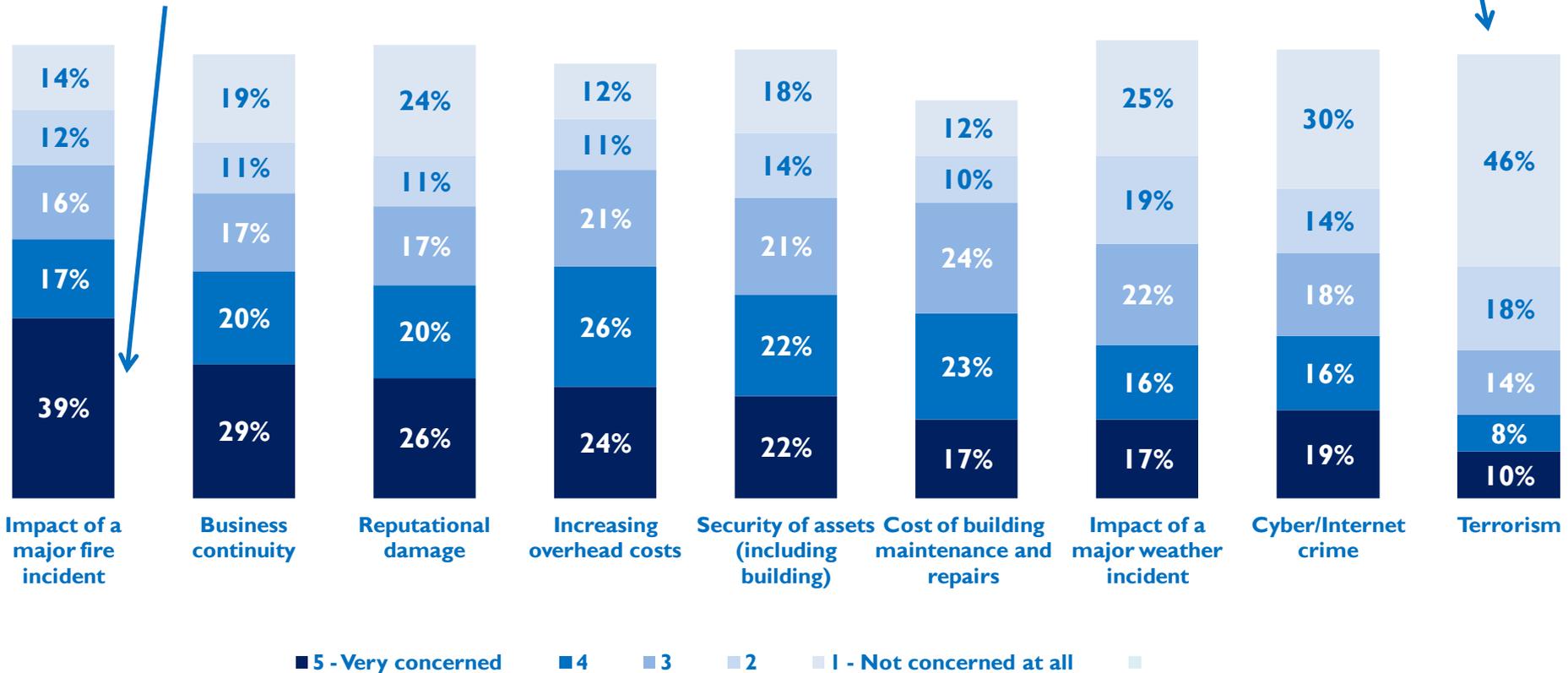
On a scale of 1 to 5 with 1 being not concerned at all and 5 being very concerned. Excludes ‘don’t knows’

Nearly 4 out of 10 (39%) were very concerned about a major FIRE

When asked to rate concern of business risk on a 1 to 5 scale with 5 being very concerned

Fire was a particular worry for SIC I: accommodation & food & owners of buildings: 51% very concerned

Nearly 1/2 not concerned about terrorism at all



Q24 How concerned are you about the following business risks?

On a scale of 1 to 5 with 1 being not concerned at all and 5 being very concerned. Excludes 'don't knows'

*“If there was a fire, then, there’s a lot of wood in this house. So although we’ve got alarms & smoke detectors & all that fire safety equipment, because it’s very wooden, then it would cause a lot of trouble if it got hold, & then no, the business wouldn’t survive.”
(Hotel)*

Other concerns covered a wide variety of subjects

- **Most were not specific to occupying a historic building & were general business worries such as lack of customers, inflation, competition, staff recruitment, etc**
- **Few concerns by those on the high street including increasing business rates**
- **Brexit was mentioned a few times as both something that has already affected (lower consumer confidence, less business investment, etc) & worry about what is to come. However, it needs to be remembered that Brexit was a frequent headline news at the time of the research (Autumn 2018)**
- **Those that were related to historic buildings**

“Lack of customers but that's what everyone worries about.” (Office)

“The council do not seem to be attracting any new business into the town as the rates are so high. As a result there are now many closed shops & a lot less footfall, which in turn is affecting profitability.”
(Food/Drink)

“Slips and trips looked like they might be an issue as we're over three floors.” (Food/Drink)

“Brexit, it is causing the country to grind to a halt.”
(Shop)

“Brexit worry of a decline in the property market and values” (Office)

“Impact from adjacent properties, there is a conversion into a hotel, which I'm very concerned about.”
(Office)

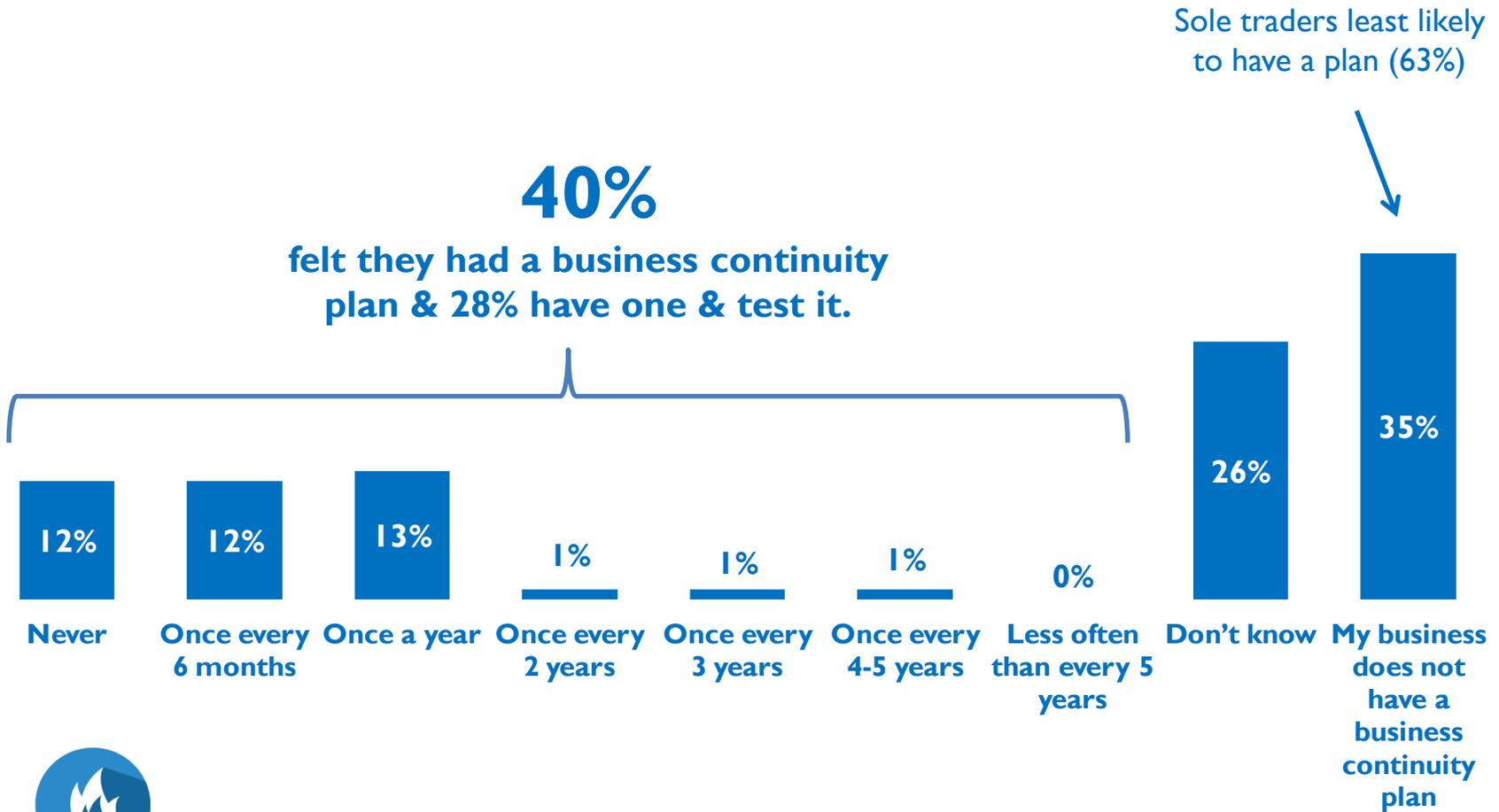
“Inflation, high interest rates, political risk”
(Office)

6. Business continuity summary

- 4 in 10 businesses claimed to have a business continuity plan
- Professional services, partnerships & those based in London & SE were most likely to have a plan; whilst sole traders were the least likely
- Just over ¼ said they had one & tested it & most did it at least once a year (63% of those with a plan)
- With a major flood, just over ½ (51%) felt they would be unable to use their building for up to 3 months & 59% could be able to set-up temporary premises in under 3 months
- In comparison, with a major fire a smaller proportion (33%) would be unable to use their building for up to 3 months & same 59% felt they could get a temporary premise up & running in 3 months
- Hotels, unsurprisingly, were the least likely to be able to find temporary premises, whilst professional service would be the speediest

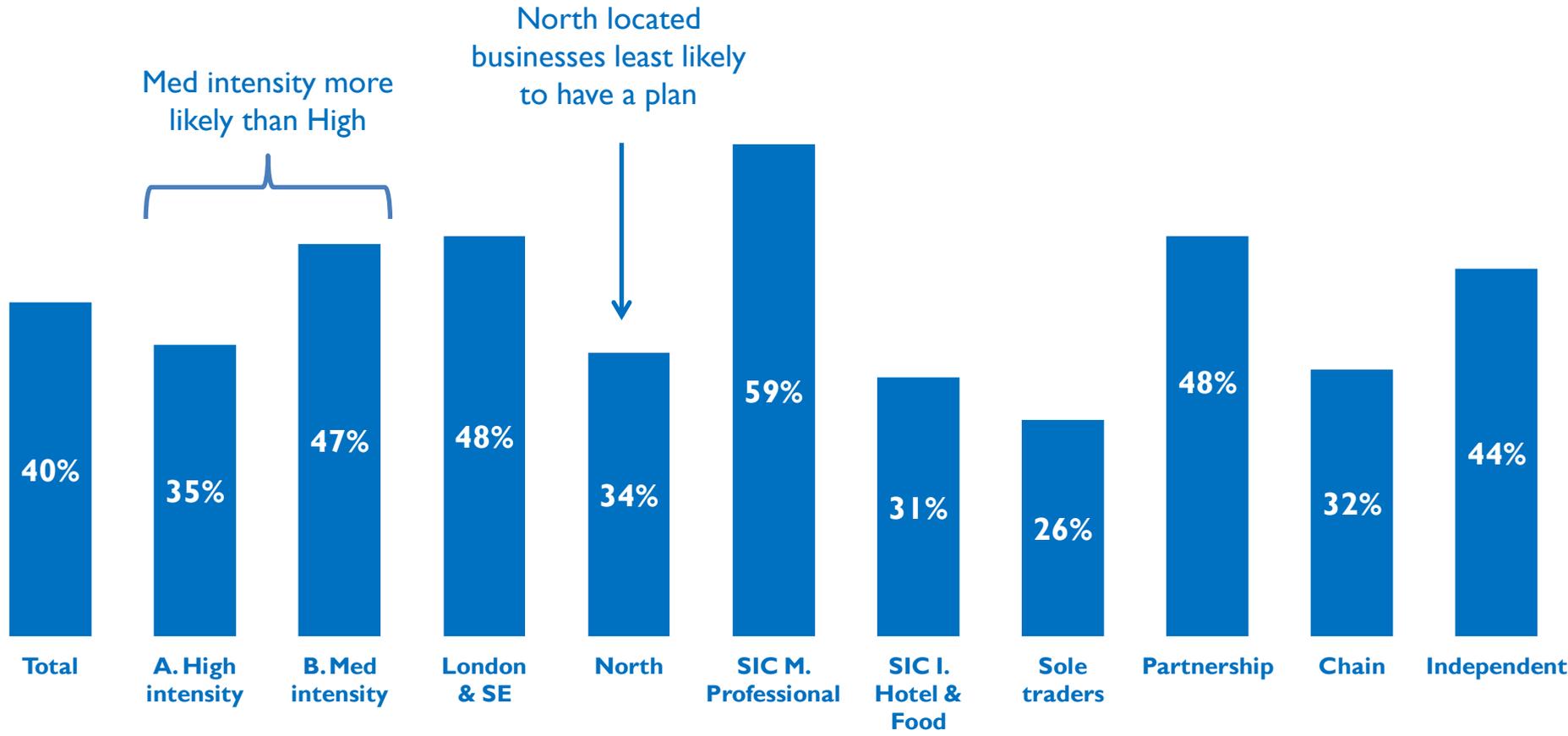


Just over 1/3 (35%) claim not to have a Business Continuity Plan at all

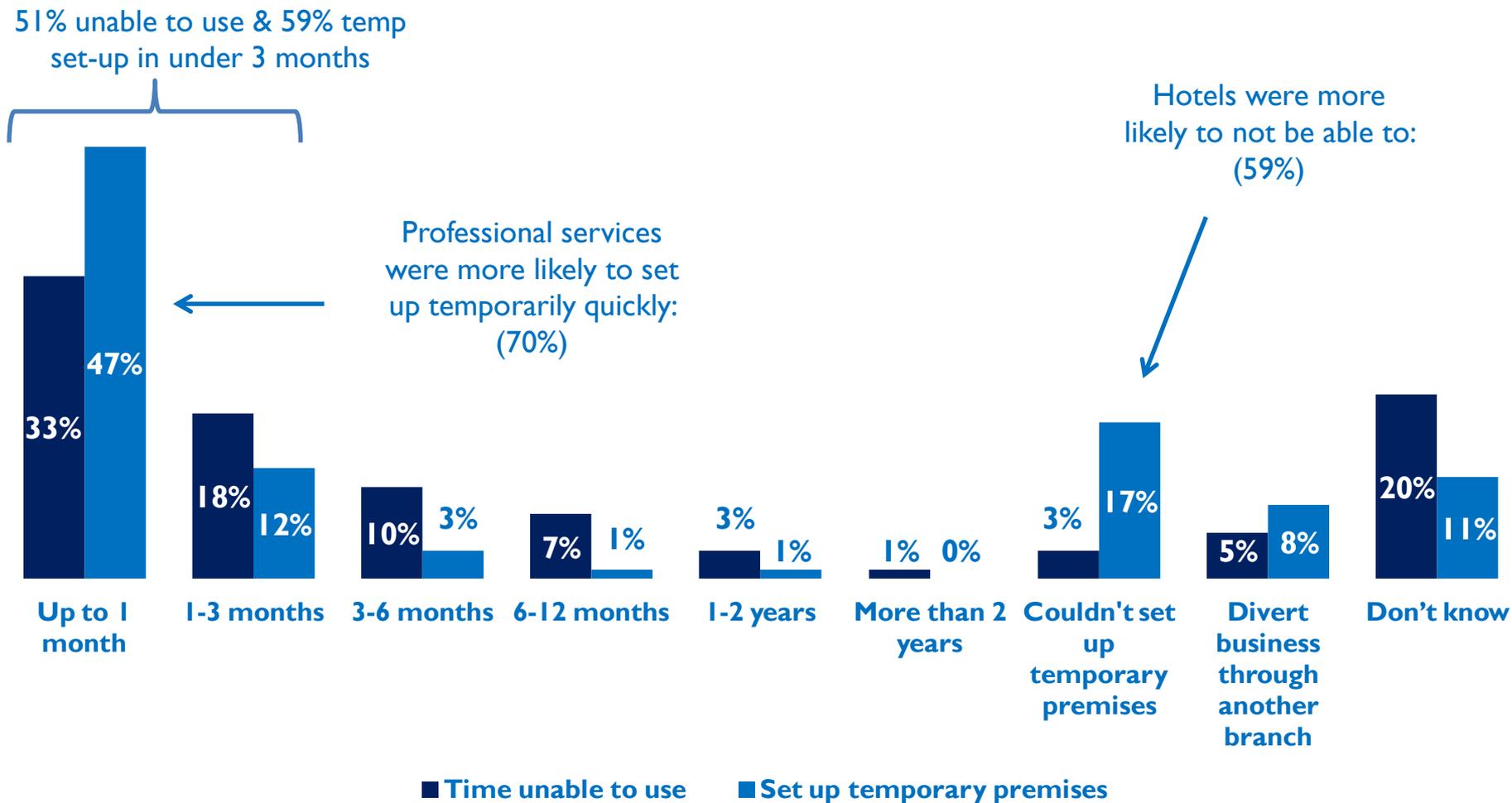


Q28. How often do you test your Business Continuity plan, if you have one? Base 509

Professionals, partnerships & London/SE most likely to have continuity plan



Just over ½ (51%) unable to use their building for up to 3 mths due to flood



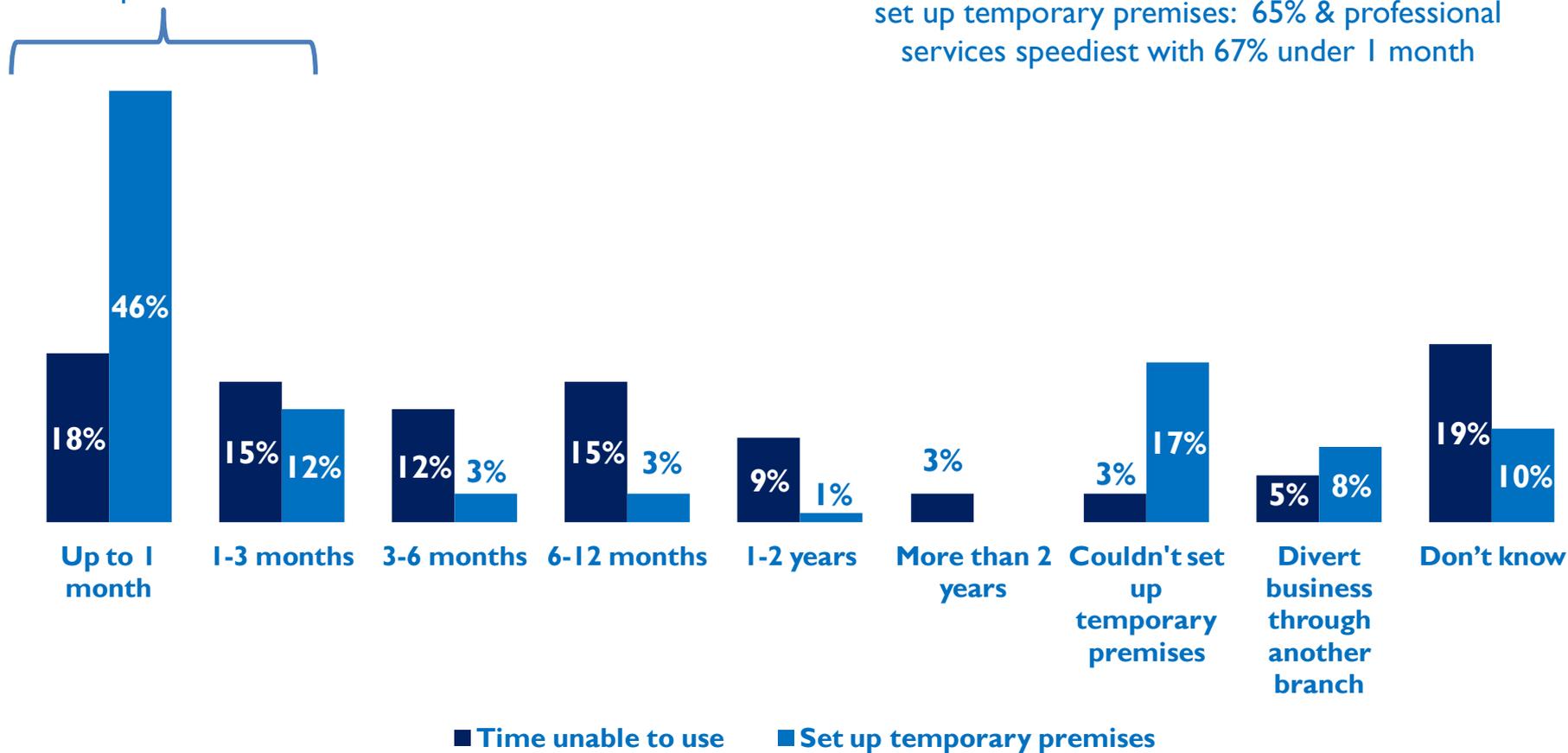
Q26. What is the longest period of time you'd expect to be unable to use your premises due to a major flood?

Q27. If you experienced a major flood and had to set up temporarily elsewhere, how long do you think this would take? Base 436

Fire appears to be seen as less of issue with 1/3 unable to use up 3 months

33% unable to use & 59% temp set-up in under 3 months

As with flood, hotels more likely to be unable to set up temporary premises: 65% & professional services speediest with 67% under 1 month



Q26. What is the longest period of time you'd expect to be unable to use your premises due to a major fire?

Q27. If you experienced a major fire and had to set up temporarily elsewhere, how long do you think this would take? Base 436

Those whose business was intrinsically linked to their building found it hard to think about temporary premises

- **It was clear that professional services & office based businesses were confident that they could cope as many needed just their records (many of which were backed-up off site) & a new office, which most perceived as being relatively easy to source & set-up**
- **Many others, however, expressed concerns about their ability to find suitable replacement premises & one that was as good as the one they currently occupy**
- **Generally it was felt to be more difficult to find & use temporary premises if a major part of the business operations, offer, ethos & positioning was bound up in the building: which for many of those in historical buildings it was**

“If there was to be damage, then the guest house would then stop” (Hotel)

“We could operate from other... I mean we've been in two other buildings before this so yeah, we could definitely operate from other buildings” (Creative)

“We think our records are safe & off site, & we think our customer relationships would survive a change of location...but then we'd pretty much want to come back here if it were ever rebuilt” (Office)

“I think it [business] would survive, [incident], but I don't think it would be as quirky or fit our ethos as well” (Food/drink)

7. Respondent profile summary

- **Quota was set for respondent location by region, which provided an appropriate regional mix around England in line with the supplied database**
- **As expected, retail (26%) & accommodation/food (23%) were most frequent sectors**
- **Most were micro or small businesses**
- **$\frac{2}{3}$ were independent businesses & 31% were part of chains**
- **57% were private ltd companies**
- **Just under $\frac{1}{2}$ (49%) established their organisation pre-2000**
- **Nearly $\frac{2}{3}$ (64%) had moved into their premises post 2000**
- **Just under $\frac{3}{4}$ (73%) rent or lease their premises**

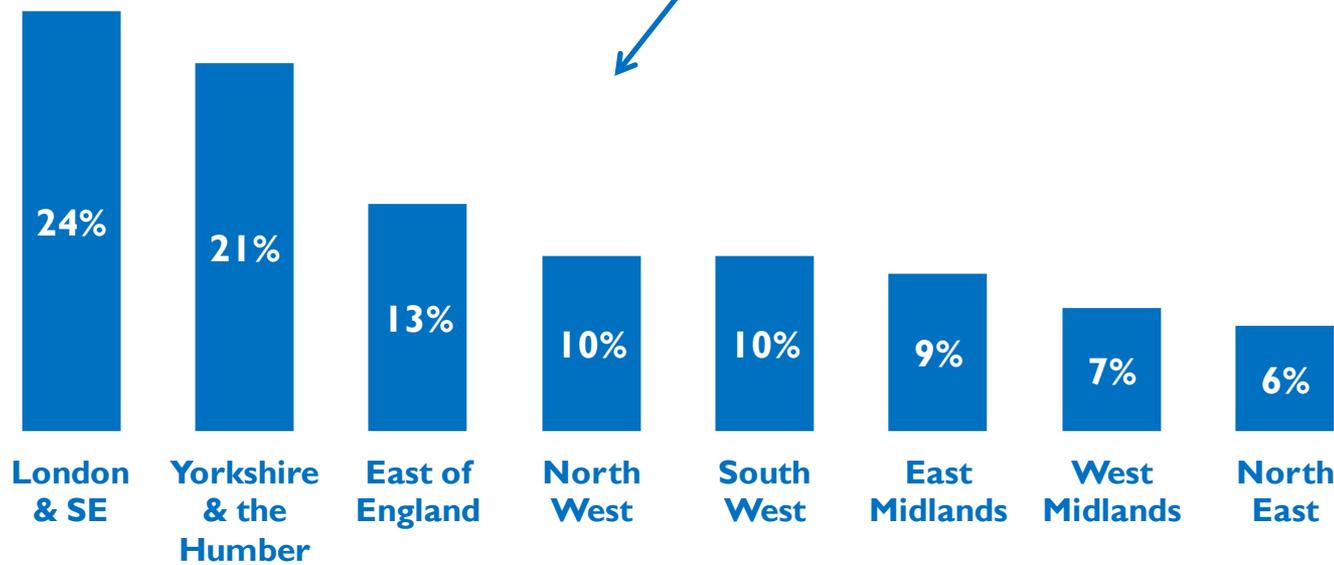


Interviews were undertaken with businesses from a mix of regions

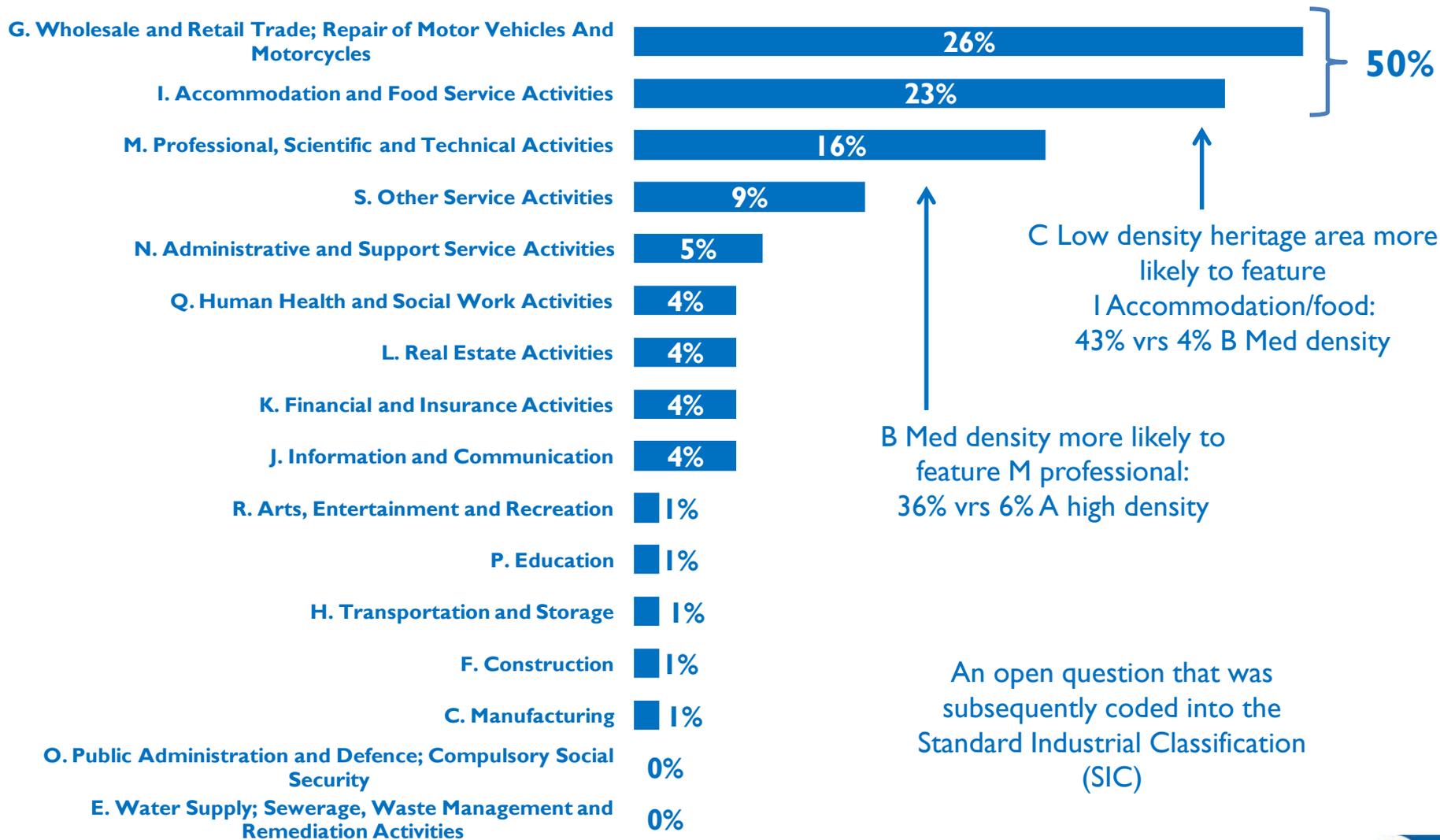


Map shows the spread of interviewees around England & the concentration around specific heritage areas

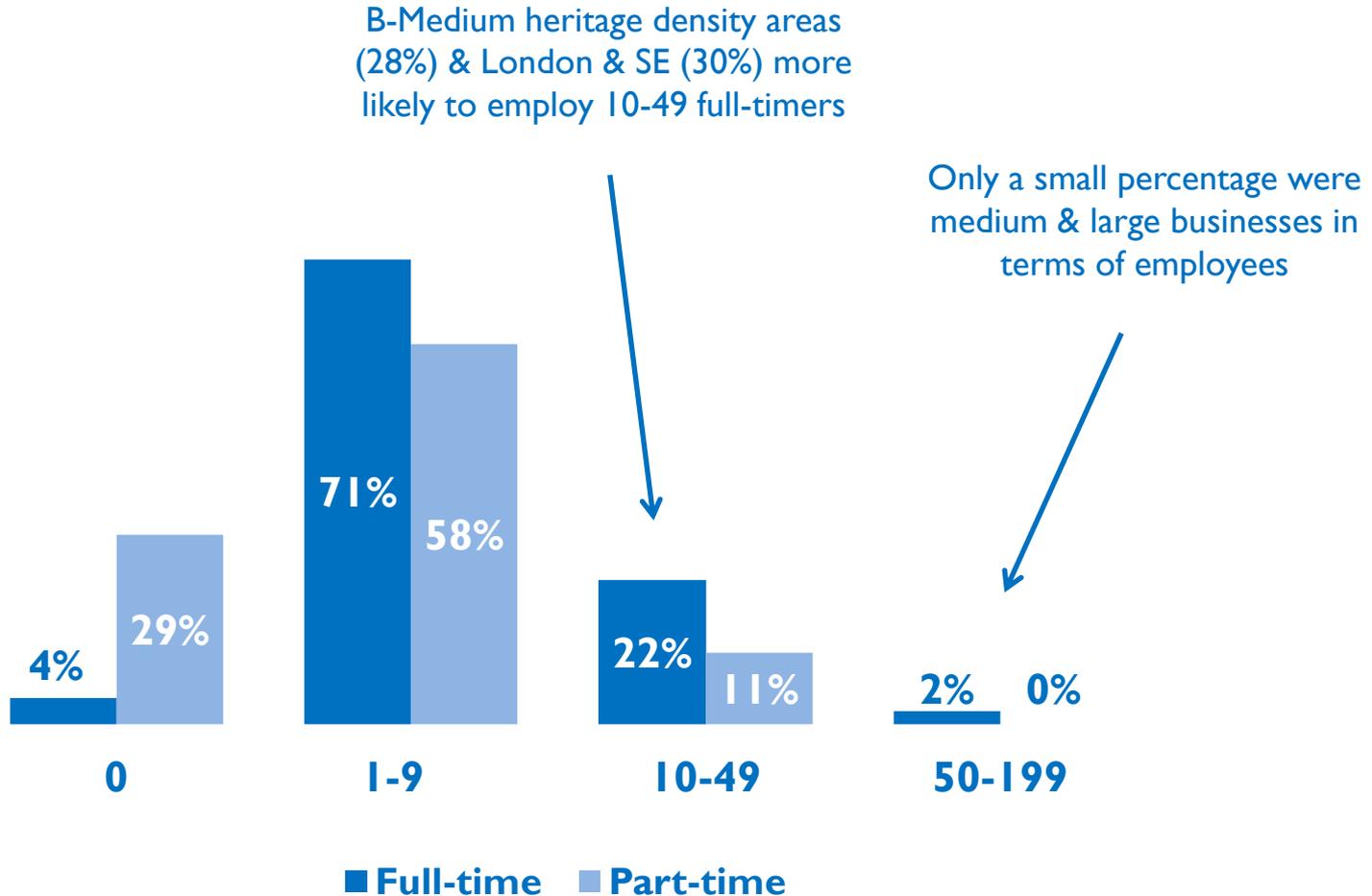
The regional breakdown broadly reflects the spread on the database provided for this research



½ were either retail or accommodation/food based organisations

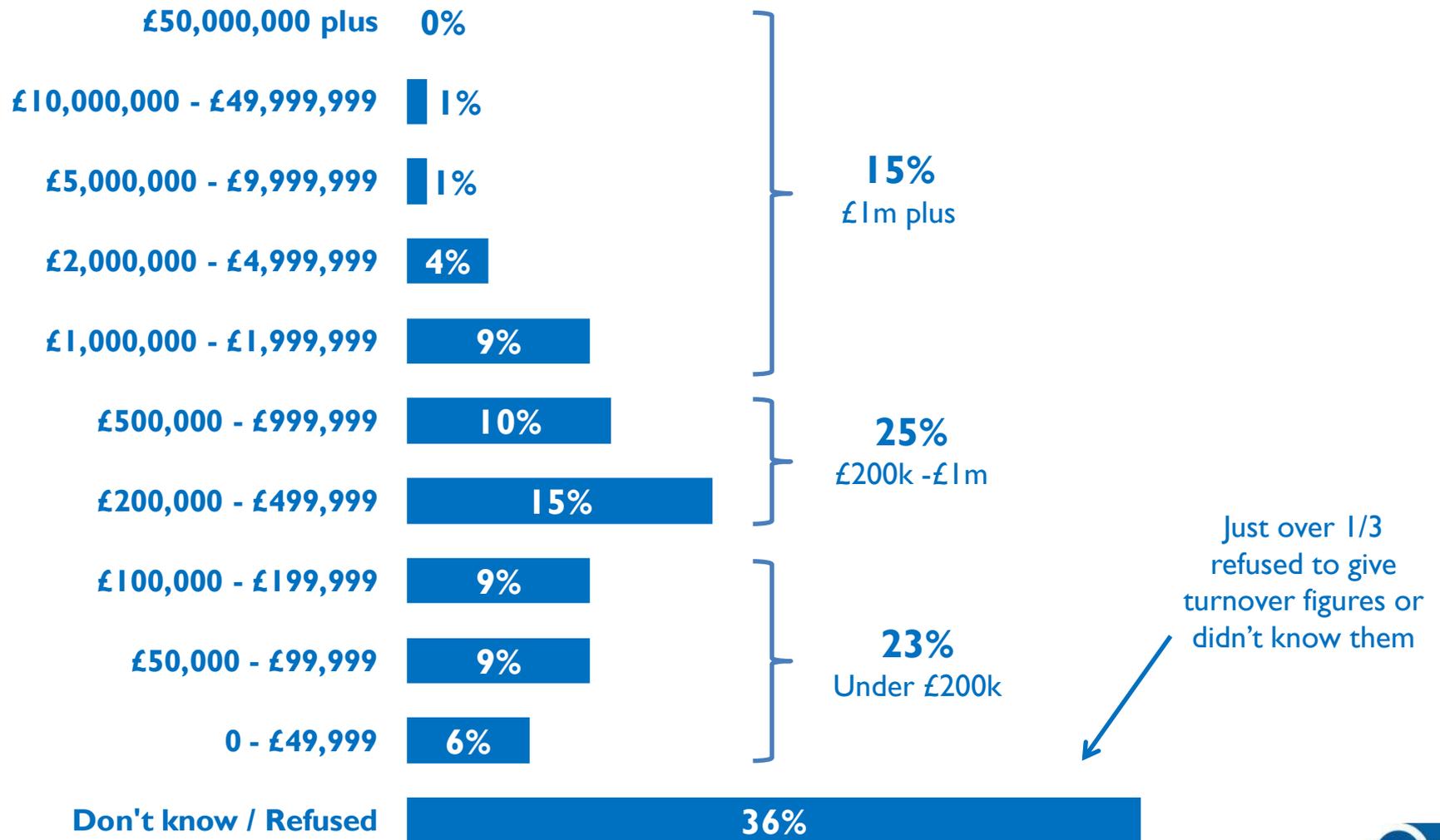


Most employed relatively small number of employees at that site



Q4. Including yourself, how many people does the business employ at this site?
Full-time (30 hours plus per week) Part-time (less than 30 hours per week) Base 509

Nearly ½ (49%) had a turnover of under £1m



Q5. What was the annual turnover of your business for your last financial year? Base 509

Most were independent (66%) private ltd. companies (57%)

B Mid- density heritage areas: more likely to have Private Ltd Companies
67% vrs 43% C Low- density

Also London & SE :
65% vrs 53% Mids & East

31% chains

Small local chain 6%
None of these 3%

Large national chain 26%

Independent 66%

A High-density heritage areas were more likely to have large chains:
39% vrs 11% C-Low density areas

B Mid & C Low density heritage areas were more likely to have Independents:
78% vrs 55% A-High density areas



Private Limited Company

Sole trader

Partnership

Public limited company

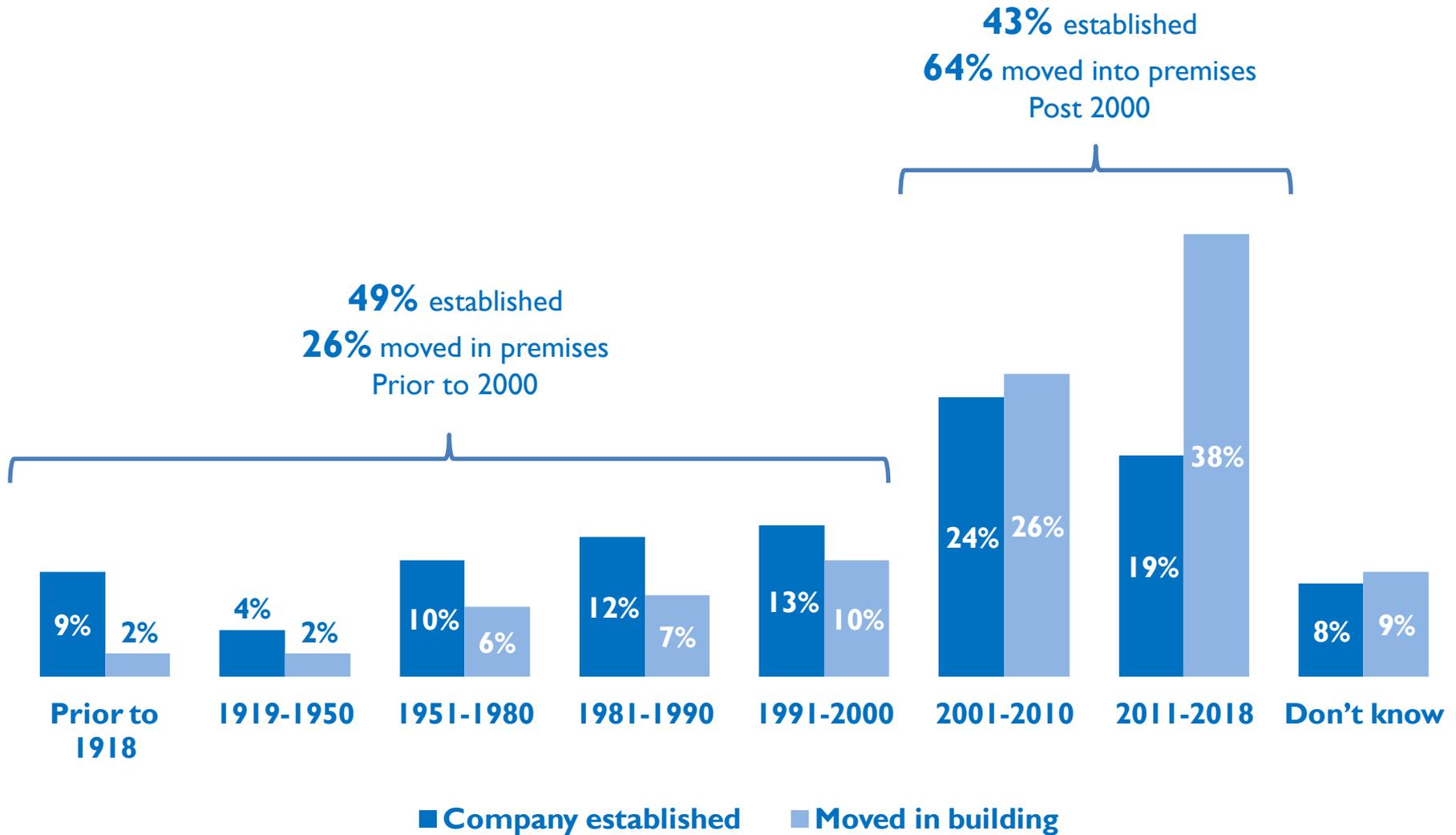
Charity / not for profit

Public sector organisation

Q6. Which of the following best describes your business or organisation?

Q7. Are you part of a... Base 509

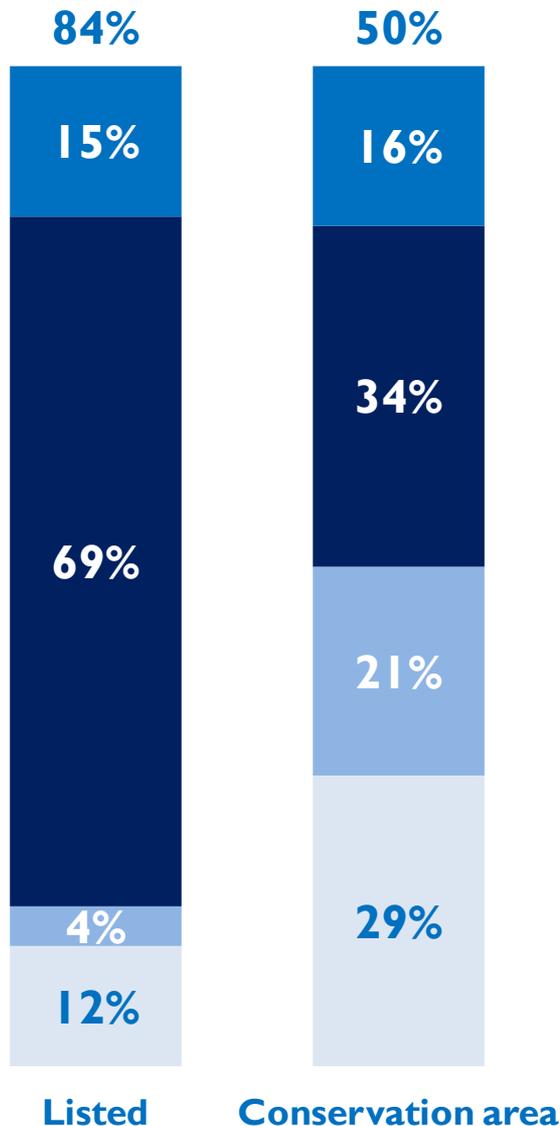
Nearly 2/3 (64%) moved into their premises since the Millennium



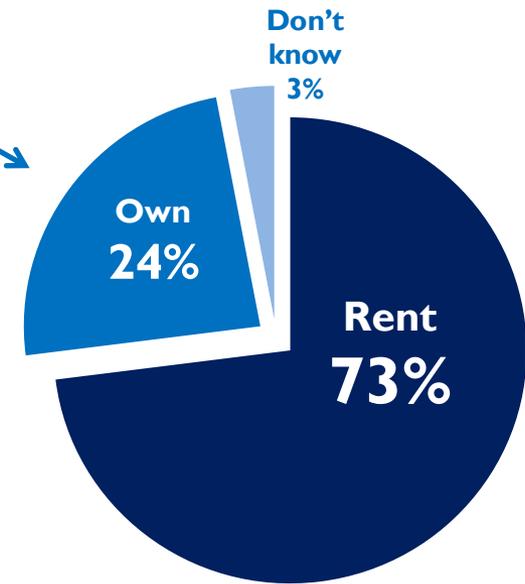
Q8. Which year was your business established?

Q9. Which year did your business move into your current premises? Base 509

Just under 3/4 rent & 84% felt their premises is listed



C-Low density heritage area more likely to own than A-High density: 41% vrs 22% in



- Maybe
- Definitely
- Not at all
- Don't know

Less renters in C-Low density: 57%

High proportion of renters in London & SE: 80% vrs 62% SW

Does your business own or rent your premises? ie building that your business is located in...? Base 509

8. Final points

- **With 509 completed surveys this research provides a robust sample of businesses across England. The sub-samples, whilst smaller in size, give a good indication of the types of businesses where the positives & drawbacks are more pronounced.**
- **Overall, these findings show a high degree of positivity towards their historic building with high overall satisfaction & business enhancement, particularly in the hospitality industry.**
- **A wide range of benefits were stated: for many, their building is a direct benefit being integral to their business model & a key element of their product offering. Others receive more indirect benefits associated with being in an atmospheric & characterful central historic district & visitor honeypot.**
- **The collective impact of concentrated areas of historic buildings was empathised, as well as the responsibility occupiers felt in playing their part, especially with the exterior of their building.**
- **However, sometimes in the highest heritage concentrations the benefits can tip into negatives with complaints about access & parking becoming more common.**
- **With drawbacks, the exterior was again topping the list with external extensions & modifications being that largest potential challenges, especially in the hotel sector.**
- **Disabled access was a clear concern & frustration for many: a desire to do the right-thing is counter balanced by the constraints of their listed building. Temperature control was another frequent frustration.**

8. Final points

- **Maintenance & upkeep appeared a constant worry & potential expense for many with plumbing & leaks seeming a particular issue. Landlord relationships appeared key, but some appear to be renegeing on their perceived responsibilities.**
- **Businesses need to keep up with demands, be flexible & innovative, but for many this seems not always possible due to the inherent building restriction, or long/confusing/challenging consent process. Under a third of businesses claimed to have applied for consent, but the process appears challenging for many, with difficulties finding consistent advice & guidelines**
- **Many businesses seem to built up a network of skilled tradespeople over time, particularly in historic concentrations; however, many still find it difficult to get work done.**
- **Insurance was a difficult subject to discuss during the research has many of the respondents were not directly involved in the purchase. However, for those that could comment, it was clear that product coverage was key in any decision. Generally, insurance didn't seem to be a major issue.**
- **The impact of a major fire was the most concerning business risk, especially for hospitality & building owners. The hospitality sector was also less likely to be able to take temporary premises if needed.**
- **On balance, the positives of their historic building nearly always outweighed the potential negatives, which were often seen as 'part and parcel' of running their business.**



This research has been carried out in compliance with
ISO 20252, (the International Standard for Market and Social research),
The Market Research Society's Code of Conduct and UK Data Protection law.



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Qa Research is a trading name of QA Research Ltd,
UK registered, company registration number 3186539, address in York as above.

Project code: SKILL01-8192

File name: HE_ListedBuilding_Qa_draft_full_report_Nov18_V2.pptx

Date: 23rd Nov 18

Report status: Draft VI

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