

# ENGLAND'S CULTURAL INFRASTRUCTURE: REPAIR, MAINTENANCE AND RENEWAL VOLUME THREE: APPENDICES SEPTEMBER 2024



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# ENGLAND’S CULTURAL INFRASTRUCTURE: REPAIR, MAINTENANCE AND RENEWAL: VOLUME THREE, APPENDICES

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# APPENDIX A: RESEARCH METHODOLOGY

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## A1 AIMS AND OBJECTIVES

The overarching aim of the research is to understand the scale and nature of the repair and maintenance needs of England's cultural infrastructure, where owned, managed or operated by public and third sector bodies. This includes theatres, concert halls, other performance spaces, cathedrals and churches (in their role as visitor destinations) and publicly accessible heritage-based destinations. The specific objectives that support this aim are to:

- Assess the cost of the maintenance, repair, and replacement backlogs for which relevant organisations are responsible.
- Understand the specific repairs and renewals required, by type of building fabric (for example, roofs, walls, windows and doors, and so on).
- Understand where buildings have fallen into disrepair and why.
- Understand how needs can vary between different types of organisations and venues.
- Assess the costs and impacts of both repairing and not repairing these sites.
- Assess the extent to which venues might be able to raise funds for addressing repair needs and identify barriers to securing funding independently.
- Assess the impact of what government funding would achieve – in terms of breadth of organisations supported and depth of repairs enabled. The estimated cost of not repairing these venues/sites should also be assessed.

## A2 METHODOLOGY

### A2.1 Desk Review

The starting point was a desk review to understand the scope of existing research relevant to the research themes, and provide a systematic overview of the political, environmental, social, legal and environmental context for the repair and maintenance of cultural infrastructure in England.

### A2.2 Stakeholder engagement

At the scoping stage a wide variety of sector organisations were contacted and interviews with stakeholders undertaken to gather sector intelligence and spread awareness of the research. The organisations contacted included:

- Architectural Heritage Fund
- Arts Council England
- Association of Independent Museums
- Canal & River Trust
- Catholic Bishops' Conference of England and Wales
- Church Commissioners
- Churches Conservation Trust
- English Heritage Trust
- The Heritage Alliance
- Heritage Trusts Network
- Historic Houses
- Historic England
- Historic Environment Forum
- Major Churches Network
- Museums Association
- National Churches Trust
- National Lottery Heritage Fund
- National Trust
- Society of London Theatre (SOLT) / UK Theatres
- Theatres Trust

Interviews were carried out with senior representatives of all of the above bodies. The resulting insights were used to inform further development of the research, while almost all these organisations provided further, more detailed information on repair and maintenance needs in their area of interest. Those organisations with relevant memberships or contact lists also agreed to promote the research and the online survey.



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### A2.3 Finalisation of Scope

While this background research was being undertaken the scope of venues, sites and organisations in England was finalised in close consultation with DCMS.

The final, agreed scope was restricted by ownership to:

- Publicly and third-sector (charity and not-for-profit enterprise) owned structures and organisations that also have a role as visitor destinations, with the exception of central government buildings (notably the Palace of Westminster).

Within these ownership types the specific types of venue within scope were those which are publicly accessible, specifically:

- Active theatres.
- Other active performance venues, such as concert halls and multi-arts performing arts centres.
- Non-accredited museums and art galleries, but not accredited museums and art galleries, as the latter already benefit from a dedicated stream of funding to support repairs and maintenance.
- Places of worship that have a significant role as visitor destinations, notably cathedrals and major churches, focusing primarily on those formally defined as such by the Church of England, but also including other churches and places of worship of any denomination or faith with significant visitor numbers (indicatively defined as 10,000 or more) or events programmes or possessing particular historic or architectural interest.
- Other arts and heritage-based visitor destinations, including: historic houses; historic monuments that operate as visitor attractions (such as ruins of castles, abbeys and historic industrial structures and notable memorials); historic cinemas; historic railways; and historic zoos.
- Parks and gardens and cemeteries were out of scope, unless acting formally as visitor destinations that are primarily of interest for their heritage value. Likewise, zoos, safari parks and wildlife sites have been excluded unless they contain significant heritage buildings which attract visitors.
- The sample frame was classified into three broad categories for analysis and extrapolation, as follows:

Venue	Number of buildings (frame)
Theatres and performance venues	681
Places of worship	383
Heritage destinations	517
<b>Total</b>	<b>1,581</b>

### A2.4 Development of Sampling Frame

DCMS provided two initial lists of potentially in-scope sites and destinations in the form of two lists: one of theatres and the other of other heritage destinations, based on VisitEngland databases of visitor attractions. Both lists were manually checked on the basis of desk research to remove venues with out-of-scope ownership or building types.

The theatre list was further cross-checked and expanded with data generously provided by the Theatres Trust on active theatres in the UK. The resulting list was then filtered by ownership type. The provisional list of in-scope theatres was then manually checked on a case-by-case basis, followed by searches for contact details. Where possible, contact details for relevant individuals were sourced; where this was not possible, generic venue email addresses were used or contact form URLs identified.

The researchers were not able to identify a similarly comprehensive database of heritage-based attractions that could be used to expand the frame. The researchers therefore undertook systematic regional searches for in-scope arts and heritage organisation and attractions. As with the theatres list, contact details were compiled and collated at this stage, and to accelerate this process organisation and personal contact details in the arts and culture sectors were obtained from a commercial data provider and integrated into the frame.

Finally, the completed frames entries were then expanded to include details on:

- Listing status: whether the relevant structures are designated as listed buildings or scheduled monuments, and if so, their listing grade.
- At risk status: whether the relevant structures appear on Historic England's Heritage at Risk Register (HARR).
- Indicative size: the ground areas of buildings in the frame were measured using Google Earth measurement tools and multiplied by an actual or estimated equivalent number of stories.

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### A2.5 Survey

The main method used to gather data for the research was a detailed questionnaire, administered to respondents via an online survey platform.

The questionnaire design was based on prior research by the Harlow Consulting research team into the maintenance backlog in accredited museums and art galleries with nationally listed buildings or sites.<sup>01</sup> This was expanded and developed to meet the need for more granular data on building conditions and on the financial status of the owning organisations. The final survey comprised a total of 88 questions, combined of close and open-response questions. These were routed to ensure that individual respondents answered only those questions of direct relevance to them and their property.

‘Screener’ questions were used at the beginning of the survey to exclude responses from:

- organisations based outside of England;
- respondents who did not have knowledge of the building condition or its repair needs.

The questions were grouped into sections on:

- The responding organisation’s details and site address.
- How the organisation assesses and monitors the condition of the site.
- The overall condition of the building, its condition by individual building element (roofs, rainwater goods, walls, windows and doors, structural components, other external components, building services, decorative fixtures and finishes, car parking), and, for theatres and performance venues only, the condition of the auditorium and associated technical and visitor infrastructure.
- Repair and maintenance approaches and currently planned and funded works by building element.
- The overall estimated cost of all required repair, maintenance and renewal, the proportion of those works considered urgent, and the amount of necessary work for which funding is not expected to be available.
- The impacts that would follow from the unfunded necessary works not being or being carried out.
- Past, current and expected future expenditure on repair, maintenance and renewal.

- The past, current and expected future financial status of the responding organisation.
- Barriers to effective repair, maintenance and renewal.

Questions on the responding organisation’s size, type, region, visitor and staff numbers, and condition were all mandatory responses.

Two parallel approaches to promoting the survey were implemented:

- Direct approaches to organisations on the developed frame via email, contact form, or telephone, with telephone follow-up to all approached venues to encourage responses, ensure that the survey had been directed to the appropriate person, and aid with any difficulties completing the questionnaire.
- Promotion of an open link to the survey via a DCMS press release, direct promotion by Purcell and Harlow Consulting via social media and sector publications and organisations, and via stakeholder organisations contacted as part of the initial stages of the research.

The survey was open and gathered responses for four weeks, from 15th January until 12th February 2024.

### A2.6 Case Studies

In addition to the main survey, Purcell’s conservation-accredited architects and surveyors worked with a geographically and typologically diverse group of 15 performance venues and heritage destinations to compile detailed assessments of repair, maintenance and renewal needs on the basis of site visits and direct dialogue. The purpose of this strand of the research was to provide an independent, expert assessment of the extent and nature of the repair needs of the participating venues and destinations, how they have arisen, and the scope for addressing them. In particular, the Purcell team sought to establish:

- The condition of the asset.
- The scale of repair backlog and funding available for any necessary repairs.
- Whether the organisation has sufficient expertise and resources to maintain the asset in good repair.
- Whether the organisation has a realistic understanding of its repair liabilities.
- Whether the planned repairs are appropriate and adequate to keep the asset in a stable condition.

<sup>01</sup> Jennifer Brennan, Clare Vokes, Nicholas Uglow, James Legard (2020) Understanding Museum Heritage Estate Management [https://archaeologydataservice.ac.uk/archives/view/management\\_he\\_2020/](https://archaeologydataservice.ac.uk/archives/view/management_he_2020/)

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- What would need to be in place to enable repairs to proceed?
- Whether the organisation has a plan in place to reduce carbon emissions.

These are the basis for the case studies that are presented in Volume 2 of this report.

### A2.7 Analysis and Reporting

The survey attracted a total of 392 responses (185 responses to the open survey link; 207 responses to the mailing survey).

An additional 345 'partial' responses were also recorded (75 to the open survey link; 270 to the mailing survey link). Many of these 'partials' were recorded by prospective respondents simply clicking on the survey link, but going no further; progressing part-way through the mandatory questions and dropping out; or completing a substantial portion but not all of the survey. Partial responses were excluded from subsequent analyses because consent for responses to be included was only provided upon submission of the survey.

Data from the completed 392 surveys was cleaned and reviewed by the project leadership team. This involved removing any out-of-scope venues and organisations that had completed the questionnaire (e.g. duplicates, accredited museums, privately-owned venues). After data cleaning, a total of 324 valid cases remained for analysis.

Further data cleaning then involved cross-checking submitted repair and maintenance estimates to identify and, where appropriate, correct outliers. During this process some apparent double-reporting of works as both 'planned and funded' and 'unfunded' was identified. Where there was sufficient evidence within questionnaire responses, these were resolved on a balance-of-probabilities basis. Where the situation was ambiguous, efforts were made to contact the relevant organisation for clarification. In some cases, clarification was not received in time. As a result, there may be some residual double-counting of works of this kind. It should be noted this in part reflects basic uncertainties amongst the respondents themselves about what is likely to be realistically fundable. Some degree of uncertainty on these figures is therefore believed to be unavoidable.

The detailed analysis of the questionnaires has been undertaken by Harlow Consulting with the support of a cross-disciplinary team of Purcell's architectural and surveying team; cost consultants Synergy LLP and; cultural sector business consultants, Barker Langham.

The data has been used to develop national and regional estimates of the outstanding backlog of repairs and maintenance work for cultural venues, by grossing up ascertained costs by building type on the basis of frame information on the total number of relevant buildings.

The survey included a large number of open response questions on the nature of works planned, and on barriers to good repair and impacts. These were individually manually coded by the research team to ensure all relevant factors were identified and their relative frequency of occurrence understood.

During the survey, respondents were asked if they were willing to provide condition surveys. A total of 65 in-scope condition surveys were received, which is a substantial subsample of the 50% of venues who stated that they have a current condition survey. These were submitted to Synergy for a detailed quality and completeness review. The cost and works data from the survey responses have also been submitted for review by Synergy, enabling the condition surveys to be reviewed in relation to the corresponding groups of planned and funded, and necessary unfunded works.

### B1 THEATRES AND PERFORMANCE VENUES

Contextual information regarding the issues currently facing theatres has been gathered from discussions in January 2024 with the Theatres Trust and with SOLT/UK Theatres. The scope of this research includes all theatres which are owned by public bodies and third-sector organisations. Private owners such as Ambassador Theatre Group and Trafalgar Theatres are thus out of scope.

Theatres Trust is the national advisory public body for theatres, set up by the Government through an Act of Parliament in 1976. The Trust is a statutory consultee on theatres in the planning system, and also operates as a charity. Issues mentioned by the Theatres Trust:

- Fibrous plaster. This type of plaster presents a risk of collapse if neglected. It was commonly used in Victorian and Edwardian theatre buildings and was still being used in some of the cine-variety buildings in the 1930s. Annual surveys need to be undertaken and most theatres that contain fibrous plaster will have an ongoing schedule of maintenance.
- Health and safety. Improvements are needed in particular in the back-of-house areas for technical crew, for example the need to provide adequate working height above the grid, safe access to ceiling voids, plant etc.
- Technical upgrades. These include the replacement of old hemp flying with new counterweight systems; updating of dimmers to accommodate LED lighting; increasing the loading capacity for scenery within flytowers. To ensure that they can accommodate larger, heavier sets.
- Facilities. Inadequate toilet provision, both front-of-house and back-of-house.
- Accessibility. This is a common issue, both back-of-house and front-of-house.
- Building services. The replacement of outdated and inefficient M&E services can help to reduce carbon use and to reduce running costs, also linked to improvement to thermal comfort and ventilation.
- Increased day-time offer. Some theatres have increased their income from an expanded daytime catering offer for food and beverages. Some are being used to provide warm spaces.

SOLT ('Society of London Theatre') and UK Theatre are the trade associations for producers and venue owners in the theatre sector. SOLT represents approximately 190 London-based producers, theatre owners and managers; UK Theatre represents approximately 270 theatres, concert halls, dance companies, producers and arts centres throughout the UK. Issues mentioned by SOLT/UK Theatre:

- There is a cohort of members who have Victorian and Edwardian buildings, a cohort with buildings dating from the post-war period and a cohort of owners whose buildings were built in the first flush of lottery money.
- Some of the post-war theatres now have major repair problems and some of the lottery-funded buildings have not been maintained and also have significant problems.
- A common arrangement is for a local authority to own the freehold of a theatre building and to lease it to a private operator or charitable trust. The number of theatres wholly owned and operated by local authorities is diminishing.
- Theatres which lease their buildings from local authorities or rely on financial support from these authorities are in a vulnerable position.
- The ceiling collapse at the Apollo Theatre in 2013 resulted in action to assess the risks associated with fibrous plaster; although awareness of this issue may have faded, the risk has not gone away.
- Skills. A high proportion of the buildings management and maintenance staff with substantial industry experience, knowledge, competence and capability left as a result of the Covid-19 epidemic. They have been replaced by less-experienced staff.
- Theatre Tax Relief (TTR) has been an important factor in supporting theatrical productions since it was introduced in 2014. The higher rate of TTR, introduced in 2021, has turbo-charged the sector's bounce back from the pandemic.

Research published by the Theatres Trust in 2021<sup>01</sup> reported that 86% of theatres said finance was a major barrier to making energy efficiency improvements, with this figure rising to 92% for historic theatres. In order to address this problem SOLT and UK Theatre are proposing a Theatre Energy Efficiency Grant Scheme. This initiative would provide theatres with capital to make immediate 'quick win' energy efficiency adaptations, such as the installation of LED lighting rigs.

01 <https://www.theatrestrust.org.uk/latest/news/1626-more-than-1bn-needed-to-make-the-uks-theatre-buildings-sustainable>



### B2 PLACES OF WORSHIP

Contextual information regarding active places of worship has been gathered from discussions with the Church Commissioners and with the National Churches Trust in January 2024. In the time available for the research, consideration of places of worship belonging to other denominations has been limited.

#### B2.1 Anglican Cathedrals and Churches

The Church of England has 42 dioceses, 42 cathedrals and 16,000 parish churches.

The Taylor Review of 2017 (see Appendix F2) examined the challenges facing church buildings and considered how they could become more sustainable – ensuring that maintenance, repairs and major works can be undertaken in a timely way and funded as far as possible by the congregation or PCC, and that opportunities to generate additional income to meet these costs are maximised.

The General Synod of the Church of England has committed to all parts of the Church being ‘net zero carbon’ by 2030. The Church Commissioners has allocated triennium funding of £190 million to the Net Zero programme over three trienniums (2023–2031), with £30 million in the first triennium (2023–25).

Churches and cathedrals have had significant funding of approximately £14 million from the Government’s Culture Recovery Fund.

#### B2.2 Anglican Cathedrals

Detailed information regarding the condition of the 42 Church of England cathedrals has been collected through periodic Fabric Needs Surveys which began in 1988/89 and have been repeated approximately once every decade. The third round of surveys was completed in 2010 by Stainburn Taylor Architects. In 2019 Ian Stainburn prepared a further survey of English cathedrals, both Anglican and Roman Catholic. The completed report was submitted to the Church Buildings Council in 2020 but has not been published. An analysis of the financial information drawn from the fabric surveys is contained in Appendix D.

Visitor numbers for some of the English cathedrals are contained in the ALVA report. The two cathedrals with the most visitors in 2023 were St Paul’s Cathedral and Westminster Abbey, with approximately 1.5million visitors to each. St Paul’s Cathedral is the subject of a case study in Volume 3 of this report.

The Taylor report noted that, in contrast to churches, ‘Cathedrals have paid, professional staff to raise, administer and account for funding and carry out necessary works.’

#### B2.3 Churches

The continuing care, maintenance and repair of Church of England parish churches represents an enormous task. 78% (12,200) of them are listed: nationally nearly 45% of all Grade I listed buildings in England are parish churches. These figures also include over 300 churches defined as Major Parish Churches following a joint research project between the Church of England and Historic England.

Previous reports concerned with the challenges of maintaining churches include:

- *Sustaining Major Parish Churches*, Purcell 2016 (see Appendix F1)
- *The Taylor Review: Sustainability of English Churches and Cathedrals*, 2017 (see Appendix F2)
- *The Value of Maintenance*, Historic England 2019 (see Appendix F4)
- *The Future of the UK’s Church Buildings*, National Churches Trust, 2021 (see Appendix F6)

Funding from the Church Commissioners, the Archbishops’ Council is currently providing financial support to dioceses and some partner organisations to recruit a number of Church Buildings Support Officers around the country. The first round of grants was offered in 2023. CBSOs are specialist advisers and enablers who help parishes manage their church buildings, plan for maintenance and repairs and develop ideas for opening up churches for wider use.

The National Churches Trust (NCT) was established in 2002 and supports churches of all denominations, but not cathedrals, across the UK. It gives grants for fabric repairs and new facilities, worth about £1.5 million per annum, and these grant resources are always over-subscribed. A £3.6 million investment in the NCT’s grants scheme by the Government’s Heritage Stimulus Fund was secured 2001/2022.

The NCT has been awarded £1.9 million by the Heritage Fund to boost skills, resources, and funding for historic places of worship in the United Kingdom. This grant will benefit places of worship in the Northwest of England (including Greater Manchester, Lancashire, and Cumbria) as well as churches in Wales and Scotland.

Unlike cathedrals, museums and historic houses, there is no reliable data on the number of people who visit churches each year. Currently, the only data gathered is from the entries recorded in visitor books and of people who attend services. These are thought to seriously underestimate the number of visitors and tourists who visit churches and chapels. The NCT is promoting the Great Church Visitor Count is a research project which will see digital counters installed at churches and chapels in England and Wales and gathering numbers from visitor books at churches across the UK.

### B2.4 Catholic Cathedrals

Contextual information regarding Roman Catholic cathedrals has been provided by the Catholic Bishops' Conference of England and Wales. Catholic cathedrals are not really tourist attractions in this country and are essentially places of prayer. They are eligible for Heritage Lottery funding, for example the current project to restore the Pugin painted decoration at Nottingham Cathedral. Fabric Needs Assessments were prepared in 2019/20 for all Catholic cathedrals in England and Wales. The reports for the twenty English cathedrals have been shared by the Catholic Bishops' Conference for the purposes of this research. One of these, the Metropolitan Cathedral in Liverpool, is the subject of a case study in this report.

### B2.5 Redundant Churches

Contextual information regarding redundant churches has been provided by the Churches Conservation Trust. The CCT is a registered charity and an arms-length government body, funded jointly by the Church Commissioners and the Department for Culture, Media and Sport. The Trust receives about half of its income from these two bodies and the remainder from other sources including membership, legacies and lottery funding. The Trust currently looks after 357 closed church buildings. One of these, St Mary the Virgin in Shrewsbury, is the subject of a case study in this report.

The CCT has a comprehensive and methodical approach to assessing the condition of its buildings, preparing a condition report on one third of its estate every three years. Thus every church is inspected once every nine years, with additional interim visits. The most recent Estates Review undertaken by the CCT rated the state and condition of each building; 73% of these were classed as 'Very good' or 'Good'. 11% were classed as being in poor or very poor condition. The CCT requires £1.7 million annually to maintain its estate in a stable condition. The core budget is prioritised for maintenance. The Heritage Stimulus Fund (see above) and the Heritage Fund have been important sources of funding for CCT's churches.

General issues facing the CCT include:

- deterring theft through greater use of alarms
- greater incidence of vandalism and anti-social behaviour
- encouraging use for exhibitions, concerts and festivals
- inflation in construction costs
- effects of climate change – storm damage, flooding in wet winters, ground shrinkage in dry summers.

The CCT's internal Repair Liability Report, August 2023 (not published), predicts costs for repairing and conserving the Trust's 357 churches over the next 8 years (2023–2031). It also looks back at predictions of costs made in 2019 and considers these in light of the major work undertaken by the Trust in recent years. It reviews how the Trust's financial position has changed and how the Trust might deal with the repair needs in the new strategic period. The report also categorises churches according to their condition based on a methodology that can be replicated in future years. The report provided a figure of just over £25 million for 'ideal spend' on repair and maintenance in the years 2022–25, of which only £210,000 is available from the CCT's core funding.

## B3 HERITAGE DESTINATIONS

### B3.1 Canal & River Trust

The Canal & River Trust (CRT) is a registered charity established in 2012 when all British Waterways' responsibilities in England and Wales were transferred to it. The Trust's charitable objectives include 'To protect and conserve for public benefit sites, objects and buildings of archaeological, architectural, engineering or historic interest on, in the vicinity of, or otherwise associated with inland waterways'.

The Trust is responsible for over 2,000 miles of canals and river navigations across England and Wales, together with the many thousands of structures along their length – reservoirs, aqueducts, bridges, locks, heritage buildings. Some of the canal network is up to 250 years old, and keeping this ageing waterways infrastructure in a safe working condition is a constant challenge.

Outstanding sites on the canal network include Foxton Locks, Bingley Five Rise Locks and Caen Hill Locks. The Anderton Boat Lift, a Scheduled Monument, received a £574,000 grant in 2022 from The National Lottery Heritage Fund to support the development of a major repair and refurbishment project.

The CRT Annual report mentions with regard to repair of heritage assets:

*The more extreme weather resulting from climate change is severely impacting these historic structures and the cost of maintaining them is rapidly increasing. We also saw severe impairment to our water supplies during summer 2022 when temperatures reached 40 degrees in the UK for the first time ever, and the drought period lasted several weeks.*

*Over the past year the Trust has seen an increase in pressure on its finances with rapid inflation and external, global factors affecting supply chains and impacting the cost and availability of materials. At the same time, our government grant payments have been fixed until 2027 with no allowance made for*

## APPENDIX B: CONTEXTUAL INFORMATION FROM STAKEHOLDER ENGAGEMENT

*inflation, and so declining in real terms, forcing us to take urgent measures to address a projected shortfall in our finances. This has meant carefully prioritising where to focus our work to address the most critical and urgent issues, forcing us to scale back on some non-essential works.*

*We have recently received the Government's decision to reduce its funding commitment to the Trust from 2027 onwards.*

*We have continued to carry out a significant amount of water saving maintenance work, investing in our reservoirs and pumping systems to help improve the resilience of the network as extreme weather events are becoming more common.*

*CRT's existing museums such as the Canal Museum at Stoke Bruerne and the National Waterways Museum at Ellesmere Port are accredited museums and thus fall outside the scope of this research.*

### B3.2 English Heritage Trust

Since 1st April 2015 the English Heritage Trust has been operating as an independent charity. Its core mission is to conserve the National Heritage Collection of over 400 sites and monuments. One of these – Whitby Abbey – is the subject of a detailed case study in Volume 2 of this report.

A financial model known as the New Model Contractual Framework was developed whereby the EH Trust received a one-off grant of £80 million from Historic England on 31st March 2015 (the new Model grant). This has enabled the EH Trust to invest over the past eight years in this unique portfolio of sites and monuments. The New Model grant included £52 million during the period up to 2022/23 to address urgent conservation defects. Government grant in aid has come to an end and the Trust is now expected to be financially self-sufficient.

The EH Trust derives well over half of its income from its 1.18 million members and admission charges. The Trust has also benefitted from grants from Historic England and the National Lottery Heritage Fund. Income from fundraising and philanthropy is also significant and the Trust aims to secure at least £25 million in philanthropic income per year by 2025/26. A loan of £23.4 million was received from the Culture Recovery Fund (CRF) in March 2021 from Arts Council England.

By 2022/23 the Trust had spent £50.9 million from the £52 million grant awarded when it became a charity. The actual expenditure in 2022/23 was about £23 million inclusive of £7.4 million of major projects funded from the £52 million grant and about £16 million from EH unrestricted funds covering core maintenance, safety, compliance, landscape management and building services.

In terms of the financial value of the current backlog, the Trust currently has identified about £60 million of work to be undertaken within the next five years (classed as Priority 0, 1 and 2). There is a further £50 million in known lower priority works as well (classed as Priority 3 and 4). This does not include the cost of delivery, which will include fees, contractors' prelims, scaffolding and in the case of 'free to enter sites', irrecoverable VAT. This can increase the baseline 'deficit' costs by up to 80%. Based on current knowledge, the Trust is planning a 10-year £65 million programme of major conservation projects – subject to the availability of funding.

One of the key performance indicators recorded in the Annual Report is the percentage of sites in sustainable condition. This was 73.5% in 2022/23 and the goal is to increase this to 76% in 2024/25. A small number of English Heritage sites are included in Historic England's Heritage at Risk Register. One of these is Baguley Hall, a Grade I listed building, and two are scheduled monuments: Derwentcote steel cementation furnace, and parts of the fortifications on the Western Heights at Dover.

Challenges mentioned in the Annual Report include the ending of the New Model grant, high inflation, the cost-of-living crisis, supply chain bottlenecks, the energy crisis, a labour shortage and slow economic growth. Climate change brings the increased risk of more frequent adverse weather conditions which can affect the ability to open and conserve the Trust's sites. The Trust launched its Climate Action Plan in 2022 with an ambition to achieve net zero carbon by 2040.

Over the current two-year period (2022/23 and 2024/25), the Trust plans to:

- increase knowledge of the condition of the sites in its care and the causes of deterioration through a ten-year survey programme (which commenced in 2021/22)
- bring more properties up to the standard of 'Sustainable Condition' through a programme of major conservation projects
- introduce new maintenance schedules and contractor frameworks to align to sustainable conservation standards
- establish an approach to climate risk to inform adaptation measures and help embed climate resilience in the Trust's processes and decision making.

### B3.3 National Trust

The National Trust is a conservation charity founded in 1895 with 5.7 million members which aims to protect natural and historic places for current and future generations. The Trust looks after more than 250,000 hectares of farmland, 780 miles of coastline and 500 historic places, gardens and nature reserves across England, Wales and Northern Ireland. The Trust's Property System has the potential to be an asset management system for all 28,500 built assets across the estate. These range from country houses to workshops, bridges, follies and lighthouses. The Trust also manages about 5,000 residential properties and about 2,000 farms.

A significant number of the Trust's historic houses are outside of the scope of the current research, being accredited museums. However, one of the Trust's properties, Shugborough Hall in Staffordshire, is the subject of a detailed case study in this report. The following summary of the Trust's conservation management approach is based on the Trust's annual report and on information supplied by the Trust's Senior Buildings Asset Manager.

The Trust previously used a Conservation Performance Indicator (CPI) process to assess the condition of assets that they care for. This is being replaced through the Conservation Management Review (CMR) process, aiming to make conservation management planning and decision-making easier and allow more effective performance measures to be in place from 2024–25. The Trust is currently commissioning Conservation Condition Reports (CCRs) to be carried out over the next two years for its 150 'key' properties, and these will follow a five-year cycle. In the meantime, these properties are typically following a programme of works defined by previous quinquennial reports.

CCRs are a bespoke version of the Quinquennial Inspection (QI) Surveys which have been carried out hitherto. CCRs will be more targeted than QIs and will focus on determining distinct projects, enabling appropriate long-term planning for each property. The smaller properties do not currently have a formal framework for condition appraisals, though the CCR process is designed to be scalable. Works are typically planned following guidance of in-house regional building surveyors, informed by external consultant advice on a needs basis.

The Trust's annual report for 2022/23 reports membership fees as the single biggest source of income at £276.5 million out of a total of £605.8 million. Most repair and maintenance projects are funded internally, with additional funding secured through grants, philanthropic giving and fundraising. Key sources of grant income are Arts Council England, the National Lottery Heritage Fund and the Landfill

Community Fund. The Trust has also benefited from the Covid Cultural Recovery Fund (2020–21), receiving £5.3 million spread across 15 properties.

The Trust's has commented regarding the future outlook for grant funding:

*"I think the volume of grant income will plateau and increase slightly over the next 5–10 years (allowing for inflation). We are likely to see change though in what the grant funding is for, for example, following the pandemic we saw a rise in grant schemes for access to nature/wellbeing. In response to the climate and nature crises we are seeing a sharp increase in grants for nature conservation projects. At the same time, grant schemes for building/collections management/restoration have dwindled."*

The Trust aims to be carbon net zero by 2030, and to embed climate change adaptation into their decision making. In the remainder of this decade heritage projects are likely to be competing for resources with a growing market for retrofitting traditional buildings. Another issue is that a large proportion of the current workforce in the heritage crafts industry are nearing retirement age, bringing the challenge of transferring that experience to the next generation.

### B3.4 Third-Sector Bodies

A number of former government sites which contain nationally significant heritage assets are owned and maintained by independent charitable trusts, notably the Chatham Historic Dockyard Trust, the Portsmouth Naval Base Property Trust, the Greenwich Foundation for the Old Royal Naval College and the Somerset House Trust. Some of these organisations are accredited museums and are thus out of scope for the current research. Discussion with the Head of Buildings at the Somerset House Trust highlighted a number of issues at that site:

- The SHT does not receive funding from central government and relies on income from events (such as the Christmas ice rink), office rentals and cultural projects. Location filming is also a significant income source.
- The Trust has not benefited from lottery funding since 1999–2003 when it received two major grants. More recent sources of funding have included the Covid Recovery Fund.
- The condition of the fabric has significantly improved since the Trust was established in 1997. As well as a long-running programme of fabric repairs, there has been significant investment to renew the site's infrastructure, including lifts and air-conditioning plant.



## APPENDIX B: CONTEXTUAL INFORMATION FROM STAKEHOLDER ENGAGEMENT

- The programming of repair works is constrained by the need to host a programme of events, and there is always competition for the available funding with other projects.
- The estate has a quinquennial condition inspection and defects are logged on a 3-D digital model. The aim is to upgrade this to BIM (Building Information Modelling), however the cost of doing this has been found to be prohibitive.
- The biggest risk is seen as climate change. Increased rainfall has increased the risk of flooding and mitigation measures are needed, including more regular maintenance and new drainage systems.
- The estate has already achieved significant energy savings of 35% through more efficient heating controls, voltage optimisation, improved insulation in roofs and the adoption of LED lighting.
- A CCHP (Combined Cooling Heat & Power) system was installed in 2015 and has achieved significant energy savings.
- The biggest remaining source of heat loss is through windows.
- New energy regulations for office buildings require them to have an EPC rating of C or above by 2027.

As local authorities are seeking to divest their cultural assets, charitable trusts and not-for-profit organisations are an important and growing category of ownership in the arts and heritage sector. Contextual information about this sector has been gathered from discussions with the Architectural Heritage Fund and the Heritage Trust Network. The former provides early-stage grants for feasibility and development projects, and acts as a social investor through its loans to building preservation projects. The latter is a registered charity which provides support to its membership engaged in heritage projects.

The pilot *Heritage Development Trusts* project is an organisational capacity building initiative which aims to enable building preservation trusts or similar organisations delivering heritage-led regeneration to make a step change in their operations and support their long-term sustainability. It is part of the Architectural Heritage Fund's *Transforming Places through Heritage* programme (running from 2019–23), funded by DCMS which supports charities and social enterprises to create sustainable new uses for redundant or underused historic buildings on high streets and town centres in England. Seven organisations were selected to receive Heritage Development Trust grants in 2019 and 2020. These are Great Yarmouth Preservation Trust, Historic Coventry Trust, Tyne & Wear BPT, Valley Heritage CIO,

Heart of Hastings CLT, Heritage Lab CIC and Heritage Lincolnshire. Each of these has received revenue funding and business development support. The Heritage Fund has funded the Architectural Heritage Fund to develop twelve more Heritage Development Trusts in addition to the seven that already exist.

### B3.5 Non-Accredited Museums

Accredited museums are out of scope, having benefitted from nearly £100 million for repair and maintenance through the MEND programme – see Appendix E5 below. Information regarding the issues currently facing non-accredited museums has been drawn from discussion with Lisa Ollerhead, Director of the Association of Independent Museums (AIM), and with Sharon Heal, Director of the Museums Association.

The AIM membership encompasses accredited as well as non-accredited museums. About two thirds of the membership consists of small museums, often with less than 20,000 visitors annually, and often completely run by volunteers. Smaller museums are less likely to be accredited and may not have the capacity to maintain the accreditation procedures. They are also more likely to occupy part of a building which they do not manage themselves.

AIM receives funding from the Arts Council ACE to support museums through focusing on their governance and management. AIM also gives out grants from the Pilgrim Trust, National Lottery Heritage Fund and from DCMS itself. The Pilgrim Trust has a long-term partnership with AIM and has awarded a three-year grant (2023–25) of £414,000 to support their collections care and conservation grant programmes.

Issues mentioned by AIM included:

- Long-term impact of Covid-19
- Cuts to local authority funding leading to risk of museum closures
- Likelihood of museums which currently have a property arrangement with a local authority, such as a 'peppercorn' non-repairing lease, may be confronted with less favourable terms, potentially resulting in closure
- Heritage skills shortage
- Smaller museums do not have development officers who can prepare funding bids.
- Funding is much more likely to be directed towards audience engagement/ visitor services rather than routine maintenance
- Adverse impact of VAT on repairs which incentivises new building rather than retrofit.

## APPENDIX B: CONTEXTUAL INFORMATION FROM STAKEHOLDER ENGAGEMENT

AIM's own membership survey in September 2023 showed that 44% of 200 responses identified maintenance as a funding need.

Issues mentioned by the Museums Association included:

- Lack of capacity in smaller museums to prepare funding applications
- A drop of approximately 30% in funding from local authorities
- Recruitment freezes in local authorities and some arms-length bodies
- Lack of expertise in smaller museums, for example in how to manage risk
- Importance of the Culture Recovery Fund in ensuring the survival of museums
- Running down of reserves
- The Annual Museum Survey 2023 shows that the cost-of-living crisis is having a huge impact on visitor numbers, staffing, volunteers and finances.
- Although few museums are reported to have closed, many are 'on the edge' of closure.

## APPENDIX C: DETAILED SURVEY FINDINGS

### C1 INTRODUCTION

The survey gathered information on building condition, condition monitoring, maintenance regimes, budgets and finance. A key part of the survey focused on informing a detailed understanding of works (planned and funded) on specific building elements, as well as the overall backlog of works required, and its value.

Data on the cost of repairs and maintenance required by venues, and data on unfunded works to specific building elements, has been extrapolated and is presented in this report as estimates on an England-wide basis.

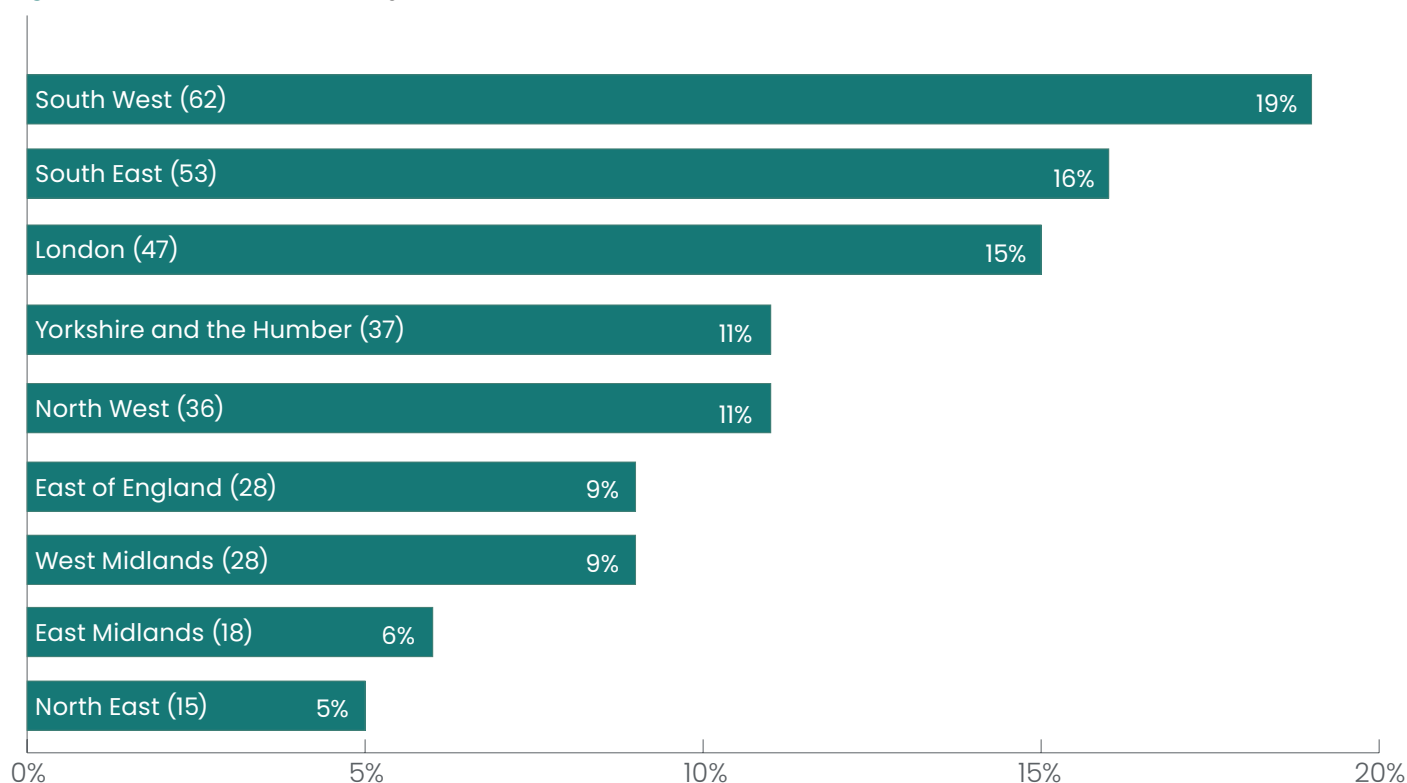
Data is presented for all venues and is disaggregated for three broad venue categories:

- Theatres and performance venues
- Places of worship
- Heritage destinations

### C2 RESPONDENT PROFILE

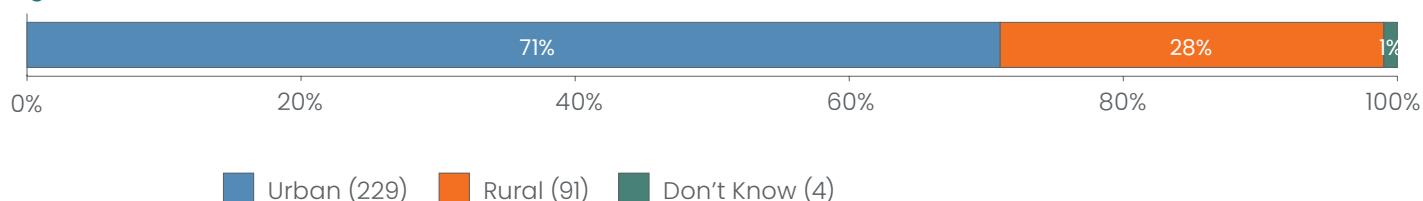
The survey gathered valid responses from 324 venues. Looking at the responses by Region, the South West produced the largest proportion (19%), and the North East the smallest proportion (5%), of responses. This aligns with the regional distribution of heritage buildings, which are numerous in the South West but relatively few in the North East, and also – in the case of the North East – the relative population.

**Figure 1:** Location of venue: region



Base: 324 respondents

**Figure 2:** Location of venue: urban or rural

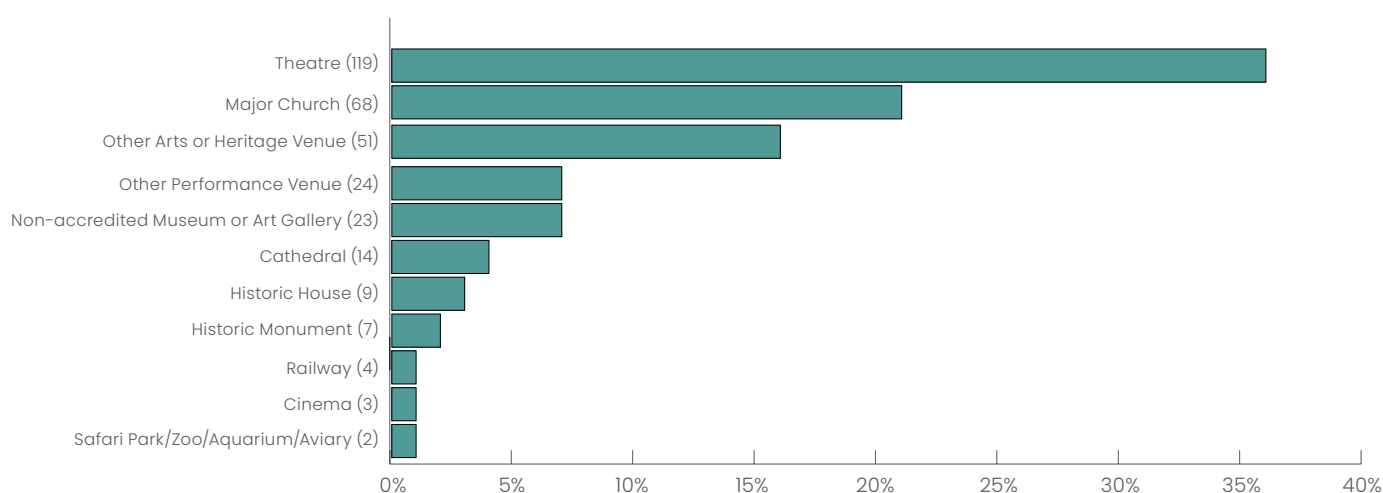


## APPENDIX C: DETAILED SURVEY FINDINGS

Cross-comparison with the sampling frame and known data (for example, the proportion of cathedrals relative to major churches and theatres relative to other types of venue) suggests that the achieved sample provides a generally good, balanced representation of in-scope buildings.

**Most venues** within the theatres and performance category of the sample are theatres, along with 24 other performance venues, most of which are performing arts centres or concert halls. Among the places of worship, there are 14 cathedrals and 68 major churches, the majority of which are Anglican (Church of England) but also included a number of Roman Catholic cathedrals and Nonconformist churches and chapels. Among heritage destinations, the largest number of responses came from non-accredited museums and art galleries. It may be noted that a substantial number of otherwise valid responses were excluded from the sample because they came from accredited museums which were out of scope due to their outstanding repair needs being addressed through an existing funding mechanism, the MEND fund.

**Figure 3:** Venue type



Total: 324 venues

Other heritage destinations included multi-arts centres with a visual arts focus; historic houses and historic monuments; small numbers of cinemas, historic railways, and some more unusual buildings such as windmills and canal structures.

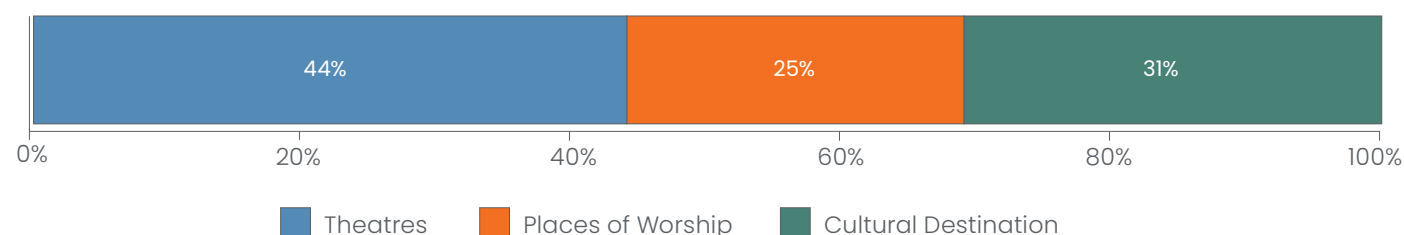
Of the respondents who selected 'other publicly accessible arts venue', most (31 of 54) described their venue as an arts or community centre, followed by:

- Multipurpose venue (7)
- Music venue (7)
- Monument or landmark (3)
- Garden (2)
- Community initiative (2)
- Library (1)
- Observatory (1)



## APPENDIX C: DETAILED SURVEY FINDINGS

**Figure 4:** Venue Category



**Figure 5:** Venue Ownership

Total: 324 venues

The most common types of ownership amongst respondents were charitable trusts (37%), the Church of England (22%), local authority (17%) and 'other third sector' (8%).

English Heritage (EH) and the National Trust (NT) were not largely represented. Many NT properties are accredited museums, and therefore out of the scope of this research. Although most EH properties were in-scope, they were under-represented in the response to the survey. To compensate for this, cumulative data on building condition was sought from EH, and an EH property (Whitby Abbey) was used as a case study heritage destination.

Other categories of ownership include:

- Local authority owned, operated by a charity or trust (7)
- Charity, trust or society owned and run (7)
- Private sector owned (5)
- Owned by organisation – unclear if private or charity (3)
- Educational establishment (2)
- Church organisation (2)
- Government organisation (1)
- Multiple bodies (1)

## APPENDIX C: DETAILED SURVEY FINDINGS

**Table 1:** Visitor numbers

Venue	Total (000s)	Max (000s)	Median (000s)	Mean (000s)
All	36,862	3,100	30	117
Theatres and performance venues	19,052	3,100	50	138
Places of worship	6,953	1,297	23	88
Heritage destinations	10,857.5	1,149	28	111

**Table 2:** Numbers of staff (FTE)

Venue	Total (000s)	Max (000s)	Median (000s)	Mean (000s)
All	11,268	1,439	5	35
Theatres and performance venues	7,177	1,055	10	51
Places of worship	866	180	3	11
Heritage destinations	3,225	1,439	5	33

**Table 3:** Numbers of volunteers

Venue	Total (000s)	Max (000s)	Median (000s)	Mean (000s)
All	22,403	1,000	35	70
Theatres and performance venues	10,217	1,000	40	72
Places of worship	8,034	631	50	98
Heritage destinations	4,152	450	24	44

C3 THE CONDITION OF CULTURAL AND HERITAGE VENUES

Key points:

- A majority of buildings were reported to have significant repair needs, with needs varying by destination type.
- Overall, places of worship had the most significant condition problems, with significantly more buildings in poor to very poor condition, and fewer in good to very good condition than theatres or heritage destinations.
- Theatres reported slightly better building condition than the other categories; no respondents reported immediate threats to their building’s survival. However, they reported particular problems with their technical infrastructure.
- Of the various key building elements, the fundamental structural components of the building were reported to be in best condition. This is not surprising, as traditionally constructed buildings will generally withstand significant neglect before becoming actively unstable. However, there was still a general picture of roofs, windows and doors, along with building services, having the most widespread problems.
- Amongst building services, there is evidence of a significant minority of lifts being in very poor condition.
- Among theatres, the overall picture suggests that the condition of front of house elements is better than back of house, though there are significant reported problems with toilets. In addition, a significant proportion of theatre respondents said they were not sure of the condition of fibrous plaster in their venues. This finding would bear further investigation: ageing fibrous plaster is a known potential hazard and there should be regular inspections to ensure potential issues are identified and remedied early.

This research uses a five-point scale to report on condition (Table 4). Using this scale, respondents were asked to rate the current condition of their venue, and specific building elements. Later in this section of the report we present respondents’ ratings of the condition of their venue in five years, should their current maintenance expenditure be maintained (Figure 58).

Table 4: Rating scale for building condition

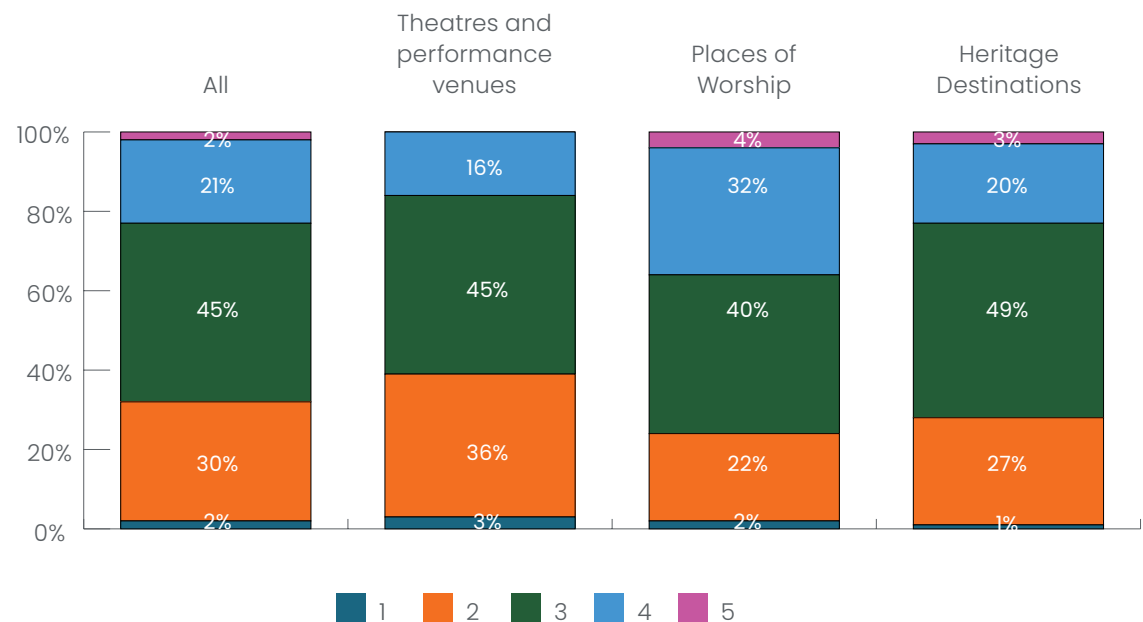
Rating	Description
1	Structurally sound, no repair needed
2	Structurally sound, but with need for minor repair or general maintenance
3	Generally structurally sound, but in need of more extensive repair or maintenance to address substantive but localised/ contained problems (e.g. minor rot, infestation, masonry deterioration, multiple localised but currently manageable roof leaks)
4	Significantly compromised, with element(s) having problems that, if unaddressed, threaten the long-term stability or survival of the building (e.g. rot or infestation of timber structural elements, extensive masonry deterioration, roof leaks or failures that are non-localised, actively spreading or worsening)
5	Active failure of elements or clear signs of structural instability, posing an imminent threat to the survival of the building (e.g. loss of areas of roofing, broken or collapsing windows and doors, major deterioration of the interior, extensive severe masonry erosion and/or spalling and/or widespread loss of integrity to jointing etc.)

Ratings of building conditions reveal a widespread maintenance need (Figure 6). Almost all (98%) buildings are rated as being in need of some form of repair and maintenance, ranging from minor works (30%) to extensive repair (45%) to significant compromise (21%) and active failure or structural instability (2%).

# APPENDIX C: DETAILED SURVEY FINDINGS

The picture is most severe for places of worship, with over a third of venues rated as being in the bottom two condition categories.

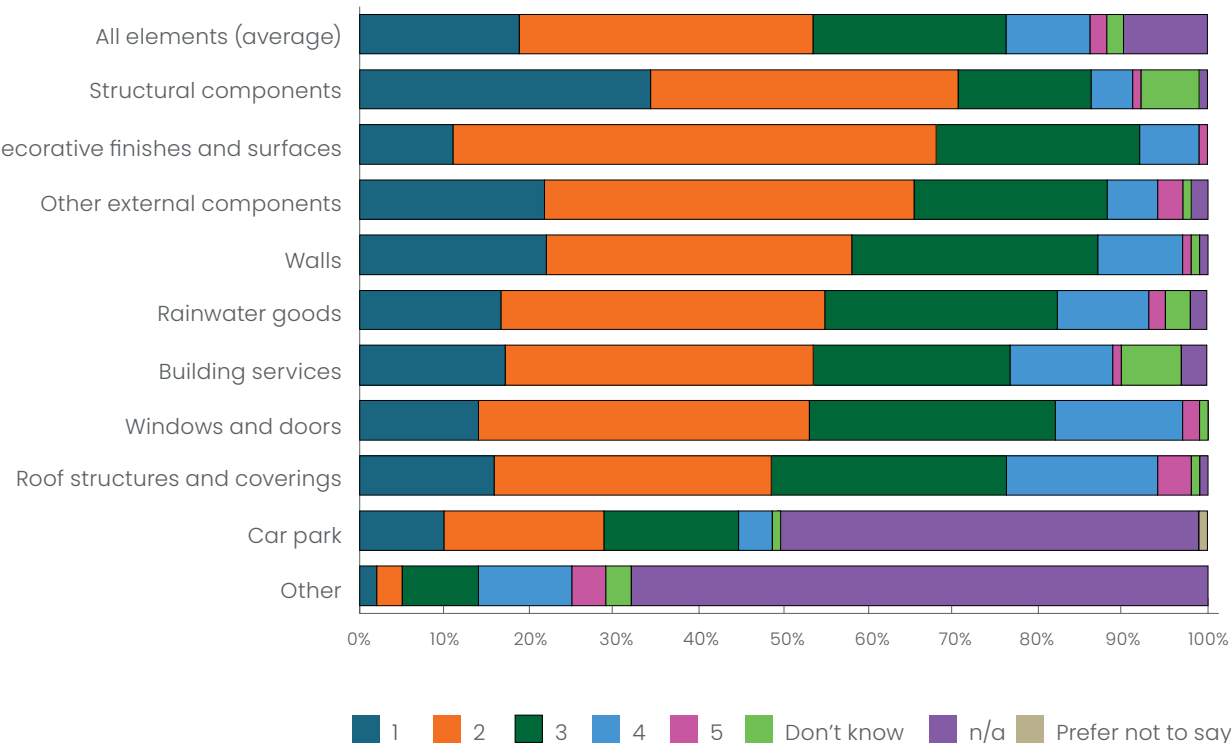
Figure 6: Current condition of buildings



Base: 324 respondents

When individual building elements are considered, the picture appears slightly more positive, with more venues rating elements as being ‘sound’, and therefore without a maintenance need (Figure 7). Notwithstanding, the ratings reveal that key elements of building envelope, such as roofs, windows and doors are rated by respondents as being in the poorest condition.

Figure 7: Condition of building elements



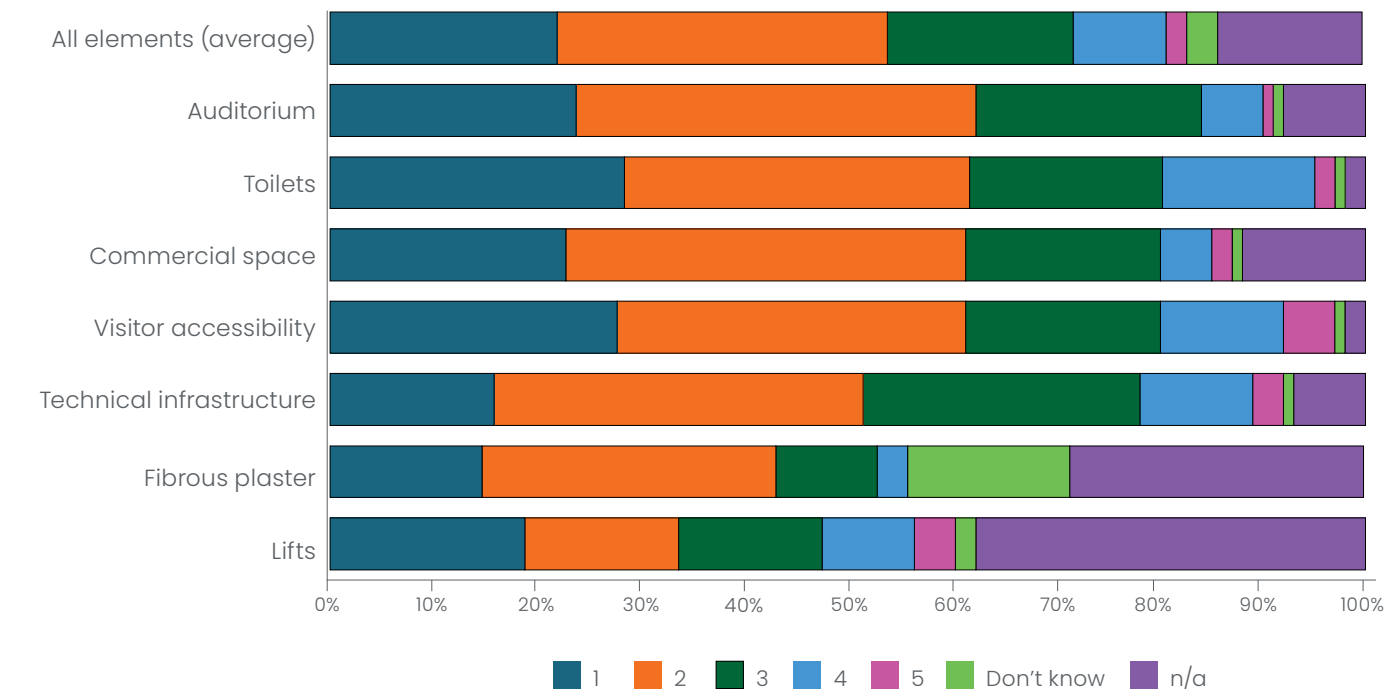
Base: 324 respondents



APPENDIX C: DETAILED SURVEY FINDINGS

The survey also sought information from performance venues – such as theatres and concert halls – on the condition of discrete elements of the venue (Figure 8). Overall, ratings suggest a fair proportion (just over a fifth) are sound, without a need for repair. A further third of respondents consider their venue to be in need of minor repair, whilst almost a third suggest their infrastructure is in need of extensive repair, is significantly compromised, or is at risk or failure. Front of house elements appear to be in the best condition, potentially masking more serious problems in the back of house, such as in technical infrastructure (two thirds report the most serious problems here).

Figure 8: Condition of specific elements of performance venues



Base: 193 respondents

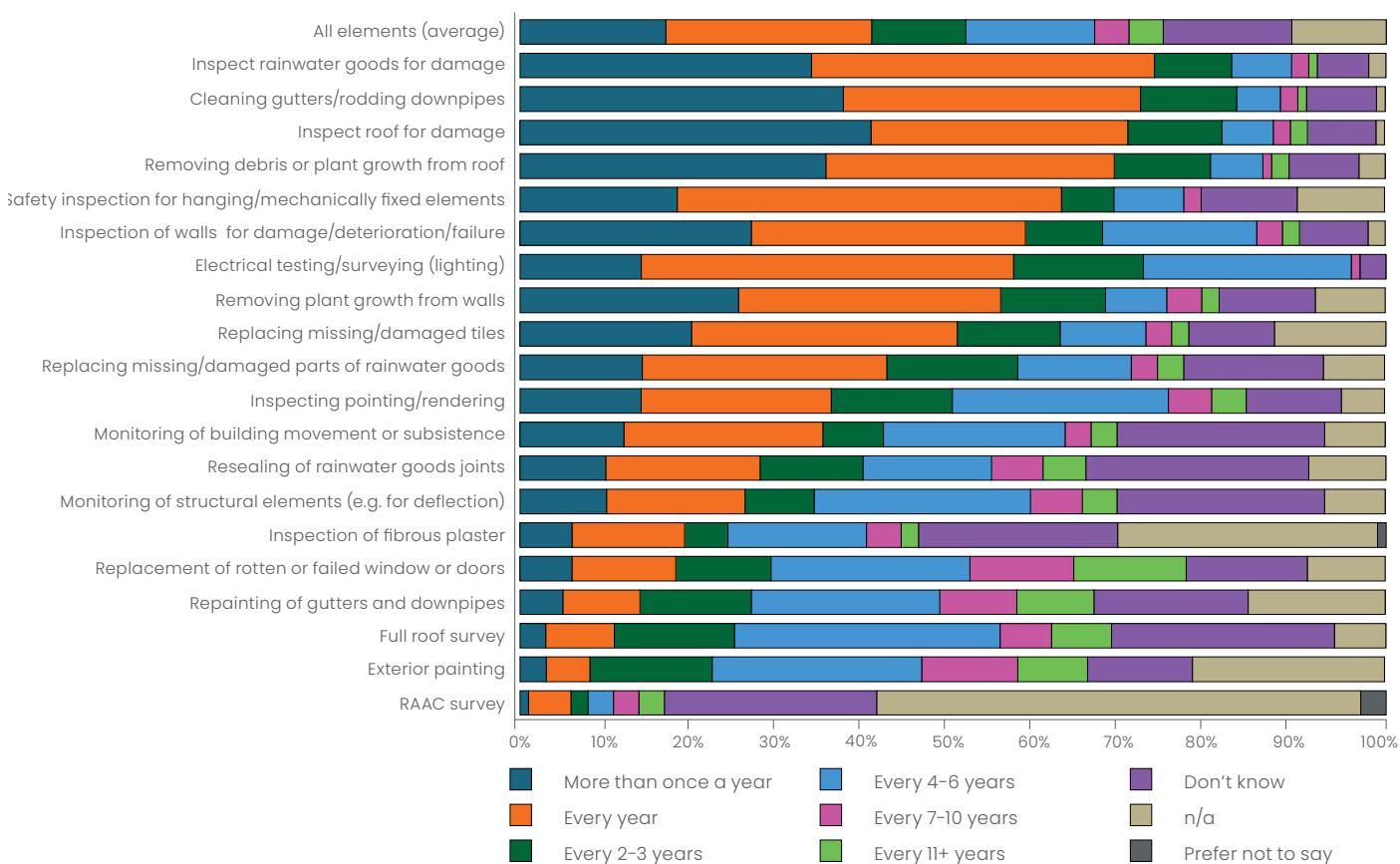
## APPENDIX C: DETAILED SURVEY FINDINGS

Venues are conducting maintenance activities on a fairly frequent basis, with over 40% performing maintenance at least every year (17% more than once a year). The most frequent maintenance activities include inspecting roofs for damage, cleaning gutters and downpipes, and inspecting rainwater goods for damage (Figure 9).

Most venues (57%) are testing lighting at least once a year and 62% are conducting safety inspections for hanging/mechanically fixed elements.

Not all respondents were able to provide an indication of the frequency of different maintenance activities. There is most uncertainty surrounding the monitoring of critical structural elements. For example, 26% of respondents do not know how frequently a full roof survey is undertaken, 24% do not know how regularly the building is monitored for movement or subsistence and 24% do not know how regularly structural elements are monitored (e.g. for deflection).

**Figure 9:** Frequency of maintenance activities



Base: 324 respondents

## APPENDIX C: DETAILED SURVEY FINDINGS

### C4 THE COST OF THE MAINTENANCE, REPAIR, AND REPLACEMENT BACKLOG

#### Key points:

- Total repair backlog conservatively estimated at in excess of £7 billion
- Of this, some £3 billion is urgent and necessary within the next five years, and more than £2 billion is currently unfunded.
- Theatres represent well over half the unfunded, necessary works. This is in spite of their better overall reported condition. This appears to reflect their high number, their physical size and complexity, and their need for complex technical and operational systems.
- Roofs are the most frequently reported category of necessary but unfunded works, with 22% of respondents citing them, followed by window restoration and repair.
- Although not routinely cited, climate change was noted by a number of respondents as a factor leading to greater need for works to roofs and drainage.
- Places of worship report the highest value of necessary but unfunded repairs. This is consistent with the generally poorer reported condition of cathedrals and churches.

To inform an understanding of the extent of outstanding repair and maintenance work, survey respondents were asked a series of questions on the value of works that are required to their venue.

The data reported in this section of the report relates to the nature and value of

- all the repair, maintenance and renewal works that are needed;
- urgent works, defined as those work that should be completed in the next five years;
- the value of urgent works that are currently unfunded.

All repair and maintenance needed  
(whether funded or unfunded)

Of this total need, any urgent works  
that are required

How much of that urgent work is  
currently unfunded

The data presented in the tables that follow has been extrapolated from the survey data to a national, England-wide level.

The findings suggest a national need – across all venue types – of over £7 billion, with over half of this required by theatres and performance venues (Table 5). Average costs are also highest amongst theatres and performance venues, at over £6m per venue.

**Table 5:** Total value of all repair and maintenance needed

Venue	Mean (£000s)	Proportion of Respondents (%)	Number of Buildings (frame)	Total Value (£000s)
Theatres and performance venues	6,148	97%	681	4,040,324.5
Places of worship	5,028	90%	383	1,737,728
Heritage destinations	2,946	90%	517	1,369,113.5
All	4,926	93%	1,581	7,147,166

Note: The extrapolated totals were calculated by taking average expected cost of repair for those venues reporting a repair need, multiplied by the proportion of that the type of venue reporting such a repair need, multiplied by the total number of that type of venue in the sample frame. For example, the total figure for theatres and performance venues is: £6,147,890 x 96.5% x 681 = £4,040,324,425.

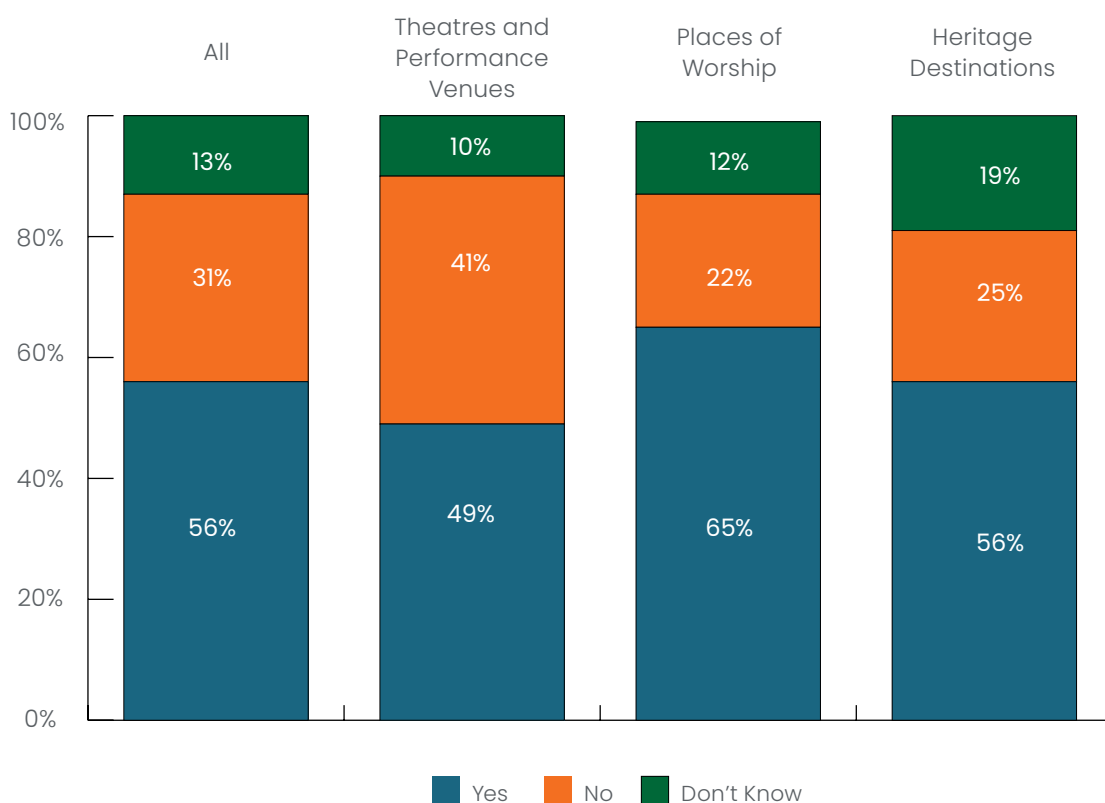
## APPENDIX C: DETAILED SURVEY FINDINGS

Of this total cost, 43% (£3 billion) is estimated to be required for urgent works (defined as needing to be completed within the next five years) (Table 6). Theatres and performance venues report the highest average cost for urgent works (£2.8 million).

Venue	Mean (£000s)	Proportion of Respondents (%)	Number of Buildings (frame)	Total Value (£000s)
Theatres and performance venues	2,758	96%	681	1,799,318
Places of worship	1,816	89%	383	619,241
Heritage destinations	1,493	87%	517	670,563
All	2,158	91%	1,581	3,089,122

Over half (56%) of surveyed venues report that at least some of their urgently needed works are currently unfunded (Figure 10). Whilst theatres and performance venues report the highest average cost per venue, unfunded works are most prevalent amongst places of worship, with 65% of urgent works required to these venues currently being unfunded.

**Figure 10:** Is there any urgent, but currently unfunded, work needed?



Base: 319 respondents



## APPENDIX C: DETAILED SURVEY FINDINGS

The total value of funds required to complete unfunded urgent works is estimated to be over £2 billion (Table 7). Theatres and performance venues represent the highest average unfunded amounts, even though theatres report that their buildings are, overall, in better condition than places of worship and heritage destinations. This partly reflects the significant numbers of theatres in the frame but also must directly relate to the size and complexity of their buildings and the extent of technical infrastructure needed to support their operations.

**Table 7:** Total value of currently unfunded, but urgent, works

Venue	Mean (£000s)	Proportion of Respondents (%)	Number of Buildings (frame)	Total Value (£000s)
Theatres and performance venues	3,693	47%	681	1,178,349
Places of worship	2,101	60%	383	480,785
Heritage destinations	1,917	51%	517	500,583
All	2,688	51%	1,581	2,159,717.5

The value of urgent, unfunded repairs, as estimated by individual venues, ranges from a few thousand pounds to tens of millions of pounds. In general, there is a long right tail, meaning that while the average (mean) repair need is in the region of £2.7 million, the median is the region of £300,000 to £500,000, depending on venue type. The median and first and third quartile figures give a clearer sense of the distribution of values for these repair needs.

Venue	First quartile (£000s)	Median (%)	Third Quartile (frame)
Theatres and performance venues	100	300	2,500
Places of worship	213	500	2,150
Heritage destinations	100	350	1,911
All	110	363	2,000

## APPENDIX C: DETAILED SURVEY FINDINGS

### C5 THE NATURE AND COST OF SPECIFIC REPAIRS AND REPLACEMENTS REQUIRED

#### C5.1 Roofs

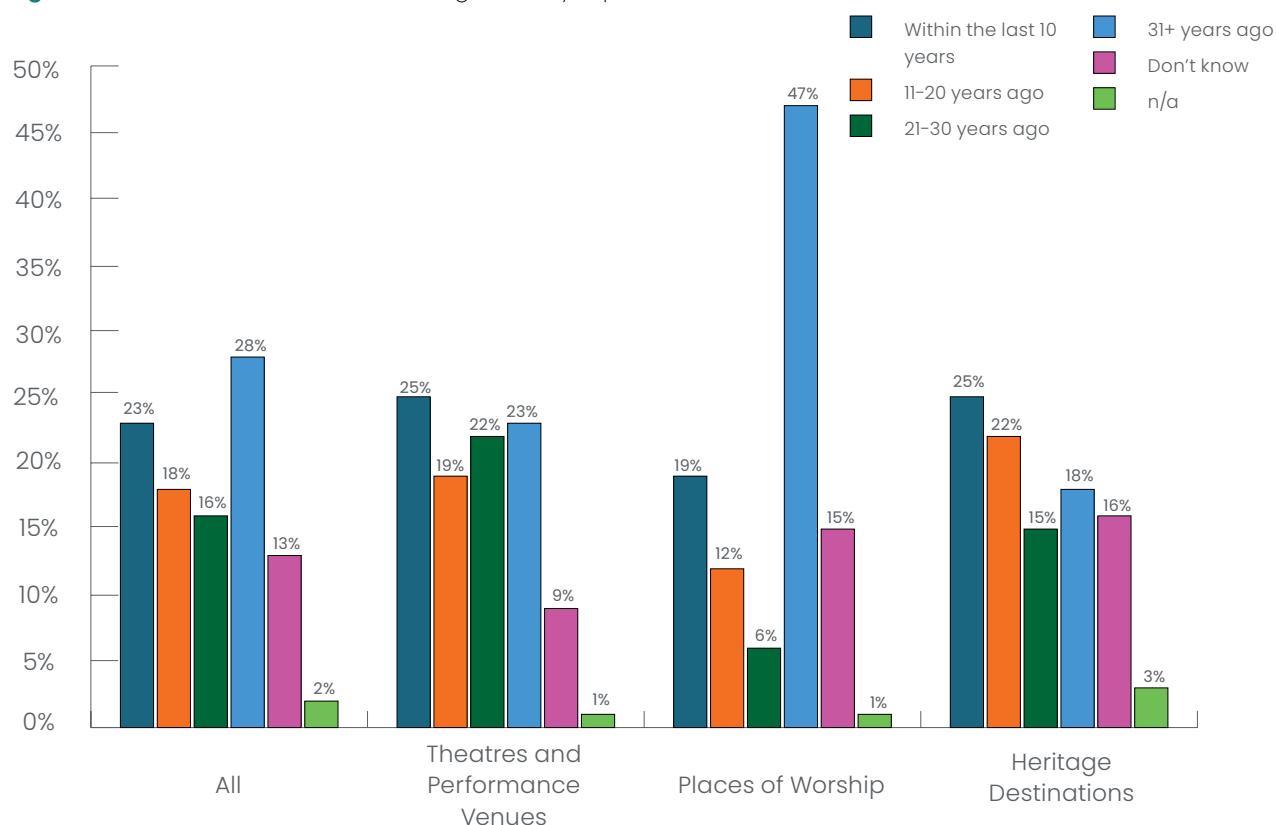
##### Key points:

- Approximately 40% of respondents reported recent (within 20 years) renovation or replacement of their venue's roof. Nearly 15% reported that they expected to fully renovate or replace their roof in the next five years.
- The oldest roofs are found on places of worship, with nearly half reporting that it was more than 30 years since their last major works of refurbishment or replacement.
- Theatres had the most consistent distribution of times since the last replacement of refurbishment of roof coverings, suggesting that they have the most systematic approach to roof replacement and refurbishment. Places of worship showed the greatest inconsistency, suggesting a more reactive approach to repair and maintenance.
- The average cost of planned works is somewhat higher for theatres than places of worship, while heritage destinations planning roof works report significantly lower projected spends. This is likely to directly reflect the relative size and complexity of the works required.

Just over two fifths (41%) of respondents state that the roof of their venue has been replaced or renovated within the last 20 years (Figure 11). This tends to support the suggestion by just under half of survey respondents that the roof of their venue is in good condition (either no repair needed, or minor repair needed).

As might be expected, the oldest roofs are found amongst places of worship, with just under half of respondents (47%) stating that the roof of their venue was last replaced or renovated over 31 years ago. It should be borne in mind, however, that the materials used for roofing churches often have very long lifespans, meaning that roofs that have had minimal renewal or renovation for substantial periods may nevertheless remain in good overall condition. Even so, the open responses made it clear that places of worship are frequently confronted by serious condition issues with their roofs.

**Figure 11:** When was the roof covering last fully replaced or renovated?



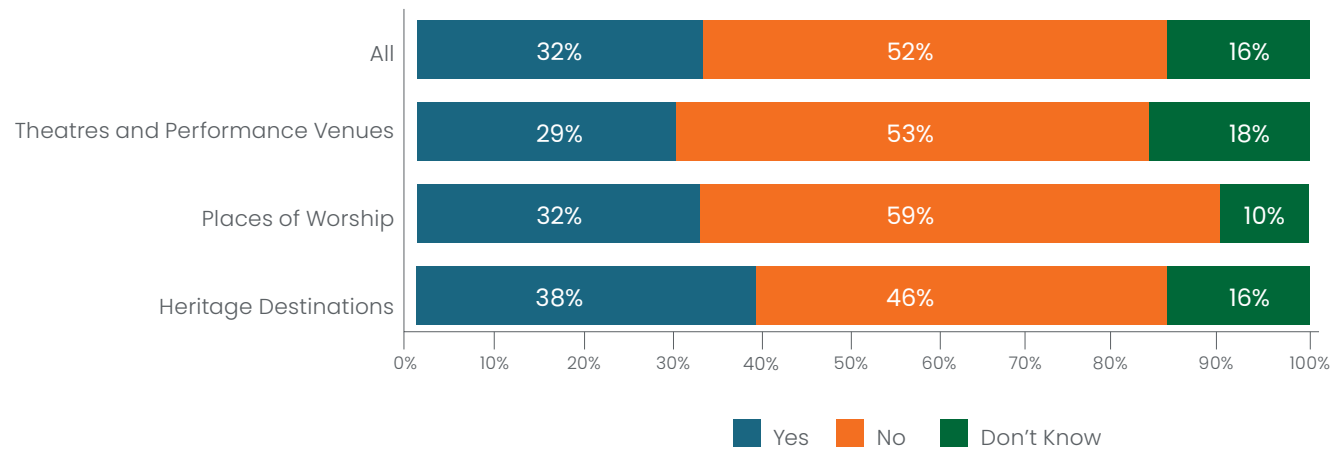
Base: 322 respondents

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# APPENDIX C: DETAILED SURVEY FINDINGS

About a third of respondents state that work is planned to take place on the roof of their venue within the next five years (Figure 12).

**Figure 12:** Are works planned to roofs in the next 5 years (funding available)



Base: 323 respondents

The average value of this planned work is over £400k. Extrapolated to a national level, this would equate to £135m of planned, funded works to roofs across all cultural and heritage venues (Table 8).

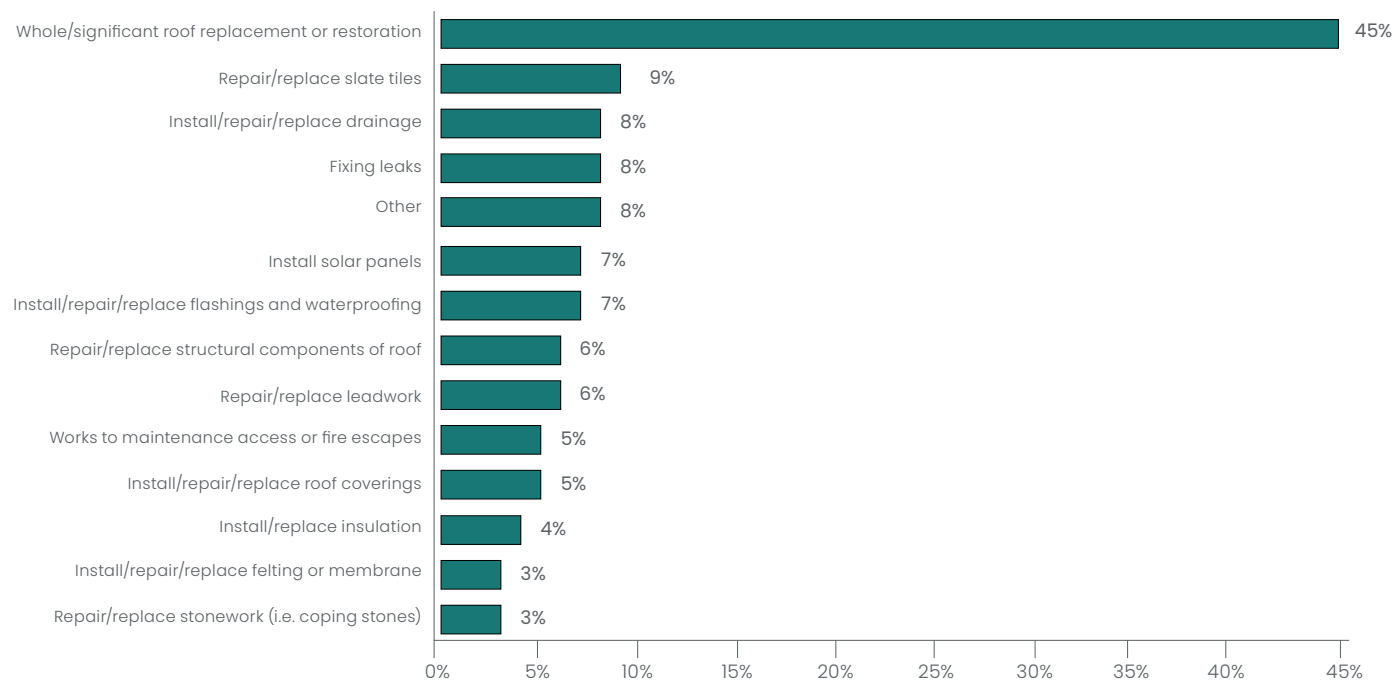
**Table 8:** Value of works planned to roofs in the next 5 years

Venue	Mean (£000s)	Number of Buildings (frame)	Total Value (£000s)
Theatres and performance venues	532.5	681	81,148.5
Places of worship	411.5	383	34,594
Heritage destinations	184.5	517	19,270
All	402	1,581	135,012

# APPENDIX C: DETAILED SURVEY FINDINGS

One hundred respondents provided additional detail about the specific nature of roofing works required. Nearly half of these respondents cited a need for a complete or significant roof replacement or restoration; this is the dominant need reported across all venue types and regions (Figure 13).

Figure 13: Types of roof repairs required



Base: 100 respondents

‘Other’ responses were varied and specific to the particular building: for example, replacement of copper, shutter repair, removal of vegetation.

Across the venue types, theatres represented nearly a third of the responses citing a need for roof repairs, followed by other arts venues (just over a fifth) and major churches (accounting for a fifth of responses).

About a fifth of all survey respondents were able to provide cost estimates for roofing works. Those who were unable to do so said that this was due to either not yet knowing (quotations still to be obtained), because the Local Authority has accountability for commissioning and managing works, or because they know no funding is available (i.e. there appears to be no point in obtaining estimates if they cannot proceed with any works). Respondents also noted that the cost of scaffolding is significant, and this can substantially increase cost estimates.

One respondent cited delays in being able to obtain cost estimates because multiple permissions needed to be sought from the landlord and Local Authority before they are able to proceed. While not all respondents were able to provide estimates, most still anticipate ‘significant’ costs for roof repairs.

“Coping stones have failed, causing water ingress that has corroded the steel structure. Steel treatment and rebricking is required. Scaffolding is a significant cost.”

Theatre, South-West

## APPENDIX C: DETAILED SURVEY FINDINGS

### C5.2 Rainwater Goods

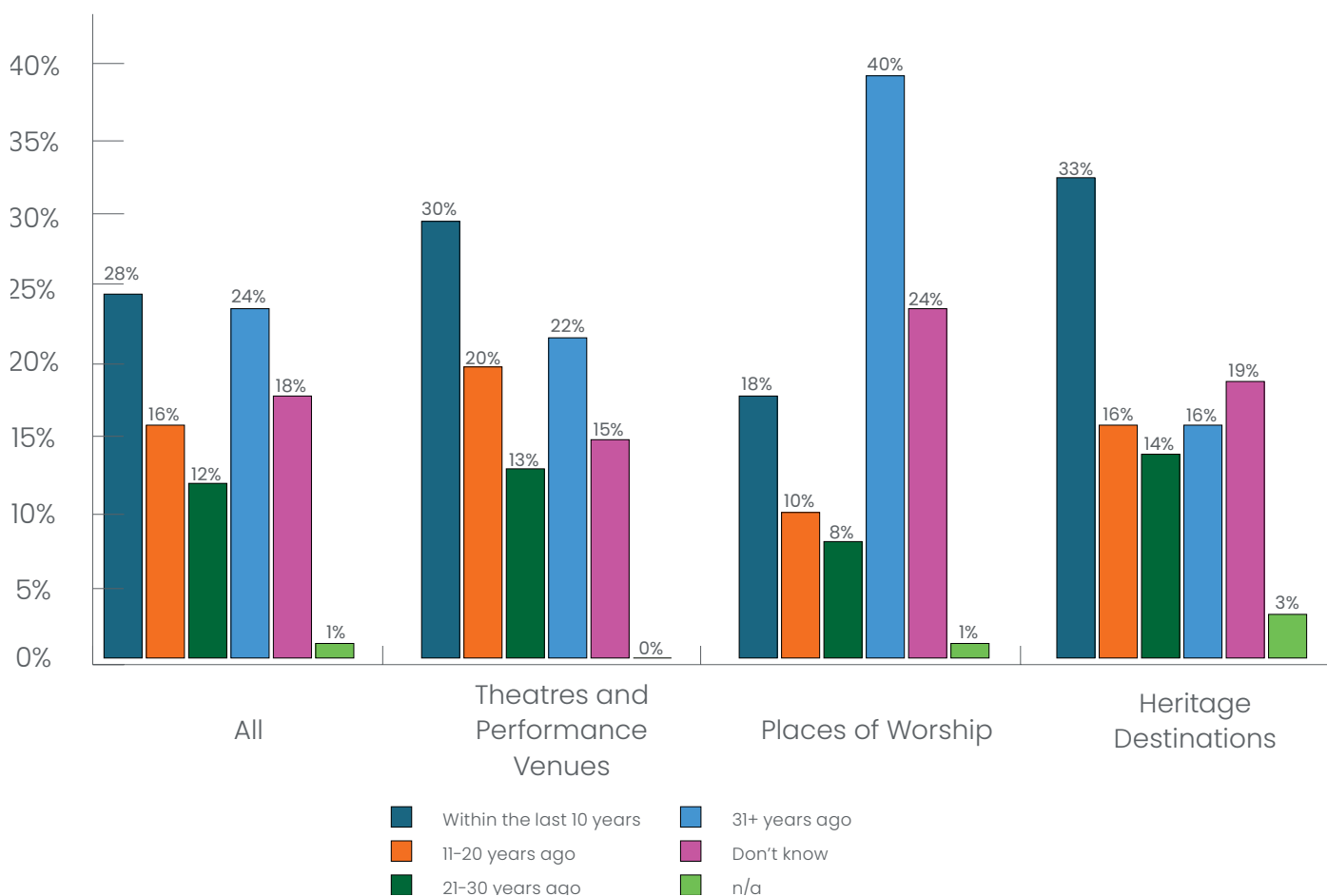
#### Key points:

- Approximately 40% of respondents reported replacement of rainwater goods within the last 20 years. Given the long lifespan of traditional guttering and downpipe materials, and the generally sound monitoring and maintenance practices reported by venues, this helps account for their relatively good state of repair.
- Nevertheless, places of worship report having by far the oldest rainwater goods, with nearly 40% saying that they have not been replaced in the last thirty years or more.
- There is some evidence that climate change is creating a need for additional work and modifications to rainwater goods to cope with increasing quantities and extremes of rainfall.
- The average cost for works to rainwater goods on theatres is very high at more than £1 million. Given that this exceeds expected expenditure on roof works, this may bear further scrutiny.

Over two fifths of all respondents report that the rainwater goods of their venue were last replaced within the previous 10 years: most recently amongst heritage destinations and least recently for places of worship (Figure 14).

This supports the suggestion by over half of the survey respondents (56%) of rainwater goods being in need of only minor repair, or no repair being needed.

**Figure 14:** When were the rainwater goods last fully replaced or renovated?

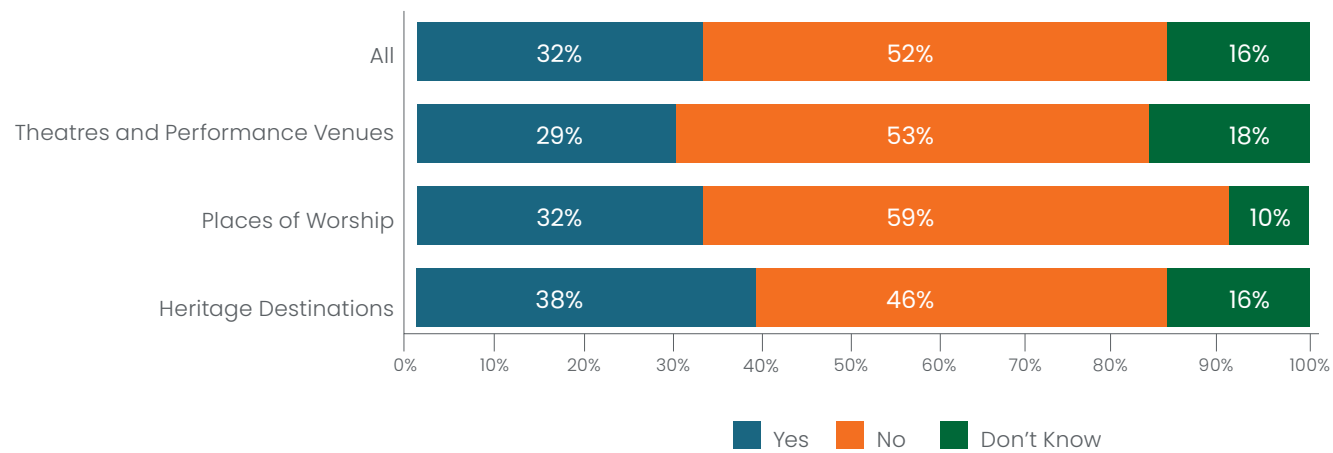


Base: 320 respondents

# APPENDIX C: DETAILED SURVEY FINDINGS

Just under a third of respondents state that work is planned to take place on the rainwater goods of the venue within the next five years (Figure 15).

**Figure 15:** Are works planned to rainwater goods in the next 5 years (funding available)?



Base: 321 respondents

The average value of this planned work is approximately £420k (Table 9). There is a large differential between the three venue types, with the average estimated costs for theatres and performance venues at over £1m, contrasted with £14k for heritage destinations. This illustrates the comparatively much larger average size of performance venues.

Extrapolated to a national level, this would equate to £86 million of planned, funded works to rainwater goods across all cultural heritage venues.

**Table 9:** Value of works planned to rainwater goods in the next 5 years

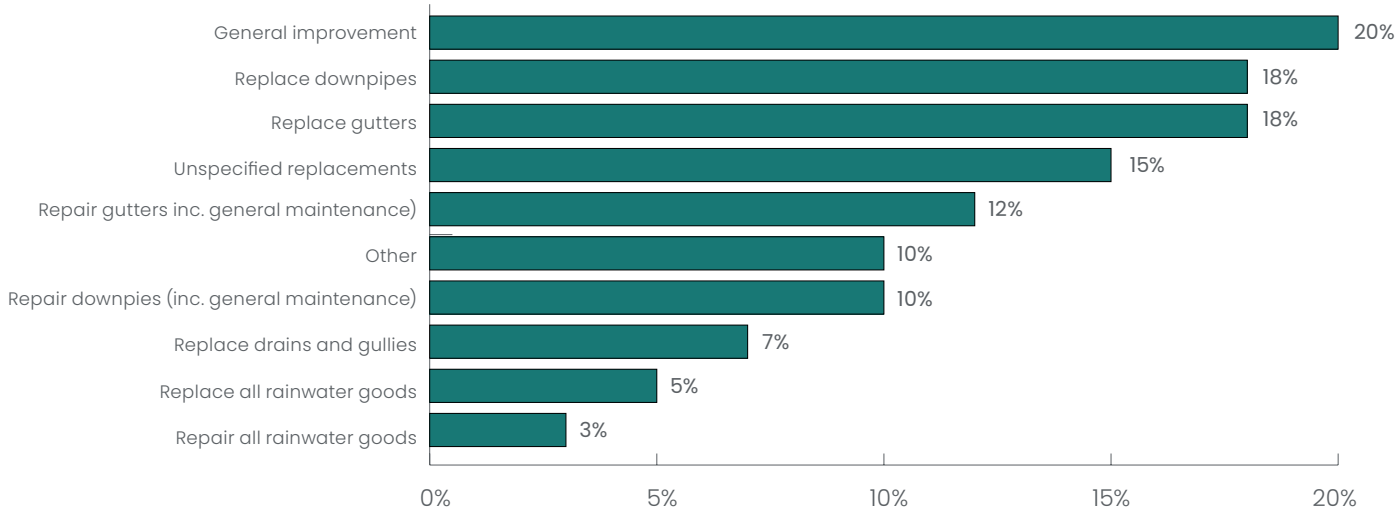
Venue	Mean (£000s)	Number of Buildings (frame)	Total Value (£000s)
Theatres and performance venues	127.5	681	9,713
Places of worship	56	383	3,676
Heritage destinations	14.5	517	909
All	71.5	1,581	14,298



APPENDIX C: DETAILED SURVEY FINDINGS

Sixty respondents provided additional detail about the specific nature of rainwater goods required, with a fifth citing general improvement overall (Figure 16). Across the venue types, a quarter of responses came from major churches, followed by theatres (23%).

Figure 16: Types of rainwater goods repairs required



Base: 60 respondents

Approximately 14% of all survey respondents provided cost estimates for rainwater goods. Four respondents noted that rainwater goods works are expected to be part of roof repair/replacement works – therefore cost estimates were not provided separately.

Three respondents highlighted changing weather patterns and increased rainfall as a catalyst for guttering and pipe repair, as existing items are ceasing to be fit for purpose.

“We have internal gutters which we have to inspect weekly. These are a severe risk to the integrity of the building and our collection. None of the gutters and downpipes are of the correct size taking account of increased rainfall due to climate breakdown. The down pipes are regularly blocked leading to damage to the brickwork.”

Art gallery, East of England

“They [existing rainwater goods] are not coping with the amount of water and so we will be making changes.”

Major church, North-West

APPENDIX C: DETAILED SURVEY FINDINGS

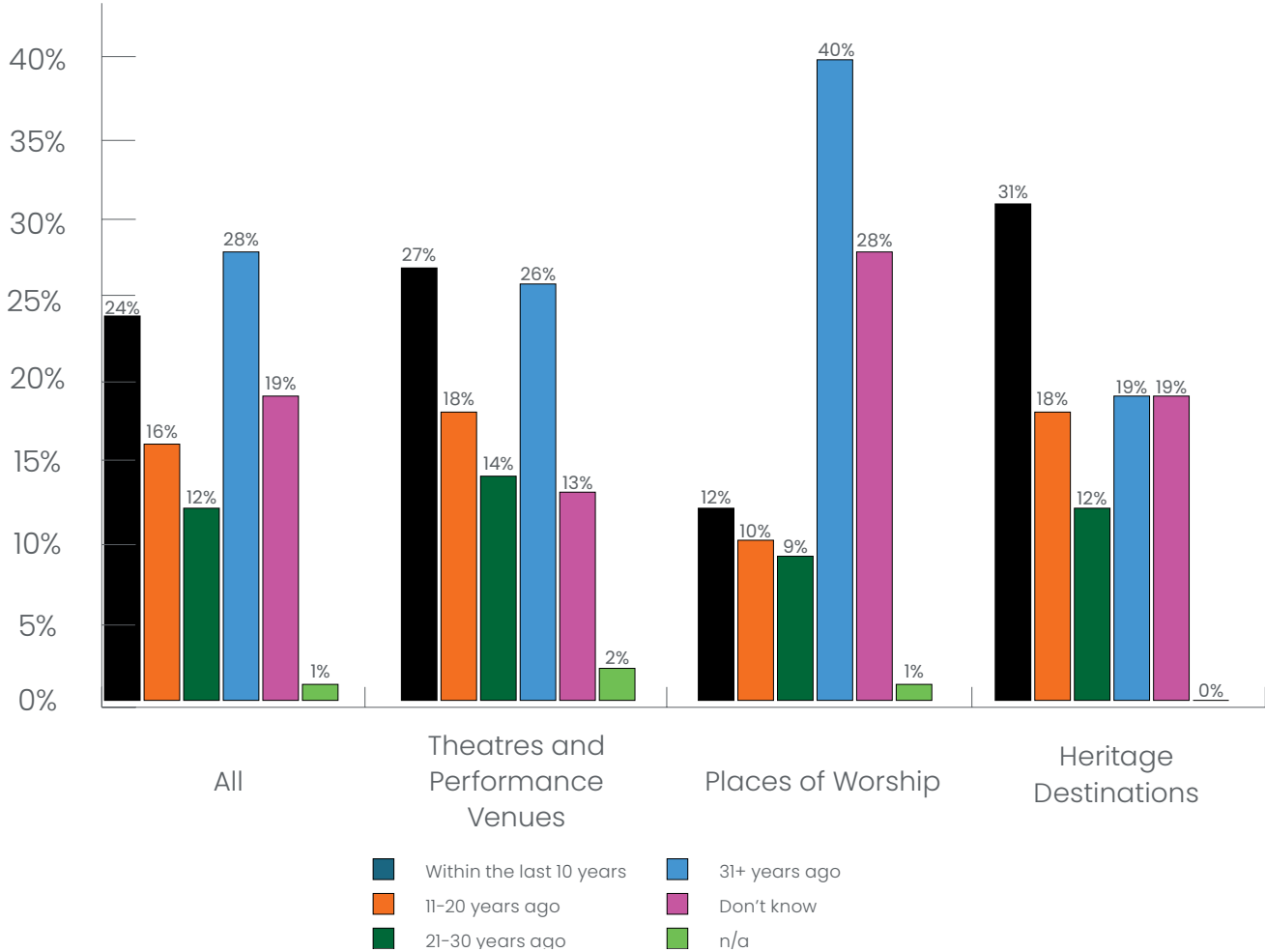
C5.3 Walls

Key points:

- As would be expected, the majority of repairs required are either repointing or masonry repairs.
- As with other building elements, the longest periods between major renovations are found in places of worship, with approximately 40% reporting that there have been no significant works for more than 30 years. Far more places of worship reported planned works to walls, and also reported significantly higher projected five-year spends on these works, at nearly £1 million, more than three times as much as theatres and nearly nine times as much as heritage destinations. This almost certainly reflects the prevalence of complex, often decorated and in some cases ancient, masonry needing expert repair to very high standards, and the particularly intensive masonry repair needs of cathedrals, which represent a significant proportion of important places of worship.
- Some respondents reported that they were only in a position to carry out patch repairs, generally for financial reasons.

Across all venue types, 40% of respondents state that the walls of their venue were last full and comprehensively renovated<sup>01</sup> within the last 20 years (24% within the last 10 years). Heritage destinations have renovated their walls more recently than other venues, and places of worship, less recently: 40% last renovated their walls over 30 years ago (Figure 17).

Figure 17: When were the walls last fully comprehensively renovated?



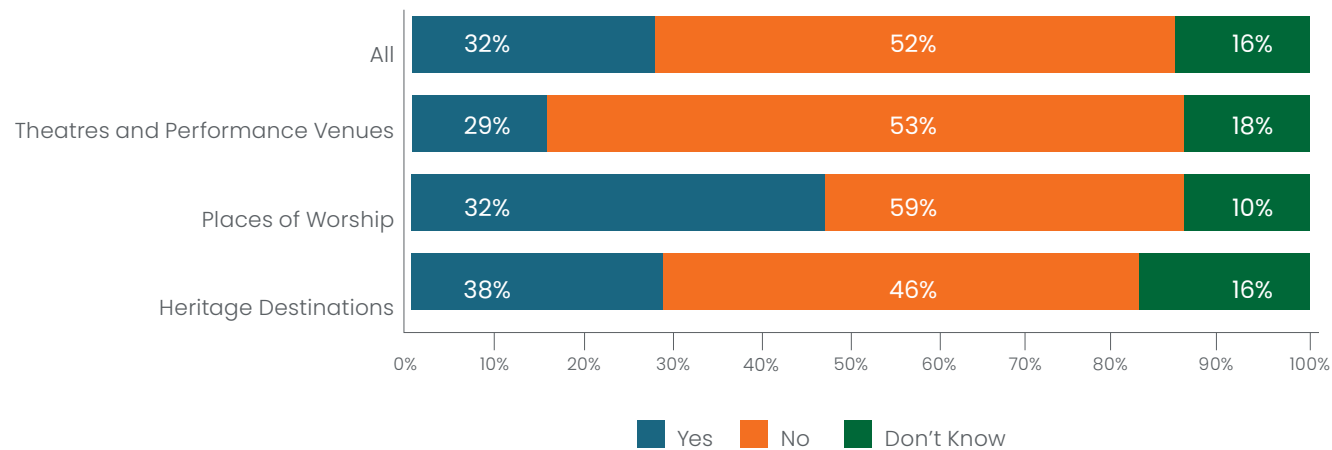
Base: 323 respondents

<sup>01</sup> 'Comprehensively renovated' includes works such as full repointing, refacing, or scheme of comprehensive repair or replacement of eroded or damaged elements.  
England's Cultural Infrastructure: Volume 3 (Purcell, September 2024)

# APPENDIX C: DETAILED SURVEY FINDINGS

Across all venue types, 27% of respondents state that work is planned to take place on the wall of the venue within the next five years (Figure 18).

**Figure 18:** Are works planned to walls in the next 5 years (funding available)?



Base: 323 respondents

Of all survey respondents, 40% provided cost estimates for wall repairs.

The average value of this planned work is approximately £550k (Table 10). There is a large differential between the three venue types, with the average estimated costs for places of worship at almost £1 million, contrasted with £112k for heritage destinations.

Extrapolated to a national level, this would equate to £172 million of planned, funded works to walls across all cultural heritage venues.

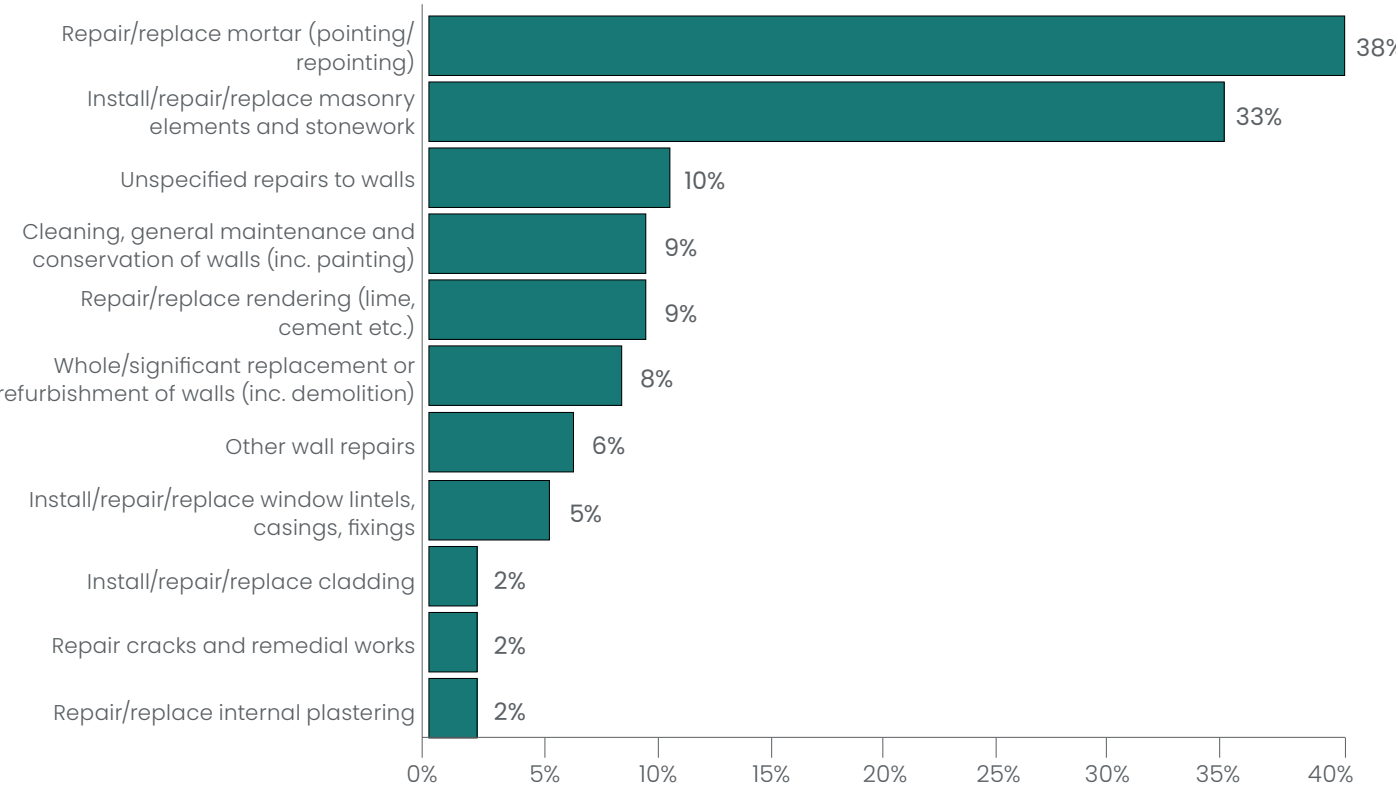
**Table 10:** Value of works planned to walls in the next 5 years

Venue	Mean (£000s)	Number of Buildings (frame)	Total Value (£000s)
Theatres and performance venues	324	681	27,788
Places of worship	983	383	133,197.5
Heritage destinations	112	517	11,142
All	553	1,581	172,127

# APPENDIX C: DETAILED SURVEY FINDINGS

Of all respondents, 109 provided additional detail about the specific nature of wall repairs required, with the majority of these citing a need for pointing or repointing (38% of respondents) and repair or replacement of masonry elements and stonework (33% of respondents) (Figure 19).

Figure 19: Types of wall repairs required



Base: 109 respondents

Some works were described as ‘patching’ or similar – i.e. temporary or short-term repairs rather than the full scale of the works needed – due to funding constraints. Several respondents also report major damage to walls likely to require extensive repairs – for example resulting from major erosion.

“Repointing and masonry replacement in various places as identified by our architect. These will be patching repairs to the worst areas only, due to cost. The cost of a full wall repair for a building of this size would be several hundred thousand pounds.”

Major church, Yorkshire & the Humber

“The Georgian window lintels are all cracked and falling and need to be rebuilt. There is significant mortar loss at the parapet and at ground level. We have a rendered wall that is ballooning and blistering. Our Georgian portico has significant damage.”

Art gallery, East of England

The complexity of the required repairs was also highlighted. It is commonly necessary or desirable for multiple types of repair to be carried out either concurrently or in a logical sequence; where this cannot be done, parts of the walls can be left vulnerable to further decay.

“The walls and masonry need rendering and repointing due to damage and corrosion, this will help maintain the integrity of the building. The stone finials need to be assessed to ensure stability and will be uncovered as at present they are netted. Once the walls are rendered and repointed the exterior in its entirety will need to be repainted...This work is essential for the building integrity as well as maintaining the heritage status to the standard of its grading.”

Theatre, London

## APPENDIX C: DETAILED SURVEY FINDINGS

### C5.4 Windows and Doors

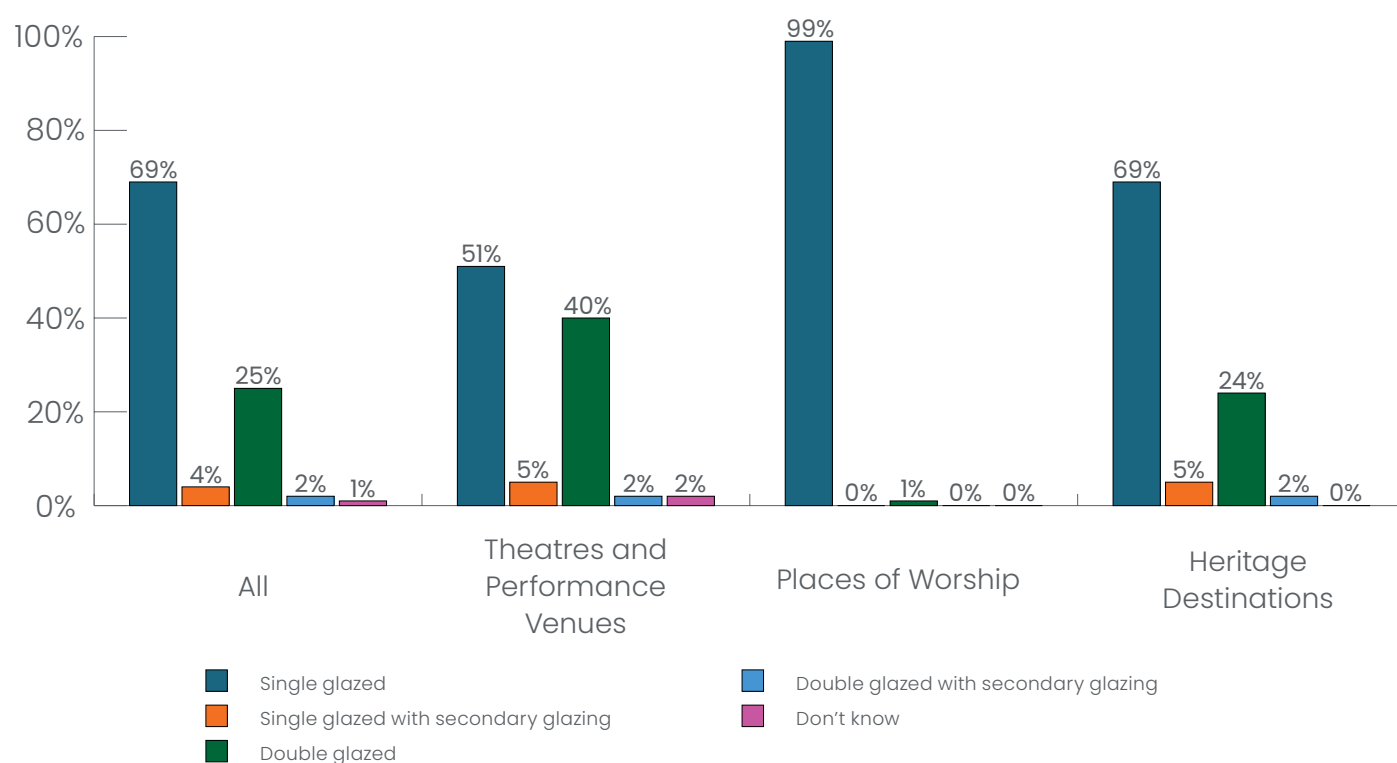
#### Key points:

- Most sites still have single glazed windows, and only among theatres do a high proportion of venues have double-glazing; secondary glazing is uncommon, in spite of being the most economical and easily introduced way of upgrading the thermal and acoustic performance of windows, especially in heritage settings.
- Once again, places of worship were most likely to report long periods and least likely to report short periods since the last major replacement or refurbishment works to windows were carried out. They were also most likely to report planned works, though the disparity with other types of venues was less marked than with walls.
- As with works to roof coverings and rainwater goods, theatres and performance venues reported the highest expected costs for their planned works, at more than £350,000.

Single-glazed windows are typical across all venue types, with these being most commonplace in places of worship (Figure 20).

Single glazing with added secondary glazing is uncommon in theatres, performance venues and heritage destinations. Double-glazing is found more frequently, with 40% of theatres and performance venues, and 25% of heritage destinations stating that they have double-glazed windows.

**Figure 20:** Type of window glazing

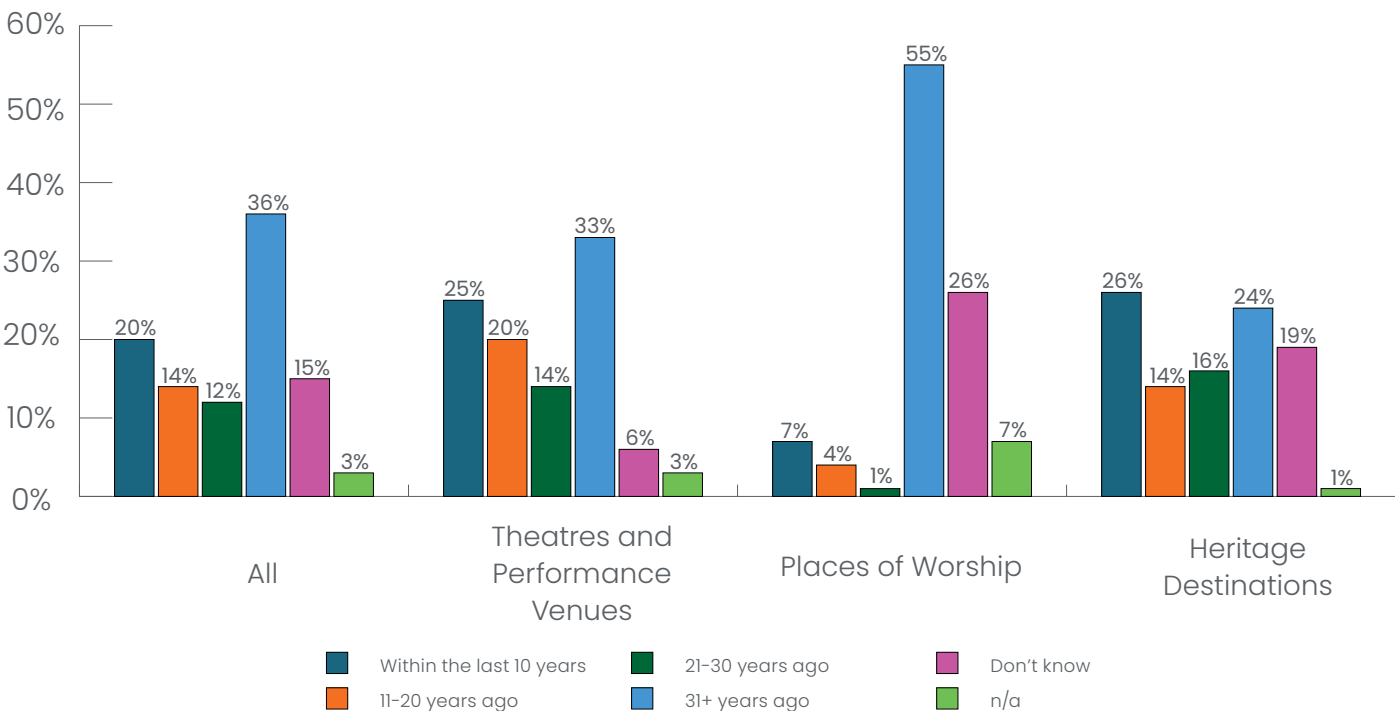


Base: 322 respondents

APPENDIX C: DETAILED SURVEY FINDINGS

20% of respondents report that the windows and doors of their venues were replaced within the last 10 years (Figure 21).

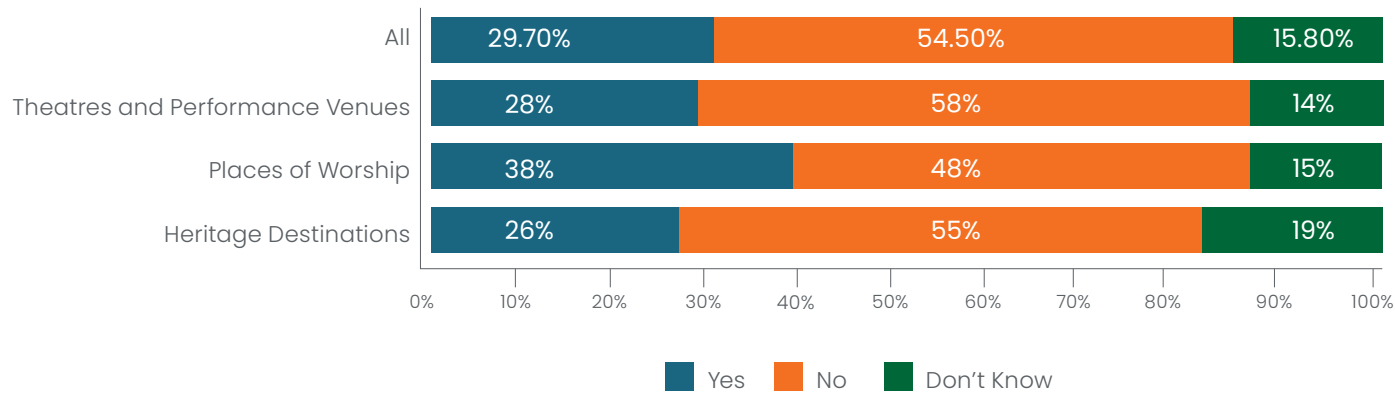
Figure 21: When were windows and doors last fully replaced or renovated?



Base: 323 respondents

30% of respondents state that work is planned to take place on the windows and doors of the venue within the next five years (Figure 22). Planned works are most common amongst places of worship (38%).

Figure 22: Are works planned to windows and doors in the next 5 years (funding available)?



Base: 323 respondents



# APPENDIX C: DETAILED SURVEY FINDINGS

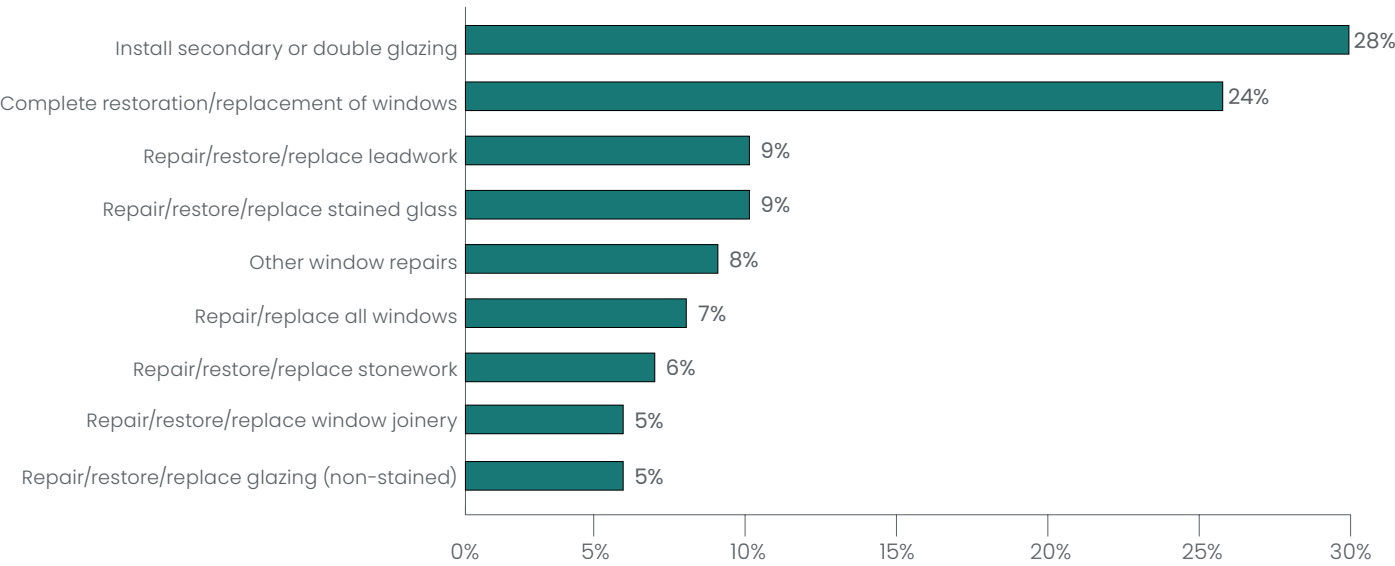
The average value of this planned work is approximately £255k (Table 11). Extrapolated to a national level, this would equate to £85m of planned, funded works to windows and doors across all cultural heritage venues.

**Table 11:** Value of planned works to windows and doors in the next 5 years

Venue	Mean (£000s)	Number of Buildings (frame)	Total Value (£000s)
Theatres and performance venues	354	681	55,680
Places of worship	210	383	22,607
Heritage destinations	97	517	7,081
All	255.5	1,581	85,000

Eighty-eight respondents provided additional detail about the specific nature of window repairs required. Over a quarter of these respondents (28%) cited a need for installation of secondary or double glazing, while just under a quarter (24%) report a need for complete restoration or replacement of all windows (Figure 23).

**Figure 23:** Types of window and door repairs required



Base: 106 responses

Several respondents noted the replacement of the windows is likely to take some time due to high costs, with the work being undertaken in stages – often one window at a time which is not deemed to be the most cost-efficient way of undertaking the work.

“Replacement of windows as an on-going programme. Grade II listed building so must be made like-for-like which is prohibitively expensive...to make double glazed rather than single with minor modifications. Four done so far, another 28 to do.”

Theatre, North-West

A smaller number of respondents (17) provided descriptions of door repairs required. The majority of these report a need for replacement, or repair of, the main front door (including painting). Replacement of fire doors was also cited.

“Repair and upgrade of failed internal doors that are required to improve fire safety.”

Cathedral, London

## APPENDIX C: DETAILED SURVEY FINDINGS

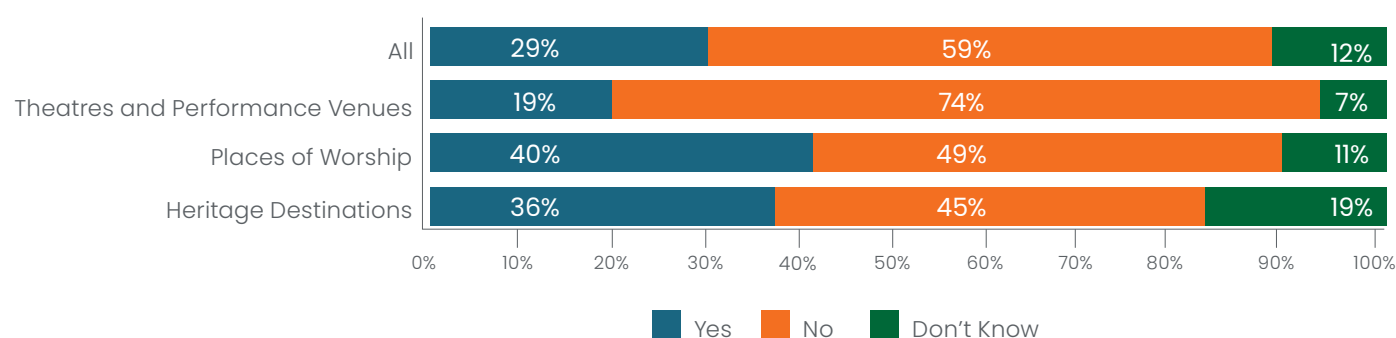
### C5.5 Structural Components

#### Key points:

- Past structural works are most often reported in places of worship and heritage destinations.
- Among the minority of venues (less than 15%) that reported planned structural works, however, theatres and performance venues were the most common. They also reported the highest expected expenditures. The main driver for this is proposed large-scale redevelopment or refurbishment works.
- Places of worship also reported high expected expenditures. It is likely that the respondents reporting structural works to towers are over-represented in this group, as they are both more common in churches and liable to more extreme and potentially dangerous forms of structural failure than most other built forms.

Under a third (29%) of respondents suggest that any substantial renewal, replacement or reinforcement has been undertaken to the structure of their venue (Figure 24). Such work is more common amongst places of worship and heritage destinations.

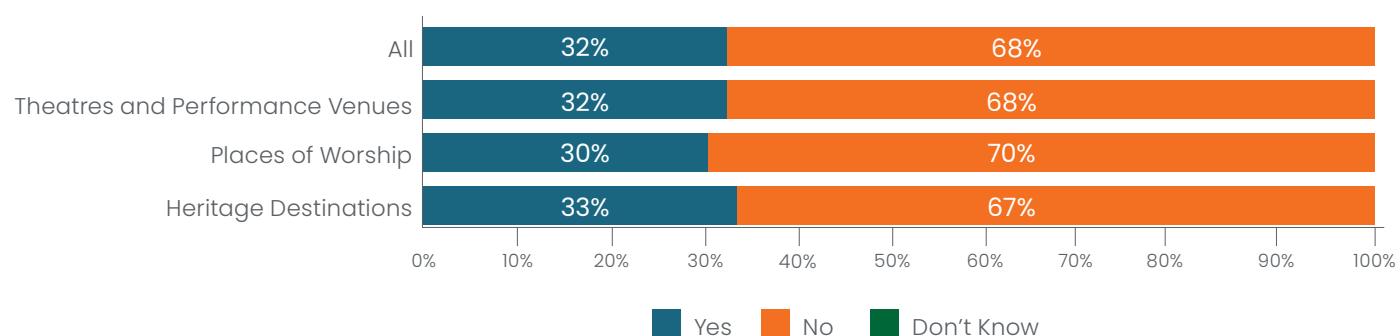
**Figure 24:** Has there ever been substantial renewal, replacement or reinforcement?



Base: 323 respondents

Across all venue types, about a third of respondents report that substantial works to the structure of the building have taken place within the last 5 years (Figure 25).

**Figure 25:** Did any substantial works to structure take place in the last 5 years?

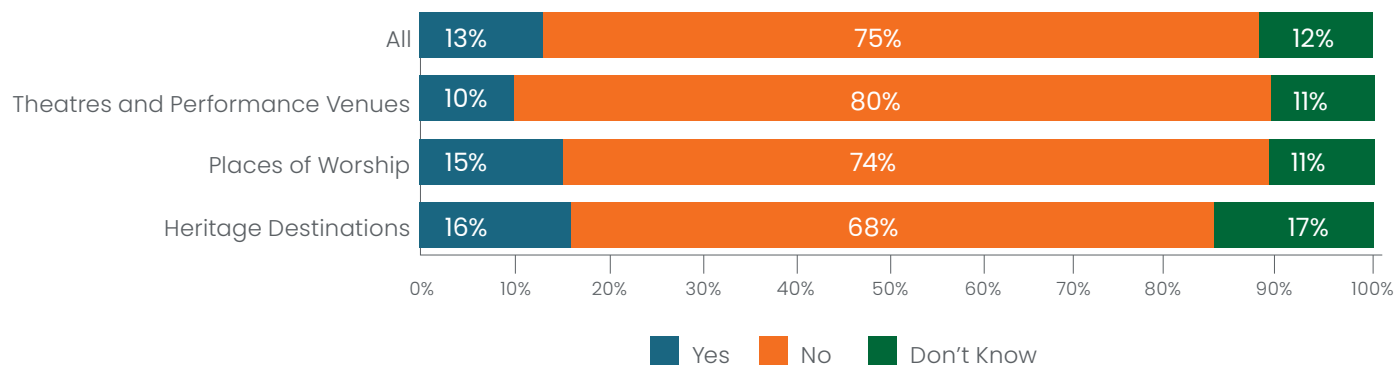


Base: 94 respondents

# APPENDIX C: DETAILED SURVEY FINDINGS

A minority of venues (13%) plan to undertake works to structural elements of the building within the next 5 years, for which funding is available (Figure 26).

**Figure 26:** Are works planned to structural elements in the next 5 years (funding available)?



Base: 322 respondents

The average value of this planned work is approximately £1.7m (Table 12). There is a large differential amongst venue types, with an average cost for theatres of almost £3m, and £80k for heritage destinations.

Extrapolated to a national level, this would equate to £219m of planned, funded works to structural elements across all cultural heritage venues.

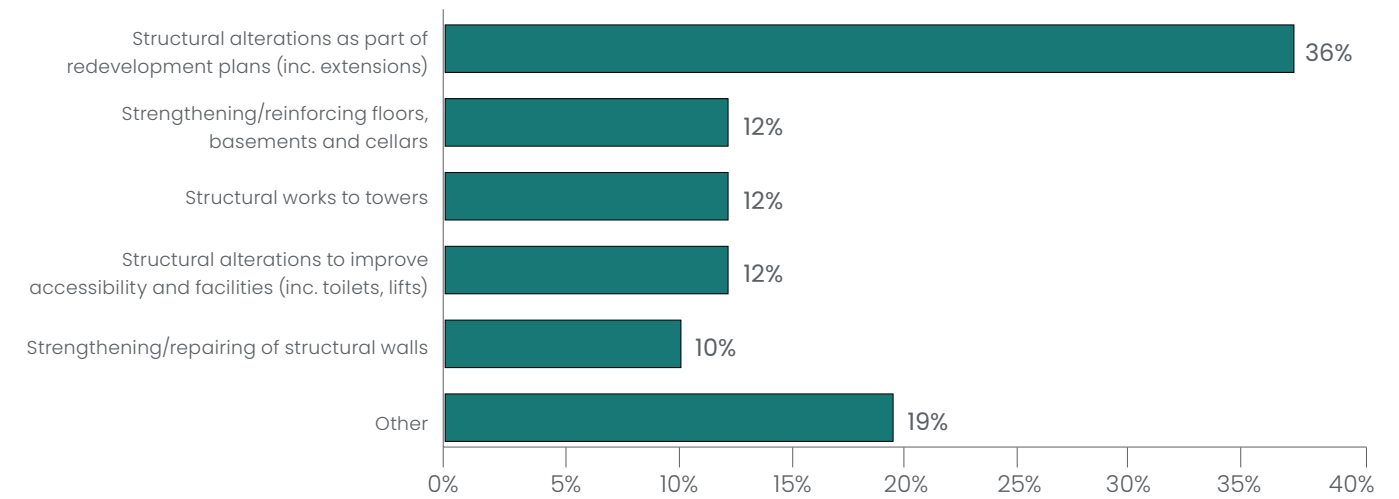
**Table 12:** Value of planned works to structural components in the next 5 years

Venue	Mean (£000s)	Number of Buildings (frame)	Total Value (£000s)
Theatres and performance venues	1,790	681	93,745
Places of worship	1,341	383	50,098
Heritage destinations	79.5	517	2,909
All	1,191	1,581	146,752

APPENDIX C: DETAILED SURVEY FINDINGS

Forty-two respondents provided more detail about the types of works to structural components that are planned; 36% report that these comprise structural alterations being undertaken as part of overarching redevelopment and refurbishment plans. Respondents also identified the need for reinforcement works to strengthen and repair building elements including floors and walls. 'Other' responses spanned a wide range of different types of work. For example, there were mentions of asbestos removal, upgrading of glass structures and replacement of elements specific to certain types of heritage buildings (Figure 27).

Figure 27: Types of structural elements works required



Base: 42 respondents

*“The roof of the cellar, which is beneath the engine house, is deteriorated and needs extensive work to underpin it. This is due to corrosion of the rebar elements in the concrete roof beams.”*

Museum, North-West

# APPENDIX C: DETAILED SURVEY FINDINGS

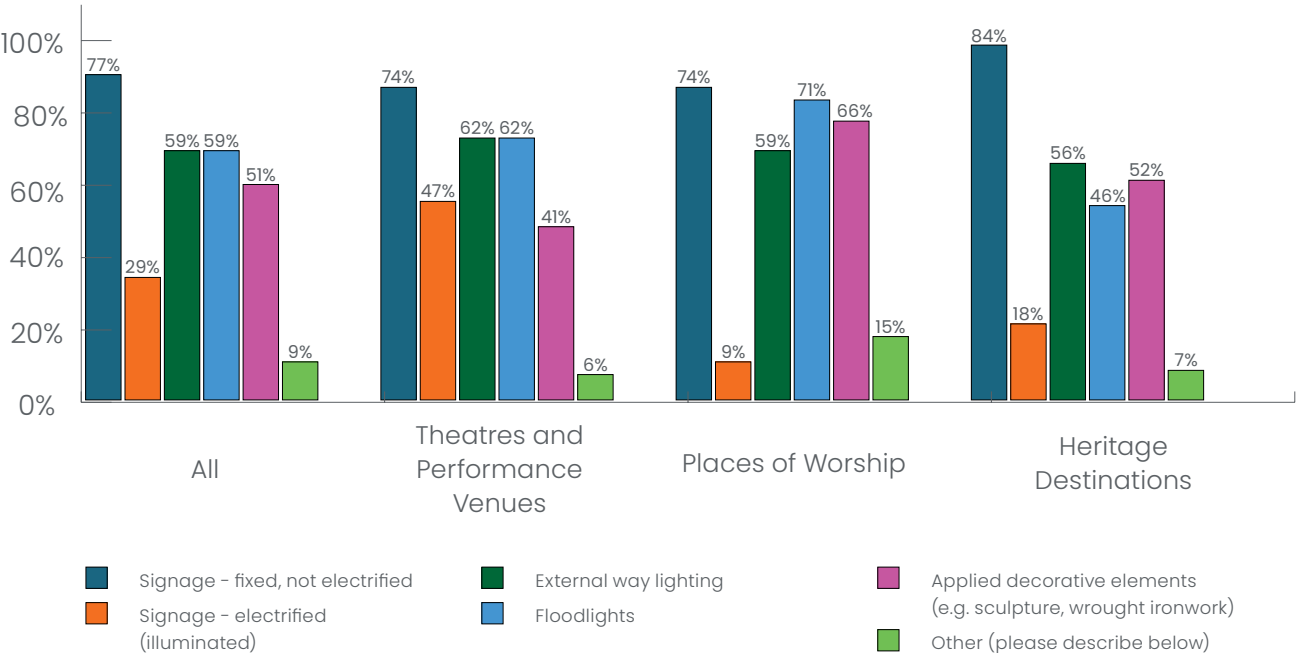
## C5.6 Other External Components

Key points:

- Signage and lighting were the commonest types of external components and the most common subject of planned expenditure.
- Just over a quarter of venues planned other external works, with places of worship by the far the most likely to report such works. The highest cost works were, however, reported by theatres and performance venues, with an average spend of approximately £600k, far higher than the £226k reported by places of worship.
- Signage and interpretation boards were the commonest category of planned expenditure, with lighting a close second. The lighting category included a diverse array of works, ranging from security lights, through way lighting, to floodlighting schemes.

About three quarters of all respondents state that their venue has fixed external signage (Figure 28). Electrified signage is only present in a very small proportion of places of worship and heritage destinations (9% and 18% respectively), but is found amongst almost half (47%) of theatres and performance venues. Other types of external components are present in similar proportions of each venue type e.g. c. 60% have external way lighting, 40–50% have floodlights, and 50–60% have external decorative elements.

Figure 28: External components of the building

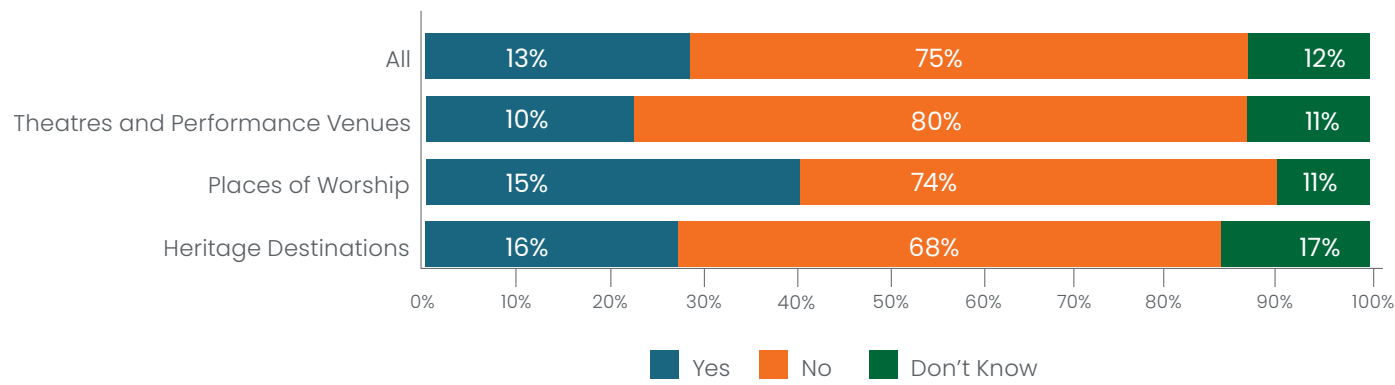


Base: 902 responses

# APPENDIX C: DETAILED SURVEY FINDINGS

Under a third of all respondents (28%) report that works are planned to the external components of their venue within the next 5 years (Figure 29). This is more common amongst places of worship (40%).

**Figure 29:** Are works planned to external components in the next 5 years (funding available)?



Base: 321 respondents

The average value of this planned work is approximately £320k (Table 13). There is a large differential amongst venue types, with an average cost for theatres of approximately £600k, compared with £61k for heritage destinations.

Extrapolated to a national level, this would equate to £112m of planned, funded works to external components across all cultural heritage venues.

**Table 13:** Value of planned works to external components in the next 5 years

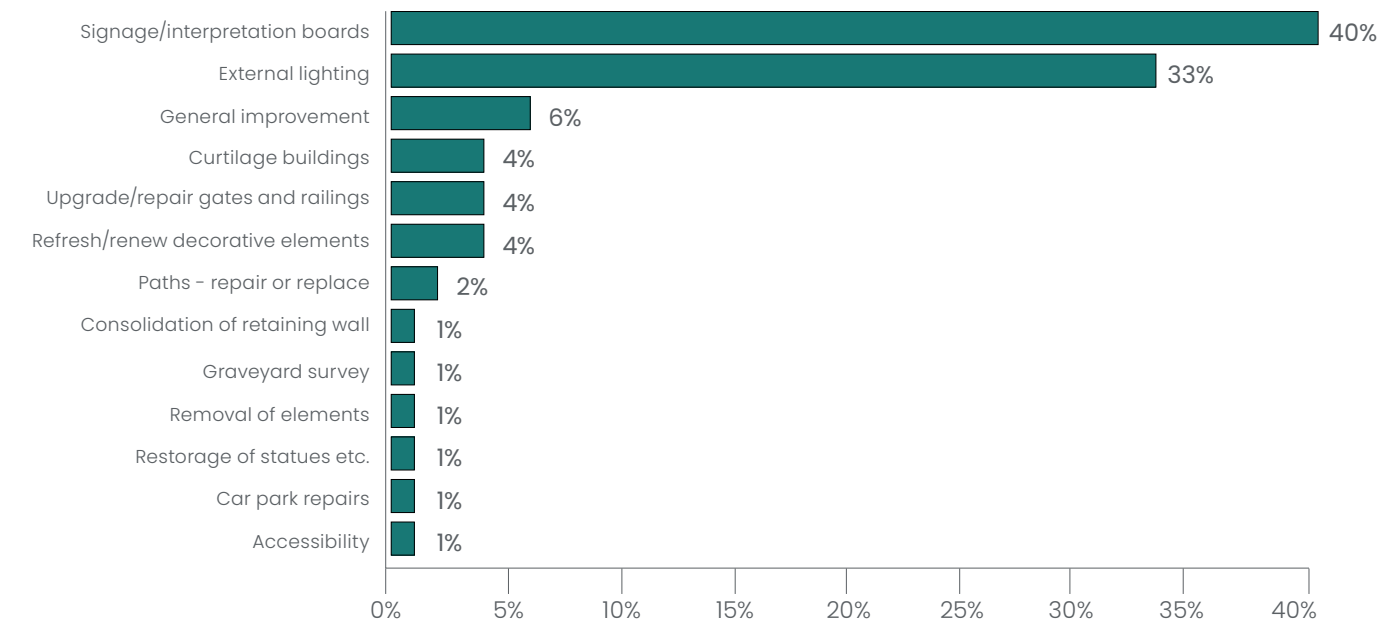
Venue	Mean (£000s)	Number of Buildings (frame)	Total Value (£000s)
Theatres and performance venues	603.5	681	77,600
Places of worship	226	383	28,469
Heritage destinations	61	517	6,053
All	323	1,581	112,121



APPENDIX C: DETAILED SURVEY FINDINGS

Eighty-eight respondents provided additional detail about work required to external components. The majority of these (40%) state they require new or updated signage or interpretation boards. A third of these respondents cited a need for external lighting (Figure 30).

Figure 30: Types of other external components work planned



Base: 88 respondents

“There is a need to improve safety and security lighting to the rear of the Cathedral as we are open late for the community to help those without permanent residence and also for the song room exits / entrance for the community choir.”

Cathedral, London

“Replacement of signage, possible additional floodlighting, provision of emergency exit lighting.”

Major church, Yorkshire & the Humber

## APPENDIX C: DETAILED SURVEY FINDINGS

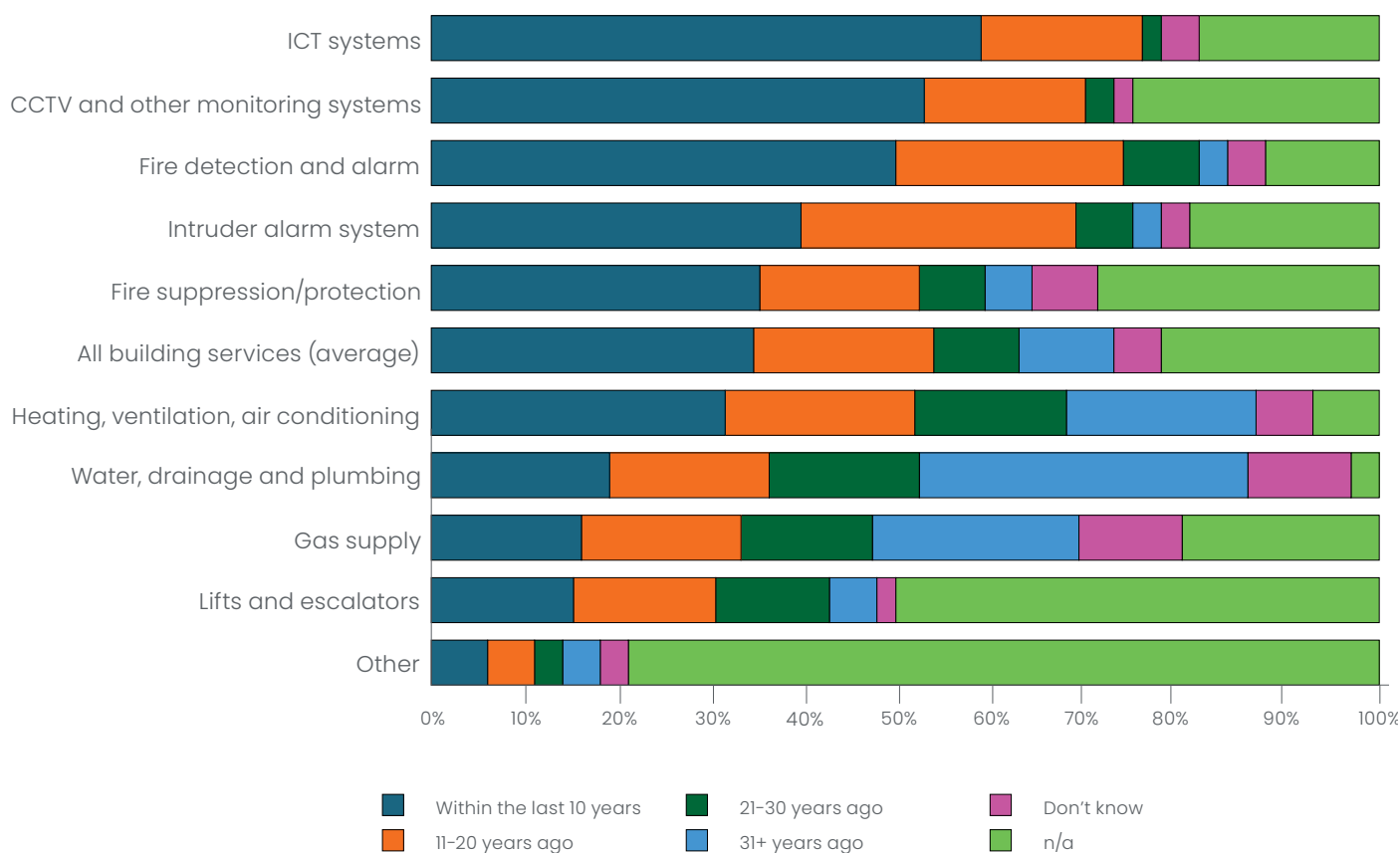
### C5.7 Building Services

#### Key points:

- Water, drainage and plumbing and gas supply were generally the oldest building services systems.
- The most recently installed systems were generally ICT and CCTV systems, but they are also the least likely to be in adequate functional condition; this must reflect the rapid obsolescence of these kinds of technical systems.
- As would be expected given the strong compliance requirement to maintain them in good condition, fire detection and alarm systems were reported to be in the best condition.
- Although only installed in a minority of venues, lifts had a high proportion of old (more than 20 year old) installations
- Places of worship were most likely to be planning works to building services (more than 40% of respondents) and theatres and performance venues the least (less than 30%). Places of worship also reported by far the highest anticipated spend. The most likely type of planned work was to heating, ventilation and/or air conditioning systems. In combination, these findings may reflect the Church of England's imperative to reach net zero carbon by 2030, as well as broader imperatives to reduce energy costs at a time of significant energy price inflation.

On average across all building services systems, 34% were installed in the last 10 years and 19% installed within the last 11-20 years (Figure 31). The oldest building services systems are water, drainage and plumbing, and the gas supply. ICT systems and CCTV tend to be the most modern systems.

**Figure 31:** How long is it since building services systems were installed?

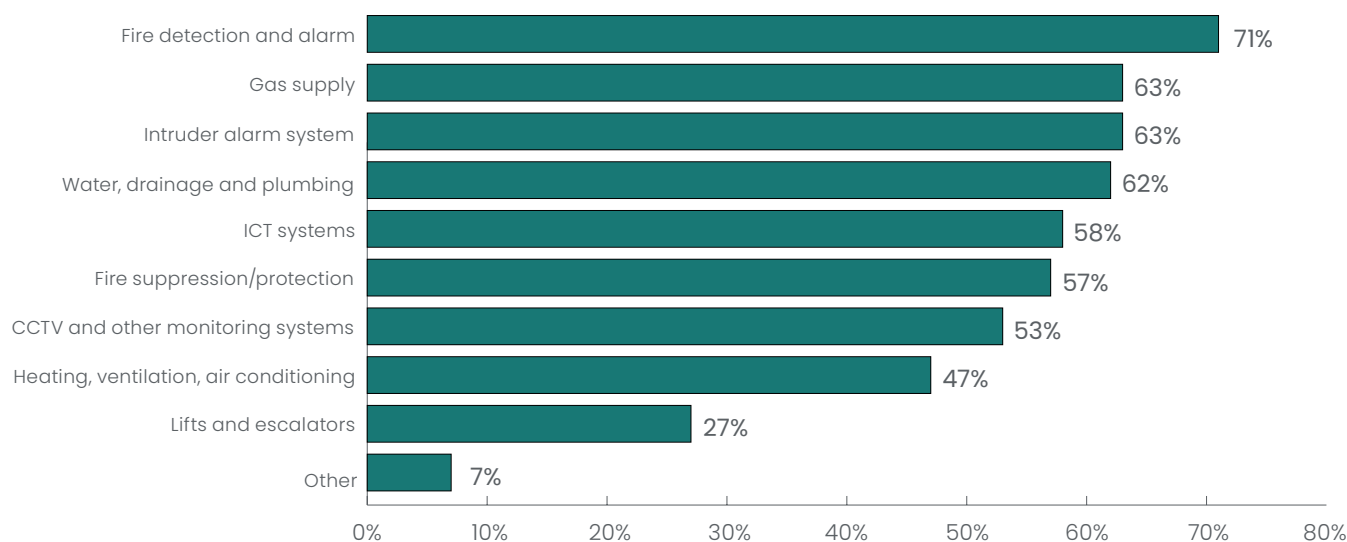


Base: 3,013 responses

## APPENDIX C: DETAILED SURVEY FINDINGS

Although CCTV and ICT systems appear to be the most modern of all building systems, only about half of respondents rate these as being adequate (53% and 58% respectively). Fire detection and alarm systems are rated adequate by the highest number of respondents (71%), however, this suggests that just under a third of fire detection and alarm systems in cultural and heritage destinations are inadequate (Figure 32).

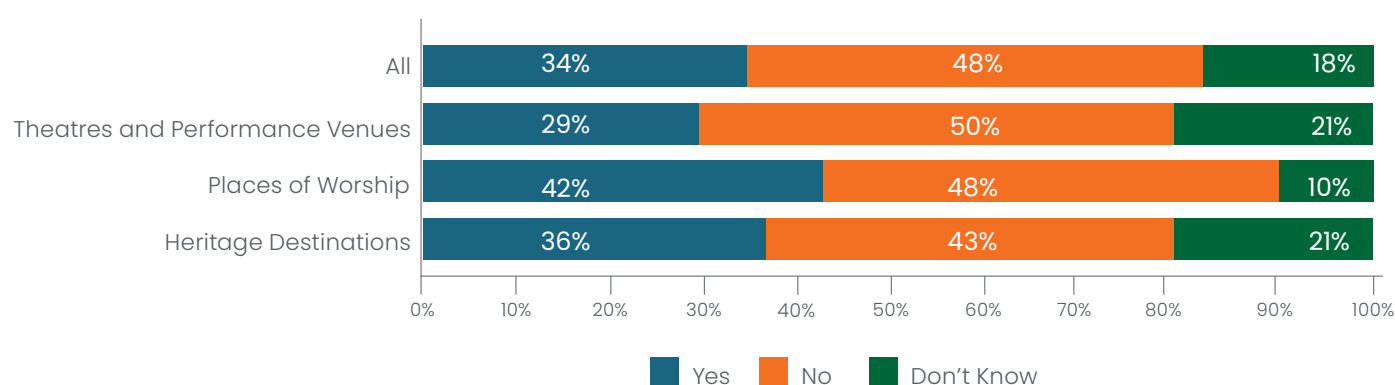
**Figure 32:** Building services that are in adequate functional condition



Base: 320 respondents

34% of all respondents reported that work is planned to building services within the next 5 years (Figure 33). This is more common amongst places of worship (42%).

**Figure 33:** Are works planned to building services in the next 5 years (funding available)?



Base: 320 respondents

## APPENDIX C: DETAILED SURVEY FINDINGS

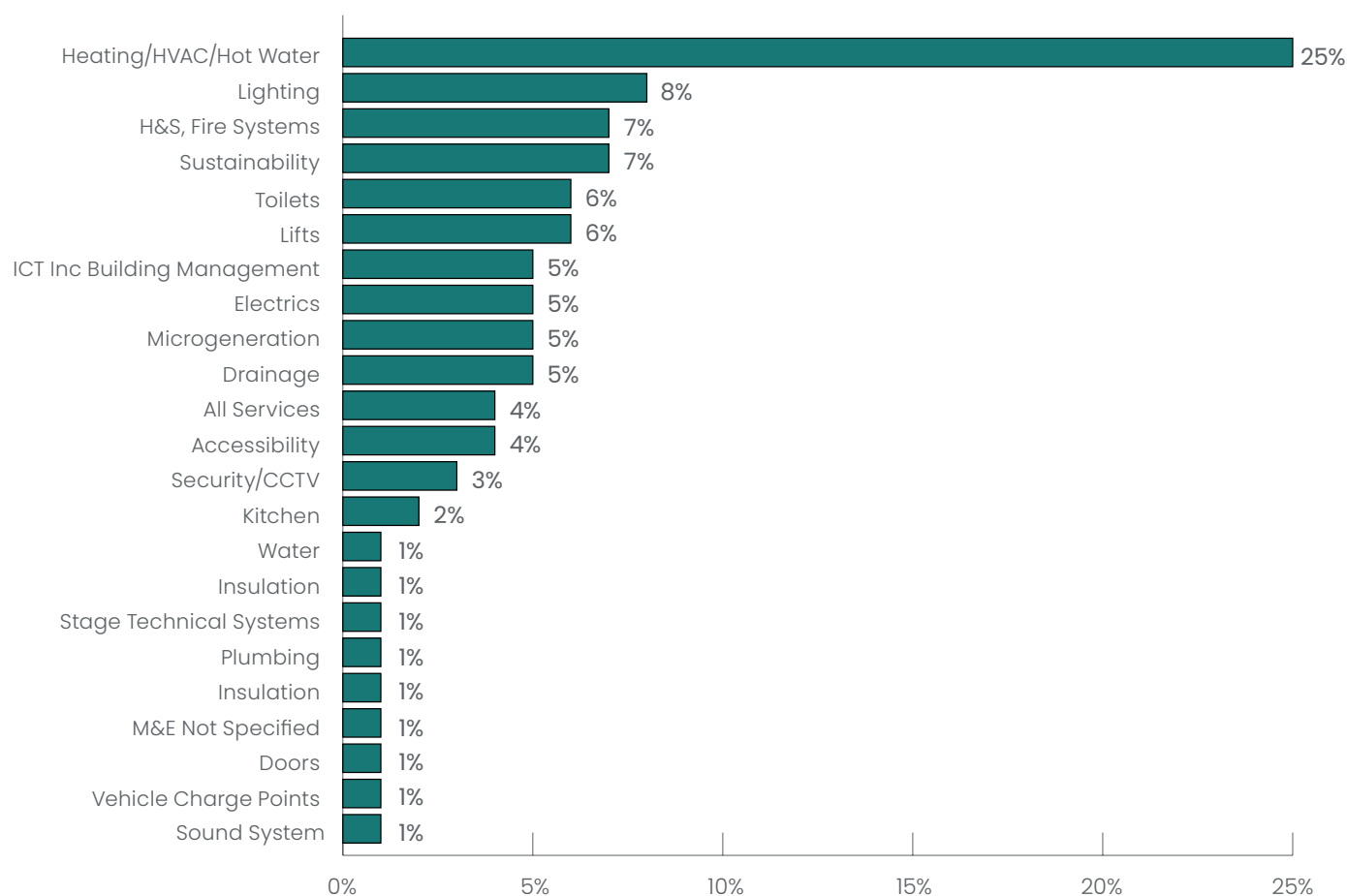
The average value of this planned work is approximately £660k (Table 14). Theatres and performance venues and heritage destinations estimate an average cost of about £500–600k, whereas the average cost for places of worship is estimated at just under £1m.

Extrapolated to a national level, this would equate to £269m of planned, funded works to building services across all cultural heritage venues.

Venue	Mean (£000s)	Number of Buildings (frame)	Total Value (£000s)
Theatres and performance venues	518	681	93,737.5
Places of worship	956.5	383	107,231
Heritage destinations	588	517	67,554
All	662	1,581	268,523

The majority of respondents that provided further information about the types of required work to building services cited heating and cooling systems (25% of respondents) (Figure 34).

**Figure 34:** Types of building services works required



Base: 167 respondents

## APPENDIX C: DETAILED SURVEY FINDINGS

There is a desire among respondents to upgrade heating systems with more energy efficient alternatives.

*“We intend to replace/upgrade the heating and cooling system looking at insulation and ventilation. We have had some quotes concerning this work and are applying for grant funding. We have been working with a RIBA Climate Net Zero consultant who believes that our spaces are ideal for installing green energy sources including insulation. We are keen to combine this with our re-roofing plans to ensure a coordinated building management scheme and good value for money.”*

Heritage destination, East of England

*“Replace [the] heating system in the library... [we are] working towards a new heating system throughout [we need to] replace the boilers that are nearing the end of life ...remove the wet heating systems at high-level and replace with new effective heating systems.”*

Cathedral, West Midlands

APPENDIX C: DETAILED SURVEY FINDINGS

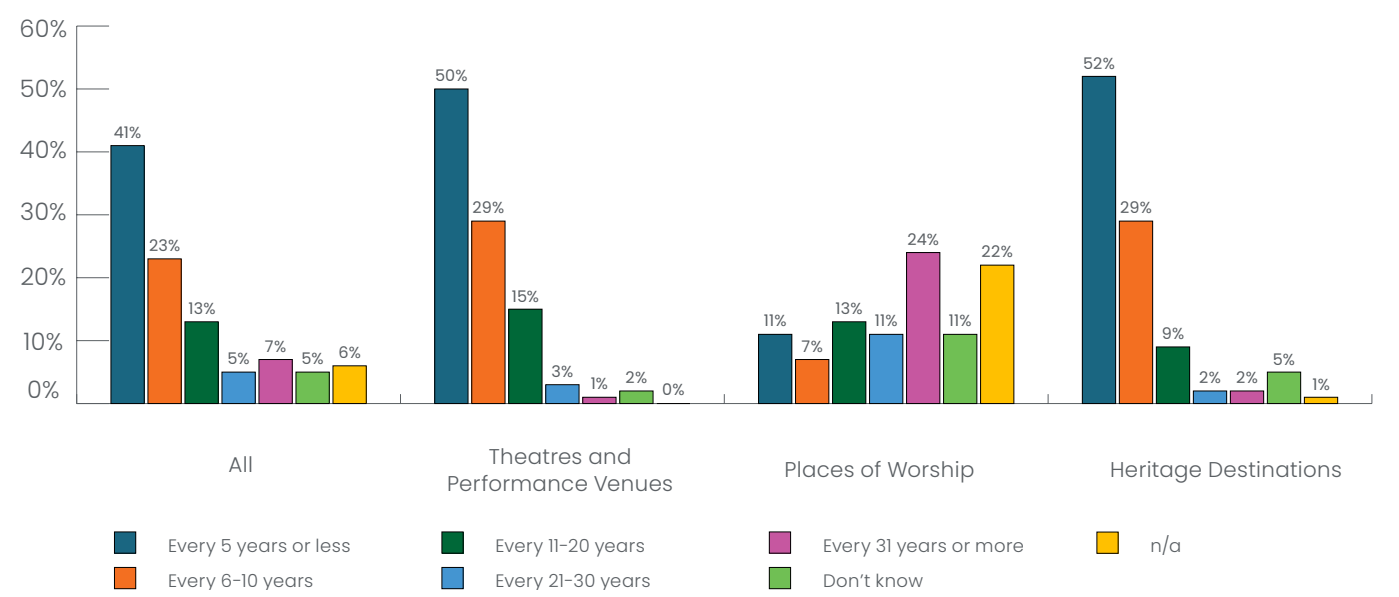
C5.8 Interiors

Key points:

- Theatres and heritage destinations report frequent internal redecoration, with 50% or more undertaking works every 5 years or more often and very few redecorating less often than every 20 years. Places of worship are redecorated least frequently, but the open responses suggest that when redecoration is needed it often requires complex work and specialist skills, with correspondingly high costs.
- In spite of this, very high proportions of all venue types reported recent substantial interior refurbishment, redecoration or restoration works, or planned works.
- Heritage destinations reported by far the highest planned spend on such works, probably reflecting the extent to which their offer relies on attractive internal presentation and high-quality visitor facilities.

Theatres and performance venues and heritage destinations are typically redecorated every 5 years, or less (51%). For places of worship, interior redecoration takes place far less frequently, on average, and there is a high degree of difference in how often it is undertaken. 24% of places of worship will redecorate every 31 years or more, and 22% of respondents from places of worship do not know how frequently this happens (Figure 35).

Figure 35: How regularly do you carry out redecoration of the building interior?



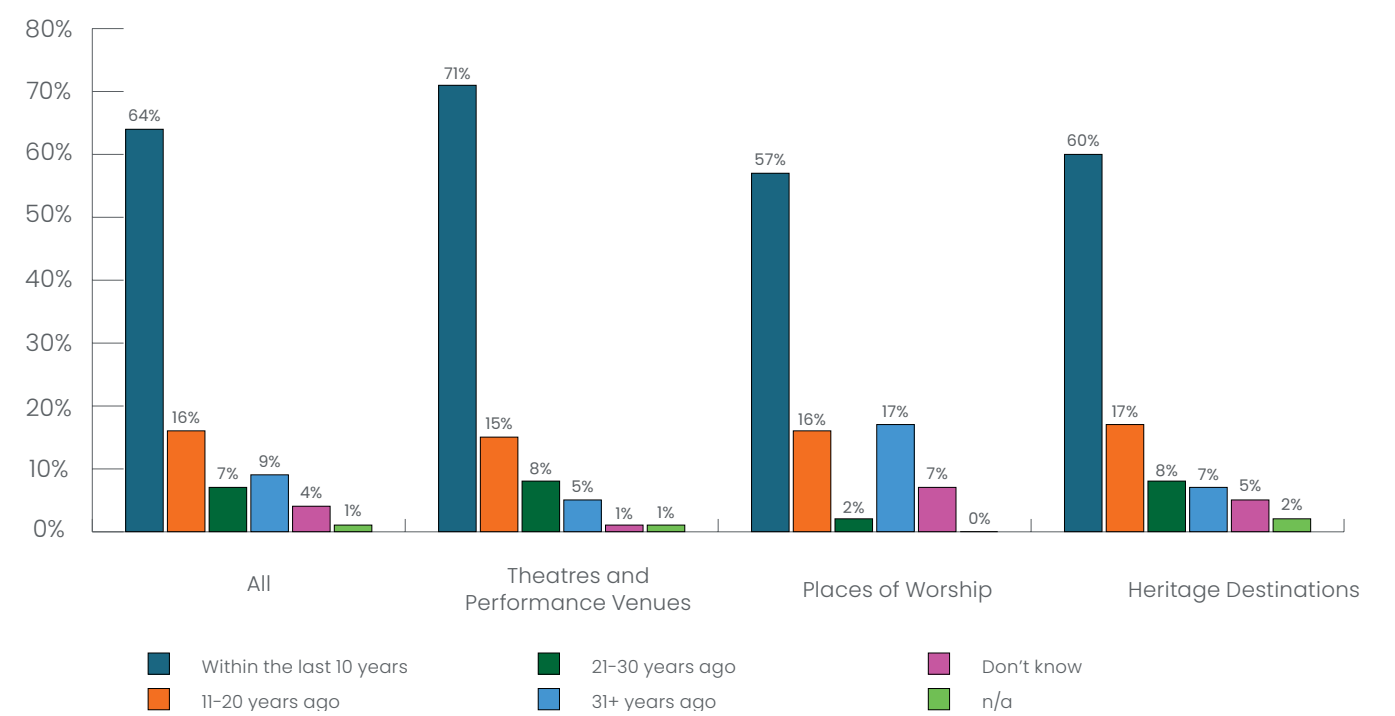
Base: 323 respondents



APPENDIX C: DETAILED SURVEY FINDINGS

The majority of respondents (64%) stated that their venue had undergone substantial refurbishment, restoration or conservation work within the last 10 years (Figure 36).

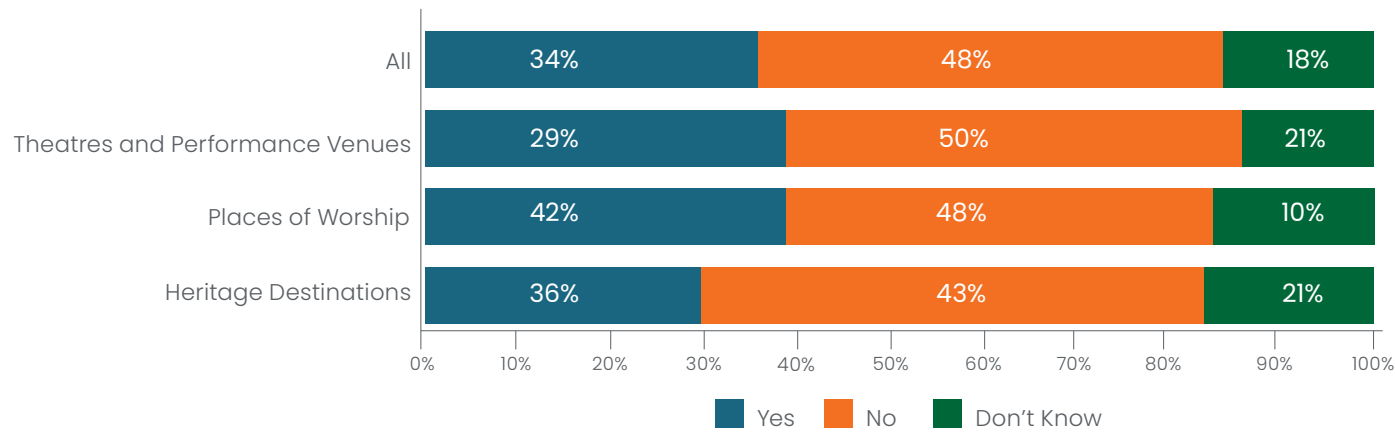
Figure 36: When did you last carry out substantial refurbishment, restoration or conservation works?



Base: 323 respondents

Just over a third of all respondents report that works are planned for the interior of their venue within the next 5 years (Figure 37). This is more common amongst places of worship (40%).

Figure 37: Are works planned to interiors in the next 5 years (funding available)



Base: 323 respondents

# APPENDIX C: DETAILED SURVEY FINDINGS

The average value of this planned work is approximately £650k (Table 15). The average cost for heritage venues is highest, at just under £1m per venue and lowest at places of worship, at approximately £440k.

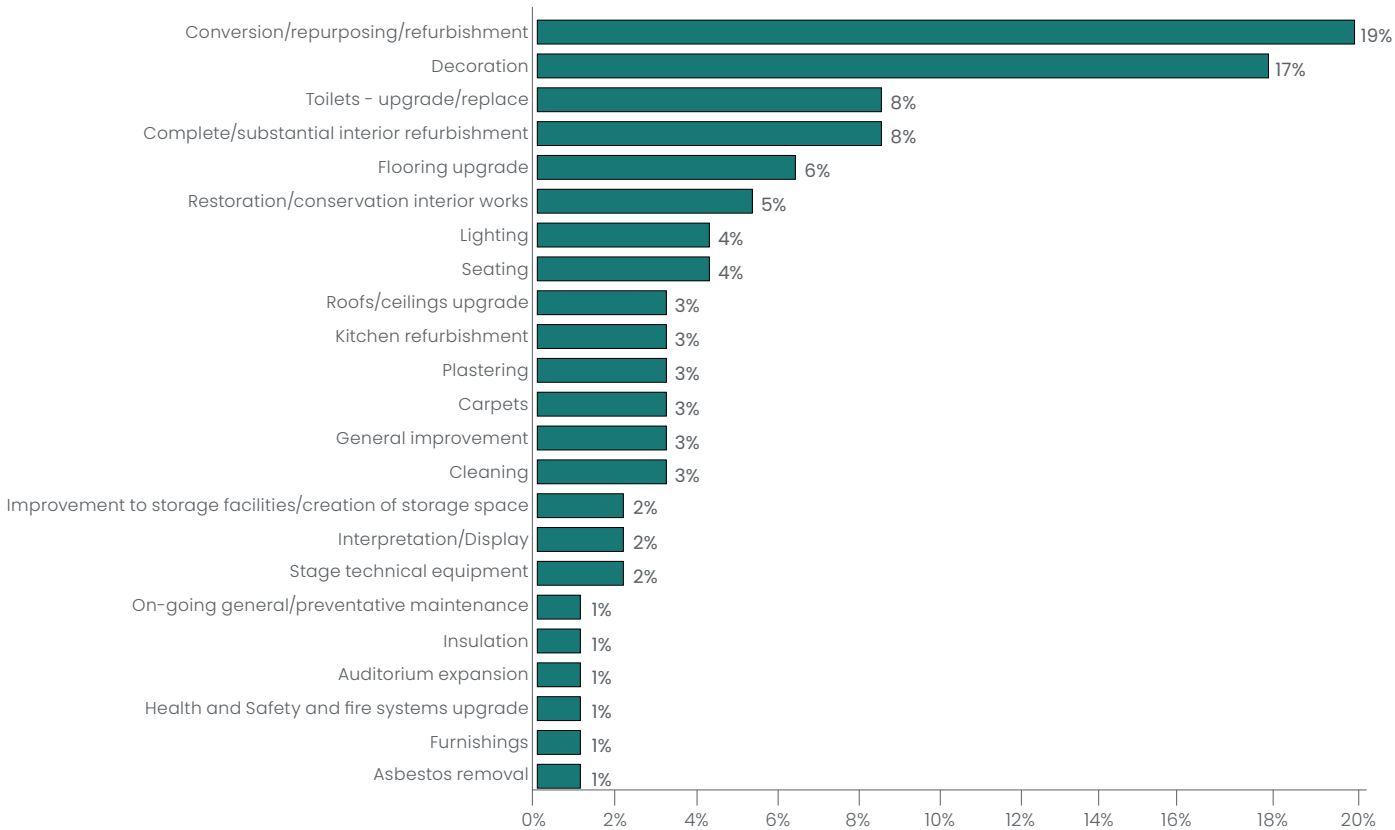
Extrapolated to a national level, this would equate to £293 million of planned, funded works to interior decoration across all cultural heritage venues.

**Table 15:** Value of planned works to interiors in the next 5 years

Venue	Mean (£000s)	Number of Buildings (frame)	Total Value (£000s)
Theatres and performance venues	631	681	141,269.5
Places of worship	444	383	49,800
Heritage destinations	934	517	102,426
All	651.5	1,581	293,495

There were 111 respondents that provided additional detail about the type of interior work planned. The majority relate to conversion/repurposing or refurbishment of interior space (19% of respondents) and to decorating (17% of respondents) (Figure 38).

**Figure 38:** Types of interiors works planned



Base: 111 respondents

“We are planning to refurbish and remodel our theatre / cinema space to increase access, sustainability and commercial viability.”

Theatre, Yorkshire & the Humber

“Reconfiguration, improvements and redecoration of basement and other interior spaces.”

Performance venue, London

## APPENDIX C: DETAILED SURVEY FINDINGS

### C6 UNFUNDED URGENT WORKS BY BUILDING ELEMENT

#### Key points:

- Roofs are commonly reported as a significant element requiring urgent repair.
- Lifts emerge as a particular issue – while most are in acceptable functional condition, there is a significant minority where urgent repair or replacement needs are reported. Because of their high intrinsic cost, the critical safety issues they present, and their long but limited operational lifespan before replacement or extensive refurbishment is required, lifts can become a major challenge within otherwise manageable repair and maintenance loads. There was evidence of these issues presenting major problems in some of England’s largest and most prominent venues as well as in smaller buildings.
- HVAC systems are also cited frequently and present significant challenges: like lifts they have long operational lifespans but require periodic comprehensive replacement. There are also trade-offs between up-front and long-term costs, meaning that where finances are challenging it can be difficult to secure the long-term savings that come from
- The ambition for carbon neutrality and the challenge of increasing energy costs have increased the expectation

In addition to asking about the cost of unfunded, urgent works, the survey also sought information on the nature of those works.

The majority of respondents describing the nature of unfunded urgent works cited roof repairs of some form – either substantial repair/restoration or the need for complete replacement (Figure 39). Where new roofs are required, respondents also cite a desire for solar panels as they believe this will improve energy efficiency – but most describe this as a ‘nice to have’, anticipating that there will not be sufficient funds available to add solar panels to the programme of work.

*“Renewal of roof terraces currently in poor repair, likely to be unsafe in less than 5 years.”*

Theatre, London

*“If we spend £20000 on the new roof, it will deplete our funds completely.”*

Theatre, North-West

*“Re-roofing the southern end of the house and addressing water egress issues exacerbated by climate change and sheer volume of rainwater.”*

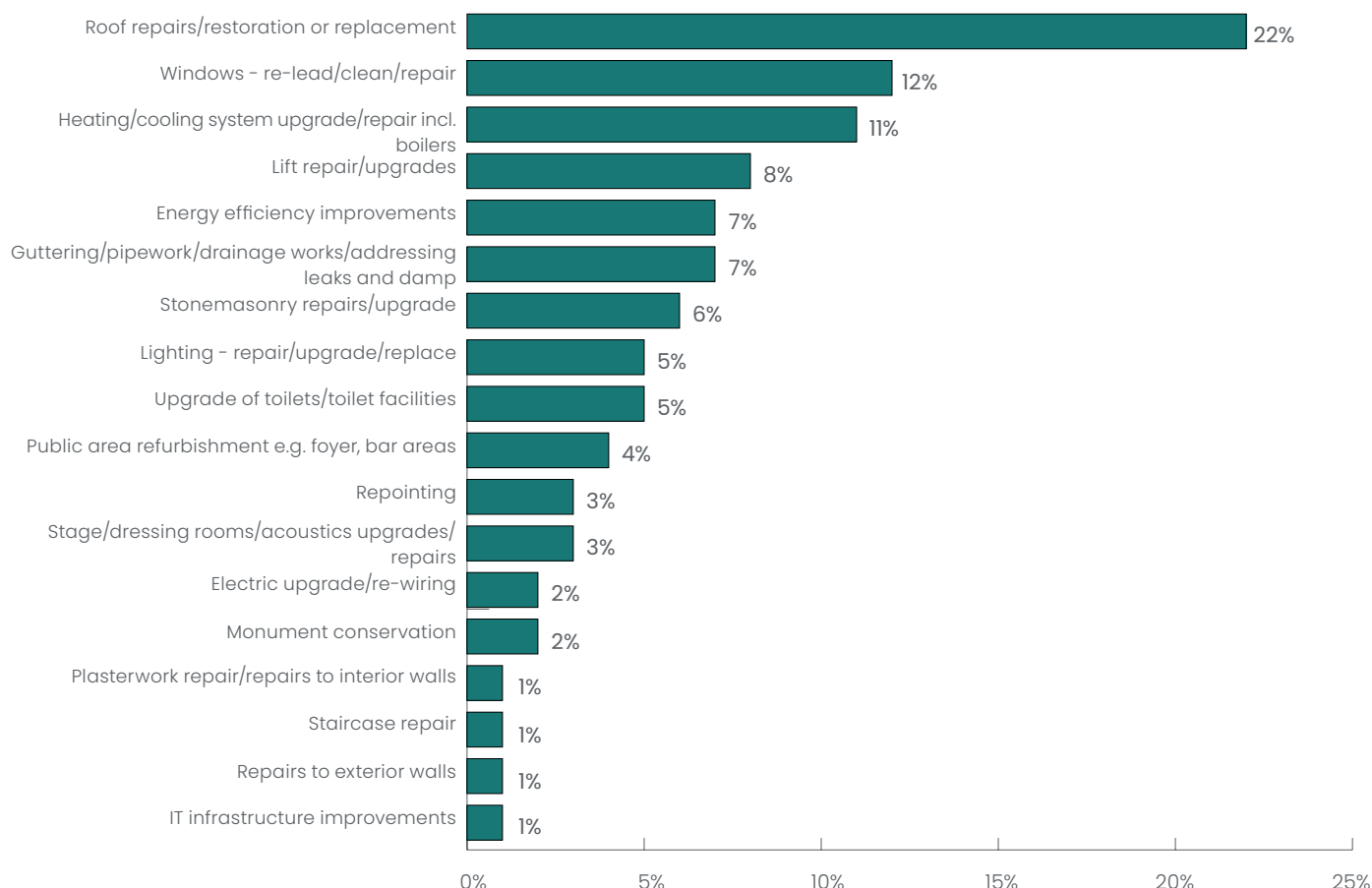
Historic house, East of England

## APPENDIX C: DETAILED SURVEY FINDINGS

Work on windows – including re-leading, comprehensive cleaning and repair – was cited by 12% of the respondents that provided answers to this question (Figure 39). Extensive amounts of highly specialised expertise are required for stained glass window repair, which can result in very high costs; one respondent anticipates costs of £2m for repair of two stained glass windows.

Work on heating and cooling systems – upgrading, repair, and boiler replacement – was cited by 11% of those responding to this question. Many of these systems were installed some years ago – one respondent stated their system was over 40 years old and had not been upgraded since the 1980s.

**Figure 39:** Urgent unfunded works



Base: 177 respondents

Respondents emphasised the risks of worsening issues and decay that would ensue if urgent works are left unfunded.

*“This is important and urgent work, but currently outside our budget. We need to seek funding for this work. This may [take] time some time to materialise, and in the interim, costs increase, and the problem worsens.”*

Heritage destination, East Midlands

## APPENDIX C: DETAILED SURVEY FINDINGS

### C7 UNDERSTANDING CONDITION

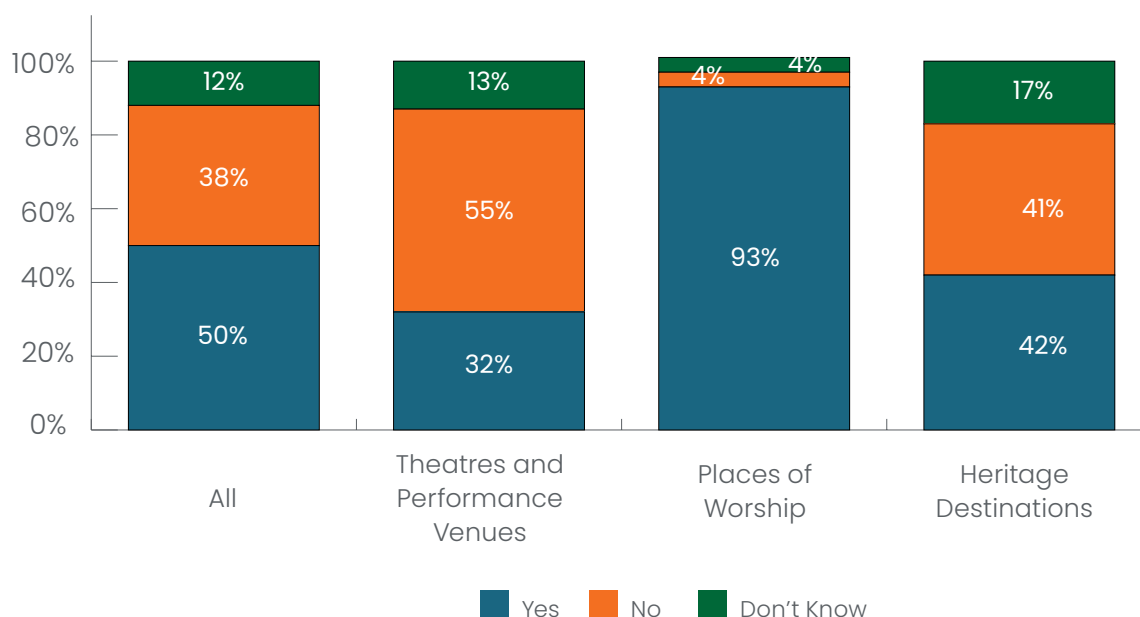
#### Key points:

- Overall, half of respondents reported having a current condition survey in place, in most cases undertaken by an external consultant and almost always within the last five years; however, there is a high level of disparity in most of the variables collected between places of worship and other venue types.
- Of the three types of venue considered, Church of England cathedrals and churches have by far the highest proportion with current condition surveys, usually carried out by an architect; this directly reflects the statutory requirement for inspection introduced by the Inspection of Churches Measure 1955 and its revised successor, the Care of Churches and Ecclesiastical Jurisdiction Measure 1991. However, only approximately 40% had a schedule of repairs which included costs.
- About two fifths of heritage venues and about a third of theatres have current condition surveys, the former often, and the latter usually, carried out by a chartered building surveyor, with the balance undertaken by architects. Nearly 60% of these types of venues had a schedule of repairs with costs.
- Those without condition surveys overwhelmingly reported their cost as the primary limiting factor, though in the case of those few churches without a recent quinquennial inspection inaccessibility of expertise was also mentioned. Among the remainder, some reported having sufficient in-house expertise or comprehensive enough repair and maintenance processes and/or personnel to not require formal condition surveys.
- Just less than a third of respondents described prioritising repairs in a systematic way with expert professional input. Just over specifically 10% reported using a condition survey or quinquennial inspection as a means of prioritisation. However, nearly half of respondents who gave specific information (144 respondents of 308) seemed to be making use of an essentially reactive approach, in some cases informed by systematic surveys but more usually by urgency

Ninety-three percent of places of worship have a current condition survey in place; this is because the Church of England requires church buildings to be inspected by a suitably experienced and qualified professional every five years (Figure 40).

Of other venue types, just under a third of theatres and performance venues (32%) and about two fifths (42%) of heritage venues have a current condition survey.

**Figure 40:** Whether venues have a current condition survey

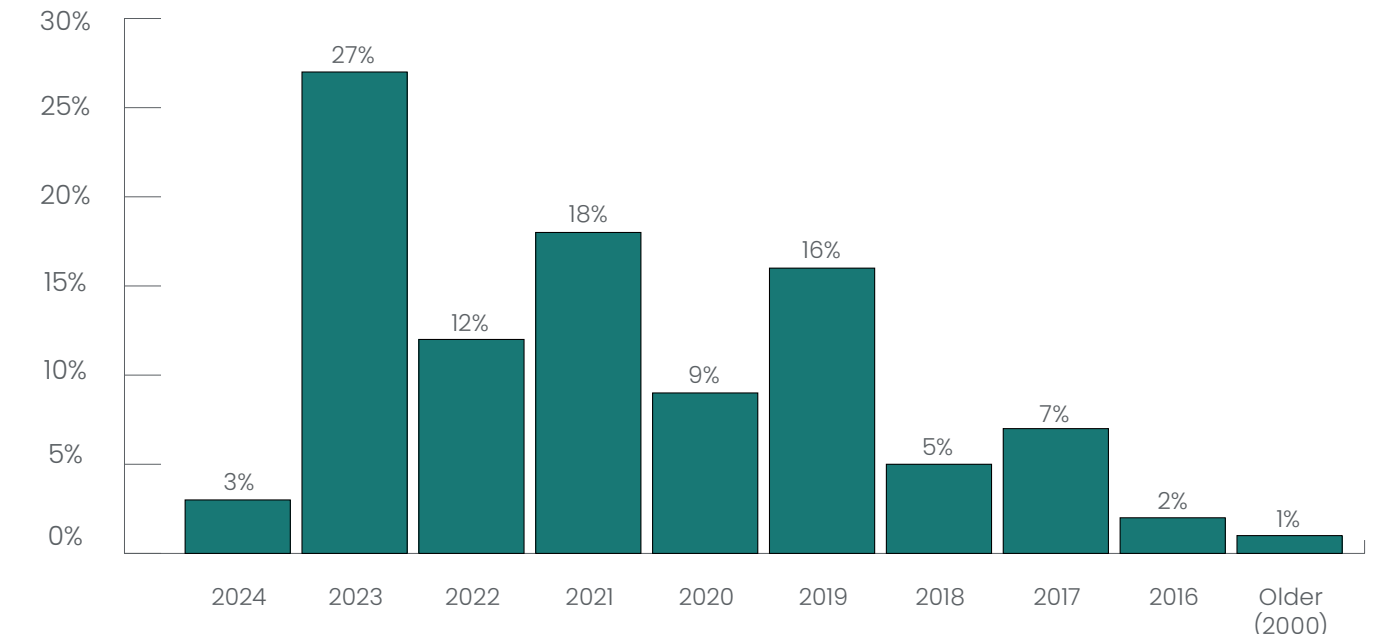


Base: 322 respondents

APPENDIX C: DETAILED SURVEY FINDINGS

Roughly half of the venues provided a date for when their condition survey was produced (Figure 41). Of those, over a quarter were 2023, followed by the previous odd years, 2021 and 2019. Over 85% of the current condition surveys were produced in the last five years. There is one anomalously old survey, carried out in 2000; with this exception, the oldest ‘most recent survey’ date was 2016.

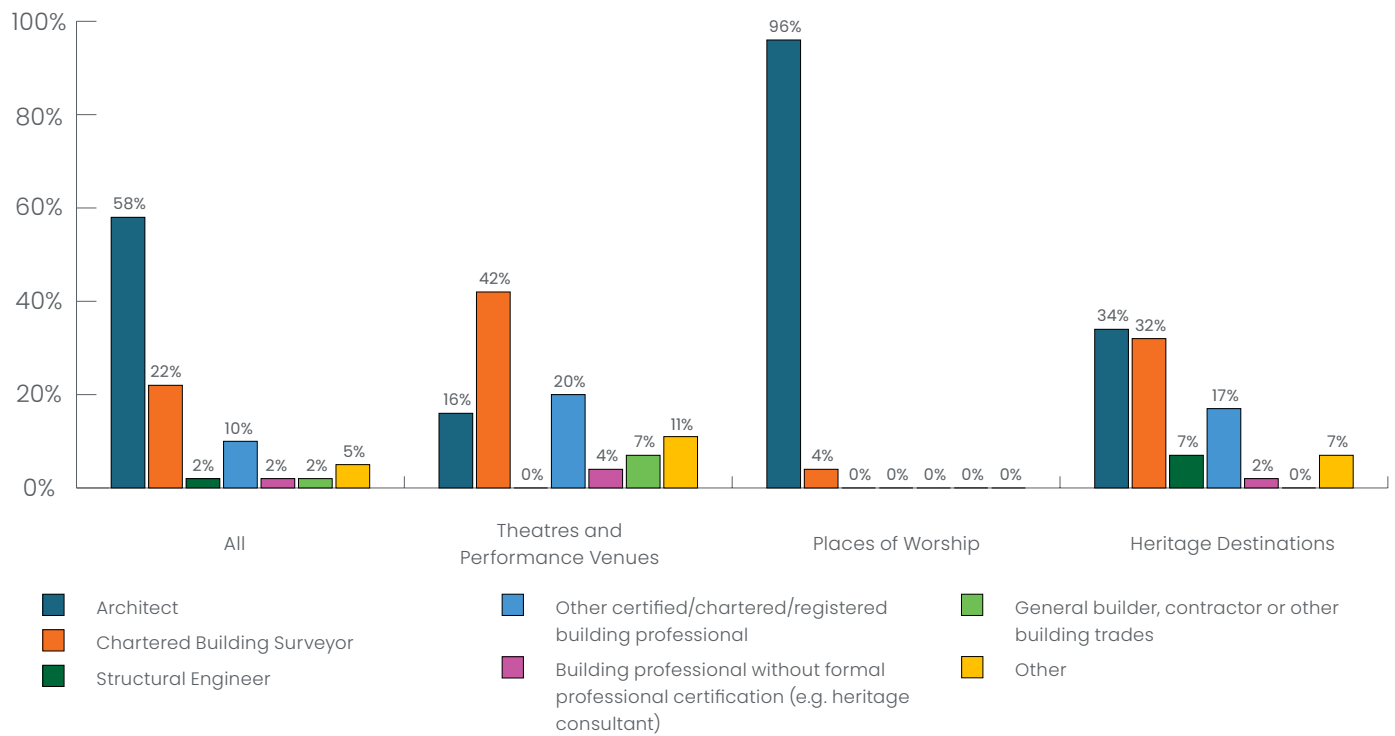
Figure 41: Date current condition surveys were produced



Base: 161 respondents

In accordance with the requirements of the Church of England, most places of worship employ an architect to produce their condition survey. For other venues, this is more likely to be a chartered building surveyor. A comparatively smaller number (approximately 20%) of these venues will employ another certified, chartered or registered building professional (Figure 42).

Figure 42: Lead for undertaking condition surveys



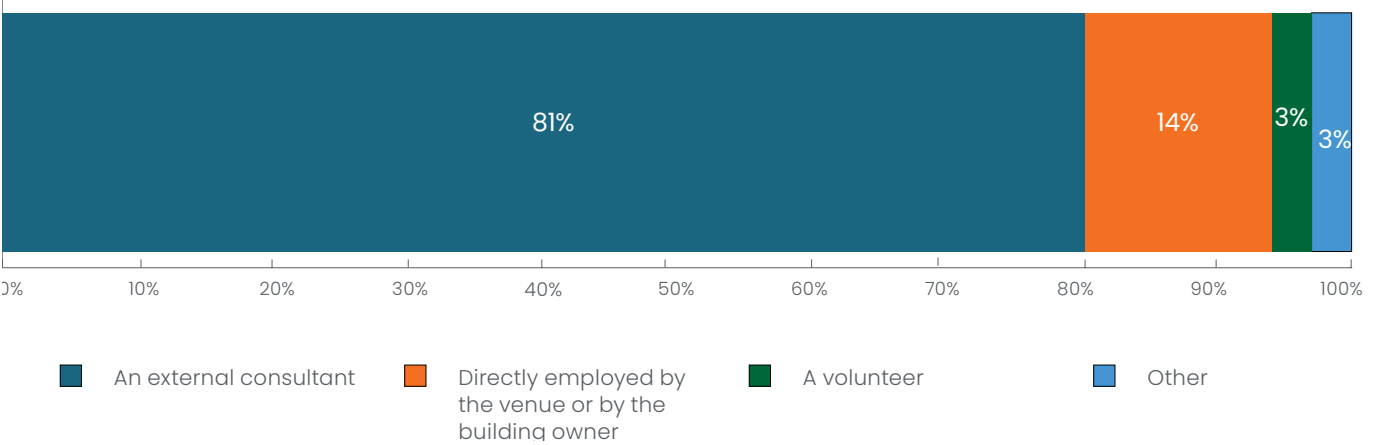
Base: 161 respondents

APPENDIX C: DETAILED SURVEY FINDINGS

Where condition surveys are undertaken by individuals other than a registered building professional, this tends to be internal staff (particularly at theatres), or an architect, builder or surveyor.

For the majority of venues (81%), the individual undertaking the survey is an external consultant (Figure 43).

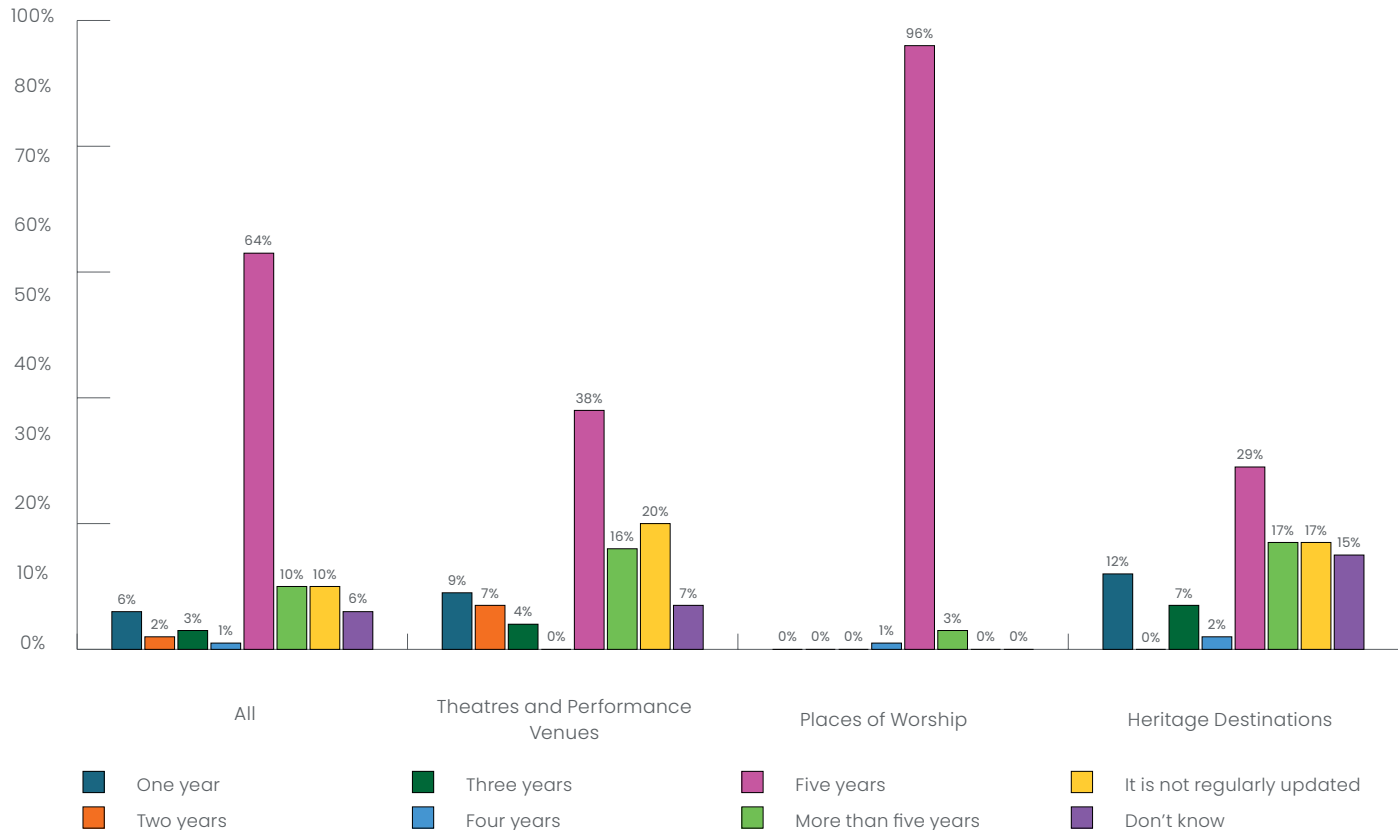
Figure 43: Is the condition survey undertaken by internal or external personnel?



Base: 162 respondents

In line with CoFE requirements, most condition surveys for places of worship are undertaken every five years. The majority of theatres and performance venues and heritage destinations also have a survey conducted every five years (Figure 44).

Figure 44: Time interval between condition surveys



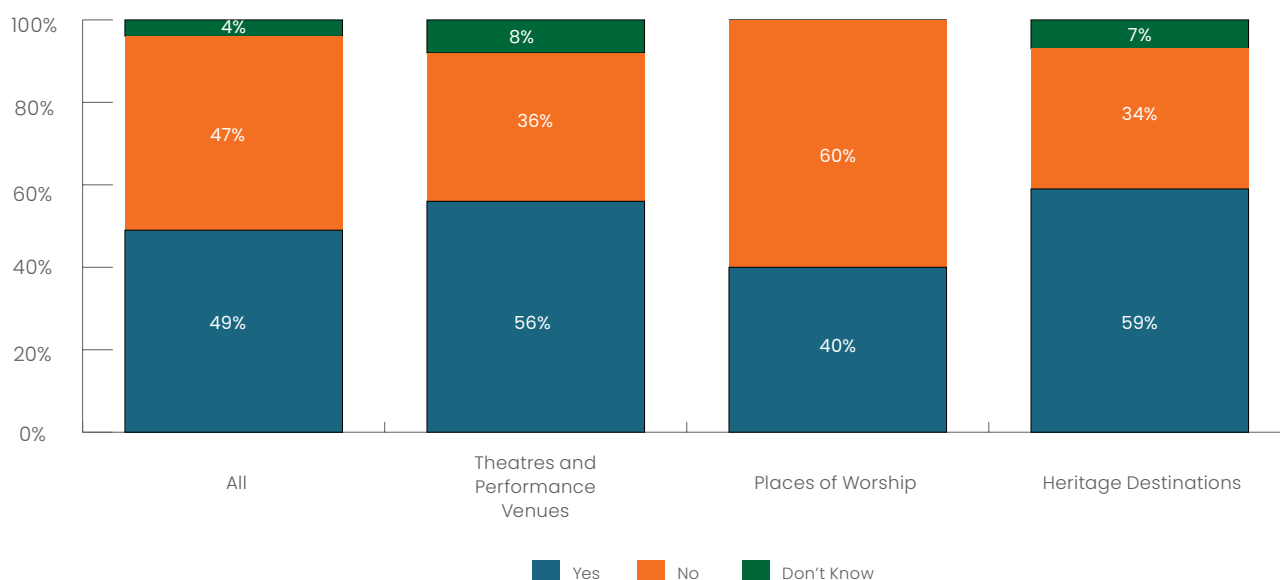
Base: 162 respondents

## APPENDIX C: DETAILED SURVEY FINDINGS

Where venues have a current condition survey for their building, about half (49%) of these include a repair schedule including estimated costs (Figure 45).

This means that, unless venues are able to assess the value of required repairs in another way, less than a quarter of all of the theatres and performance venues and heritage destinations surveyed have a costing repair schedule. (Places of worship are excluded from this calculation because 93% have a condition survey).

**Figure 45:** Does the condition survey include a costing repair schedule?

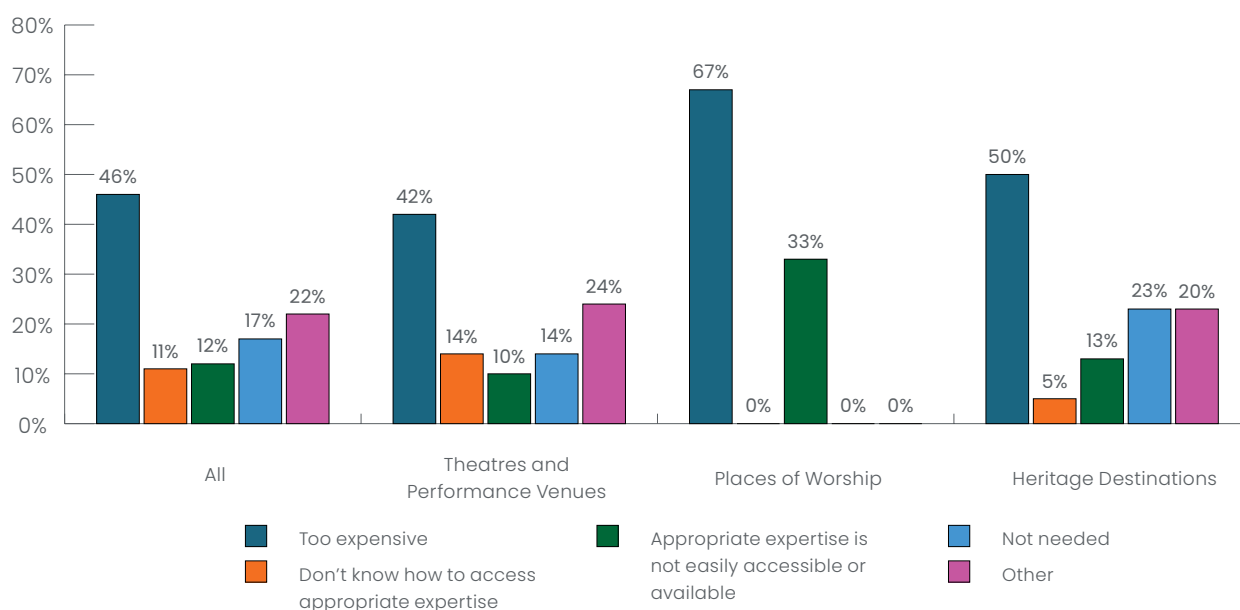


Base: 162 respondents

Where venues do not have a current condition survey – 121 venues – cost is identified as the main factor (it being too expensive). This, and not knowing how to access appropriate expertise, are cited as reasons for places of worship not having the requisite survey.

For theatres and performance venues and heritage destinations, expense is cited as the main reason, as well as a range of 'other' factors (Figure 46).

**Figure 46:** Reasons for not having a condition survey



Base: 121 respondents



## APPENDIX C: DETAILED SURVEY FINDINGS

Of the 45 respondents who stated that a condition survey is 'not needed' and provided further details, 10 have a condition survey in progress or coming soon, with a further two reviewing the need for a condition survey. The majority stated that they did not require a survey, because of sufficient in-house expertise, ongoing maintenance, recent major repairs, or the newness of the building. A further three were not responsible for the maintenance, two were unfamiliar with condition surveys, one had not had time to organise a condition survey and one had a concern over funding the repairs that would likely be identified in a condition survey.

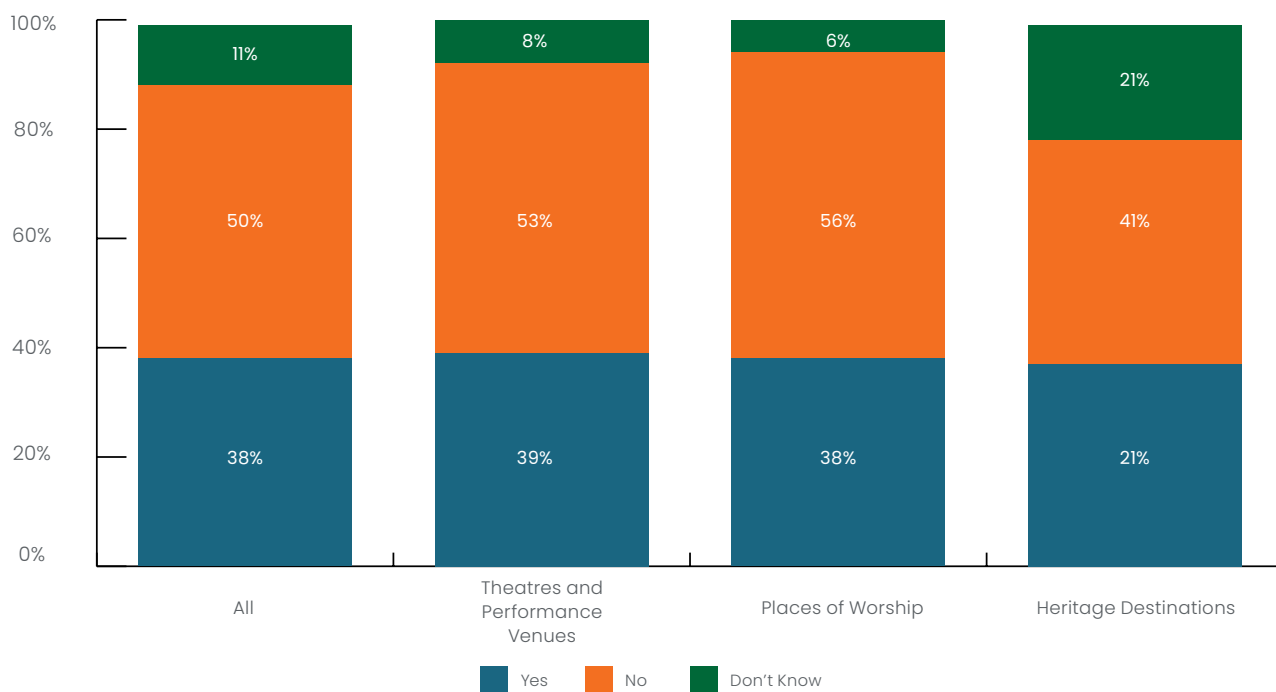
The evidence from open responses suggests that the single most frequent approach to prioritising repair and maintenance was based on immediate and pressing need, with health and safety tending to be the preeminent driver. This reactive approach, aptly described by one respondent as 'find it, fix it', was directly evidenced in nearly half of all respondents who provided information (144 of 308 responses). This was often coupled, directly or implicitly, with the need to work within financial constraints. As one theatre in London stated "Urgency, compliance, funds available", are the key factors, with another commenting that repairs were assessed "On a case-by-case basis, as and when needed. Priority would always be dependent on financial cost and immediate safety."

*“Emergency repairs; anything putting visitors or staff at risk. All other repairs are considered but typically pushed back as cannot be afforded.”*

Museum, London

Fewer venues have an Asset Management Plan or Estates Strategy (38%) than a condition survey (50%). There is little variation across different venue types (Figure 47).

**Figure 47:** Does the venue have an Asset Management Plan or Estates Strategy?



Base: 324 respondents

## APPENDIX C: DETAILED SURVEY FINDINGS

### C8 CONDUCTING MAINTENANCE

#### Key points:

- Maintenance is typically undertaken by subcontracted maintenance teams, with only a minority using directly employed staff. However, there is evidence that venues with directly employed maintenance teams tend to be in better condition than those without (though this may also reflect other differences, as larger venues with larger funding flows are more likely to have directly employed maintenance teams).
- Approximately two-thirds of respondents reported having a maintenance plan and a slightly higher proportion of churches report having a maintenance plan and were most likely to report that repair and maintenance of their building was a high priority. Nevertheless, churches are also reported to be in poorer condition than other venue types. It does seem likely that churches are in worse condition.
- A similar proportion reported having a maintenance budget. Average maintenance budgets reported by places of worship are approximately £145k, smaller than the approximately £170k reported by theatres and heritage destinations. All venue types reported spending more than the allocated budget, with an average spend across building types of approximately £190k. These findings suggest that there is a limited direct link between effective maintenance planning and good building condition, if sufficient resources to carry out work are not available.
- There was evidence of widespread use of volunteers or members for repairs and maintenance, especially in churches.
- A number of venues reported increased intensity of and expenditure on repairs and maintenance due to past underinvestment leading to a situation where repairs could no longer be deferred. This was the single most frequently given reason for a 'substantial' increase in repair intensity.

### C9 MAINTENANCE ACTIVITY

Maintenance is typically undertaken by a sub-contracted maintenance team (43% of all venues) and there is little variation from this, by venue type (Figure 48). In just under a quarter of venues, maintenance is undertaken by a directly employed individual, such as a caretaker or handyman. In a large proportion of venues (approximately 40% in all venue types), maintenance is undertaken by a range of other individuals or organisations; most typically, volunteers or 'members' (13%). This is particularly the case in places of worship.

In other venues, various other types of contractors will conduct maintenance on an ad hoc basis; for eight venues this is the responsibility of the local council; for eight venues, maintenance is undertaken by staff who are employed in roles other than maintenance.

*“Everything is done in-house with volunteers unless professional work is required.”*

Theatre, North West

*“Combination of theatre technicians and external tradesmen, overseen by the council's property team.”*

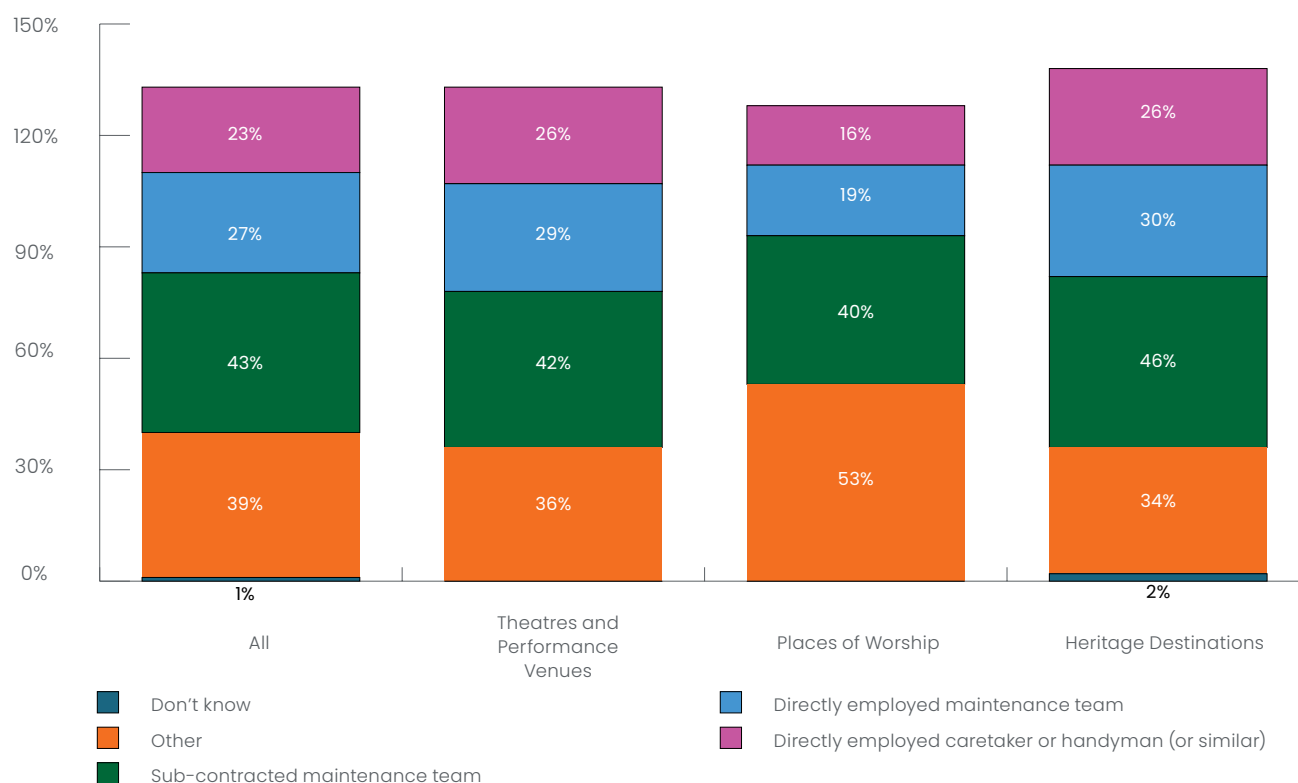
Theatre, South East

*“Volunteers who have relevant skills e.g. retired electricians.”*

Major Church, North West

## APPENDIX C: DETAILED SURVEY FINDINGS

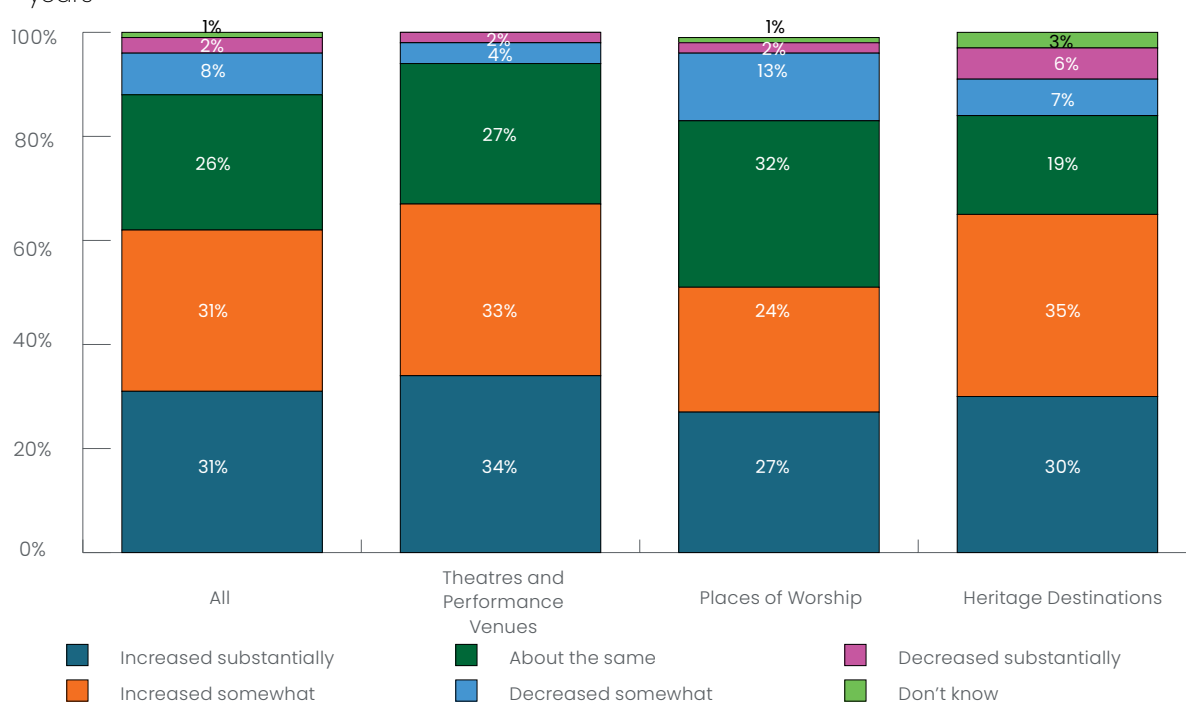
**Figure 48:** Who is responsible for conducting maintenance of the venue?



Base: 319 respondents

The intensiveness of repair and maintenance undertaken in the last 5 years has increased across all venue types (62%) (Figure 49). Of the three categories of venue, theatres have increased the intensity of maintenance most notably – over two thirds of venues surveyed – compared with over half of places of worship.

**Figure 49:** Extent to which the intensiveness of repair and maintenance on the building has changed in the last 5 years



Base: 322 respondents

## APPENDIX C: DETAILED SURVEY FINDINGS

Where maintenance has increased:

*“The water comes through the roof and causes damage to the wood block flooring. The amount of water coming in has increased but also depends on the direction of the wind; we have had to make repairs to ageing boilers.”*

Major Church, London

*“Value engineering at the build stage has seen product end of life come sooner, bespoke designs are difficult to repair, poor warranty periods, poor Operations & Maintenance (O&M) manuals. Wear and tear with products never designed for the footfall.”*

Other publicly accessible arts venue or heritage destination, North West

*“Many systems have reached [the] end of life. Impact of Covid shutdowns on budgets and less ability to plan. More pressure to raise income from building – more use and demand on building.”*

Non-accredited museum, North East

*“Previous underinvestment in repair and maintenance has led to increased intensiveness required now.”*

London, Theatre

Where funding has decreased, this is either because a major programme of renovation has been recently completed, or because funds are so depleted that spending on maintenance has had to be cut.

Where maintenance has decreased:

*“Falling attendances and increased costs as a result of pandemic and cost of living are depleting reserves and resulting in hand to mouth existence just to keep functioning.”*

Heritage destination, East of England

*“Lack of budget has meant that some day to day and annual repairs and maintenance has not taken place.”*

Theatre, London

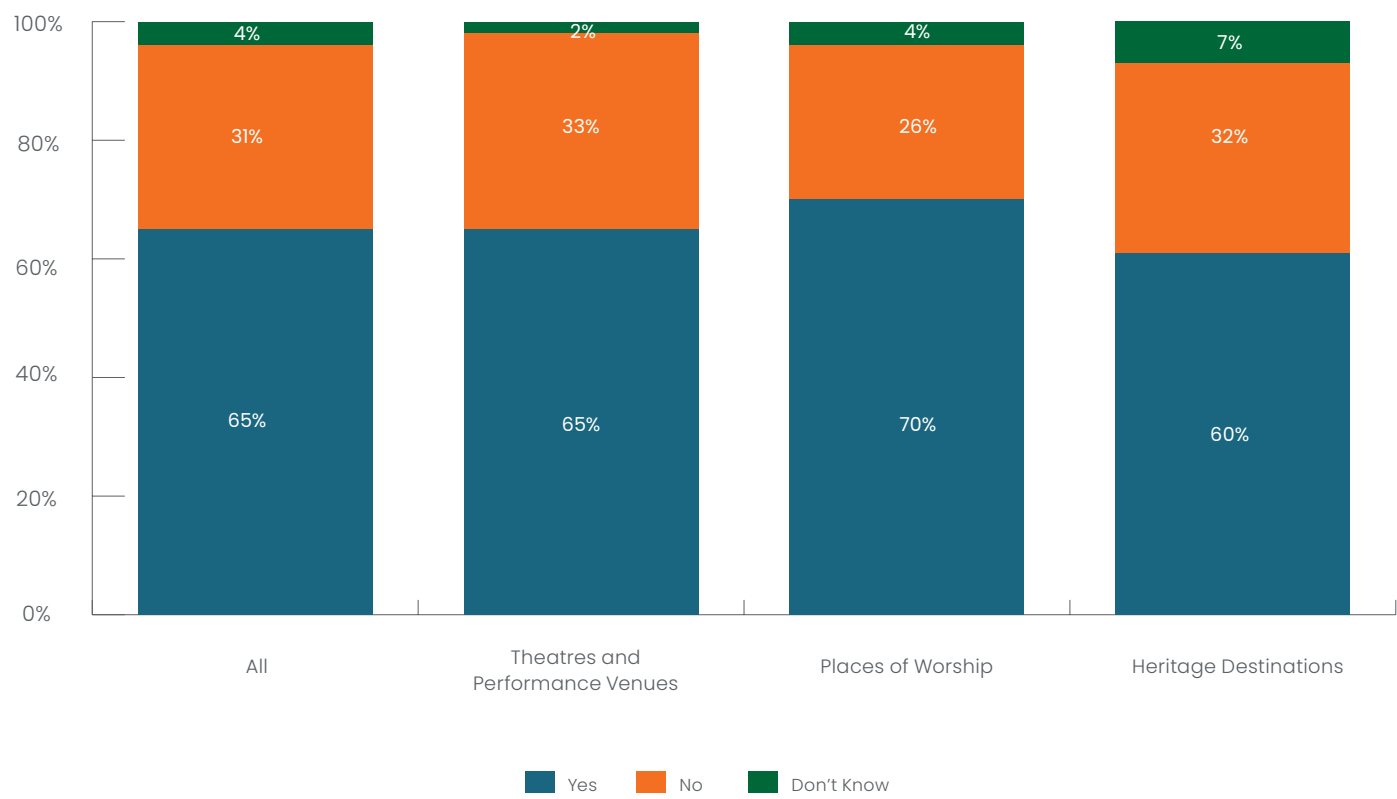
*“We’ve actually increased our spend on building maintenance, but it’s not enough.”*

Yorkshire & the Humber, Railway

APPENDIX C: DETAILED SURVEY FINDINGS

Approximately two thirds of venues have a maintenance plan (Figure 50). There is little variation by venue type; a slightly higher proportion of places of worship (71%) have a maintenance plan than other types of venues.

Figure 50: Does the venue have a maintenance plan?



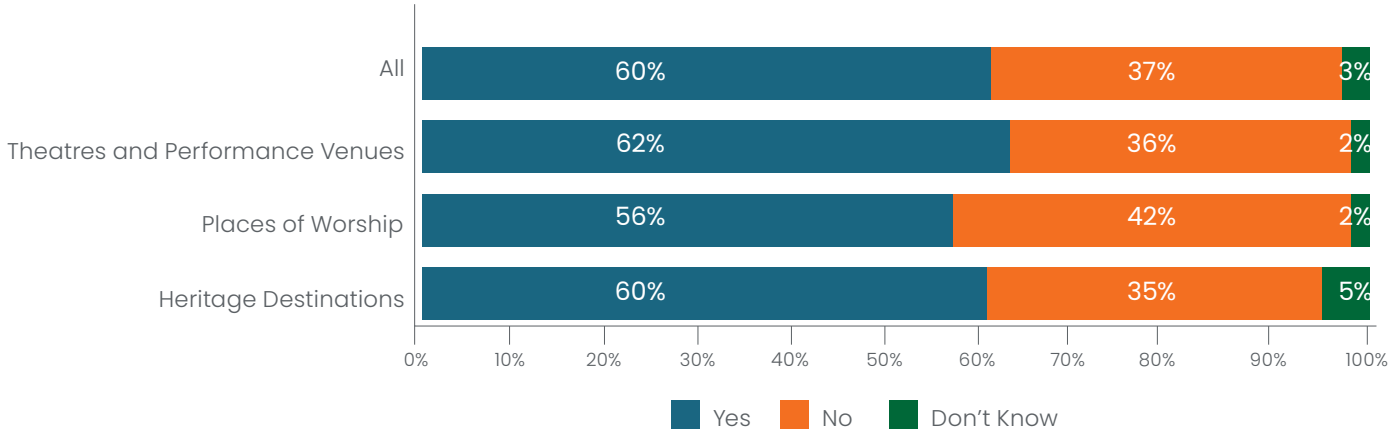
Base: 321 respondents

APPENDIX C: DETAILED SURVEY FINDINGS

C10 MAINTENANCE BUDGET AND EXPENDITURE

A similar proportion of venues that have a maintenance plan, have a maintenance budget (60% overall) and there is little variation by venue type (Figure 51).

Figure 51: Does the venue have a specific annual budget for building maintenance?

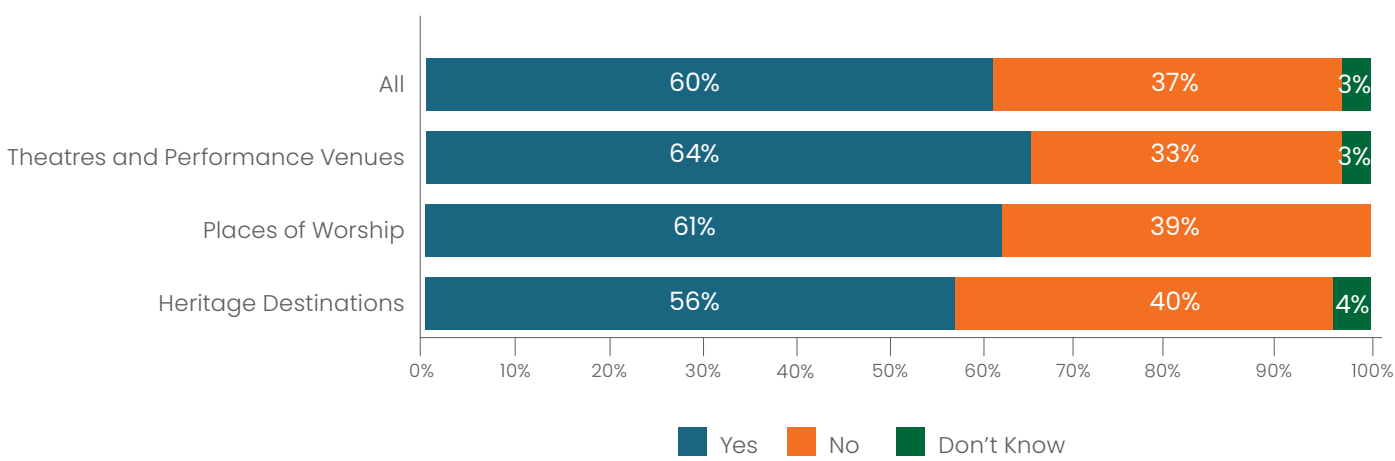


Base: 321 respondents

Of the venues that have a maintenance budget, under two thirds state this is ring-fenced (Figure 52). There is little variation by venue type.

This means that only a third of all of the venues that responded to the survey have a ring-fenced maintenance budget.

Figure 52: Is the maintenance budget ring-fenced?

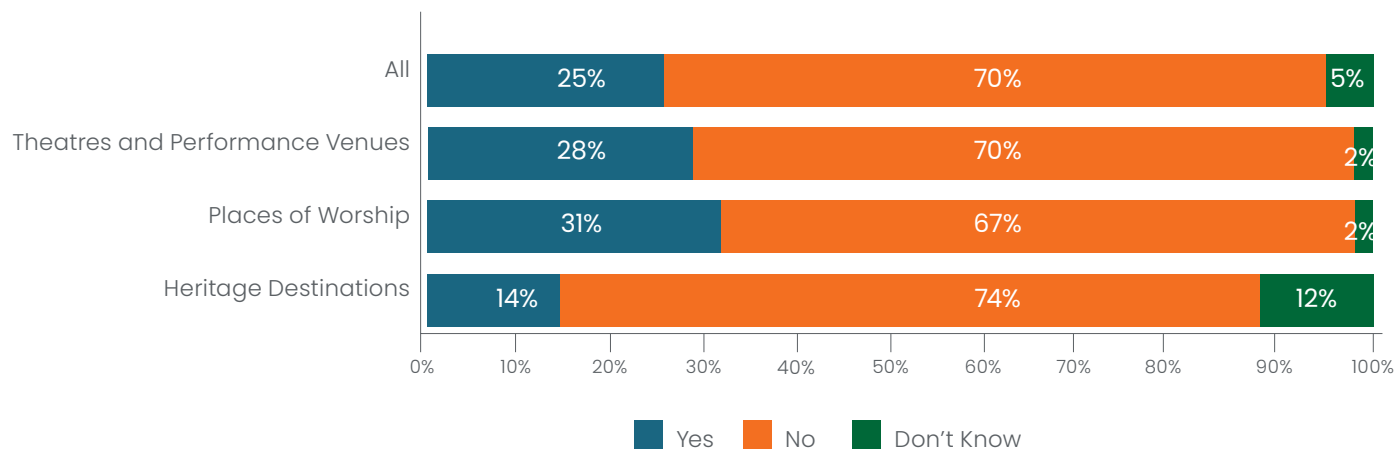


Base: 189 respondents

APPENDIX C: DETAILED SURVEY FINDINGS

Of those venues that have a maintenance budget, only a quarter (25%) state that it is sufficient to perform the necessary repair and maintenance to the building (Figure 53).

Figure 53: Is the maintenance budget sufficient?



Base: 190 respondents

Where venues have a maintenance budget, the average across all venue types is just under £170k. Theatres and performance venues have a similar budget to heritage destinations (at about £175k) and places of worship have just under £145k per year allocated to maintenance (Table 16).

Extrapolated to a national level, this would equate to £149 million budgeted for maintenance. Note: this number has been extrapolated from the 60% of venues that state they have a budget.

All venue types are spending more than their annual budget on maintenance each year. The average spend is just over £192k, meaning a shortfall (on average) of £24k: they are spending 15% more. The shortfall is greatest for places of worship, who report an annual shortfall of approximately £47k per year.

Table 16: Maintenance budget vs expenditure

Venue	Number of Buildings (frame)	Mean (£000s)		Total Value (£000s)	
		Budget	Spend	Budget	Spend
Theatres and performance venues	681	175	186	70,739	116,751
Places of worship	383	143.5	191	28,883	62,496.5
Heritage destinations	517	176	203	49,619	90,034
All	1,581	168	192	149,186	269,282

## APPENDIX C: DETAILED SURVEY FINDINGS

### C11 PRESSURES AND CHALLENGES

#### Key points:

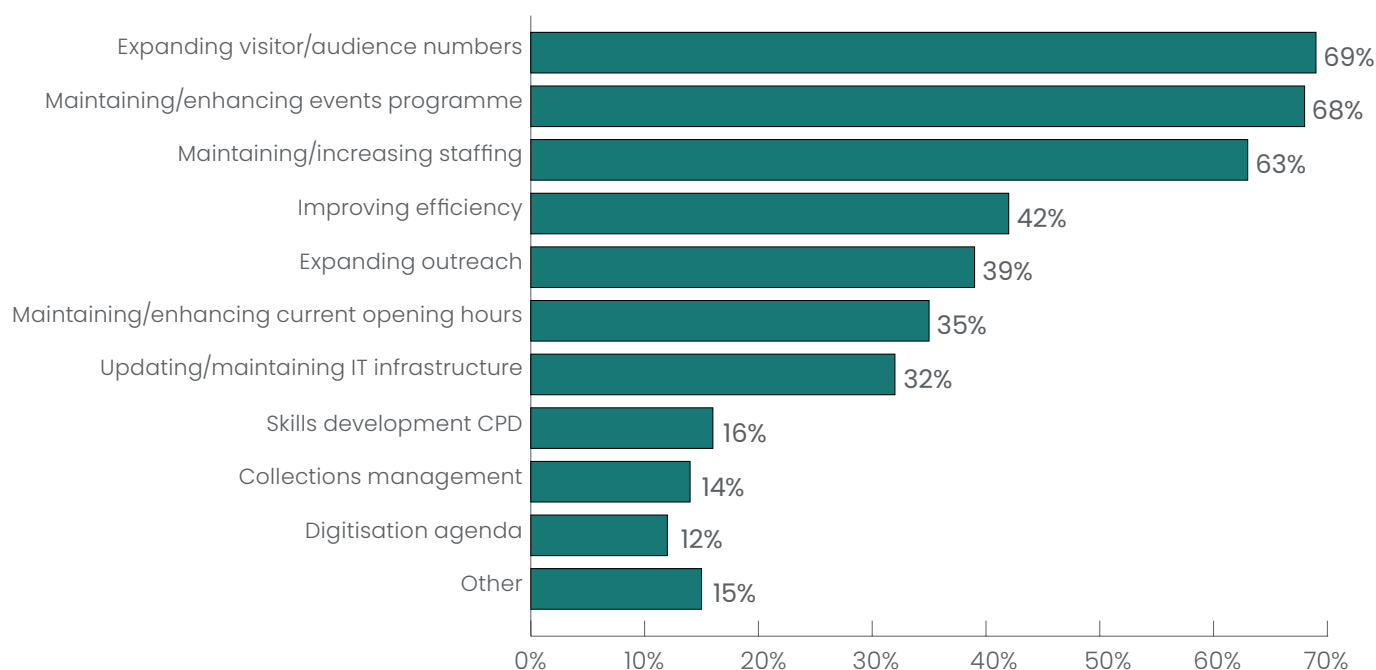
- Venues reported that repair and maintenance is a high priority. However, the reality is that it seems to be difficult to translate this priority in principle into the reality of keeping buildings in good condition.
- The most significant immediate obstacle to carrying out repair and maintenance was reported to be lack of finance (87% of respondents) or difficulty accessing grant funding (76%). Closely related financial obstacles were the loss of revenue associated with undertaking repairs, cited by nearly half of respondents, and the lack of a ring-fenced maintenance budget, cited by more than a quarter.
- Other important barriers included disruptions to visitor access and skills shortages (both to commission and manage and to undertake the work), both being reported by more than 25% of respondents.
- The most significant competing priorities were reported to be increasing visitor and audience numbers, maintaining or increasing events programmes and maintaining or increasing staffing levels. These findings correlate well with anecdotal evidence that an increased focus among funders on audience engagement and diversification and growing pressures since 2014 to be 'entrepreneurial' are taking focus and resources away from building repair and maintenance, while increasing the need for repair, maintenance and renewal as a result of more intensive use of buildings and their services.
- Energy efficiency was also regarded as an important factor that had to be taken into account when planning maintenance.
- As with many other aspects of the findings, places of worship emerged as having special characteristics: outreach is prioritised much more highly than by other venue types (58% of churches vs 36% of theatres and 27% of heritage destinations) while maintaining or enhancing events programmes is a less frequent priority (47% of places of worship vs more than 70% of both theatres and heritage destinations).
- The need for permissions or consents was also cited by more than 20% of respondents as a barrier. Anglican churches reported that the need to obtain a faculty for any changes and the related right of numerous interest groups to object to changes, causing particular problems. In both cases, however, such consents often form an important part of the national framework for protecting heritage assets, though there is now good evidence from other sources that heritage-related planning applications are taking increasingly long times to be decided by local planning authorities.



## APPENDIX C: DETAILED SURVEY FINDINGS

Various pressures compete with maintenance, the most significant of which relate to attracting and increasing visitor or audience numbers (69%) and maintaining or enhancing events programmes (68%): both key, direct means of increasing revenue. In line with this, the third most important pressure that competes with maintenance is maintaining or increasing staffing (63%) (Figure 54).

**Figure 54:** Pressures competing with maintenance and repair



Base: 1,252 responses

Other responses include:

- Energy costs
- Maintenance costs of other buildings in the estate
- Constraints imposed by landlord (e.g. diocese)
- And miscellaneous pressures, such as:

*“Due to the scale of the organisation there is always a need to balance spend on maintenance and conservation against wider organisation priorities.”*

Historic monument, Yorkshire & the Humber

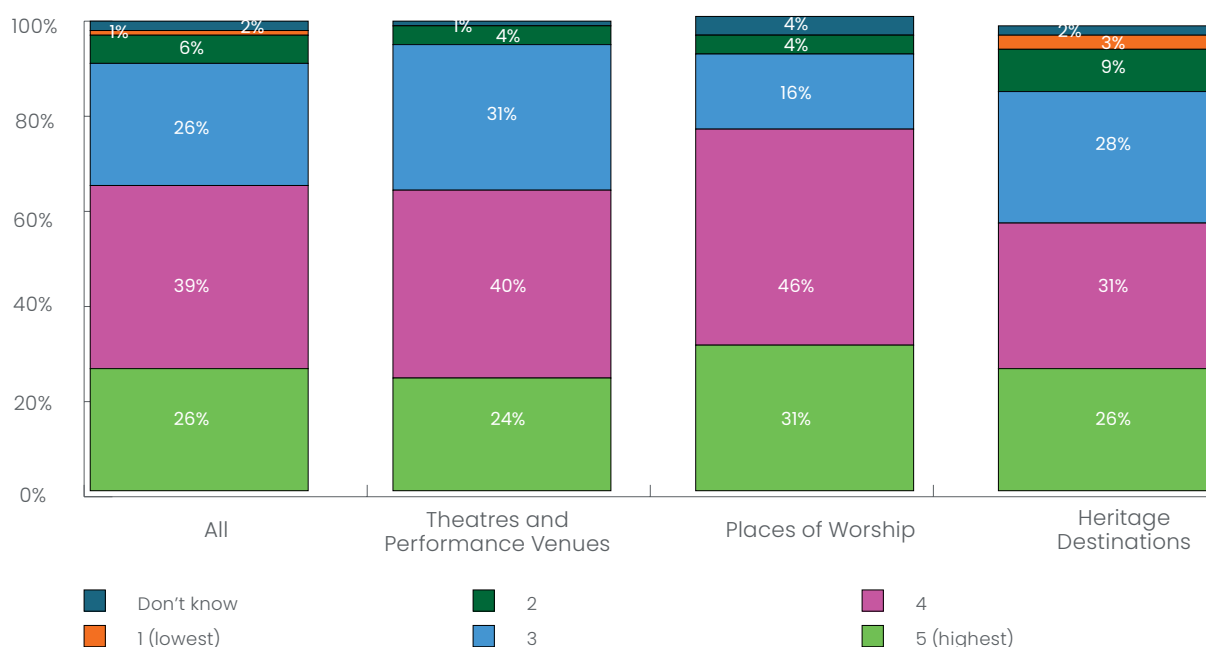
*“Getting planning permission.”*

Other performance venue (concert hall etc.),  
South West

## APPENDIX C: DETAILED SURVEY FINDINGS

Maintenance is reported as being a high priority (either the highest or second highest priority) by approximately two thirds (65%) of all respondents (Figure 55). A quarter suggest maintenance is their highest priority. Places of worship place a greater priority on maintenance than theatres and performance venues, and heritage destinations.

**Figure 55:** How much of a priority is maintaining the venue (where '5' is the highest and '1' is the lowest)?



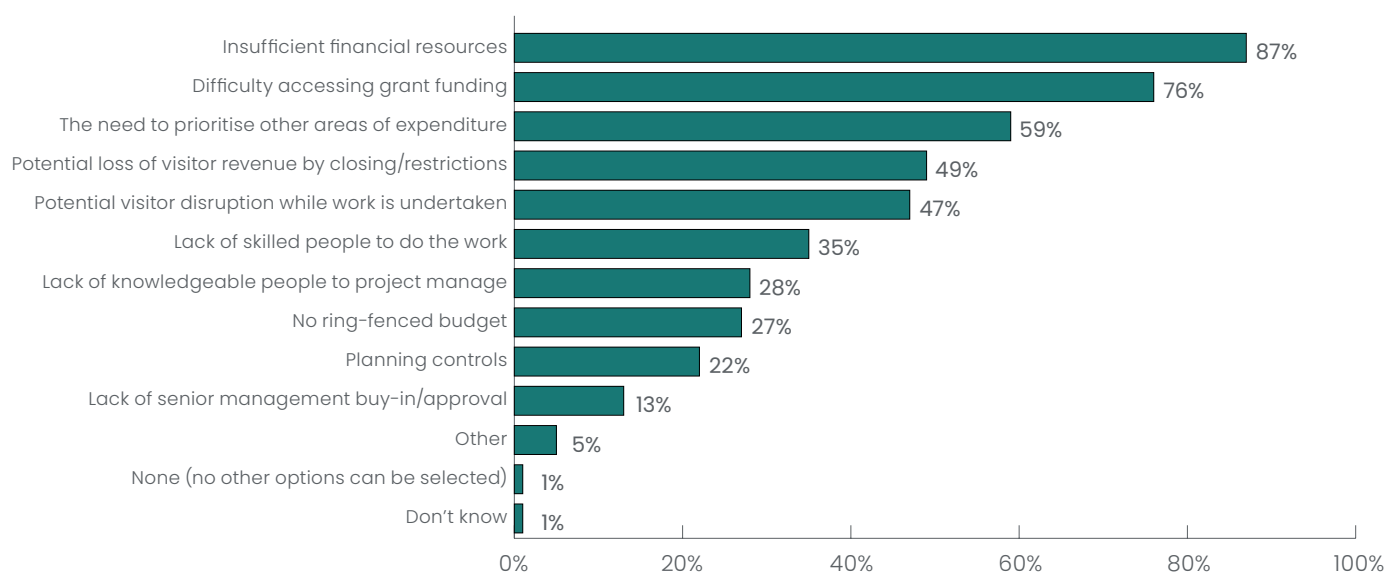
Base: 323 respondents

When asked about barriers and challenges that the venue faces in conducting maintenance and repair, 'insufficient financial resources' is cited by the highest number of respondents (87%), followed by 'difficulty accessing grant funding' (76%) (Figure 56).

This emphasises earlier findings on the insufficiency of maintenance budgets.

Other barriers cited only serve to compound the issues, such as the conflict of a potential loss of visitor revenue by closing/restricting areas of the venue to conduct the maintenance that is needed (49%). Linked to this is the potential disruption whilst work is being undertaken (47%).

**Figure 56:** Barriers and challenges that the venue faces in conducting maintenance and repair



Base: 1,435 responses

# APPENDIX C: DETAILED SURVEY FINDINGS

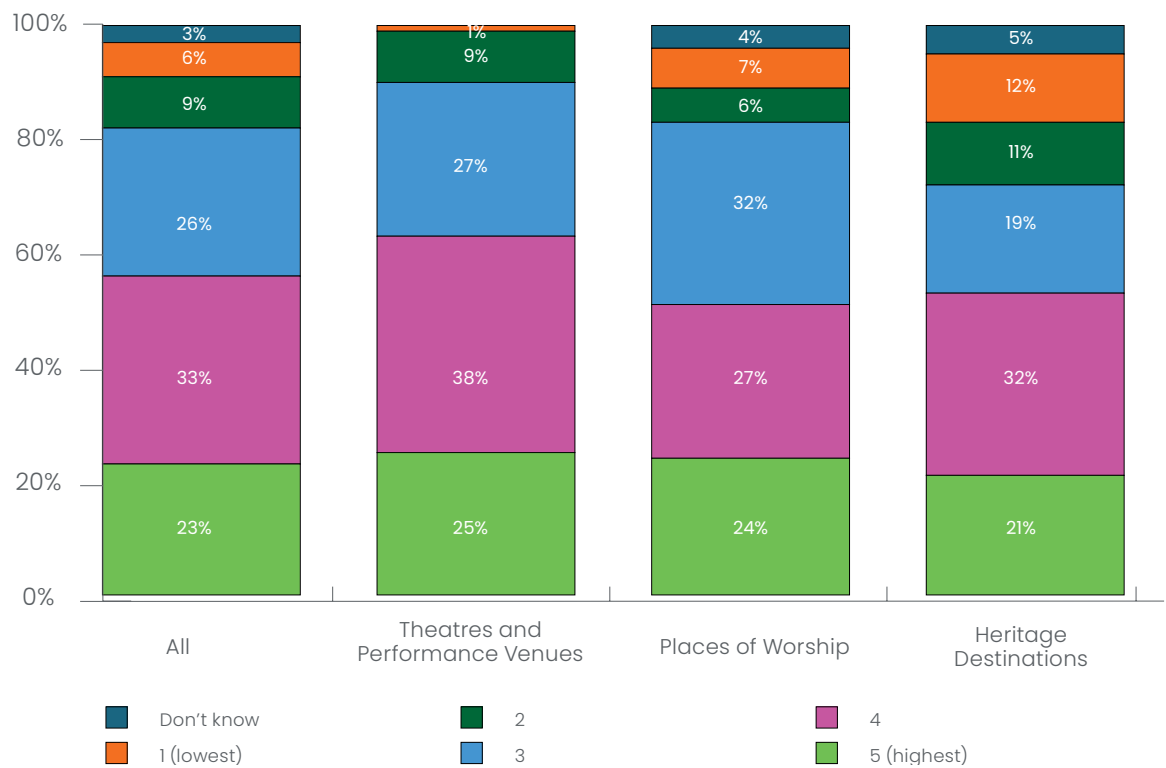
Where respondents identified ‘other’ barriers, these were typically related to restrictions imposed on churches by their Diocese, for example:

“Although our plans will not alter the fabric of the historic building, our plans need the Diocesan approval by way of a “faculty”. Many organisations can object to this approval.”

Major church, South West

Considerations around energy efficiency also appear to be important to venues, with over half of all venues giving this the highest or second highest rating on a scale of five when asked to assess its level of influence on repair and maintenance decisions (Figure 57). Theatres and performance venues tend to place more importance on improving energy efficiency, than places of worship, or heritage destinations.

Figure 57: Extent to which the need to improve energy efficiency influences maintenance plans



Base: 320 respondents

## APPENDIX C: DETAILED SURVEY FINDINGS

### C12 THE BENEFITS OF REPAIR

#### Key points:

- The main beneficial impact of being able to tackle currently unfunded works was reported to be enabling the building to be used for its intended purpose.
- Respondents claimed that multiple benefits, cultural, social and economic, would flow from being able to undertake these works, including:
  - Preservation of heritage buildings for future generations
  - Increased community outreach and improved accessibility
  - Building better visitor experiences
  - Building income streams
  - Reducing costs, in the form of energy costs and insurance payments
  - Lower carbon emissions
  - Improved staff morale and wellbeing
  - Increased demand for heritage skills

The greatest benefits and impacts identified by respondents, of being able to tackle necessary (but currently unfunded) works stem from being able to use the building for its intended purpose, resulting in:

- Preservation of the country's heritage buildings for future generations, enhancing community health & wellbeing through access to such venues and building civic pride
- Maintenance and increase of community outreach (e.g. for nurseries, early years, students, community choirs, parish clinics, baby/toddler groups, learning cafes etc.)
- Unlocking opportunities for increasing existing income streams and adding new ones, through the ability to use the building for multiple purposes including educational visits (to buildings deemed safe and secure having had necessary essential repairs and maintenance)
- Improved accessibility leading to higher visitor numbers and greater inclusivity
- Energy savings resulting in lower carbon emissions
- Better visitor experiences, leading to repeat visits and reputational benefits – attracting more visitors locally, nationally and internationally – in turn boosting revenue with a positive knock-on impact for the local and national economy
- Reduced pressure on staff and volunteers and opportunity to strengthen financial resilience and build up reserves and ability to safeguard jobs in consequence
- Reduction of insurance costs if essential works undertaken, reducing risks to building stability and safety
- Stimulation of demand for specialist heritage conservation skills to undertake necessary repair and maintenance works

## APPENDIX C: DETAILED SURVEY FINDINGS

*“A building that is fit for use by the community for many activities. Restoration of a wonderful grade I building and a legacy for the future. More time spent in serving the community instead of fundraising.”*

Major church, South-West

*“A capital investment to bring [the building] up to a modern standard would unlock opportunities to earn additional income from audiences through increased ticket sales and ancillary income and to attract private hirers. Facilities for disabled people would be improved, as would working conditions and staff and public safety levels. Investment would allow us to get closer to decarbonising the venue and reaching net zero within the operation. Costs in maintaining aged elements of the building would reduce for a considerable period as well as costs for energy to run the venue. The building would be safely preserved as the cultural resource and unique heritage asset it is.”*

Performance venue, South-East

*“The theatre and organisation would be future-proofed for the 21st century, ensuring the continuation of the only professional theatre [in the district]. This will ensure we can continue to offer significant community engagement and benefits in addition to performances, such as work with the local refugee and asylum seeker communities, work with young people, particularly disabled young people, and with socially isolated older people. It will also make our listed building more fully accessible, with the addition of a lift and increased toilet provision. It will significantly improve our environmental sustainability – reducing our impact and increasing our compliance with the Theatre Green Book. All of these positive benefits and impacts would secure employment for 23 staff, work for over 80 freelancers and volunteering opportunities and the benefits this brings for 84 local people.”*

Theatre, Yorkshire & the Humber

*“Securing the future of this unique [building]... secure employment for 14 people, continue with school visits and volunteering, ecological benefits, community hub to continue. Increased visitor numbers to help to make the location more financially sustainable.”*

Heritage destination, North-West

## APPENDIX C: DETAILED SURVEY FINDINGS

### C13 IMPACTS AND RISKS OF NOT REPAIRING THESE VENUES/SITES

#### Key points:

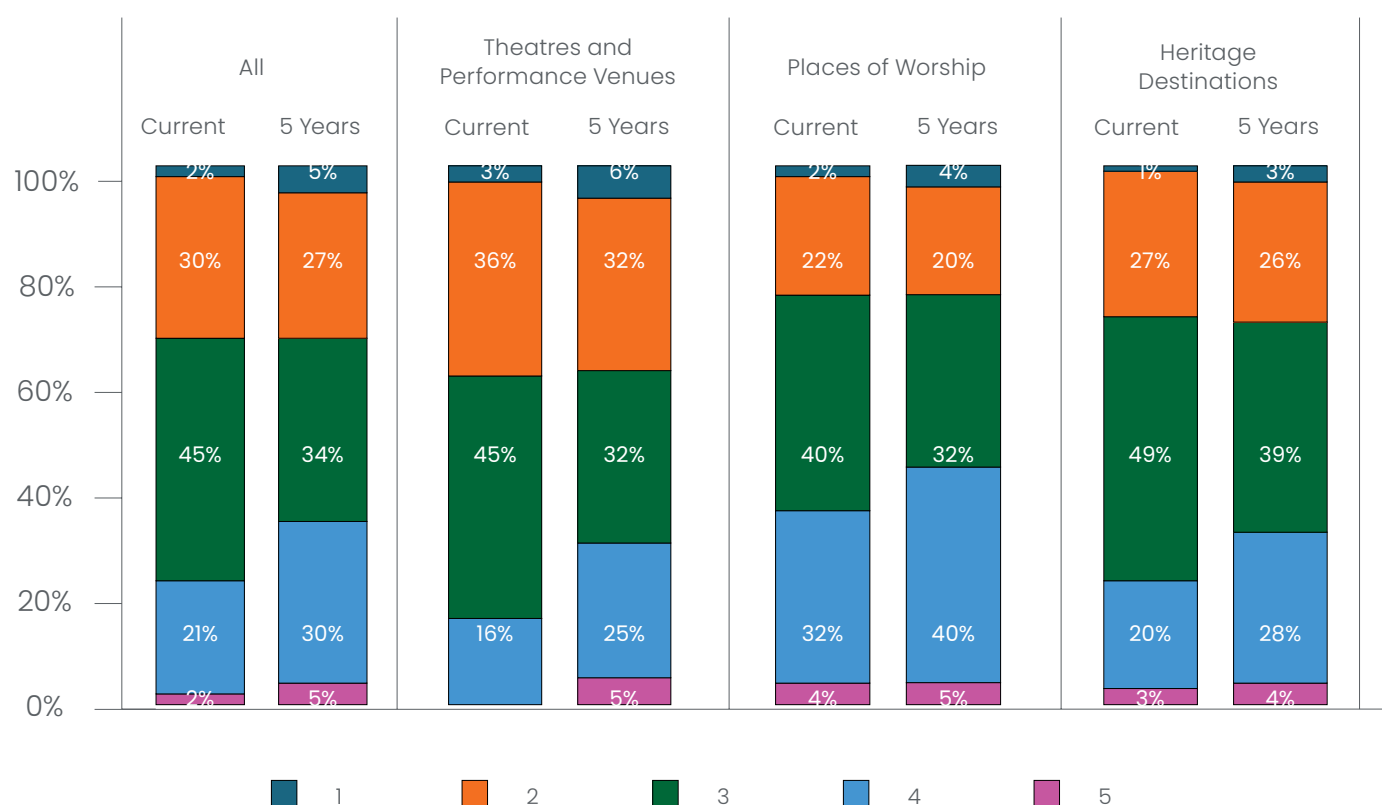
- Expectations of future condition, should repair and maintenance expenditures remain stable, are polarised: the situation is expected to be stable or improving for the two better condition categories, but significantly declining for the worst condition category. In most cases it would appear likely that it is buildings already in basically good condition that are expected to be stable or improve further, and the buildings in moderate to poor condition that are expected to decline further. This requires further analysis.
- Although this overall picture was consistent across venue types, it was striking that theatres and performance venues envisaged a greater proportion of buildings falling into the lowest condition category than any other category. The expectation is that the proportion of buildings in poor or very poor condition will increase by nearly 88%. Heritage destinations come next, with an expectation of the same proportion increasing just less than 40%. Finally, places of worship have the highest baseline proportion of buildings in poor or very poor condition (at approximately 35%) but expect a smaller proportional increase of 25%. If these increases were to take place, 30% of theatres and performance venues, 32% of heritage destinations and 45% of places of worship that took part in the research would be in poor or very poor condition.

Respondents were asked what they predict the condition of their building will be in five years' time, should maintenance expenditure remain the same.

The proportion of buildings in category 1 is predicted to increase; this might be because budgets have increased substantially (in over a third of venues) in the last five years and because a large amount of work is being planned by venues. However, the proportion of venues rating their building as category 1 is still very small (Figure 58).

The proportion of buildings in the very worst state of repair (categories 4 and 5) is expected to increase from 23% to 35%.

**Figure 58:** Condition of the building in 5 years, should maintenance expenditure remain the same



Base: 318 respondents

APPENDIX C: DETAILED SURVEY FINDINGS

RATING	DESCRIPTION
1	Structurally sound, no repair needed
2	Structurally sound, but with need for minor repair or general maintenance
3	Generally structurally sound, but in need of more extensive repair or maintenance to address substantive but localised/contained problems (e.g. minor rot, infestation, masonry deterioration, multiple localised but currently manageable roof leaks)
4	Significantly compromised, with element(s) having problems that, if unaddressed, threaten the long-term stability or survival of the building (e.g. rot or infestation of timber structural elements, extensive masonry deterioration, roof leaks or failures that is/are non-localised, actively spreading or worsening)
5	Active failure of elements or clear signs of structural instability, posing an imminent threat to the survival of the buildings (e.g. loss of areas of roofing, broken or collapsing windows and doors, major deterioration of the interior, extensive severe masonry erosion and/or spalling and/or widespread loss of integrity to jointing etc.)

Table 17 on the following page summarises the current impacts and the impacts anticipated by venues if the works they have identified as urgent – and which are currently unfunded – are not carried out.

## APPENDIX C: DETAILED SURVEY FINDINGS

**Table 17:** Impacts of unfunded, urgent works

Immediate and on-going impacts	Knock-on effects	Resulting in high risk of total building loss through closure, partial closure, or demolition
		
<ul style="list-style-type: none"> <li>• Building deterioration</li> <li>• Localised deterioration/ damage to specific aspects and elements e.g. stonework, roofs, panels</li> <li>• Pressures on staff and volunteer community to raise more funds and/ or deal with on-going impacts of building deterioration – taking time away from the ‘day to day’</li> <li>• Risk to health, comfort and safety for building users, i.e. unsafe structural elements, inadequate fire detection systems, inadequate heating and lighting systems, insufficient access</li> </ul>	<ul style="list-style-type: none"> <li>• Damage to building contents e.g. from leaks, damp etc.</li> <li>• Security risks arising from damage or deterioration of exterior doors and/or windows</li> <li>• Risk of injury or loss of life for building users – building elements may not be compliant with building regulations</li> <li>• On-going building deterioration due to delays to repairs and maintenance mean problems worsen, leading to increased costs to fix (multiple respondents pointed out that if work was not undertaken in the next two to three years, no repair or refurbishment options would actually remain viable as condition worsens and costs increase in line with inflation)</li> <li>• Concurrently, insurance costs may increase as building deterioration worsens</li> <li>• Accessibility is constrained, reducing access to heritage</li> <li>• Reputational damage due to safety risks, building deterioration, aesthetic issues, discomfort for users – leading to lower visitor numbers and loss of revenue</li> <li>• Reduced number of shows (theatres); performers decline to perform in buildings in a state of disrepair</li> <li>• Reduced scope to use buildings in different ways e.g. hire to external users, use for educational purposes – diminishing revenue streams</li> <li>• Temporary building closure for repairs or safety concerns resulting in interruption to community use and/or worship (churches/cathedrals) and loss of revenue due to show cancellations (theatres)</li> </ul>	<ul style="list-style-type: none"> <li>• Loss of community asset</li> <li>• Loss of heritage assets of aesthetic significance</li> <li>• Loss of educational asset</li> <li>• Theatres: loss of venue for local community and for touring shows</li> <li>• Job losses</li> <li>• Impact on local and national economy</li> <li>• Costs incurred from demolition and/or land remediation</li> <li>• Liability – contractual, financial and public safety</li> </ul>



## APPENDIX C: DETAILED SURVEY FINDINGS

*“If we are unable to complete the most urgent of these works, the building would soon become unsafe, and might have to be partially or completely closed. Serious deterioration from weather and water damage, etc. would also ensue. Our income would be diminished as worshippers would be forced to go elsewhere, and many would cease to make regular contributions. The church might be described as shabby at present, and without non-urgent but necessary works it will deteriorate further and appear neglected and in decline. It is more difficult to attract and retain members of the congregation in these circumstances and we would expect numbers to reduce, leading to a vicious circle of reducing income and ever poorer maintenance. Without adequate funds for maintenance, this church would have to close’.”*

Major church, Yorkshire & the Humber

*“If we are not able to raise and spend the approx. £4 million needed over the next five years we will not be able to function effectively as an arts centre. Without this investment our long-term viability as a community asset would be severely impacted, with a potential failure of the business model and a loss of this vital cultural home for the community.”*

Arts venue, London

*“With limited resources... [the Trust has] undertaken some of the extremely urgent dilapidations, but [we are] currently seeking grant aid... in order to restore the listed building. At the time of writing very little funding has been made available... [the risk is that] the theatre will ultimately downward spiral to a point where the Trust will not be able to continue... with such a list of extensive inherited dilapidations no commercial theatre company will be prepared to take the building on – this vicious circle needs to be broken sooner rather than later, as we know that we are sitting on a ticking time-bomb.”*

Theatre, North-East

APPENDIX C: DETAILED SURVEY FINDINGS

C14 FINANCE, FUNDING AND REVENUE

Expenditure on repair and maintenance

Key points:

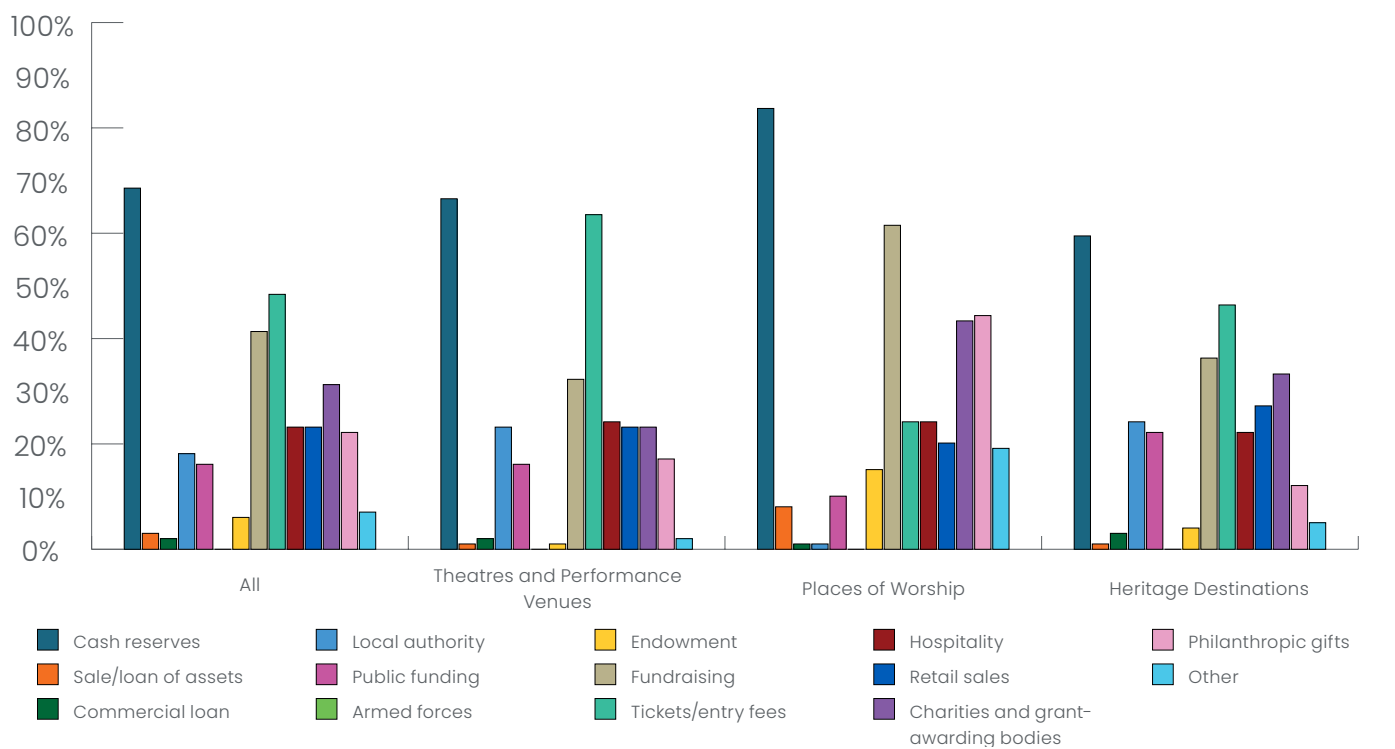
- Nearly 70% of venues are funding repair and maintenance expenditure from cash reserves, by far the most frequently cited source of funds.
- Once again, places of worship seem to be most reliant on reserves, with well over 80% drawing on them for repair and maintenance needs, while also relying heavily on fund-raising to supplement this.
- Both theatres and performance venues and heritage destinations were able to draw, as would be expected on ticket sales. Across destination types there was a clear inverse relationship between the ability to raise money from ticket sales and reliance on fundraising. Places of worship are much the most reliant on fundraising, though a minority were also able to draw on endowments, which are less important for other venues. At times, these are sufficient to fund all repair and maintenance requirements.
- More than a third of venues reported substantial increases in repair and maintenance expenditure, but in most cases said that this was still not enough to meet repair needs.

68% of all venues are funding their expenditure on repair and maintenance from their cash reserves (Figure 59). Of all venue types, places of worship are most reliant on their cash reserves with 83% of these venues funding repair and maintenance in this way.

Fundraising and tickets and entry fees are used by a smaller proportion of venues to fund repair and maintenance work, this is particularly true of theatres and performance venues and heritage destinations (although a not insubstantial proportion of places of worship are also reliant on these sources of funding).

Local authority funding accounts for a fairly small proportion (18%) across all venues and public funding accounts for even less (16%). For the purposes of this research, public funding includes funding from central government, a public body, or the National Lottery Heritage Fund.

Figure 59: How did you finance expenditure on repair and maintenance in the last 12 months?



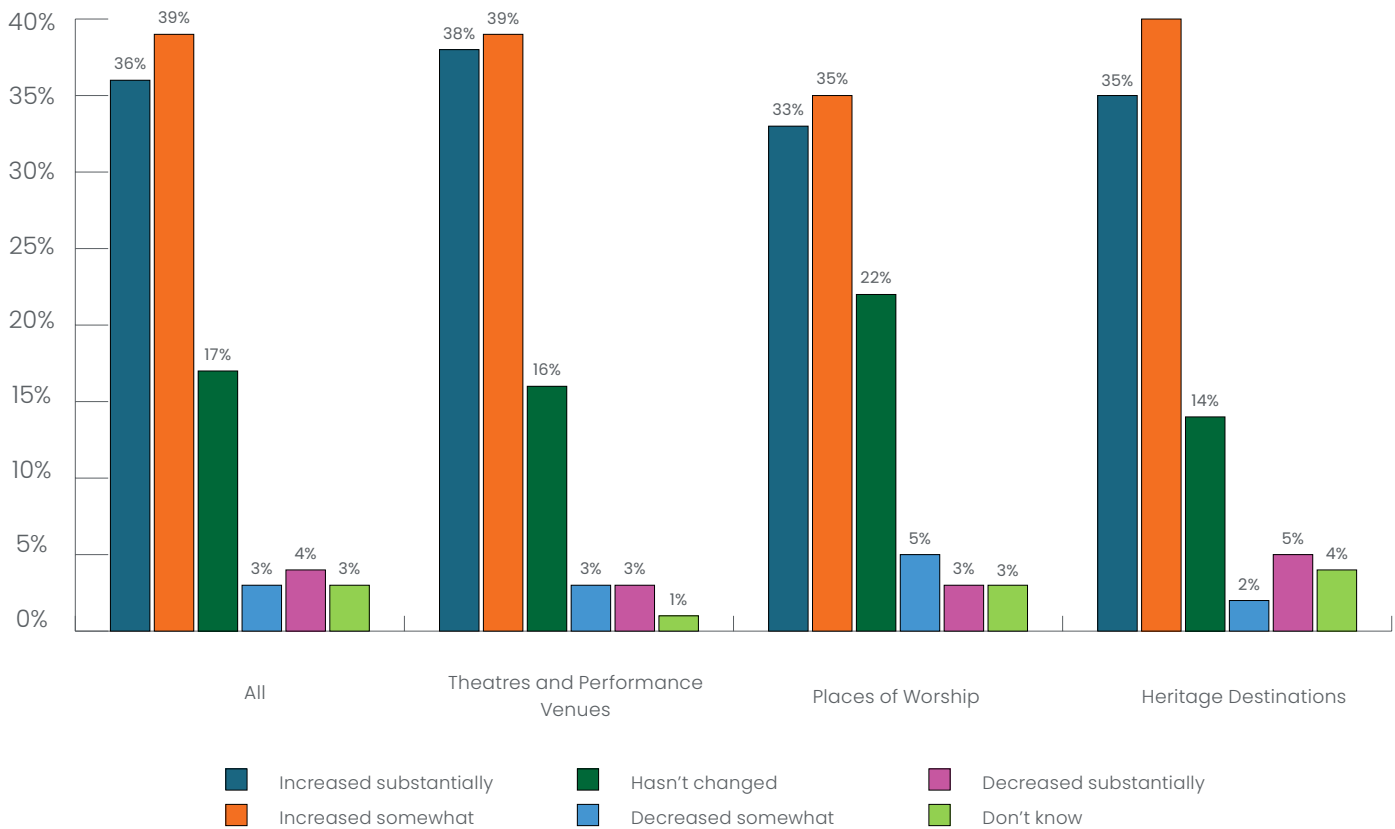
Base: 976 responses

APPENDIX C: DETAILED SURVEY FINDINGS

Expenditure on repair and maintenance has increased markedly across all venue types (there is little variation by type), with over a third (36%) saying that expenditure has increased ‘substantially’ in the last five years (Figure 60). Despite this, earlier findings confirm that this is not enough.

A small proportion of venues have reduced their spending on repair and maintenance (7%).

Figure 60: How, if at all, has expenditure on repair and maintenance changed over the last 5 years?



Base: 316 respondents

## APPENDIX C: DETAILED SURVEY FINDINGS

### C15 REVENUE AND SECURING FUNDING

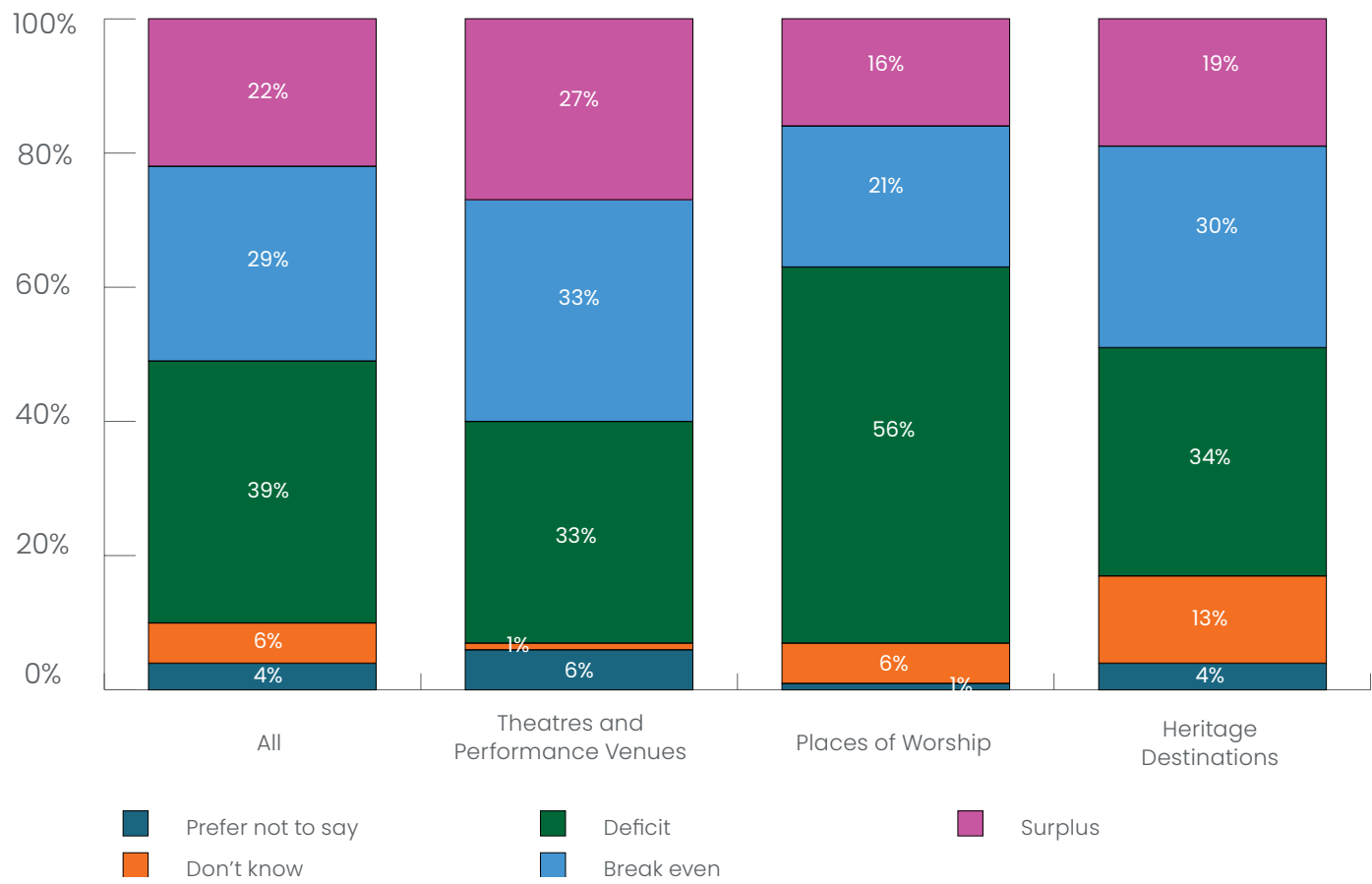
#### Key points:

- Overall, nearly 40% of venues are operating at a deficit. Places of worship were most likely to report operating in deficit, with 56% in the red; about a third of both theatres and performance venues, and heritage destinations also reported being in deficit. However, places of worship also reported the highest levels of confidence that they would be able to generate additional future funding for repairs and maintenance.
- Approximately 20% of venues are generating a surplus, with theatres and performance venues being most likely (33%) and places of worship (16%) least likely to do so.
- Venues overwhelmingly reported that it was challenging to secure funding for works over and above routine repair and maintenance.
- All income streams were far more frequently reported to have declined or stayed the same than increased relative to the pre-Covid situation. This suggests there has been a real-terms cut in most forms of income for most organisations, regardless of subsector.
- Public funding was the most likely to be reported as stable, but far fewer venues reported an increase than a decrease.
- The form of funding that was most likely to be reported as having increased was commercial income. This gives substance to anecdotal reports that venues have become more entrepreneurial in an attempt to fill the 'funding gap'. This is reported to have led to diversion of income away from buildings at the same time as having increased intensity of building use, with consequences for repair and maintenance needs. It is also important to note, however, that this situation was polarised: commercial income was also one of the most frequently reported to have declined. As with building condition itself, this reinforces a picture of 'winners and losers'.
- More than half of both theatres and performance venues and heritage destinations anticipate commercial income increasing further in importance in the next five years, making it the single most important expected area of revenue growth. Even churches viewed commercial income as the area that they most expected to grow. It is currently unclear whether this reflects a realistic sense that there is significant additional potential for commercial income, or a reaction to awareness that other income streams, particularly those dependent on public funds or individual philanthropy, are unlikely to grow.
- The largest proportion of respondents (25%; 20/81) who believe that their venues have potential to increase self-generated funding for repairs and maintenance think that this additional income will come through increasing or diversifying their commercial activities. Conversely, the most common reason given by organisations for not being able to increase self-generated funding for R&M is that there are limited opportunities to increase commercial activities at their venues. A quarter of venues who answered this question (32/124) say that, even where they can increase commercial income, increases in operational and running costs limit how much of the resulting additional revenue can be dedicated to R&M costs.

# APPENDIX C: DETAILED SURVEY FINDINGS

39% of venues are operating at a deficit, with a further 29% currently breaking even (Figure 61). About a fifth are operating at a profit. Generally, theatres and performance venues have a slightly better status than other venues, with places of worship being in the worst financial situation.

Figure 61: Current financial status of venues

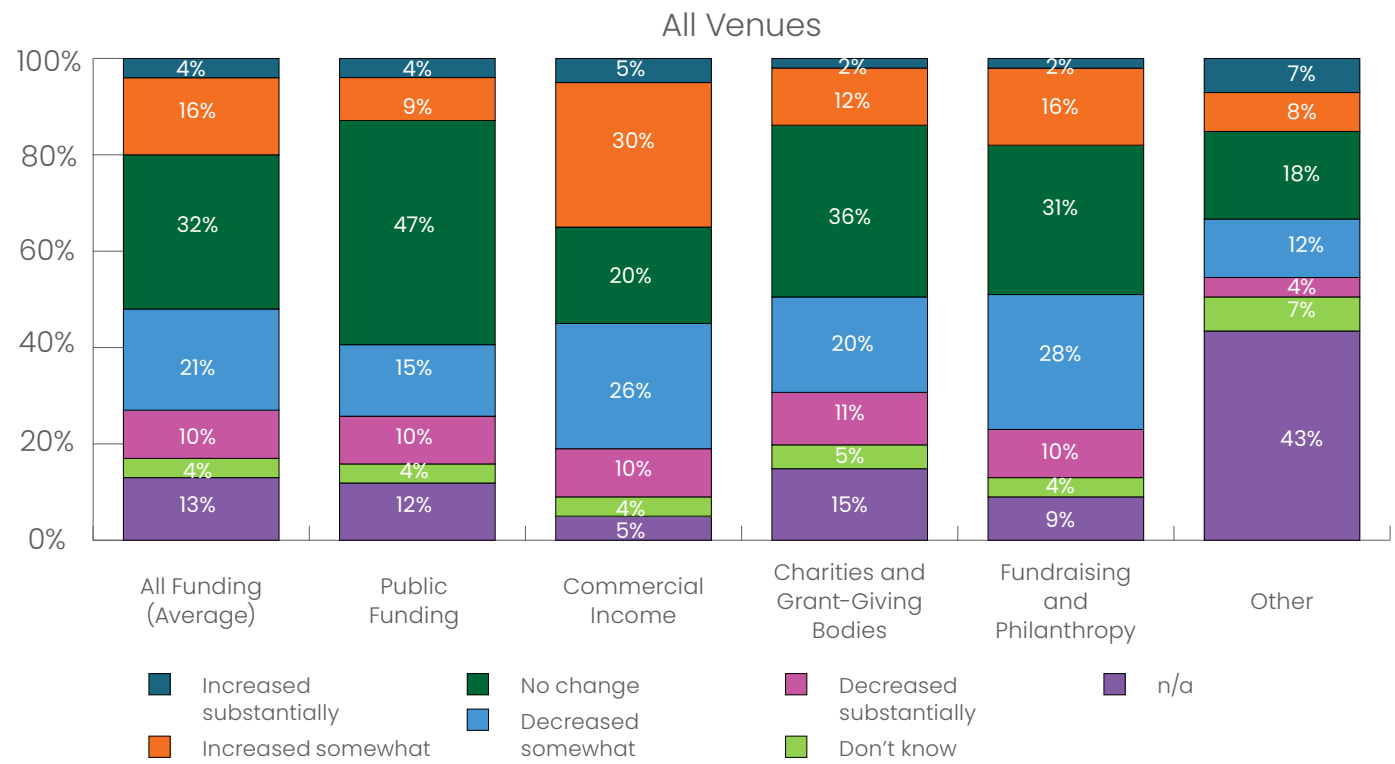


Base: 319 respondents

APPENDIX C: DETAILED SURVEY FINDINGS

Since the COVID-19 pandemic, income has largely remained the same from public funding (47%), from charities and grant-giving bodies (36%), and from fundraising and philanthropy (31%), although of all sources funding has decreased most from the latter (Figure 62).

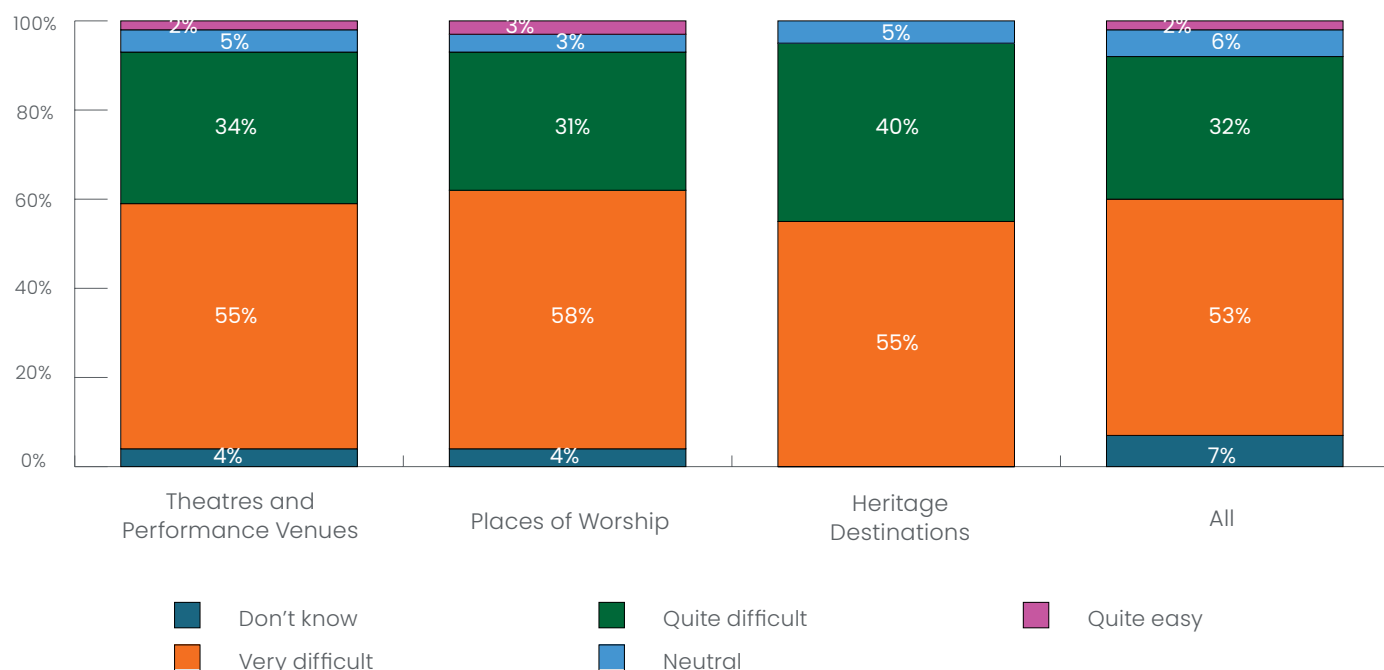
Figure 62: Change in funding since before the COVID-19 pandemic



## APPENDIX C: DETAILED SURVEY FINDINGS

Venues of all types find it difficult to secure funding for works over and above routine repair and maintenance, with 32% stating it is 'quite difficult' and 53% reporting it as 'very difficult' (Figure 63).

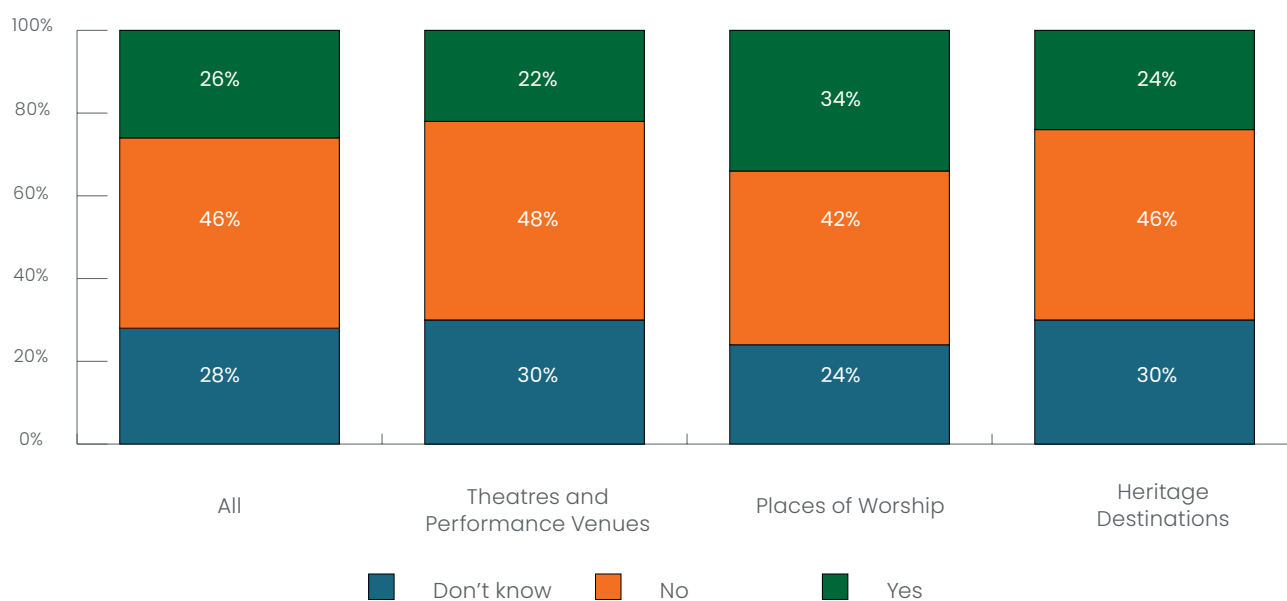
**Figure 63:** Securing dedicated funding for works over and above routine repair



Base: 318 respondents

Of all venues, only 26% suggest there is potential for them to increase self-generated funding for repair and maintenance in the next five years. There is little variation by venue type (Figure 64).

**Figure 64:** Do you think there is potential for the venue to increase self-generated funding for repair and maintenance in the next 5 years?



Base: 318 respondents

## APPENDIX C: DETAILED SURVEY FINDINGS

### C16 INCREASING SELF-GENERATED REVENUE

The largest proportion of respondents (25%; 20/81) who believe that their venues have potential to increase self-generated funding think that this additional income will come through increasing or diversifying their commercial activities. These include increasing the range of events and visitor services, as well as branching into new commercial areas, such as catering and venue hire. Several respondents representing theatres are thinking about hiring their spaces as a means of generating more commercial income.

Just under one fifth of respondents (15/81) are planning investments into new services and facilities which they believe will improve the visitor offering and increase the number of visitors to the venue, which is hoped will increase income. Similar proportions of respondents also anticipate increases in visitor numbers/footfall or (for theatres) increases to ticket sales (not linked to investments in new services), which they believe will increase the self-generated funding of the site.

A small number of respondents (6) are planning on increasing prices for admissions and tickets. Another small batch of respondents (5) are planning to increase requests for voluntary donations and giving – these are mostly churches who plan to increase voluntary giving from congregations.

### C17 NOT INCREASING SELF-GENERATED REVENUE

The most common reason given by organisations for not being able to increase self-generated funding for R&M is that there are limited opportunities to increase commercial activities at their venues. Many of the respondents say that their venue is operating at full capacity in terms of income generation through commercial means (these include ticket sales, venue hire, retail revenue). Theatres: commercial revenue generated mostly through ticket sales and most theatres say that they are limited in increasing revenue through ticket sales. Volume cannot easily be increased as the number of tickets sold depends on capacity. Ticket sales are often at a maximum and theatres feel that they cannot increase the price of tickets as they want to keep their audiences engaged. Churches: the need to function first and foremost as a place of worship limits the extent of commercial activity; volunteer-run venues: many claim they are at capacity in terms of income that can be generated by volunteers – unreasonable to ask them to give more of their time.

A quarter of venues who answered this question (32/124) say that, even where they can increase commercial income, increases in operational and running costs limit how much of their revenue can be dedicated to R&M costs. Linked to this is decreases in funding from LA/grant funding from Arts Council – Commercially generated income increasingly needs to be used to make up the shortfall in funding, which means there is less for R&M.

Several (18) venues also see limited potential to increase self-generated income through increasing visitor numbers or growing the donor base. With churches the main donor base is the congregation, which is often static or declining in numbers. Most see the size of the congregation as unlikely to increase and report that they give 'sacrificially'. There is limited potential to increase revenue through this means. Other venues talk about limited growth potential in terms of attracting more visitors (due to venue size, location).

Other destination types also felt that there were limits to the extent they could increase fundraising activities. For example, fundraising events are particularly difficult for theatres, as even when operated in the third sector they are quasi-commercial enterprises.



## APPENDIX D: COST ANALYSIS BY SYNERGY LLP

### D1 SURVEY RESPONSES

Following the return of the survey responses there are 324 that provide cost information relating to the fabric of the buildings. It is assumed that all of the costs noted are current costs.

These are split into the following categories and regions. This provides a good spread of types and regions, as seen in Table D1.

**Table D1:** Spread of types per region

Region	Theatres and performance venues	Places of Worship	Heritage Destinations
London	22	7	18
South East	19	15	19
North West	13	10	13
East of England	6	6	16
West Midlands	11	8	9
South West	19	16	27
Yorkshire & the Humber	15	11	11
East Midlands	8	6	4
North East	6	3	6

The pertinent questions from the survey, which all relate to works where funding is expected to be available are as noted in Table D2:

**Table D2:** Survey questions related to cost

Number	Question
30 b)	Expected cost of works to the roof within 5 years
33 b)	Expected cost of works to rainwater goods within 5 years
36 b)	Expected cost of works to walls within 5 years
40 b)	Expected cost of works to windows and doors within 5 years
44 b)	Expected cost of works to structural elements within 5 years
47 b)	Expected cost of works to external components within 5 years
51 b)	Expected cost of works to building services within 5 years
55 b)	Expected cost of works to interior refurbishment within 5 years
56	Estimated total cost of repair, maintenance and renewal works required
57	Estimated value of works urgently required
59 b)	Unfunded but necessary urgent works
67	Current annual budget for repair and maintenance
70	Actual expenditure on building repair and maintenance in last 12 months

## APPENDIX D: COST ANALYSIS BY SYNERGY LLP

Taken as a whole, the minimum, maximum and averages are as follows, in Table D3:

**Table D3:** Survey questions and cost outliers

Question	Minimum	Maximum	Average
30 b)	£1,000	£5,000,000	£419,947
33 b)	£25	£500,000	£76,940
36 b)	£1,000	£11,000,500	£588,483
40 b)	£0	£8,300,000	£266,986
44 b)	£15,000	£15,000,000	£1,407,636
47 b)	£500	£15,000,000	£331,676
51 b)	£2,500	£10,000,000	£694,718
55 b)	£500	£16,000,000	£688,965
56	£112	£200,000,000	£5,025,849
57	£12	£99,000,000	£2,339,981
59 b)	£2,800	£50,000,000	£2,688,121
67	£200	£4,600,000	£167,734
70	£0	£6,250,000	£192,115

It should be noted that the 7 of the 13 maximum figures noted above relate to Theatres, 2 to Places of Worship and 4 to Other Heritage (museums and galleries).

Focusing on the unfunded but necessary urgent works the average cost is significant at circa £2.7m per property. This is well in excess of the annual repair/maintenance budget available.

The critical questions relate to questions 56, 57 and 59b, which are total cost of works required, urgent works and unfunded works.

Using the same basis as above the split into the regions is as follows in Table D4, D5 and D6:

**Table D4:** Minimum spend against total, urgent and unfunded survey questions

Region	Minimum Spend		
	Total	Urgent	Unfunded
London	£8,000	£10,000	£24,000
South East	£5,000	£5,000	£2,800
North West	£5,000	£2,000	£10,000
East of England	£10,000	£5,000	£25,000
West Midlands	£20,000	£5,000	£47,000
South West	£112	£12	£7,000
Yorkshire & the Humber	£5,000	£1,500	£10,000
East Midlands	£10,000	£1,000	£135,000
North East	£75,000	£15,000	£15,000

## APPENDIX D: COST ANALYSIS BY SYNERGY LLP

**Table D5:** Maximum spend against total, urgent and unfunded survey questions

Region	Maximum Spend		
	Total	Urgent	Unfunded
London	£200,000,000	£99,000,000	£50,000,000
South East	£27,000,000	£15,000,000	£4,475,000
North West	£35,000,000	£14,000,000	£10,000,000
East of England	£30,000,000	£30,000,000	£30,000,000
West Midlands	£75,000,000	£25,000,000	£23,000,000
South West	£15,000,000	£15,000,000	£13,000,000
Yorkshire & the Humber	£58,500,000	£15,000,000	£15,000,000
East Midlands	£25,000,000	£8,000,000	£7,000,000
North East	£20,000,000	£15,000,000	£15,000,000

It can be seen from Tables 3 and 5 that there is an exceedingly large maximum spend in the London Region. This relates to a nationally significant arts venue which clearly has some major works requirements to be undertaken. For reference, the next highest maximum figures are £165m for total works and £50m for urgent works (again a nationally significant arts venue) and after this is £80m and £30m.

**Table D6:** Average spend against total, urgent and unfunded survey questions

Region	Average Spend		
	Total	Urgent	Unfunded
London	£14,154,430	£7,303,775	£6,216,082
South East	£2,163,722	£981,342	£713,576
North West	£2,661,509	£1,015,024	£1,720,667
East of England	£4,572,019	£1,920,200	£2,403,438
West Midlands	£5,603,692	£2,259,459	£2,980,129
South West	£1,817,546	£971,510	£1,088,207
Yorkshire & the Humber	£6,338,399	£2,180,977	£2,986,622
East Midlands	£3,015,000	£1,320,867	£1,846,429
North East	£3,929,909	£2,668,636	£3,138,200

From the analysis above there is a significant element of works that are required but are unfunded. From the 165 responses that completed this question the total unfunded works value is just over £446 million. This can be split into the regions and property types as shown below in Table 7.

## APPENDIX D: COST ANALYSIS BY SYNERGY LLP

**Table D7:** Unfunded spend against property type and region

Total Unfunded Spend			
Region	Cathedrals and Churches	Theatres and performance venues	Heritage Destinations
London	£34,541,300	£44,244,000	£95,265,000
South East	£4,593,000	£1,897,800	£5,640,000
North West	£3,950,000	£9,520,000	£12,340,000
East of England	£2,320,000	£100,000	£36,035,000
West Midlands	£14,354,556	£23,827,000	£9,500,500
South West	£11,619,000	£17,178,000	£9,290,250
Yorkshire & the Humber	£19,407,894	£26,063,000	£20,234,800
East Midlands	£10,200,000	£2,400,000	£325,000
North East	£1,950,000	£18,100,000	£11,332,000
<b>Total unfunded Spend</b>	<b>£102,935,750</b>	<b>£143,329,800</b>	<b>£199,962,550</b>

If these totals were further extrapolated across all of the respondents contacted as part of this survey, this unfunded spend figure would be billions of pounds. This is noted in more detail within the main report summary and conclusions.

It is noted that these figures are significant, but it is not clear whether the figures given are on the basis of a professional cost estimate or direct from the respondent's perspective. Based upon the direct correlation from the costed condition surveys and the survey responses there was an approximately 50/50 split between those that were in excess of the costed works and those that were below. This would give some credence that the figures given above as unfunded works can be treated with some confidence.

## APPENDIX D: COST ANALYSIS BY SYNERGY LLP

### D2 CONDITION SURVEYS

#### D2.1 Analysis of Submitted Condition Surveys

65 condition survey reports were submitted as part of the survey responses, however only 18 of these contained repair costs. There is insufficient data to provide a breakdown into the regions due to the limited data set provided. The base findings from this data are as follows:

Average spend required within the next two years:	£477,729
Average unfunded but necessary works:	£1,953,310
Average annual maintenance budget:	£80,424

Whilst the first two averages are not directly comparable, due to different inclusions, it is clear that both are significantly above the actual average maintenance budget available. This will result in the gradual decline of the asset building without the necessary funds to maintain it adequately. At best this is currently being done through external funding (mainly lottery funding for all projects, Church related grants or donations from benefactors).

Of the condition surveys with costs, thirteen were for places of worship, two for museums, two for arts centres and one was for a theatre. From this it would seem that places of worship are much more likely than other types of site to undertake condition surveys and have costs allocated to them. This is because Cathedrals and churches are required to undertake quinquennial inspections (QIs). This provides a significant advantage in that it provides an indication of the required spend and a possible timescale. This gives time for the necessary fundraising and grant applications to be prepared, along with the additional time and resources to fully scope a project.

#### D2.2 Analysis of fabric surveys for cathedrals

Fabric Survey reports (also known as Fabric Needs Assessments) have been obtained for 62 English cathedrals, dating from 2019/20, covering both Church of England and Roman Catholic cathedrals. From the reports received there is a good regional spread.

The costs given are from the date of the report except where the figure relates to costs for future spend. Using construction industry standard indices from Building Cost Information Service gives an uplift of 16.4% in tender costs between second quarter 2020 and first quarter 2024. This increase is forecast to continue to rise at between three to four percent per annum to at least 2028. The costs noted below for major repairs within 5 years, between 5 and 10 years and repair/conservation works are all based upon uplifted indices to current costs. There has been a period of increased inflation following the Covid-19 pandemic which has resulted in increased costs in undertaking the necessary works required to repair and maintain buildings. Without increases in funding, this is likely to result in less work being carried out.

In the Fabric Survey reports, there were several cost questions requiring a response. The overall minimums, maximums and averages of these are noted below in Table D8:

**Table D8:** Fabric Condition Report heading costs

Heading	Min	Max	Average
Maintenance (PA)	£5,966	£1,200,000	£122,616
Spent since 2009	£75,650	£18,511,514	£2,762,846
Major repairs in hand	£9,000	£14,100,000	£1,141,571
Major repairs within 5 years	£6,000	£21,770,000	£2,794,350
Major repairs between 5 and 10 years	£41,000	£23,284,000	£2,912,240

It should be noted that all of the maximum figures noted above are related to either St Paul's Cathedral or York Minster. These do skew the average figures higher.

## APPENDIX D: COST ANALYSIS BY SYNERGY LLP

It should be noted that approximately two thirds of the cathedrals fall below the average figure, with the remaining cathedrals lying above. Using the same cost heading and then splitting into the regions gives the following costs noted in Tables D9, D10 and D11:

**Table D9:** Minimum spend against cost headings per region

Minimum Spend per Cathedral						
Region	Maintenance (PA)	Spent since 2009	Major repairs in hand	Major repairs within 5 years	Major repairs between 5 and 10 years	No. of reports
London	£30,000	£891,278	£28,000	£732,000	£815,000	4
South East	£6,593	£145,000	£9,000	£161,000	£73,000	8
North West	£24,894	£130,000	£25,000	£58,000	£41,000	8
East of England	£9,000	£106,489	£50,000	£52,000	£116,000	8
West Midlands	£15,000	£744,000	£30,000	£233,000	£553,000	7
South West	£5,966	£1,000,000	£549,250	£58,000	£58,000	9
Yorkshire & the Humber	£13,400	£80,000	£15,000	£6,000	£233,000	7
East Midlands	£8,400	£381,000	£70,000	£390,000	£41,000	7
North East	£18,000	£75,650	£94,350	£58,000	£146,000	4

**Table D10:** Maximum spend against cost headings per region

Maximum Spend per Cathedral						
Region	Maintenance (PA)	Spent since 2009	Major repairs in hand	Major repairs within 5 years	Major repairs between 5 and 10 years	No. of reports
London	£1,200,000	£8,450,000	£1,252,000	£21,770,000	£23,284,000	4
South East	£125,000	£14,137,598	£3,876,365	£13,388,000	£3,725,000	8
North West	£143,932	£4,182,000	£35,000	£1,819,000	£1,246,000	8
East of England	£167,000	£7,679,000	£189,000	£3,023,000	£2,678,000	8
West Midlands	£330,000	£10,397,000	£2,126,000	£5,239,000	£11,642,000	7
South West	£140,000	£7,900,000	£2,000,000	£6,985,000	£6,985,000	9
Yorkshire & the Humber	£1,200,000	£18,511,514	£14,100,000	£5,821,000	£12,806,000	7
East Midlands	£466,518	£3,037,000	£2,096,000	£11,642,000	£11,642,000	7
North East	£112,000	£2,303,750	£4,000,000	£17,573,000	£11,545,000	4

## APPENDIX D: COST ANALYSIS BY SYNERGY LLP

**Table D11:** Average spend against cost headings per region

Average Spend per Cathedral						
London	£456,333	£3,263,320	£526,667	£7,183,860	£8,323,880	4
South East	£62,049	£5,236,400	£1,420,122	£4,100,230	£983,340	8
North West	£68,707	£1,362,768	£31,667	£968,760	£623,460	8
East of England	£59,000	£1,960,174	£139,667	£998,450	£1,358,600	8
West Midlands	£101,200	£3,020,857	£511,833	£2,700,200	£3,817,350	7
South West	£56,335	£3,096,031	£967,450	£2,819,230	£2,895,250	9
Yorkshire & the Humber	£239,938	£4,327,427	£7,057,500	£1,584,450	£4,505,370	7
East Midlands	£149,395	£1,233,791	£981,500	£2,876,850	£3,077,520	7
North East	£51,667	1,159,100£	£1,408,883	£4,621,790	£5,061,070	4

The high average costs in five of the six categories shown in Table 11 above for both London and Yorkshire & the Humber regions are due to the large spends at St Paul's and York Minster respectively.

From the analysis it can be seen that significant spends are made against fabric items for the largest cathedrals. Most do not spend significant sums as demonstrated above as two thirds spend less than the average. It is anticipated that a large proportion of the funding is from external grant sources although some do receive income from ticket sales. Nevertheless, a significant sum is required to be spent on cathedrals within the next 10 years.

There are 13 responses from cathedrals in the survey responses in comparison to 62 fabric condition reports received. Due to the different nature of questions in the surveys and the fabric report a direct comparison is difficult to make. However, using the figures from the survey response question 70 (repair and maintenance expenditure in the last 12 months) gives an average of £832,630, which over 5 years is £4,163,150. This compares to the fabric condition reports average figure of major works required over 5 years £4,023,860. These figures provide a good correlation between the different sources of information. The survey responses give an average figure of £2,841,600 (excluding St Paul's Cathedral) as unfunded but necessary works for the 13 Cathedrals.

## APPENDIX E: FUNDING OVERVIEW

The following section is a summary of the most commonly mentioned sources of grant funding for repairs in the cultural sector. It is by no means exhaustive. Other sources include Levelling Up Fund; UK Shared Prosperity Fund; Museums and Galleries Tax Relief; Energy Bill Relief Scheme; and various other government programmes and initiatives.

### E1 CULTURE RECOVERY FUND

On 5 July 2020, DCMS announced a £1.57 billion Culture Recovery Fund rescue package for cultural organisations initially for cultural and heritage organisations at risk of insolvency in the year 2020–2021 due to having been adversely impacted by the COVID-19 pandemic. The third round of the Culture Recovery Fund was announced in June 2021 to provide further support to cultural, heritage and creative sectors. Grants are no longer being made through the Culture Recovery Fund, with final grant offers announced in March 2022. The Heritage Fund, in partnership with Historic England, distributed this funding based on criteria set by DCMS. The Culture Recovery Fund for Heritage: Emergency Resource Support was for organisations that were in severe need. This strand was originally open from July to September 2021 and was extended into 2022.

The Heritage Stimulus Fund (HSF) was a package of investment within the Culture Recovery Fund. It awarded grants to 991 projects to the value of £90.3m to allow heritage properties to continue repair and restoration works during the Covid-19 pandemic. The HSF was launched in July 2020 and distributed through three separate funds and two rounds, as follows:

- Covid-19 Emergency Heritage at Risk Response Fund (£9.4m)
- Grants for Programmes of Major Works (Round 1 £37.7m and Round 2 £33.6m)
- Repair Grants for Heritage at Risk (£5.6m) and Major Repairs for Heritage at Risk (£4.1m).

An evaluation of the HSF has been published<sup>01</sup> showing how important the Fund was in retaining skills in the heritage construction sector and providing heritage organisations with funds to restart or continue important repairs during a period of huge financial uncertainty.

### E2 ARTS COUNCIL ENGLAND

The Arts Council has directly invested £63.3 million in museums from 2022–2023, including £36.5 million through our Investment Programme and £22 million through the Museums Estates and Development Fund (MEND). In the three years to 2026 the Arts Council England (ACE) plans to invest:

- £458.5 million per year in the National Portfolio – this includes National Portfolio Organisations.
- £116.8 million of National Lottery funding per year in Arts Council National Lottery Project Grants, an open-access funding programme.
- £50 million per year in Arts Council Development Funds which will focus on a variety of areas such as: capital investment programme, cultural education, digital culture network, museum development, arts council collection management, UK City of Culture and activities listed within the Delivery Plan.

There are 985 arts and culture organisations making up ACE's National Portfolio. They include three of the organisations that are featured in this report as case studies (Royal Festival Hall, Royal Shakespeare Theatre and A-Space Arts). National Portfolio Organisations will be able to apply for an additional year of core funding to the end of March 2027.

<sup>01</sup> <https://historicengland.org.uk/content/docs/grants/evaluation-he-heritage-stimulus-fund/>



## APPENDIX E: FUNDING OVERVIEW

### E3 NATIONAL LOTTERY HERITAGE FUND

The Heritage Fund's 10-year strategy is set out in *Heritage 2033*<sup>02</sup>. The Delivery Plan 2023 – 2026 is the first of the three-year delivery plans which set out how the Fund plans to invest over £1 billion between 2023–2026. Areas of Focus were a feature of the previous Strategic Funding Framework. Heritage Places, based on the Heritage Fund's revised version of the Heritage Index<sup>03</sup>. This combines heritage indices and IMD indices, and the scoring takes into account whether places have benefitted from lottery funding in the past<sup>04</sup>. There are currently nine heritage places across the UK, and the aim is to increase these to 20 heritage places. These stand to benefit from £200 million over 10 years.

The four investment principles are:

- Saving heritage: Conserving and valuing heritage, for now and the future.
- Protecting the environment: Supporting nature recovery and environmental sustainability.
- Inclusion, access, and participation: Supporting greater inclusion, diversity, access and participation in heritage.
- Organisational sustainability: Strengthening heritage to be adaptive and financially resilient, contributing to communities and economies.

The Heritage Fund is a project funder and does not fund revenue. It will not fund building repairs in isolation but can do so as part of projects which deliver wider benefits. The principle of additionality applies i.e. the Heritage Fund could not backfill for shortage of capacity in local authorities.

### E4 LISTED PLACES OF WORSHIP GRANT SCHEME

The Listed Places of Worship Grant Scheme runs until 31 March 2025. It supports the protection of religious buildings representing all faiths and denominations. The scheme has delivered funding of up to £42 million in 2023 to 4,900 places of worship towards the cost of essential conservation and maintenance work<sup>05</sup>. A very wide range of building works are eligible under the scheme including repairs to roofs, towers, parapets, masonry and building services.

### E5 MUSEUM ESTATE AND DEVELOPMENT FUND (MEND)

This is an open-access capital fund targeted at non-national Accredited museums and local authorities based in England to apply for funding to undertake vital infrastructure and urgent maintenance backlogs which are beyond the scope of day-to-day maintenance budgets. The grant range is £50,000 to £5 million. Round 4 of the MEND fund was opened to expressions of interest in March 2024. Applications need to be accompanied by a condition survey with estimated costs prepared or updated by a suitably qualified professional within the past 12 months. The grants are administered, awarded and monitored by Arts Council England. Funding has been provided by DCMS.

<sup>02</sup> <https://www.heritagefund.org.uk/about/heritage-2033-our-10-year-strategy>

<sup>03</sup> <https://www.heritagefund.org.uk/about/insight/research/data-heritage-places-new-analysis-using-heritage-index>

<sup>04</sup> Data for Heritage Places – a new analysis using the Heritage Index | The National Lottery Heritage Fund

<sup>05</sup> <https://www.gov.uk/government/news/nearly-5000-churches-across-the-united-kingdom-benefit-from-42-million-conservation-fund>

## APPENDIX F: PREVIOUS RESEARCH

The following summaries of recent reports (since 2016) help to provide further contextual information and data relating to the repair and maintenance of cultural assets. They are listed in order of their date of publication.

### F1 SUSTAINING MAJOR PARISH CHURCHES, PURCELL, 2016<sup>01</sup>

This research considered the challenges and opportunities facing more than 300 'Major Parish Churches'. It found that the great majority of these buildings remain well cared for and in a good state of repair. However substantial amounts of historic fabric can be costly to repair and maintain. Many churches do not have the facilities to sustain complementary uses, most find it increasingly difficult to recruit skilled volunteers, few have effective strategic plans in place and paid staff or incumbents face considerable pressures on their time. The report found that the income of over half of Major Parish Church did not meet their expenditure. Often, deficits were due to large or unexpected capital projects for repairs. Some churches had no financial reserves at all and even those with reserves were relying on them at an unsustainable rate.

### F2 THE TAYLOR REVIEW: SUSTAINABILITY OF ENGLISH CHURCHES AND CATHEDRALS, 2017<sup>02</sup>

This Review was commissioned to consider how church buildings could become more sustainable – ensuring that maintenance, repairs and major works can be undertaken in a timely way and funded as far as possible by the congregation or PCC, and that opportunities to generate additional income to meet these costs are maximised. It noted:

*Against a backdrop of demographic change and reducing congregations, particularly in rural areas where many listed church buildings serve very small populations, the repair and maintenance of church buildings has relied increasingly upon grants and Government funding. Four elements threaten to inhibit further the ability of local people all over England to care for these heritage assets:*

- *declining congregations (Church of England statistics show attendance falling by 11% in the last decade);*
- *a lack in most areas of skilled assistance on the ground to help volunteers and communities make best use of their church buildings and keep up with maintenance and repair;*

- *a scarcity of public funding to support that work;*
- *the absence of an overall strategic approach for targeting resources effectively in a timely manner.*

The Taylor Review noted that, in contrast to churches, cathedrals have paid professional staff to raise, administer and account for funding and carry out necessary works.

### F3 THE FUTURE OF CIVIC MUSEUMS, ENGLISH CIVIC MUSEUMS NETWORK, 2018<sup>03</sup>

This think piece was commissioned by the English Civic Museums Network (ECMN) and funded by the National Museum Directors' Council (NMDC). It noted that civic museums face an immediate funding crisis, substantially more threatening than the challenging one facing museums in general. Many civic museums are characterised by a weak financial model, governance inflexibility, an under-developed collective view of themselves as a movement, and some unhelpful defensiveness concerning collections and competition. Many also share common challenges, including:

- impressive buildings that are no longer wholly fit for purpose and are expensive to maintain and adapt;
- a wide range of collections, giving an eclectic but patchy coverage of issues of local relevance;
- decision making processes determined by Council ownership, or by Council contract interfaces, inhibiting experiment and customer responsiveness.

### F4 THE VALUE OF MAINTENANCE, HISTORIC ENGLAND, 2019<sup>04</sup>

This report by APEC Architects and Greenwood Projects sought to evaluate the estimated repair liability of a sample of 30 churches, the impact of 'stitch in time' repairs on the condition of the building fabric and the cost impact of delaying repair work and maintenance. The report drew a number of conclusions:

- Poor maintenance and repair results in increased cost liability that is prone to rapid escalation.
- Delaying repair results in a significantly increased cost liability for churches.
- There is further damage from consequential repairs (where one issue causes another defect elsewhere in the building fabric) to consider.

<sup>01</sup> <https://historicengland.org.uk/content/docs/research/sustaining-major-parish-churches-research-summary.pdf/>

<sup>02</sup> <https://www.gov.uk/government/publications/the-taylor-review-sustainability-of-english-churches-and-cathedrals>

<sup>03</sup> [https://www.nationalmuseums.org.uk/media/documents/publications/civic\\_museums\\_think\\_piece.pdf](https://www.nationalmuseums.org.uk/media/documents/publications/civic_museums_think_piece.pdf)

<sup>04</sup> <https://historicengland.org.uk/images-books/publications/value-of-maintenance/>

## APPENDIX F: PREVIOUS RESEARCH

- Roofs and rainwater goods/drainage are the primary cause of defects and consequential decay. Delaying repairs to these elements resulted in a more rapid increase in cost liability.
- Based on the project sample, different ages of church experience broadly the same issues.

When broken down into 'regularly maintained' and 'minimal maintenance' churches, the research found that the churches that carry out regular works have far less cost associated with delayed repair or increased number of defects.

### F5 UNDERSTANDING MUSEUM HERITAGE ESTATE MANAGEMENT, HISTORIC ENGLAND, 2020<sup>05</sup>

This research was carried out by Simpson & Brown in partnership with Harlow Consulting. It followed the Mendoza Review in 2017 that identified the condition of listed buildings on museum estates as a major challenge for the museum and gallery sector. A mixed method of an online survey and in-depth telephone interviews was used to collect information from a sample of ACE Accredited museums in England with a listed estate. The information gathered concerned the challenges and competing pressures faced by museums in maintaining their listed estate, the value and nature of recent and planned maintenance, and the scale of the backlog. In total, 101 museums participated with case studies developed based on nine of those museums. The report found that financial pressures on museums were severe. For most, funding received was insufficient to effectively maintain the listed estate and there is heavy reliance on grants to supplement income. This research led to the Museum Estate and Development Fund (MEND) which supports vital infrastructure repairs and urgent maintenance works – see E5 above.

### F6 THE FUTURE OF THE UK'S CHURCH BUILDINGS, NATIONAL CHURCHES TRUST, 2021<sup>06</sup>

With regard to funding of church buildings, this report commented that:

*To remain open and sustainable, church buildings need to be in good repair, well maintained and with a range of community facilities to help serve the needs of local people.*

*Many people think that church authorities or government pay for the upkeep of the UK's church buildings. But it is up to parishes and congregations to raise the money to fix a leaking roof or install toilets. In many cases it is impossible for them to raise the money themselves.*

*That is why in recent years the UK's mixed economy of local funding, national philanthropy from trusts and foundations and Government and heritage body grants has been essential to keep church buildings open and in good repair and to safeguard their future.*

*Demand for funds to carry out urgent repairs and provide community facilities far exceeds supply. In 2020, the National Churches Trust had to turn away three out of every four applications such was the scale of funding requests.*

*The COVID-19 pandemic and lockdowns have exacerbated the situation, with churches closed for long periods of time and unable to raise income from their many activities, including normal collections.*

*The support provided by the Cultural Recovery Fund has proved a life saver to many parish churches and other places of worship.*

*Most recently in October 2021, it provided funding of £12 million to help fund the repair of churches, chapels and cathedrals in England.*

*The fact remains that the lack of any long term funding from Government and Heritage bodies for urgent repairs and the maintenance of church buildings is of great concern to those tasked with managing and running the UK's church buildings.*

### F7 RESEARCH INTO THE LEVEL OF PUBLIC INVESTMENT IN MUSEUMS, JANUARY 2024<sup>07</sup>

In 2023 the Arts Council commissioned DC Research and Wavehill to collect the latest data to understand the levels of public investment in museums since 2015 and its impact. The focus was on accredited museums owned and directly maintained, or dependent on local authority funding, as well as museums who have previously been owned or dependent on local authority funding. The research identified 413 local authority-reliant accredited museums in England. Although these museums are out of scope for this DCMS research, the issues and challenges they face are very similar to those affecting non-accredited museums.

The report indicates that funding from local authorities has fallen in real terms across the cultural sector since 2009/10 – by 37% for museums, by up to 40% for arts and performance and by a third for heritage.

<sup>05</sup> [https://archaeologydataservice.ac.uk/archives/view/management\\_he\\_2020/](https://archaeologydataservice.ac.uk/archives/view/management_he_2020/)

<sup>06</sup> <https://www.nationalchurchestrust.org/impact/our-campaigns/future-church-buildings>

<sup>07</sup> <https://www.artscouncil.org.uk/research-and-data/research-understand-levels-public-investment-museums>

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