



Ministry of Housing,  
Communities &  
Local Government

# Demolition and Redevelopment or Retrofit Research

Quantitative research report

March 2026



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Ministry of Housing, Communities & Local Government  
Fry Building  
2 Marsham Street  
London  
SW1P 4DF  
Telephone: 030 3444 0000

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# Foreword

Decisions about whether to demolish, redevelop, or retrofit buildings have significant implications for housing delivery, sustainability, and heritage. This research was commissioned by the Ministry of Housing, Communities and Local Government to assess whether national planning policy and guidance adequately support these decisions and to identify opportunities for improvement.

Drawing on nearly 1,000 survey responses and 13 qualitative interviews, the report provides robust evidence on stakeholder perceptions, motivations, and the tools currently used in decision-making. Qualitative interviews offered detailed insights into developer priorities, heritage considerations, and tensions between net zero and viability, complementing the quantitative findings. Evidence suggests decisions on demolition or retrofit are typically made early in the process – at feasibility or due diligence stage – highlighting the importance of clear guidance at these points. The findings reveal strong stakeholder support for clearer national guidance, standardised carbon assessment methods, and fiscal measures such as VAT harmonisation to incentivise retrofit. Respondents also endorsed proposed policy options, with over 80% agreeing on measures such as requiring whole-life carbon assessments and mandating consideration of retrofit in planning applications.

Stakeholders also highlighted practical challenges, including resource constraints within local authorities and skills gaps in retrofit delivery, which will need to be addressed alongside policy changes. These insights will inform ongoing work to improve planning policy and guidance, ensuring decisions align with net zero objectives while supporting housing delivery and heritage conservation.

We are grateful to all those who contributed to this research, including local planning authorities, industry bodies, and community organisations. Their insights will help shape future policy and ensure that planning decisions deliver sustainable, high-quality outcomes.

# List of acronyms and abbreviations

The following acronyms, abbreviations or terms are used in the report.

<b>Term</b>	<b>Definition</b>
Buildings meaningful to the local community	Buildings which are not always formally listed but could have significant value to the local community in terms of their character, design, historic meaning or their current use.
Carbon assessment	Carbon emissions of buildings (e.g., including emissions from building products and operational emissions) are measured through a carbon assessment. A carbon assessment can measure emissions at different stages of a building's lifecycle, including a whole life carbon assessment.
Carbon reduction approaches	Standards for managing carbon in building and infrastructure, looking at a project's whole life cycle and aiming to reduce carbon and costs through intelligent design, construction, and use.
Civic society or community organisation	A voluntary body or society which aims to represent the needs of a local community.
Community / leisure developments	Buildings open to the whole community, run for public benefit or leisure use, often providing a focus for neighbourhood activity or events.
Culturally significant buildings	Buildings or structures of historical or cultural importance, which are a vital part of the country's heritage and require conservation.
Demolition	The full or partial demolition of an existing building to redevelop and deliver a new building.
Demolition audit	A demolition audit is a survey carried out by qualified persons to determine the quantity of material in a building before its demolition or deconstruction. It helps to identify materials within the building that could be reused or repurposed.
DLUHC	Department for Levelling Up, Housing and Communities (now MHCLG, the Ministry of Housing Communities and Local Government).
Embodied carbon	The life cycle embodied carbon of buildings encompasses the greenhouse gas emissions generated in the production, refurbishment, maintenance and end of life of a building, including demolition and disposal. This excludes operational carbon.
GDPR	General Data Protection Regulation
Industrial Decarbonisation Strategy 2021	This strategy sets out a plan to reduce industrial emissions and transition to a low-carbon economy through the creation of low-carbon clusters, the development of low-carbon technologies, and the creation of green jobs in the industry.
LPAs	Local Planning Authorities

Major / large-scale residential developments	The provision of dwelling houses where: the number of dwelling houses to be provided is 10 or more or the development is to be carried out on a site having an area of 0.5 hectares or more.
Materials passport	A digital document listing all the materials that are included in a product or construction during its life cycle in order to facilitate strategizing circularity decisions in supply chain management.
MHCLG	Ministry of Housing, Communities and Local Government
Minor / small-scale residential developments	The provision of dwelling houses where: the number of dwellings provided is between one and nine, the floorspace is less than 1,000 square meters, and the site area is less than one hectare.
NPPF	National Planning Policy Framework
PPG	Planning Practice Guidance (this includes the National Design Guide (NDG) & the National Model Design Code (NMDC)).
NPPW	National Planning Policy for Waste
NDG	National Design Guide
Neighbourhood planning group	A parish or town council, or a neighbourhood forum (in an unparished area), that chooses to produce a neighbourhood development plan or order.
Net Zero Strategy 2021	This strategy sets out how the UK government plans to reduce greenhouse gas emissions to zero by 2050.
NMDC	National Model Design Code
PAS 2080	A globally applicable standard for managing carbon in building and infrastructure. It looks at a project's whole life cycle and aims to reduce carbon and cost through intelligent design, construction and use.
PDR	Permitted development rights (PDRs) are a national grant of planning permission that allow specified development to be undertaken without having to submit a planning application.
Redevelopment	Redevelopment involves new construction at a site that has pre-existing uses, typically involving the full or partial demolition of an existing building to deliver a new building.
Residents' association	A group of residents who come together to represent the shared interests of those who live in a local area or community.
Retrofit	Redevelopment activities that involve modifying the majority of an existing building's systems and/or structure after its initial construction. Includes terms like re-use, retention, refurbish, repurpose, repairing, and refitting.
Upfront carbon	Upfront carbon emissions are the greenhouse gas emissions associated with materials and the construction processes up to practical completion but excludes biogenic carbon.
VAT	Value-added tax

Whole life carbon

The total greenhouse gas emissions and removals, including operational, embodied, and biogenic emissions over the life cycle of an asset, including its disposal. Whole life carbon is measured through a whole life carbon assessment.

WLCA

Whole Life Carbon Assessment: A standardised type of assessment that measures the total carbon impact of an asset over its entire life cycle.

# 1 Executive Summary

## 1.1 Introduction

1. The Design and Placemaking team in MHCLG undertook research to understand whether national planning policy and guidance in England adequately supports decision-making regarding the demolition and redevelopment or retrofit of buildings. The study gathered insights from a broad range of stakeholders to assess the clarity and use of existing policy instruments, stakeholders' primary motivations for the decision and if there are opportunities for improving guidance and tools.
2. The research included 13 qualitative interviews and analysis of 988 survey responses that took place between the 9<sup>th</sup> of September 2024 and the 4<sup>th</sup> of November 2024. The survey sample comprised stakeholders who are affected by or interested in changes to national planning policy or guidance on the demolition and redevelopment or retrofit of buildings. This included those working as architects, planning officers, employees or volunteers at a civic society or community organisation, surveyors, engineers, planning consultants, environmental consultants, property developers, project managers in the building industry, academics, and demolition contractors.<sup>1</sup>
3. This research was commissioned by the Department as part of its ongoing work to build the evidence base on how national planning policy and guidance are understood and applied in practice in England, particularly in relation to demolition and retrofit decisions. The findings provide descriptive insight into stakeholder perspectives within the scope of the commissioned research. Any decisions on future policy development, guidance updates or further analytical work will be informed by this evidence alongside wider considerations and sit outside the scope of this report

## 1.2 Summary of findings

4. The report reveals a lack of clarity in both national and local planning policy when determining whether to demolish and redevelop or retrofit buildings. For any given development type, only 10-21% of stakeholders agreed that policy is easy to understand and therefore clearly indicates what action should be taken. Whilst local planning policies were viewed slightly more favourably, only 32% agreed that the planning policies in place in their Local Planning Authority (LPA) clearly supported and informed decision-making.
5. Results also showed that respondents did not clearly agree on whether policy encouraged one or the other. For the National Planning Policy Framework

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<sup>1</sup> Please check the questionnaire document for full list of occupations asked about – Section 6.2 Appendix B Q3)

(NPPF), more respondents felt planning policy encouraged demolition over retrofit (29%) compared to those who thought a 'retrofit-first' approach was encouraged (10%). Local planning policies were viewed slightly more positively, with 26% believing they promote retrofit and 21% believing they favour demolition. However, a significant proportion of respondents considered both national and local policies to be neutral or were unsure of their stance. This suggests a need not only for clearer policy but perhaps for more user-friendly guidance tailored to different development contexts.

6. In the absence of clarity, the survey explored what motivates stakeholders to demolish and redevelop or to retrofit. For demolition, financial viability (67%) and ease of delivery (66%) were the dominant drivers while local appreciation (70%), sustainability (64%) and repurposing of an existing building (69%) motivated retrofit. Whilst there was no 'typical' time in the process when a decision was made, most respondents suggested decisions occurred at project feasibility or site due diligence stage. This is useful to know for future policy design and indicates when policy can be most impactful.
7. The tools and instruments used to inform decision-making were also examined. Respondents were most likely to use the NPPF (87% familiar; 65% use) or PDRs (74% familiar; 38% use) and were least likely to use the National Planning Policy for Waste (14% familiar; 6% use) or the Industrial Decarbonisation Strategy 2021 (14% familiar, 6% use). The use of carbon reduction tools was also relatively low: carbon assessments (43%), demolition audits (23%) and materials passports (12%). Despite this, nearly nine in ten respondents want clear national guidance on how to calculate and use total carbon emissions when making planning decisions. Of those who used carbon reduction approaches, 93% felt they should be included in planning practice guidance. This suggests that whilst there are gaps in awareness, there may be impetus for carbon reduction policies and improved guidance.
8. As part of this research, respondents were presented with a range of policy options developed from suggestions during the qualitative interviews. More than 80% of respondents agreed with all seven of the proposed policy options. Respondents particularly endorsed exploring a retrofit-first approach (a 'retrofit-first' approach means improving existing buildings before considering demolition and rebuilding), standardising national guidance on whole life carbon calculations and harmonising VAT rates of retrofit developments with new builds.
9. The findings suggest that national and local planning policy does not clearly inform decision-making. There are different motivations for choosing whether to demolish and redevelop or retrofit and these will need to be considered in future policy design. Amongst respondents, there is support for increased use of carbon reduction approaches as well as retrofit-first approaches. While challenges remain - particularly around implementation and consistency - the research indicates there is appetite for change.

# 2 Background

## 2.1 Purpose of research

10. The research aimed to understand whether planning policy changes are needed to support decision-making around whether to demolish and redevelop or retrofit existing buildings. An MHCLG qualitative study commissioned in 2023 found there was appetite for improved national planning policy and guidance on the relative whole life carbon impacts of demolition and redevelopment or retrofit. This research aimed to test these findings by gathering opinions from stakeholders and experts across the built environment, as well as members of residents' association to explore what changes they would support.
11. This report focuses on the findings from a quantitative survey of 988 responses and 13 qualitative interviews. The quantitative survey also included three open-ended questions, which were analysed qualitatively by MHCLG, with the findings appended to the report (Appendix E). A summary of the policy background is provided for reference.
12. The primary aims and objectives of the research were to explore:
  - Opinions on how, when and to what extent national or local planning policy/ guidance informs decision-making;
  - The motivations of different stakeholders when deciding to demolish or retrofit an existing building;
  - What tools are used in the decision-making process and how familiar stakeholders are with them;
  - What types of policy intervention might be needed and at what level;
  - What further assistance is needed to support effective decision-making and certainty in the planning system.

## 2.2 Policy background

13. In the UK, buildings are estimated to be responsible for around 23% of greenhouse gas emissions. 80% of homes were built before 1990 and our older housing stock tends to be the least energy efficient.<sup>2</sup> Therefore, upgrading buildings is a critical step in achieving the UK's net zero emissions targets by 2050.

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<sup>2</sup> [BRE \(2020\) – The Housing Stock of the United Kingdom](#) & [Office for National Statistics \(2022\) – Data and analysis from Census 2021](#)

14. Simultaneously, there is a pressing need for more housing with a government commitment to building 1.5 million homes by 2030.<sup>3</sup> Some of these homes may be developed on brownfield or grey belt sites or otherwise involve changing the use of existing buildings. Redevelopment options often involve a decision between whether to i) retain existing structures, retrofitting to improve their condition, or ii) demolish and build a new structure on the site.
15. The decision-point offers an opportunity to reduce the operational (or 'in-use') carbon emissions and potentially incorporate embodied carbon emissions in decision-making processes.<sup>4</sup> While operational (or 'in-use') carbon is already regulated and assessed, embodied carbon (associated with the construction, maintenance and demolition of buildings) is not regulated to the same extent. This is despite embodied carbon in buildings accounting for more than aviation and shipping industries combined. Looking at both energy use and construction-related emissions together gives a 'whole life carbon' view, which could make regulations more comprehensive.
16. At a national level, the National Planning Policy Framework (NPPF) establishes the government's planning policies and sets out how these should be applied across the country. This is supported by planning practice guidance (PPG) that gives practical guidance to stakeholders' decision-making process.
17. Local planning authorities (LPAs) apply these policies through the discretionary planning system, where planners review applications from developers wanting to carry out building works. Approvals from LPAs are granted based on the planners' assessment of whether the proposals comply with both national policy and the local plan.
18. The NPPF and the National Design Guide (NDG) highlight the importance of sustainable development and the reuse of resources where possible. Particularly, the NDG follows the principles of whole life carbon assessment, reducing embodied carbon and waste, and highlights some benefits of the re-use of existing buildings. Local councils can use this guidance to inform local policy and define the standards in their area. The National Model Design Code (NMDC) provides tools and guidance to local councils for producing design codes which can be used to set the rules for the design of new developments. The NMDC also highlights the importance of reducing embodied carbon and sets out the ways that this can be achieved, including through the reuse of existing buildings. The national design guidance will be updated in 2026, and it will continue to reiterate the importance of the reuse of resources.
19. At present, national planning policy sets a broad expectation that new development contributes to emission reduction. However, individual LPAs (including the City of London Corporation, Camden Council and Westminster City Council) have a stricter approach, adopting a 'retrofit first' approach in their local

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<sup>3</sup> <https://lordslibrary.parliament.uk/housing-supply-quality-and-community-impact/>

<sup>4</sup> <https://part-z.uk/industry-support> & <https://www.nzcbuildings.co.uk/>

plans, or otherwise setting out how development should consider embodied carbon (e.g. Bristol City Council).

20. Ultimately, the findings of this research aim to gather perspectives from stakeholders to inform if and how national planning policy should be updated to reflect this approach.

## 3 Methodology

### 3.1 Research design

21. The research comprised qualitative interviews and a large-scale online survey with industry stakeholders and took place in Autumn 2024.
22. For interviews, stakeholders were approached by MHCLG if they had an interest/knowledge in the area and/or would be affected by any potential changes to policy and guidance. The process led to a total of thirteen interviews completed with key stakeholders.
23. The quantitative survey was distributed via core groups of stakeholders, representative organisations and industry bodies as well as via the Chief Planners' mailing list. This was done via direct email lists, newsletters, online forums and message bulletins. The population was then broadened through stakeholders themselves who were able to distribute the survey link to any person or group that they believed could be interested. The list of known groups the research was distributed to is shown in Appendix C.
24. The exact parameters of the total population of interest were not known and therefore the survey should be treated as a consultation. Whilst there is no way to determine if the achieved population is representative, effort was made to include a diverse range of industries/stakeholders involved in the decision-making process.

### 3.2 Methodology

25. The survey was developed using a structured plan and then tested with stakeholders and those initially interviewed. The final survey included 30 questions, of which three were open-ended to allow respondents to provide detailed qualitative responses. Screener questions were included to ensure respondents met the inclusion criteria for the research (i.e. if their role informs or influences decision-making to demolish or retrofit buildings). In total, 208 respondents were screened out from the survey.
26. Fieldwork took place between 9<sup>th</sup> September 2024 and 4<sup>th</sup> November 2024. Overall, 994 respondents completed the survey. After data cleaning and quality checks 988 responses were included in the findings. Further details on the survey design and execution, as well as research materials are provided in the appendices.

### 3.3 Interpretation of findings

27. The quantitative survey data in the findings is unweighted (e.g. results are presented as they were collected, without any adjustments to account for differences in the sample compared to the overall population). Sub-group

analysis was performed to explore differences among groups within the sample: for example, by type of organisation. The analysis is not attempting to generalise beyond the respondents who replied to the survey to a wider population.

28. In addition, the following points should be considered when reading this report:
29. Percentages for single-response questions do not always add up to exactly 100%, due to the effect of rounding.
30. When percentages are added together, the total may not match exactly because of rounding.
31. Base sizes for each result reported from the quantitative survey are shown with the charts and any base sizes smaller than 50 should be interpreted with caution. For example, comparisons looking at the subgroup of respondents who work for an organisation in the demolition industry (17 out of the 988 total survey respondents) findings should be viewed as indicative only.
32. In some charts not all answer options are shown for practical reasons. Where this is the case, it has been noted in the description.
33. Throughout this report, the term “than average” means “compared with the overall percentage for all respondents on the same question”.

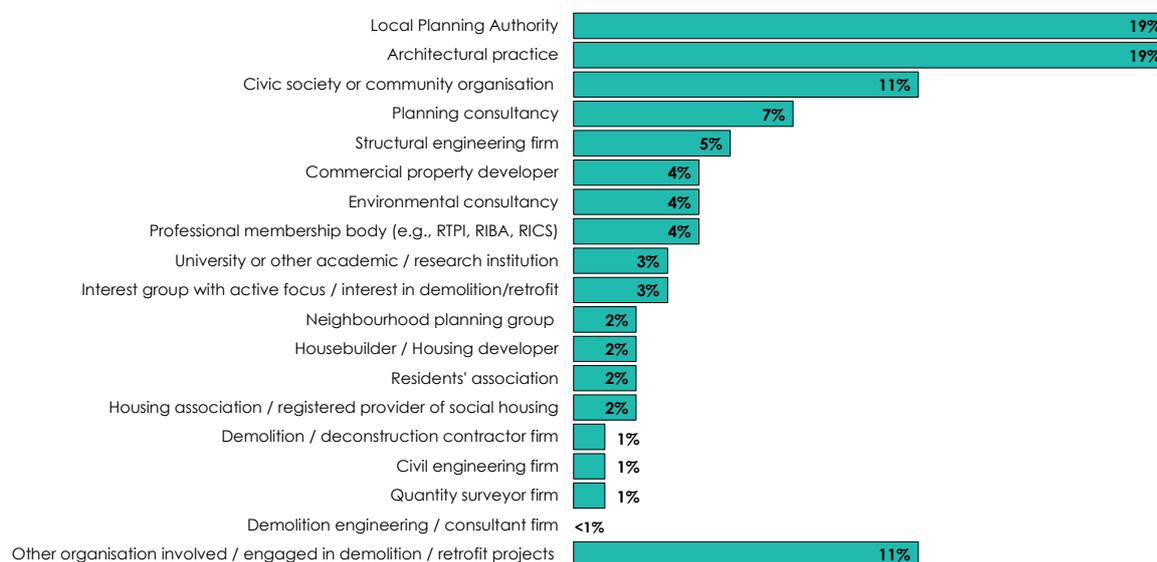
# 4 Research findings

## 4.1 Stakeholder profile

34. Stakeholders were from a diverse range of organisations, including public, private, and voluntary sectors. The largest groups were from Local Planning Authorities and architectural practices (both 19%), followed by civic societies or neighbourhood organisations (11%). Respondents held various roles influencing decision-making processes, with many involved in building development, planning applications, and planning decisions. Most commonly, respondents worked as architects (20%), planners (14%), and planning consultants (8%). Whilst the majority were employed by large organisations (37%), significant numbers were also in medium (17%), small (20%) and micro organisations (22%). These findings are illustrated in Figures 4.1.1 and 4.1.2 below, with further details on occupation and organisation size in Annex Tables D1 and D2.

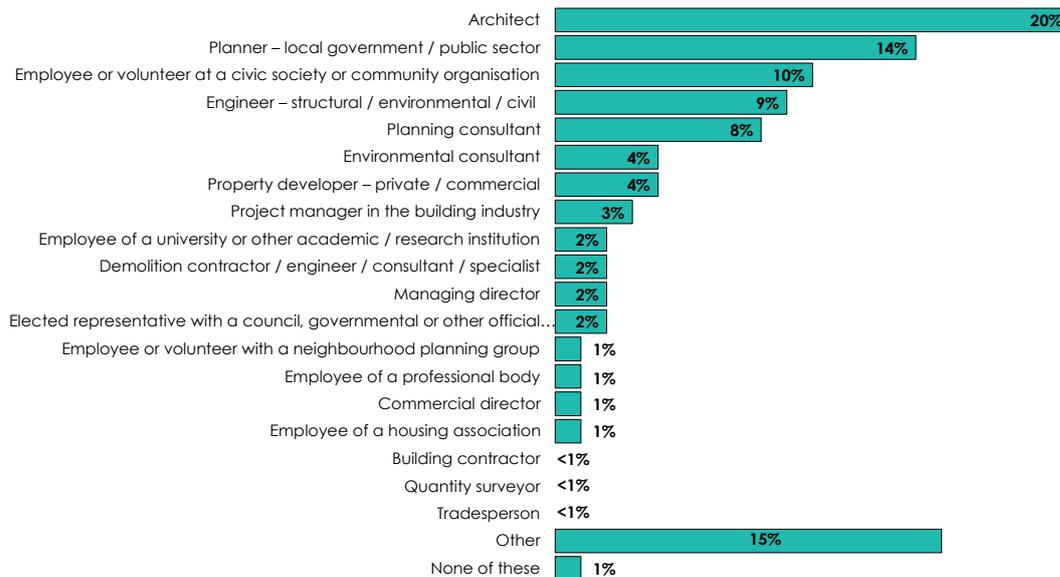
35. Additional information on the breakdown of respondents by region can be found in Annex Table D3, as well as details on the size of organisations (Annex Table D4), whether roles inform or influence the process or decision-making around whether to demolish and redevelop or retrofit buildings (Annex Table D5), and organisation types for subgroup analysis (Annex Table D6a and Table D6b).

**Figure 4.1.1 Proportion of respondents by the organisation they work for**



**Source:** Q1. Which of the following types of organisations do you currently either work for (for example, as an employee) or work with (for example, in a volunteer capacity)? Please select one answer only. If you work for or with more than one organisation, please select the one you spend the most time working for or with. Results are based on all 988 respondents, without adjustments to make them representative. Percentages may not sum to 100% due to rounding.

**Figure 4.1.2 Proportion of respondents by current occupation**

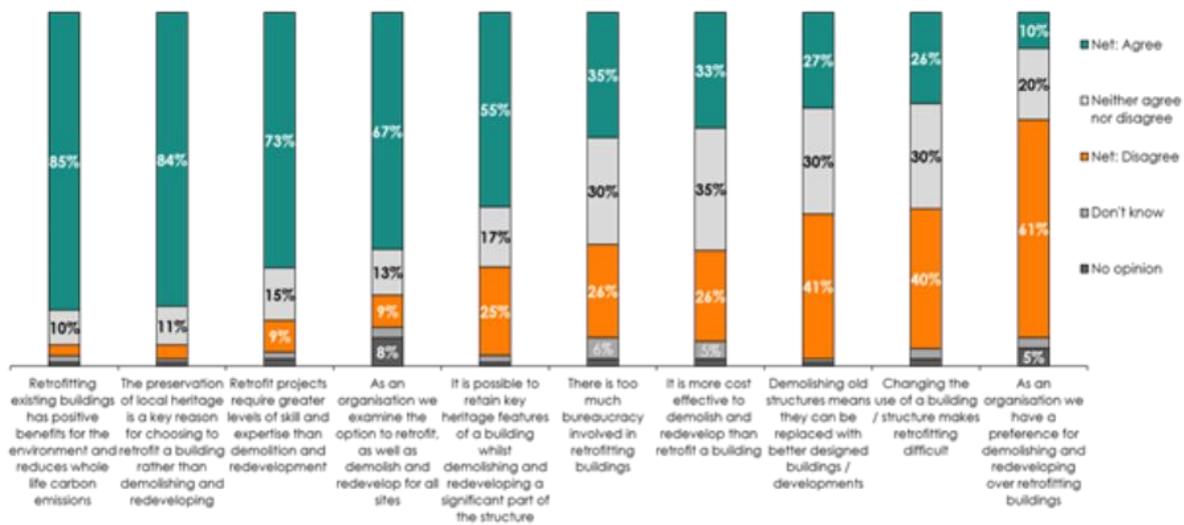


**Source:** Q3. Which of the following best describes your current occupation / role? Please select one answer only. If your role encompasses multiple aspects, then please select the role you spend the most time doing. Please note that this could involve a professional capacity, role in the voluntary sector or a role as an elected official. Results are based on all 988 respondents, without adjustments to make them representative. Percentages may not sum to 100% due to rounding.

## 4.2 General perceptions on the choice between demolition and redevelopment or retrofit

36. Almost all respondents agreed that retrofitting has positive benefits for the environment (85%) and that the preservation of local heritage was a key motivation (84%). References to “local heritage” in this report generally relate to buildings valued for local character or community significance, rather than formal heritage designations, reflecting how the term was used by participants in the qualitative research. Whilst 73% agreed retrofit projects required greater levels of skill than demolition and redevelopment, two thirds still examined the option to retrofit as well as demolish and redevelop for all sites, and one in ten respondents preferred demolition. The remainder of statements showed mixed opinions. Respondents did not necessarily agree on whether retrofitting involved too much bureaucracy or was too costly. Views also differed on whether changing the use of a building made retrofitting difficult or whether demolition and rebuild enabled better designed buildings. These findings are illustrated in Figure 4.2 below, with detailed percentages available in Annex Table D7.

**Figure 4.2 Agreement with statements about the demolition and redevelopment or retrofit of buildings**



**Source:** Q12. To what extent, if at all, do you agree or disagree with the following statements? Results are based on all 988 respondents, without adjustments to make them representative. Percentages may not sum to 100% due to rounding.

### Breakdown by subgroups

37. Approximately nine in ten respondents from LPAs (93%), consultancy/professional/academic organisations (88%), and community bodies (87%) agreed that retrofitting has positive environmental benefits and is considered alongside demolition. In contrast, around half of those working for builders/developers (52%) and a third from demolition organisations (35%) agreed that retrofitting benefits the environment.
38. Agreement that retrofit projects require greater skill and expertise compared with demolition projects was higher among respondents from engineering/surveying organisations (83%), consultancy/professional/academic organisations (77%), and LPAs (76%). Those who work for demolition organisations (53%) and builders/developers (49%) were more likely to agree that there is too much bureaucracy involved in retrofitting buildings, compared to those in other occupations. Despite the skills requirement, respondents working for builders/developers (79%), still examined the option to retrofit for all sites.
39. For building design, those working in demolition organisations or builders/developers were more likely to agree that it is possible to retain key heritage features of a building (72%) whilst demolishing and redeveloping. 82% of those in demolition organisations also agreed that demolishing structures can mean they can be replaced with better designed buildings; this is substantially higher than the levels for other occupations, particularly those working for LPAs (24%) and community bodies (18%).

40. Familiarity with legislation/policy/guidance was tested amongst respondents later in the survey (Q15, Annex Table D12). Interestingly, those familiar with policy were more likely to believe that retrofitting buildings has positive benefits for the environment (86%) than those who were not familiar (67%). Likewise, respondents familiar with policy were more likely to agree that retrofit projects require greater levels of skill (74%) compared to those not familiar (53%), suggesting a greater awareness of the complexities of retrofitting.

## 4.3 Perceived challenges and benefits of demolishing and redeveloping or retrofitting buildings

### Section summary

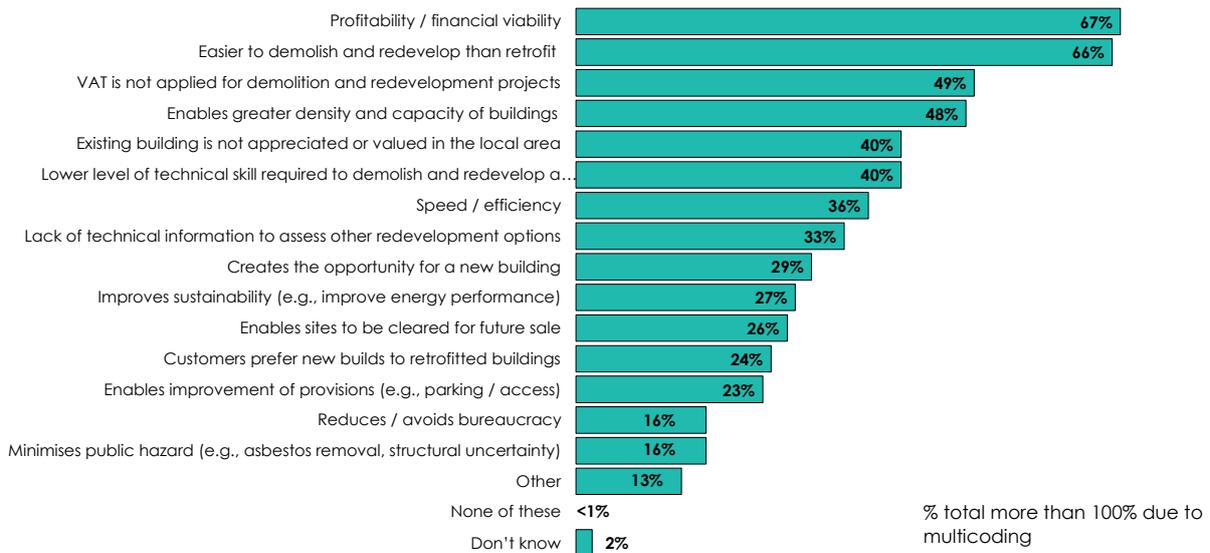
**This section explores reasons why stakeholders choose demolition and redevelopment versus retrofit.**

- **Demolition: Most common reasons were profitability/financial viability (67%), ease of demolition (66%), and VAT relief (49%).**
- **Retrofit: Most common reasons were local appreciation (70%), retention and repurposing of buildings (69%), and sustainability (64%). When asked for the single most important reason, respondents selected profitability for demolition (30%) and sustainability for retrofit (24%).**

### Key reasons to demolish and redevelop over retrofit

41. The top reasons selected for demolition compared to retrofitting were financial viability (67%) and ease (66%). Nearly half cited VAT exemptions (49%) and the ability to increase site density (48%). Other common reasons included low local appreciation for existing buildings (40%) and lower technical skill requirements (40%). Other factors also mentioned were unsuitable building types, political or social agendas, irreparable structures, and developer preferences for new builds. These findings are illustrated in Figure 4.3.1 below, with detailed percentages available in Annex Table D8.

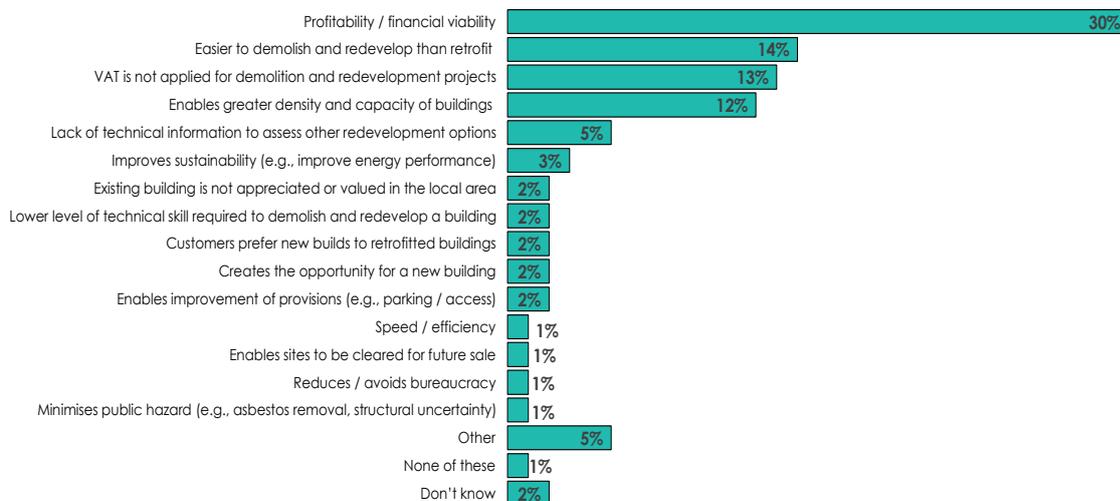
**Figure 4.3.1 Key reasons to demolish and redevelop over retrofitting**



**Source:** Q7. Which of the following, if any, do you think are key reasons why stakeholders involved in decision-making about planning and building redevelopment, choose to demolish and redevelop, rather than retrofit buildings? Results are based on all 988 respondents, without adjustments to make them representative. Totals may exceed 100% because respondents could choose more than one answer.

42. When respondents were asked to consider what they thought was the single most important reason why stakeholders choose to demolish and redevelop rather than retrofit, the top four reasons remained consistent: profitability / financial viability (30%), easier to demolish and redevelop than retrofit (14%), VAT is not applied for demolition and redevelopment projects (13%) and demolition enabling greater density and capacity of buildings (12%). These findings are illustrated in Figure 4.3.2 below, with detailed percentages available in Annex Table D9.

**Figure 4.3.2 Most important reason to demolish and redevelop over retrofitting**



**Source:** Q8. - Which of the following do you think is the most important reason why stakeholders involved in decision-making about planning and building redevelopment, choose to demolish and

*redevelop, rather than retrofit buildings? Base: All respondents (988).*

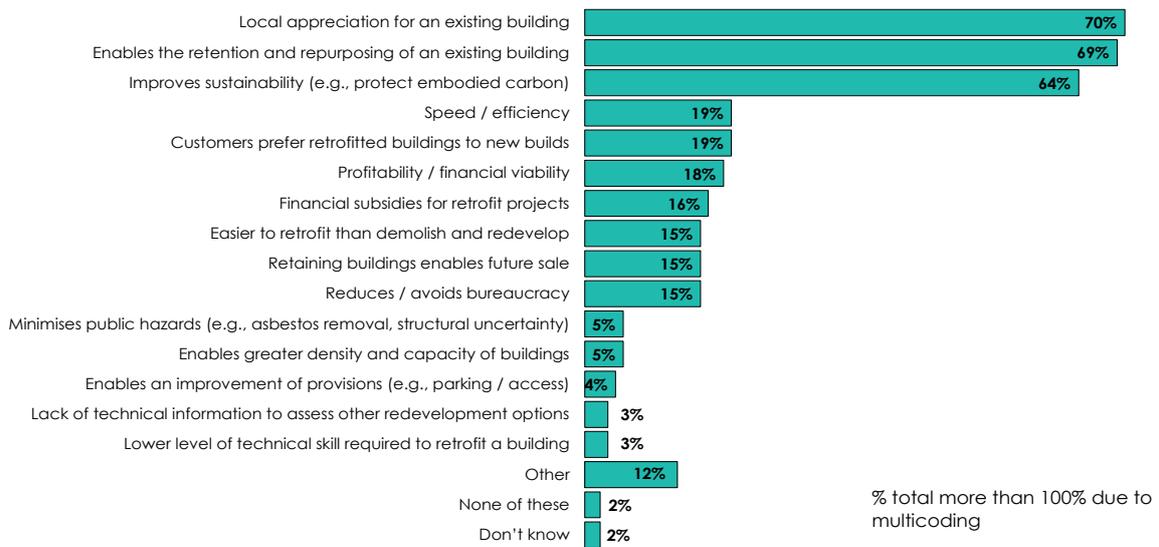
## **Breakdown by subgroups**

43. Respondents working in demolition/builders/developers were more likely than those working in any other field to say improving sustainability is a **key reason** for choosing to demolish (65% demolition, 54% builders/developers vs 27% average) but less likely to choose 'ease of demolition' (41% demolition vs 66% average). Builders and developers were more likely than average to select reasons which favour a new building such as 'enables greater density and capacity of buildings' (66% vs 48% average) or 'creates the opportunity for a new building' (43% vs 29% average).
44. In comparison, consultancy/professional/academic organisations were more likely to select VAT not being applied for demolition projects (62% vs 49% average) as a **key reason** compared to other types of organisations. LPAs were most likely to select 'easier to demolish and redevelop' (73% vs 66% average) followed by 'profitability/financial viability' (68% vs 67% average) as **key reasons** and were also substantially more likely than most other groups to select 'clears a site for future sale' (31%).
45. In summary, the factors considered important by decision-makers when choosing between demolition and redevelopment or retrofitting varied across organisations with different business priorities. Those involved in demolition were more likely to view improving sustainability as a key reason to choose demolition and redevelopment over retrofit. They were also less likely to consider demolition as easier than retrofit, and as a reason why stakeholders choose to demolish and redevelop. Builders/developers were more likely than other organisations to see the opportunity in removing a structure and being able to replace this with something new. Other organisation types often selected financial priorities such as the benefits of clearing a site for sale and the resultant profit as a reason to demolish and redevelop over retrofit.

## **Key reasons to retrofit over demolishing and redeveloping**

46. Respondents indicated key reasons for retrofit over demolition. The most commonly selected were 'local appreciation for an existing building' (70%) and that retrofitting enables the 'retention and repurposing of an existing building' (69%). Almost two-thirds selected that they think a key reason stakeholders choose to retrofit over demolishing and redeveloping is that retrofit improves sustainability (64%). Finally, 12% of respondents cited 'other' reasons including heritage and conservation, social values and maintaining community relationships, statutory requirements of some kind, land ownership/land covenants, and embodied carbon benefits (along with other carbon benefits to retrofit). These findings are illustrated in Figure 4.3.3 below, with detailed percentages available in Annex Table D10.

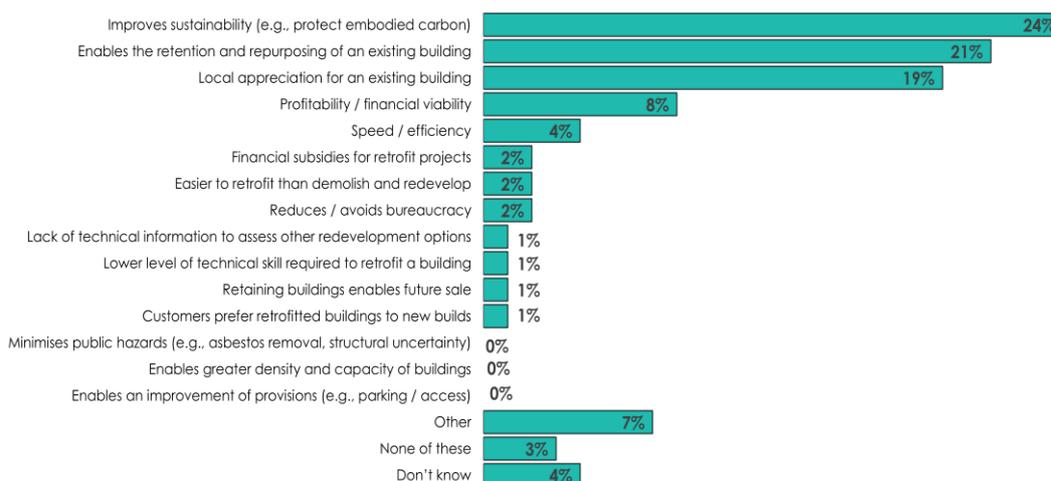
**Figure 4.3.3 Key reasons to retrofit over demolishing and redeveloping**



**Source:** Q9. Which of the following, if any, do you think are key reasons why stakeholders involved in decision-making about planning and building redevelopment, choose to retrofit, rather than demolish and redevelop buildings? Results are based on all 988 respondents, without adjustments to make them representative. Totals may exceed 100% because respondents could choose more than one answer.

47. Respondents most frequently selected improving sustainability as the single most important reason why they choose to retrofit rather than demolish and redevelop (24%). The other two most important reasons were enabling the retention of an existing building (21%) and local appreciation (19%). These findings are illustrated in Figure 4.3.4 below, with detailed percentages available in Annex Table D11.

**Figure 4.3.4 Most important reason to retrofit over demolishing and redeveloping**



**Source:** Q10. Which of the following do you think is the most important reason why stakeholders involved in decision-making about planning and building redevelopment, choose to retrofit, rather than demolish and redevelop buildings? Base: All respondents (988).

## Breakdown by subgroups

48. Respondents working for demolition organisations were more likely to cite reduced bureaucracy (41%) as a reason to retrofit, but less likely than LPAs (72%) or consultancy groups (75%) to choose appreciation for a historic building (41% those working for demolition organisations, 49% builders/developers).
49. Respondents working in larger organisations often selected ‘financial subsidies’ (20%) as a key reason to retrofit whilst, medium-sized organisations were more likely to choose ‘sustainability’ as a key reason (74%).

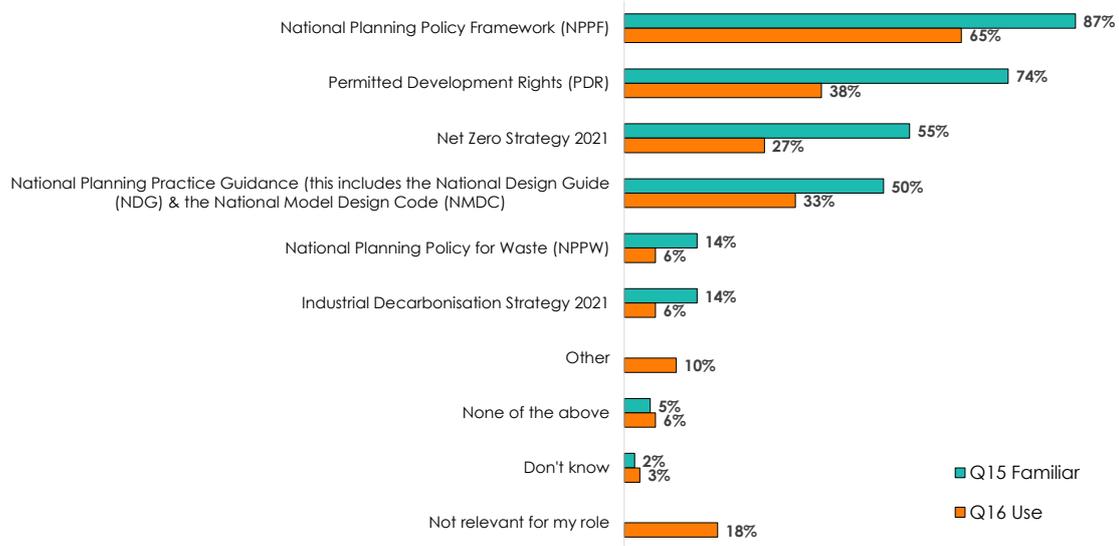
## 4.4 Familiarity and use of current legislation, policy and guidance

### Section summary

**Most respondents were familiar with the National Planning Policy Framework (NPPF) (87%) and Permitted Development Rights (74%). Awareness was lower for the Net Zero Strategy 2021 (55%) and Planning Practice Guidance (50%), and very low for the National Planning Policy for Waste and the Industrial Decarbonisation Strategy (both 14%). Usage patterns mirrored familiarity, with NPPF most used (65%) and other policies used far less frequently.**

50. Respondents were asked which policies they were aware of and which they used. Whilst the majority (87%) claim they were familiar with the NPPF and PDRs (74%), levels of awareness dropped for the Net Zero Strategy 2021 (55%) and Planning Practice Guidance (PPG) (50%). Respondents were least familiar with the NPPW (14%) or the Industrial Decarbonisation Strategy 2021 (14%). A small proportion of respondents were unfamiliar with any of the listed legislation, policy or guidance (5% none, 2% don't know).
51. These findings reflect respondents' perceptions of the usability of planning guidance, rather than a formal assessment of its technical adequacy or fitness for purpose.
52. Usage of legislation, policy, guidance, or strategy aligned with familiarity levels. The NPPF was the most commonly used (65%). Far fewer respondents used PDRs (38%), PPG (33%) or the Net Zero Strategy (27%). Only 6% used either the Industrial Decarbonisation Strategy 2021 or the NPPW. Nearly one in five (18%) reported that the use of such legislation, policy and guidance was not relevant for their role. These findings are illustrated in Figure 4.4.1 below, with detailed percentages for awareness in Annex Table D12 and for usage in Annex Table D13.

**Figure 4.4.1 Familiarity with and use of national legislation, policy and guidance**



**Source:** Q15 and Q16. Which of the following national legislation, policy, guidance, or strategies, if any, are you familiar with and which do you use? Results are based on all 988 respondents, without adjustments to make them representative. Totals may exceed 100% because respondents could choose more than one answer.

53. These findings on the perceived clarity of national legislation and guidance should be read alongside later findings in the report on how national and local planning policies are perceived to influence decision-making in practice.

### Breakdown by subgroups

54. Familiarity with legislation, policy, guidance or strategies varied by the type of organisation and role of respondents. LPAs and builders/developers were most familiar with the NPPF (97% and 90%), PDRs, and PPG. In contrast, those working in engineering/surveying (56% familiarity with NPPF, 40% with PDRs, and 19% with PPG) and demolition (65% familiarity with NPPF and 41% familiarity with PPG) were least familiar. However, those working for demolition organisations showed higher awareness of the Industrial Decarbonisation Strategy (59%) and NPPW (65%).

55. Consultancy/professional/academic organisations appeared to have higher than average levels of usage. Significant numbers of those working for engineering/surveying organisations reported that the legislation, policy, guidance or strategies cited are not relevant in their working roles (43% engineering/surveying vs. 18% overall). Those working for demolition organisations or community bodies were also more likely than average to consider it irrelevant to their roles – 21% of those working for demolition organisations (indicative only) and 24% of community bodies, compared to 18% overall.

## 4.5 National legislation, policy guidance, tools and instruments related to the demolition and redevelopment and/or retrofit of buildings

### Section summary

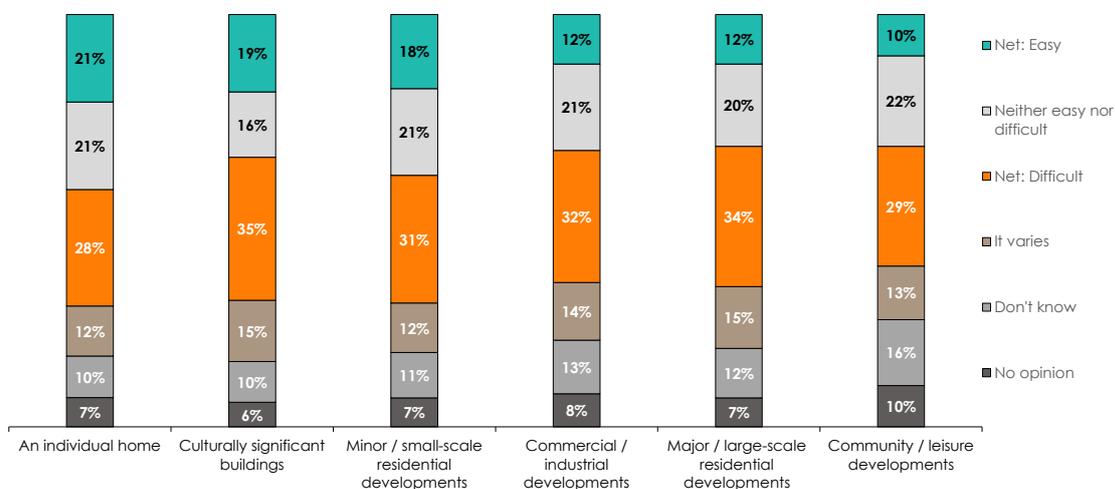
**Few respondents found national legislation and guidance easy to understand (10–21% across development types). Familiarity with tools was highest for carbon assessments (74%) and carbon reduction approaches (69%), but lower for demolition audits (41%) and materials passports (44%). Among those using these tools, 84–93% agreed they should be included in national planning practice guidance.**

56. Participants were shown examples of various building types and asked to assess how easy or difficult it was to interpret national legislation, policy, and/or guidance during the planning process for demolition, redevelopment, or retrofitting.

57. Overall, respondents did not find it easy to understand national legislation, policy, and / or guidance for any type of building/development, though this differed by development type. For culturally significant buildings and individual homes, 19% and 21% of respondents, respectively, found it easy or very easy to understand. In contrast, only 10-12% found it easy or very easy for community/leisure, commercial/industrial, or large-scale residential developments. These findings are illustrated in Figure 4.5.1 below, with detailed percentages available in Annex Table D14.

Note: In subgroup tables, headline percentages reflect the top-two-box responses (e.g., “Easy/Very easy” or “Agree/Strongly agree”), unless otherwise stated.

**Figure 4.5.1 Ease of understanding national legislation, policy and guidance for particular development types**



**Source:** Q17. *From your experience, how easy or difficult is it to understand national legislation, policy, and / or guidance around the planning process for demolishing and redeveloping and / or retrofitting buildings in the following cases? Please consider things like the National Planning Policy Framework (NPPF), National Planning Policy for Waste (NPPW), Planning Practice Guidance (including the National Design Guide (NDG) & the National Model Design Code (NMDC)), Permitted Development Rights, prior approval and planning permission. Base (unweighted): All respondents not working for / with Neighbourhood Planning groups, Civic Societies or Residents' Associations (841). Answers may not sum to 100% due to rounding.*

## **Breakdown by subgroups**

58. Across subgroups, those working for LPAs were more likely than average to find it easy to understand national legislation, policy and / or guidance (see Table 4.5.1 below for full subgroup breakdown). However, no group found it easy or very easy to understand. Respondents working for community bodies, consultancy/professional/academic organisations, and demolition organisations were more likely to find legislation/policy/guidance difficult to understand compared to the average. For example, those working in consultancy/professional/academic organisations (37%) were considerably more likely to find legislation/policy/guidance difficult to understand when it relates to culturally significant buildings. Around a third of respondents from consultancy/professional/academic organisations (33%) and builders/developers (34%), and over two-fifths of those working for community bodies (43%) found legislation/policy/guidance related to minor/small-scale residential developments difficult to understand.

**Table 4.5.1: Ease of understanding national legislation, policy and guidance for particular development types by organisation type**

Development Type	Total % Easy / very easy to understand	LPA	Consultancy/ professional/ academic organisation	Builders & Developers	Engineering/ Surveying organisations	Demolition Organisations	Community Bodies	Other
Individual Home	21%	27%	24%	16%	11%	29%	18%	11%
Culturally significant buildings	19%	26%	21%	8%	14%	12%	23%	12%
Minor / small-scale residential development	18%	24%	19%	15%	13%	18%	10%	11%
Commercial / Industrial developments	12%	17%	13%	11%	10%	6%	8%	8%
Major / large-scale residential development	12%	17%	11%	7%	7%	12%	10%	12%
Community / leisure developments	10%	13%	11%	7%	3%	12%	5%	21%

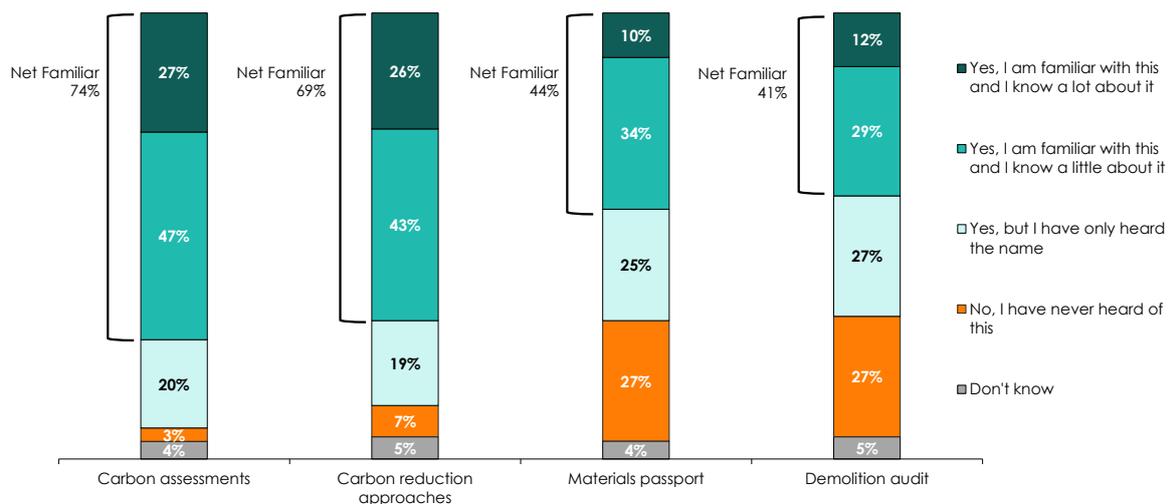
Note: Percentages shown represent the top-two-box results, calculated as the combined proportion of respondents selecting “Easy” or “Very easy” for each development type.

**Source:** Q17. From your experience, how easy or difficult is it to understand national legislation, policy, and / or guidance around the planning process for demolishing and redeveloping and / or retrofitting buildings in the following cases? Please consider things like the National Planning Policy Framework (NPPF), National Planning Policy for Waste (NPPW), Planning Practice Guidance (including the National Design Guide (NDG) & the National Model Design Code (NMDC)), Permitted Development Rights, prior approval and planning permission. Base (unweighted): All respondents not working for / with Neighbourhood Planning groups, Civic Societies or Residents' Associations (841).

## Familiarity with and use of instruments and tools

59. Respondents were most likely to be familiar with carbon assessments (74%), followed by carbon reduction approaches (69%). Respondents are less likely to know about materials passports or demolition audits (44% and 41% respectively). These findings are illustrated in Figure 4.5.2 below, with detailed percentages available in Annex Table D15.

**Figure 4.5.2 Familiarity with instruments and tools**

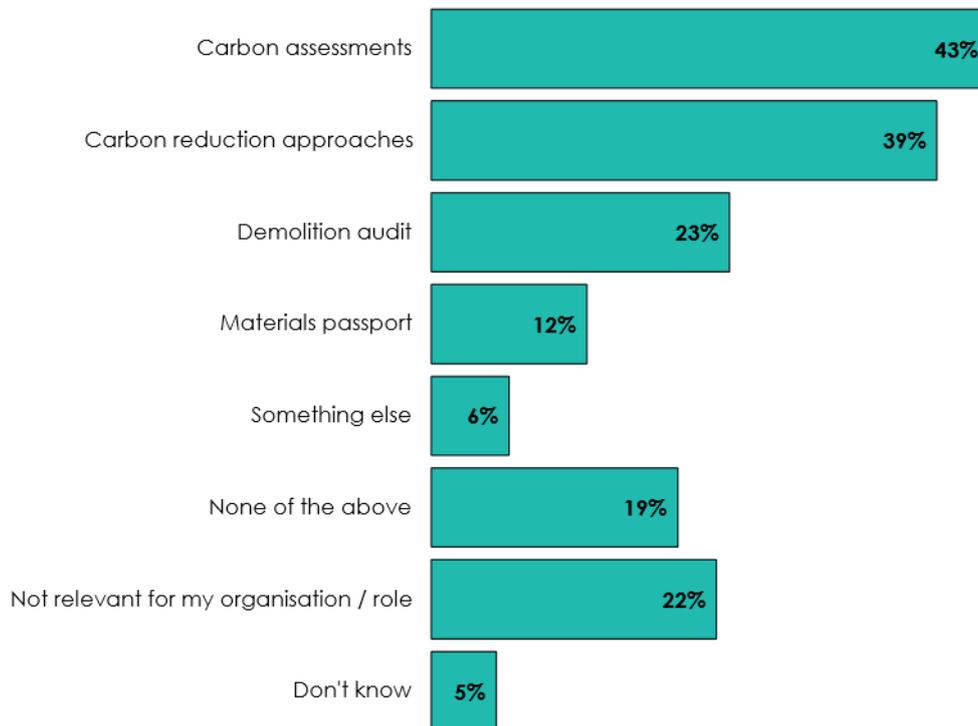


Note: Figures represent top-two-box familiarity percentages, combining respondents who selected “Yes, I am familiar with this and I know a lot about it” and “Yes, I am familiar with this and I know a little about it.”

**Source:** Q25. *To what extent, if at all, are you familiar with the following instruments and tools to aid and inform decision-making regarding whether to demolish and redevelop or retrofit buildings? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.*

60. Respondents that were familiar with any of the instruments or tools were then asked if their organisation regularly used them to help inform decision-making. Carbon assessments (43%) and carbon reduction approaches (39%) were most used, while demolition audits (23%) and materials passports (12%) were less used. In total, 41% said they do not use any of the tools (19%) or that the instruments or tools were not relevant for their organisation or role (22%). This likely reflects the different roles of organisations in the development process. Less than 1 in 10 (6%) reported that their organisation regularly used ‘something else’ to inform decision-making. Examples of tools that respondents reported using included viability or cost assessments, using organisational plan/local plans, excess material exchange platform and retrofit options. These findings are illustrated in Figure 4.5.3 below, with detailed percentages available in Annex Table D16.

**Figure 4.5.3 Use of instruments and tools**



Note: Figures show the percentage of respondents whose organisation reports using the instrument/tool regularly. Multiple responses were permitted.

**Source:** Q26 Which of the following instruments and tools, if any, does your organisation regularly use to help inform decision-making regarding whether to demolish and redevelop or retrofit buildings? Base (unweighted): All respondents who have heard of any instruments / tools to aid and inform decision-making (937). Answers may not sum to 100% due to multicoding.

### Breakdown by subgroups

61. Respondents were most likely to be familiar with carbon assessments (74%) and carbon reduction approaches (69%), while familiarity was lower for materials passports (44%) and demolition audits (41%). Familiarity varied by organisation type, with respondents from consultancy/professional/academic, builders/developers, and engineering/surveying organisations generally more familiar with the range of instruments and tools than those working for local planning authorities or community bodies. Detailed breakdowns by organisation type are provided in Annex Table D15.

62. Those working for demolition organisations were substantially more likely to be familiar with materials passports (59%) and demolition audits (88%) compared to the average (44% and 41% respectively).

63. Familiarity was generally higher among respondents from larger and mid-sized organisations compared to small and micro-organisations. For example, 80% of respondents in both large and medium-sized organisations were familiar with

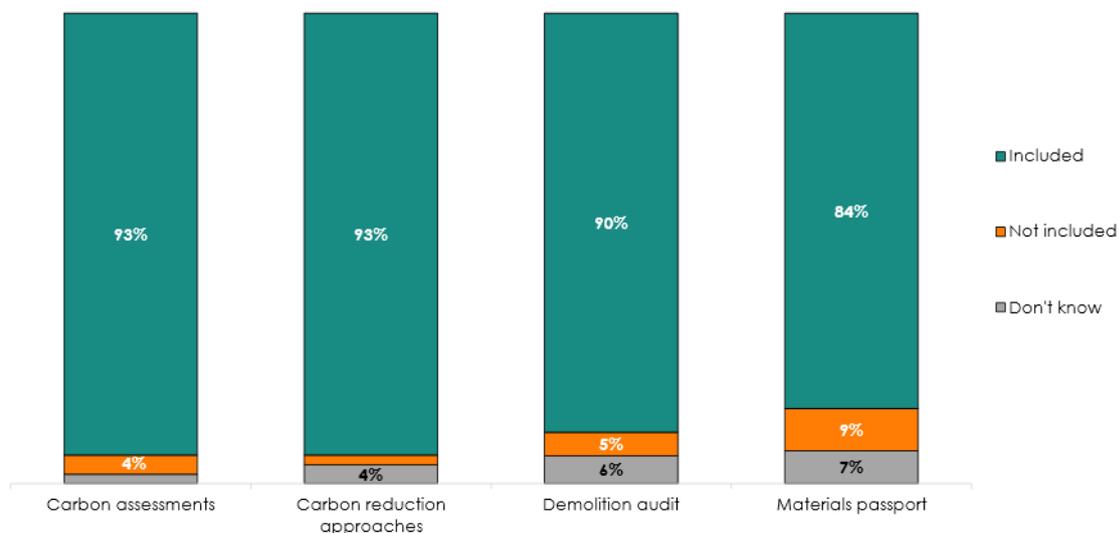
carbon assessments, compared to 68% in micro and 66% in small organisations. Similarly, familiarity with materials passports was higher in large (48%) and medium (51%) organisations than in micro (40%) and small (36%) organisations. Familiarity with demolition audits was also higher in large and medium-sized organisations (46% and 51% respectively), compared to 35% in micro and 34% in small organisations. Further detail by organisation type and organisation size is provided in Annex Table D15.

64. The survey was distributed through professional networks and stakeholder channels relevant to planning and the built environment, resulting in a consultation-style sample rather than a statistically representative one. This approach enabled the research to capture a broad range of informed practitioner perspectives on demolition and retrofit decision-making. However, it also resulted in smaller numbers of responses from some groups, including housing associations and residents' organisations. The findings should therefore be interpreted as indicative of views within the achieved sample, rather than representative of all stakeholder groups involved in redevelopment decisions.
65. Usage of instruments or tools tended to follow a similar pattern to familiarity with respondents working for engineering/surveying organisations, builders and developers were more likely to regularly use the instruments/tools compared to other organisations. Those working for demolition organisations were substantially more likely to use demolition audits (82%) and materials passports (29%), but their use of carbon assessments and carbon reduction approaches was lower. Unsurprisingly, community bodies were substantially more likely to respond that the use of such instruments or tools was not relevant to their role (47%) and LPAs were more likely to respond that their organisation did not use any of the tools (32%).
66. Additionally, usage of all instruments and tools was higher amongst respondents who work in large and mid-sized organisations compared to small-sized and micro-organisations. For example, respondents in large (53%) and medium-sized (52%) organisations were more likely to report their organisation regularly used carbon assessments compared to those in small-sized (34%) and micro (32%) organisations. This pattern was repeated for carbon reduction approaches, materials passports and demolition audits. By contrast, micro-organisations were more likely to state that they did not regularly use any of the instruments or tools listed, or that such usage was not relevant for their organisation or in their role, particularly when compared to large organisations.
67. The response options used in the survey reflect the standard design applied in the commissioned research and were intended to distinguish between neutrality, uncertainty and lack of opinion. For the purposes of this report, these categories are reported transparently rather than re-aggregated.

## Inclusion of instruments and tools in national planning practice guidance

68. Respondents whose organisations regularly used the specific instruments or tools listed were asked whether they thought these should be included in national planning practice guidance to help inform decision-making. These findings are illustrated in Figure 4.5.4 below, with detailed percentages available in Annex Table D17.

**Figure 4.5.4 Inclusion of instruments and tools in national planning practice guidance**



**Source:** Q27. Which of the following instruments and tools, if any, do you think should be included in national planning practice guidance to help inform decision-making regarding whether to demolish and redevelop or retrofit buildings? Base (unweighted): All respondents who have used any instruments / tools to aid and inform decision-making (Carbon assessment 403; Carbon reduction approaches 369; Demolition audit 217; Material passport 117). Answers may not sum to 100% due to rounding.

69. An overwhelming majority of respondents whose organisation regularly used instruments/tools agreed that these should be included in national planning practice guidance. Specifically, 93% supported including carbon assessments and carbon reduction approaches, 90% supported including demolition audits and 84% supported including materials passports. This suggests there is a significant appetite for change to guidance on the decision to demolish and rebuild or retrofit.

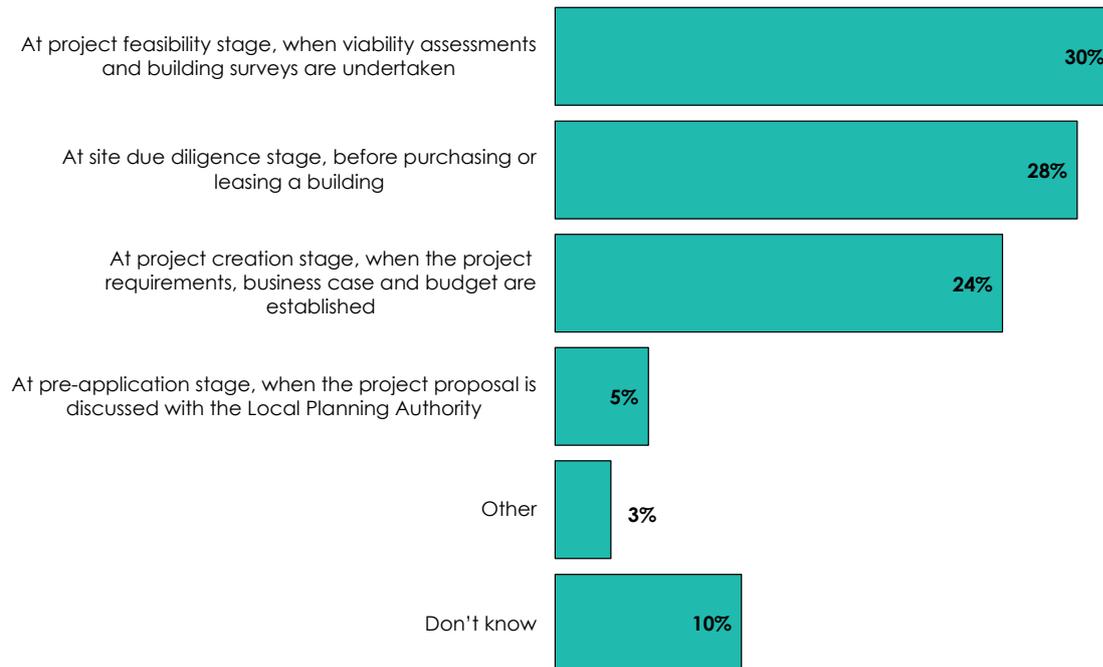
## 4.6 Current decision-making

### Section summary

**Decisions to demolish or retrofit are typically made early in the process: 30% at project feasibility stage and 28% at site due diligence stage. Fewer decisions occur at project creation (24%) or pre-application stage (5%).**

70. Early-stage planning may include optional pre-application discussions with the local planning authority, feasibility assessments to evaluate a project's viability, and site due diligence investigations to identify legal, environmental, and physical constraints – though the scope and process can vary depending on the local authority and the nature of the proposed development. Respondents were asked when the decision to demolish or retrofit is usually made. Overall, respondents indicated that decisions are typically made at the project feasibility stage (30%) or the due diligence stage (28%). One in four indicated that the decision is made at the project creation stage, when requirements, business cases and budgets are established (24%). Decisions to demolish/retrofit are rarely made at the pre-application stage (5%). These findings are illustrated in Figure 4.6.1 below, with detailed percentages available in Annex Table D18.
71. While survey responses suggest that decisions about demolition or retrofit are often made at an early stage, qualitative evidence indicates that decision-making can be iterative. Participants described circumstances in which initial preferences were revisited in light of further technical work, cost information or delivery considerations. This nuance is important for interpreting the survey findings and does not imply a single, linear decision-making pathway.

**Figure 4.6.1 Timing of decisions to demolish and redevelop or retrofit buildings**



**Source:** Q11. *In your experience, when is the decision typically made to demolish and redevelop or retrofit a building? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.*

## 4.7 Incentivisation of decision types

### Section summary

**Most respondents agreed that retrofit would be incentivised if:**

- **VAT rates for retrofit were harmonised with new builds (83%)**
- **Retrofit applications had a presumption of approval (76%)**
- **Retrofit planning consents were processed quicker compared to new builds (73%)**

**When considering whether the national or local planning policy currently incentivised retrofit or demolition, views from the sector were mixed.**

- **33% believed the NPPF was neutral towards demolition and retrofit, while 29% agreed that the NPPF encourages demolition, compared to only 10% who felt it encourages retrofit.**

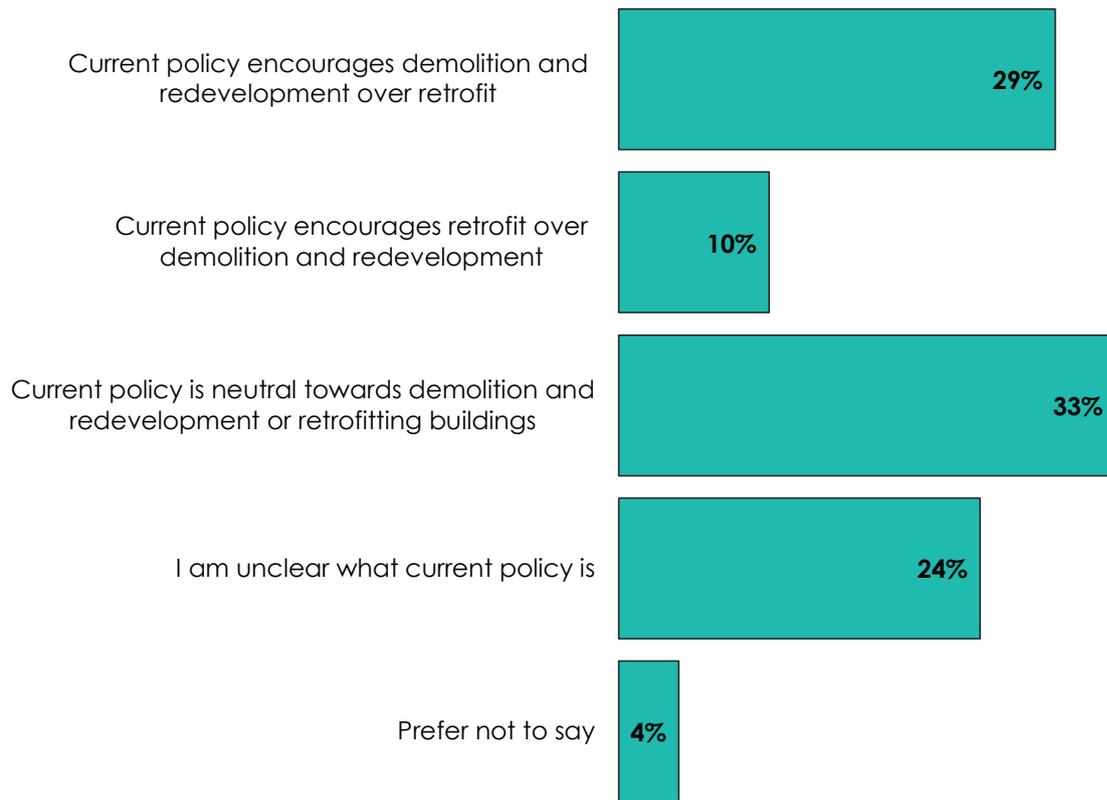
- 31% indicated that current local planning policies in their area are neutral, while 26% agreed local policy encourages retrofit and 21% agreed local policy encourages demolition.

**When considering perceptions of national and local policy, 50% of respondents disagreed that national planning policy clearly supports effective decision-making. In contrast, whilst views were also mixed across the effectiveness of local policy, local planning policy was seen as marginally more informative, with 24% unclear on national policy compared with 18% unclear on local policy.**

### **Views on whether national and local policy incentivises demolition and redevelopment or retrofit**

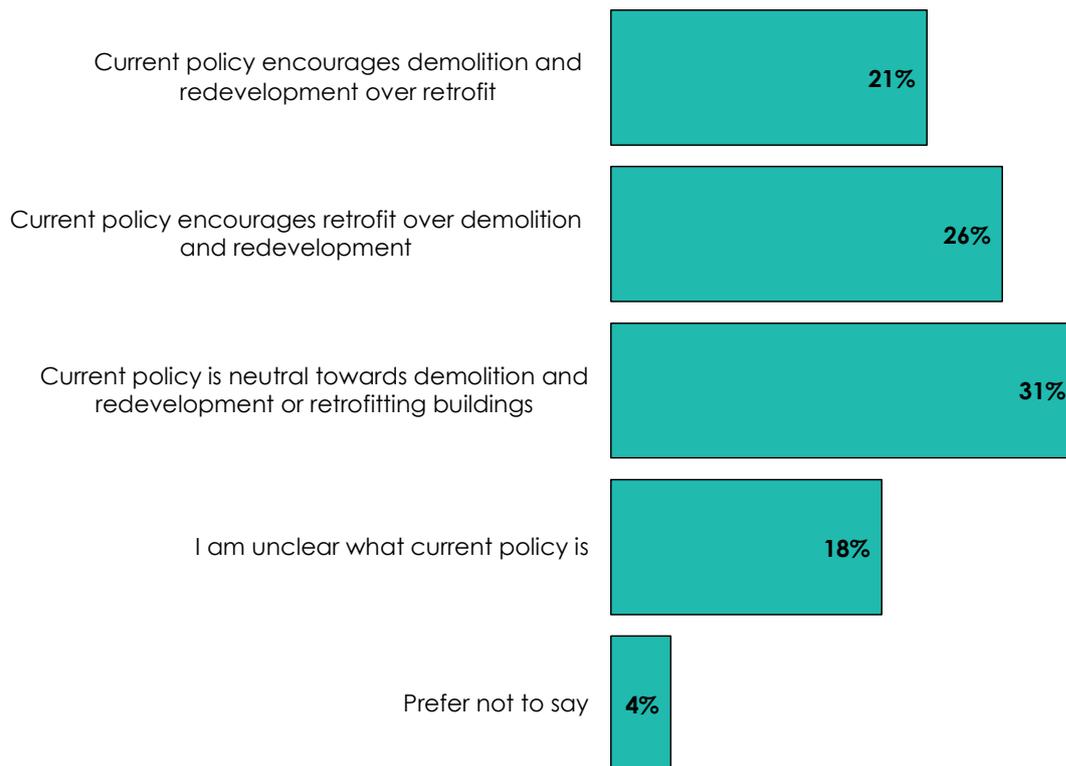
72. Almost three times as many respondents agreed the NPPF favoured demolition and redevelopment over retrofit (29%) than agreed the NPPF favoured retrofit (10%). However, a third of respondents considered it to be neutral (33%), while one-quarter (24%) were unclear on what the current policy is.
73. When considering the local planning policy/policies in which respondents operate, marginally more felt they encourage retrofit over demolition and redevelopment (26% vs 21%). Respondents were more likely to think that local planning policy encourages retrofit compared to national planning policy (26% compared to 10%). The remainder generally felt local policy is neutral (31%) or were unclear what the current local policy is (18%). These findings are illustrated in Figure 4.7.1 (National Planning Policy Framework) and Figure 4.7.2 (Local Planning Policy), and detailed in Annex Tables D19 and D20, which provide the full breakdown of responses for national and local planning policy perceptions.
74. This suggests that neither national nor local policy is clear on whether there is a preference. National policy was more likely to encourage demolition comparative to local policy which was more likely to encourage retrofit. Changes to national policy and guidance are likely to be required if a more definitive direction is to be determined.

**Figure 4.7.1 Agreement with statements about the NPPF**



**Source:** Q18. When considering the National Planning Policy Framework (NPPF) as a whole, which of the following statements would you agree with most? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.

**Figure 4.7.2 Agreement with statements about local policy**



**Source:** Q19. *When considering the local planning policy / policies for an area in which you operate frequently (i.e., your local authority area), which of the following statements would you agree with? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.*

### **Breakdown by subgroups**

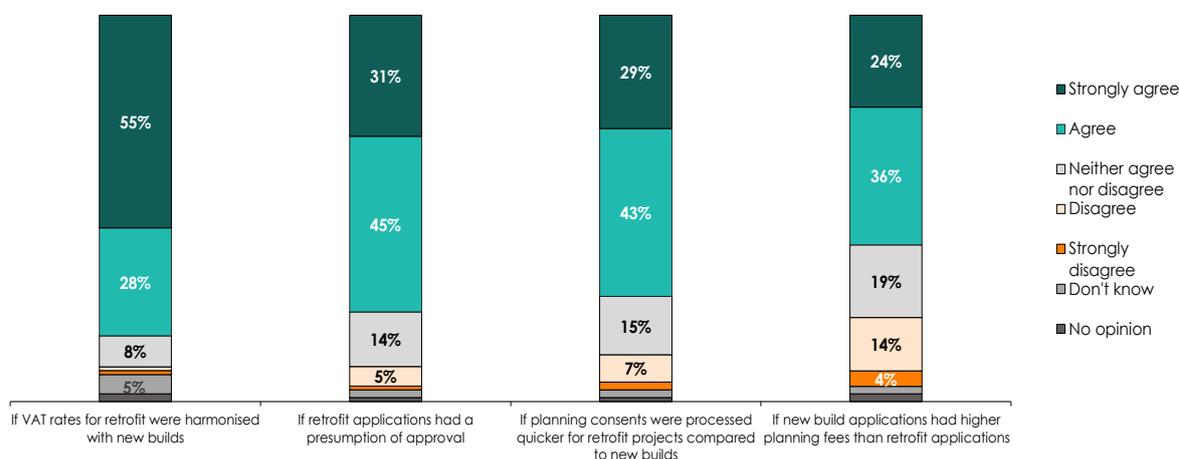
75. For the NPPF, respondents that are part of community bodies (44%) were substantially more likely to agree that current policy encourages demolition over retrofit compared to those working in builders/developers (7%), engineering/surveying (19%), and demolition organisations (18%). Around half (49%) of those working in engineering/surveying organisations and just over a third (39%) at builders and developers were unclear about what the current policy is.

76. For local policy, responses similarly varied by organisation type. For example, those in builders/ and developers (46%) and demolition organisations (41%) were more likely than average (26%) to feel that current policy encourages retrofit over demolition. Conversely, those in community bodies (39%) were considerably more likely than average (21%) to feel that current local policy encourages demolition.

## Potential incentives for retrofit

77. Respondents were asked the extent to which they thought retrofit would be incentivised over demolition and redevelopment in four different circumstances. Most respondents agreed that retrofit would be incentivised if VAT rates were harmonised, if retrofit applications have the presumption of approval and if planning consents are processed quicker compared to new builds. Fewer, though still a majority (60%), agreed that if new build applications had higher planning fees than retrofit, then retrofit would be incentivised over demolition. This suggests that should a whole life carbon approach be taken, there is evidence for which policy options are most likely to be effective. These findings are illustrated in Figure 4.7.3 below, with detailed percentages available in Annex Table D21.

**Figure 4.7.3 Extent to which retrofit would be incentivised over demolition and redevelopment in the listed circumstances**



**Source:** Q13. To what extent, if any, do you think retrofit would be incentivised / favoured over demolition and redevelopment in the following circumstances? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.

## Breakdown by subgroups

78. Respondents from consultancy/professional/academic organisations (91%) and community bodies (86%) were more likely to agree that harmonising VAT rates would incentivise retrofit (83% average). Whilst 93% of micro-organisations agreed with the idea, larger organisations were less likely than average (76% vs 83%). Whilst the degree of support is still high, the difference suggests that the relative VAT rate advantages of demolition play a bigger role in decision-making in smaller organisations.

79. There were also differences between developers/builders and other groups. 70% of those working for LPAs and 61% of those working for consultancy/professional/academic organisations responded that higher planning

fees for new builds relative to retrofit would act as an incentive. In comparison, only three in ten of respondents working for builders and developers (30%) and around one in ten of respondents in demolition organisations (12%) agreed. Again, this suggests incentives may have a different effect depending on where and by whom decisions are made.

80. Around three quarters of those working in consultancy/professional/academic organisations (78%) and engineering/surveying organisations (76%) agreed that faster processing of planning consents for retrofit projects, compared to new builds, would incentivise retrofitting.

## 4.8 National and Local Planning

### Section summary

**Only a small percentage of respondents agreed that national planning policy clearly indicates either how and why decisions should be taken by LPAs, what actions developers can and cannot take, or whether national planning policy clearly supports decision-making regarding whether to demolish and redevelop or retrofit buildings (less than 20% across all questions).**

**When considering demolishing and redeveloping or retrofitting buildings that are meaningful to the local community, more than one in three respondents (35%) agreed that neither national planning policy nor guidance promote retrofitting. Just one in five agreed national policy (4%) or guidance (6%), or both (10%), promotes the retrofit of buildings meaningful to the local community. These findings are summarised here, with the full breakdown of responses provided in Annex Table D25.**

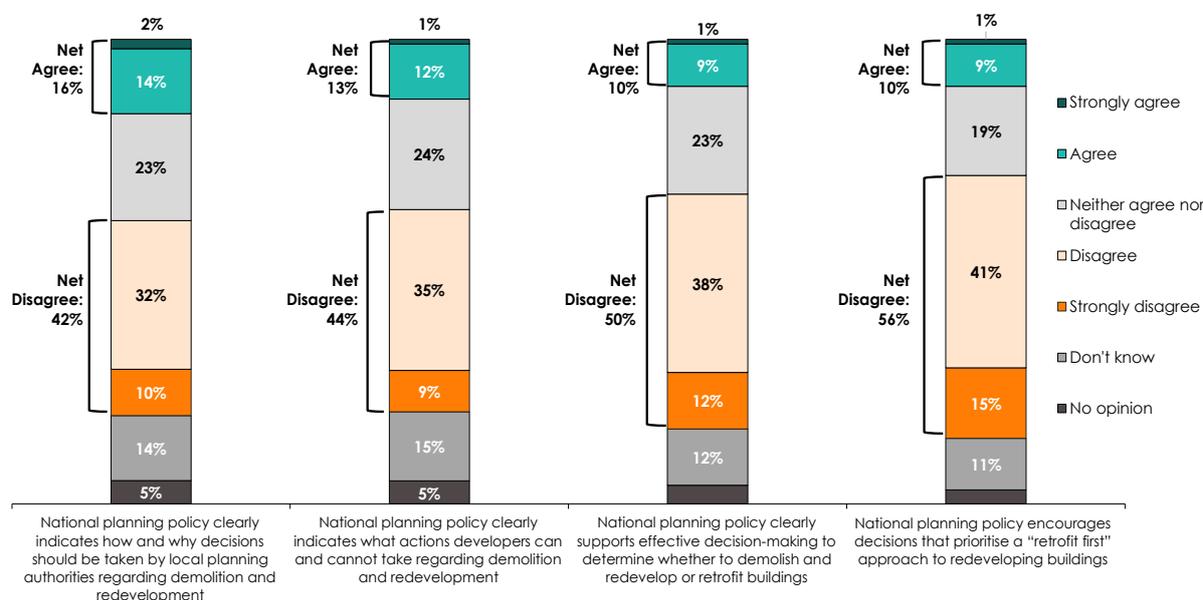
**When asking respondents who work in LPAs with guidance, they had mixed views on whether local policies support organisations and inform decision-making, with 32% agreeing and 27% disagreeing. Respondents were most likely to say that the LPA created these policies because of net zero commitments (49%), an LPA climate emergency declaration (44%) or to protect heritage buildings and other buildings of local importance (42%).**

### Views on national planning policy

81. Respondents were asked the extent to which they agreed or disagreed with statements about the impact of national planning policy on decision-making for projects involving demolishing and redeveloping or retrofitting buildings. Few agreed national planning policy clearly indicates either how and why decisions should be taken by LPAs (16%) or what actions developers can and cannot take (13%). Similarly, only one in ten felt that national planning policy clearly supports decision-making (10%). Moreover, only one in ten agreed that national planning policy encourages decisions that prioritise a 'retrofit first' approach to

redeveloping buildings. These findings are illustrated in Figure 4.8.1 below, with detailed percentages available in Annex Table D22.

**Figure 4.8.1 Agreement with standards about decision-making for projects which involve demolishing and redeveloping and/or retrofitting buildings**



**Source:** Q20. Thinking about decision-making for projects which involve demolishing and redeveloping and / or retrofitting buildings, to what extent, if at all, do you agree or disagree with the following statements? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.

### Breakdown by subgroups

82. Respondents who work in LPAs (58%) were more likely to disagree that national planning policy clearly indicates what actions developers can/cannot take. Similarly, LPAs were more likely than average to disagree that it clearly supports effective decision-making (61% vs 50%).

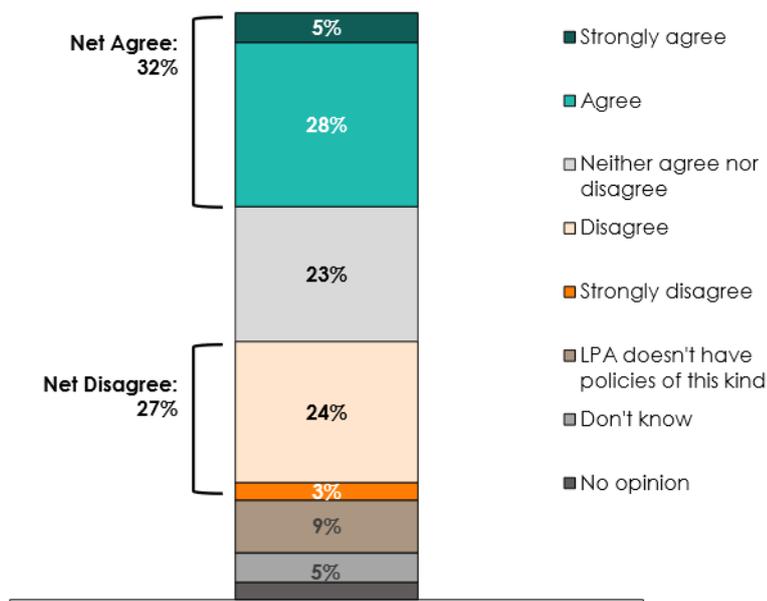
83. Agreement varied on whether national planning policy encourages a “retrofit first” approach. Builders and developers (18%) and those working for demolition organisations (29%) were more likely than average (10%) to agree that national policy encourages prioritising a “retrofit first” approach. In contrast to this, LPAs (68%) and consultancy/professional/academic (62%), were more likely than average (56%) to disagree with the statement.

### Views on local planning policy

84. Respondents working for LPAs were asked for their views on whether local planning policies support organisations and inform decision-making about whether to demolish and redevelop or retrofit buildings. Respondents had mixed

views on how helpful local planning policies were (32% agreed vs 27% disagree). This suggests that more can be done to clarify and support local planning policy. As bases were small and all responses came from the same group, no subgroup analysis was completed. These findings are illustrated in Figure 4.8.2 below, with detailed percentages available in Annex Table D23.

**Figure 4.8.2 Agreement about whether local planning policies support organisations and inform decision-making about whether to demolish and redevelop or retrofit buildings**

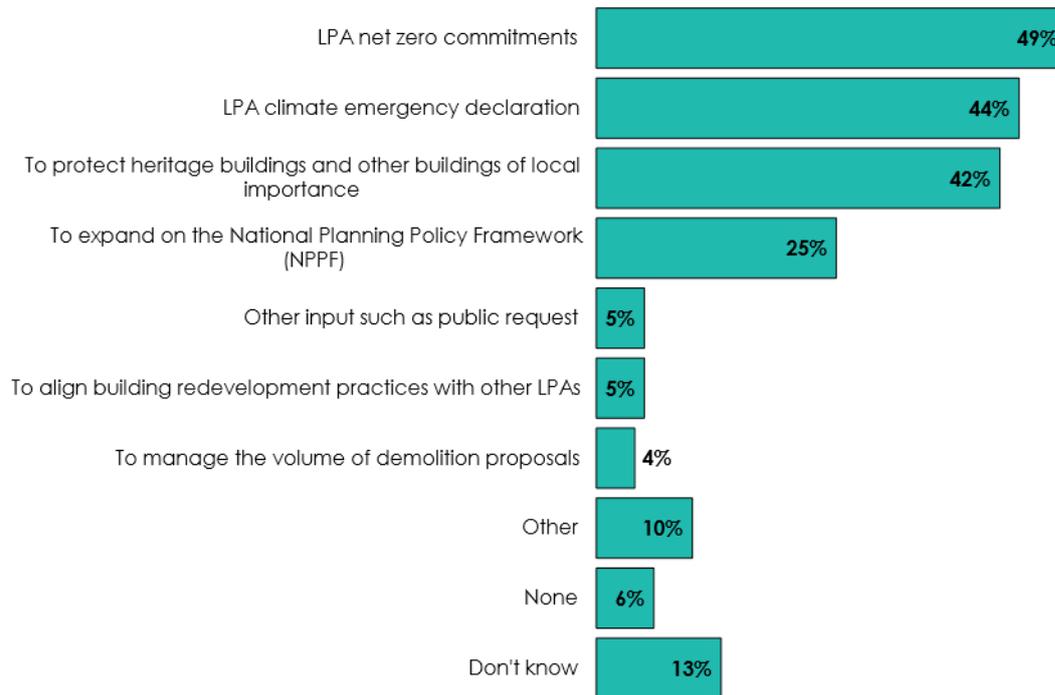


**Source:** Q21. To what extent, if at all, do you agree or disagree that the planning policies in place in your Local Planning Authority (LPA) support organisations and inform decision-making regarding whether to demolish and redevelop or retrofit buildings? Base (unweighted): All respondents who work in Local Authority Planning (192). Answers may not sum to 100% due to rounding.

### Reasons LPAs created local policies

85. Respondents were most likely to say that the LPA created these policies because of net zero commitments (49%), an LPA climate emergency declaration (44%) or to protect heritage buildings and other buildings of local importance (42%). Other reasons included expanding on the NPPF (25%), aligning practices with other LPAs (5%), responding to public requests (5%), and managing demolition proposals (4%). These findings are illustrated in Figure 4.8.3 below, and the full breakdown of all reasons is provided in Annex Table D24.

**Figure 4.8.3 Reasons that LPAs created local policies about demolition and redevelopment or retrofit**



Source: Q22. For what reason(s), if any, did the Local Planning Authority (LPA) create planning policies about demolition and redevelopment / retrofit? Please select the three options you believe had the most significant impact on the creation of LPA planning policies in this area. Base (unweighted): All respondents who work in Local Authority Planning and have an opinion on whether planning policies in place in local LPA support organisations and inform decision-making (159). Answers may not sum to 100% due to multicoding.

## 4.9 Policy options

### Section summary

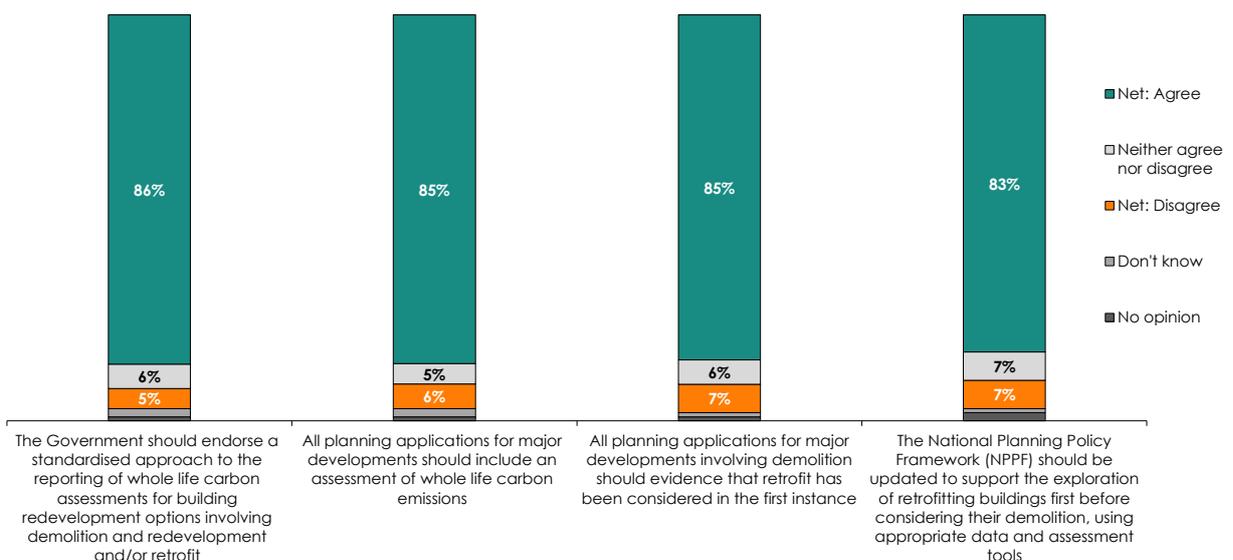
A large majority of respondents supported each of the proposed policy options, with levels of agreement ranging from 83% to 87% across all seven statements. Support was particularly strong for measures relating to whole-life carbon assessments, standardised national guidance, and requiring evidence that retrofit has been considered before demolition. Levels of disagreement were consistently low, with only a small minority of respondents opposing any of the options.

Respondents working for builders/developers and demolition organisations were less likely to agree with the potential policy options compared to those in other organisations.

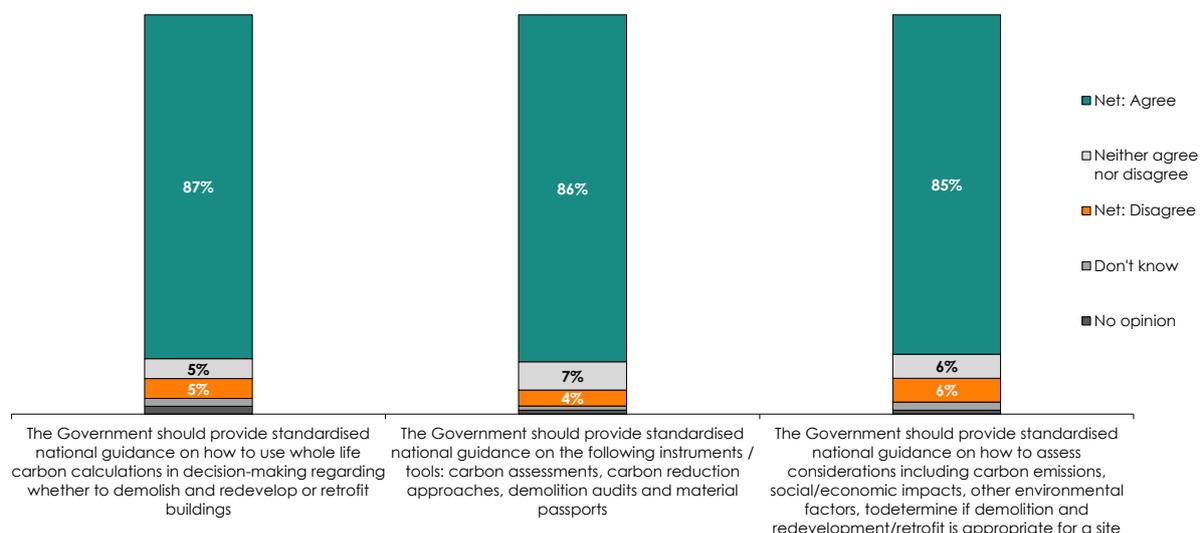
Respondents generally agreed with all the policy options. More than eight in ten agreed with each statement and only around one in twenty disagreed.

86. Stakeholder views on VAT treatment and planning incentives for retrofit, discussed earlier in the report, inform the policy options outlined below. The following section explores stakeholder agreement with the proposed policy options. These options were developed based on insights from qualitative interviews and tested in the survey to gauge levels of support. Full results are shown in Figures 4.9.1 and 4.9.2 below and detailed in Annex Table D26.

**Figure 4.9.1 Agreement with statements about potential policy options on potential changes to national planning policy and guidance regarding demolishing and redeveloping or retrofitting buildings**



**Figure 4.9.2 Agreement with statements about potential policy options on potential changes to national planning policy and guidance regarding demolishing and redeveloping or retrofitting buildings**



Q28. To what extent, if at all, do you agree or disagree with the following statements? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.

### Breakdown by subgroups

87. There was a high level of agreement among respondents across all the statements. However, relative to the average, LPAs and those working in engineering/surveying agreed more frequently and those working for demolition/developers/builders agreed less frequently.

88. For example, those working for engineering/surveying organisations were more likely to agree that all planning applications for major developments must include an assessment of whole life carbon emissions (87%) and that the Government should provide standardised national guidance on the following instruments/tools (90%).

89. Conversely, only 59% of those working for builders/developers and 41% of those working for demolition organisations agreed that planning applications for major applications should show evidence that retrofit has been considered in the first instance. Similarly, half of those working for builders/developers (49%) and just under two-fifths of those in demolition organisations (18%) agreed that the NPPF should be updated to support the exploration of retrofitting buildings first.

90. Respondents working for larger organisations were more likely to support the potential policy options, compared to those working in micro and small organisations. For example, 88% respondents within larger organisations agreed

that all planning applications for major developments should include an assessment of whole life carbon emissions, compared to 83% of those working in micro-organisations.

91. Across all the statements, those who were familiar with instruments/tools associated with the demolition and redevelopment or retrofit were more likely to agree than those that are unfamiliar. For example, for the statement that the Government should provide standardised national guidance on carbon assessments, carbon reduction approaches, demolition audits and material passports, 90% of respondents who were familiar with instruments/tools agreed with the statement, compared to 72% of those who were unfamiliar.

## 4.10 Summary of qualitative research findings

92. The qualitative stage for the current project involved 13 interviews with stakeholders (see Appendix E for detailed analysis and illustrative quotes).<sup>5</sup> Further detail on the qualitative analysis, including coded themes and illustrative quotes, is provided in Appendix E. The interviews and reporting for this stage took place in spring 2024 before updates to the NPPF in December 2024. Results from the qualitative research broadly verified the findings of the previous 2023 study, with clear emerging themes of i) a perceived need for government to clarify national planning policy around demolition and redevelopment or retrofit and ii) a need for standardised policy mechanisms and guidance for measuring and limiting embodied carbon to inform planning decisions.

### **Delivery and decision-making**

93.81. Financial viability and return-on-investment emerged as the dominant factors in the decisions of developers. Wider concerns such as net zero, heritage and community impacts did feature in decision-making, but were secondary to economic considerations. That said, it was noted that a focus on driving down costs often leads to poor quality outcomes, delays and issues in the delivery of projects.

94. Value for money was a key issue raised, and this often meant developers seeking the lowest possible cost during their decision-making. Such financial prioritisation could mean that the involvement of experts or conducting voluntary audits in the early stages of decision-making was not an option from a price point of view. Furthermore, the focus on cost was reported to often result in a preference for demolition and redevelopment over retrofit on domestic development projects due to a zero rate of VAT on demolition and redevelopment.

95. The decision to demolish and redevelop or retain and retrofit a building was often (though not always) made prior to the involvement of planners, engineers and other specialist consultants. It was acknowledged that the involvement of such stakeholders could contribute innovative ideas and options that had not been previously considered by developers and their architects.

96. Embodied carbon (and whole life carbon) emissions were rarely a factor in decision-making at present. Whilst there is a requirement in the December 2024 NPPF to consider climate change in decision-making and plan-making, there is no current requirement for carbon assessments to be carried out, nor financial impetus to do so. Furthermore, with wide variation in carbon calculation methodologies, there is a perceived lack of ability to make meaningful judgements and comparisons related to whole-life and embodied carbon.

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<sup>5</sup> These participants represented stakeholders from the following professions and groups: architects, planning officers, surveyors/engineers, housebuilders, developers, property owners, neighbourhood planning groups, town planners, and trade media. Stakeholders were selected by MHCLG and initially approached by a representative from their Design and Placemaking Team.

97. Pre-demolition audits were often not carried out on projects, or when they were they often occurred too late in the decision-making process to influence design decisions or may be carried out as part of a 'box-ticking exercise' towards an accreditation. There was, however, widespread agreement that such audits lead to better project outcomes, smoother project delivery, more reuse of materials and safer conditions for those working on site.
98. Waste management plans were more common, often as part of planning conditions on larger projects. However, the practice of waste minimisation was most commonly achieved through crushing and reusing construction materials in construction projects rather than through asset reuse.
99. Where neighbourhood and community groups were involved in the decision-making process, it was generally felt that these groups prioritised heritage and aesthetic concerns over environmental and net zero considerations. It was recognised that these concerns aligned in their preference for retrofit over demolition and redevelopment.
100. When considering the benefits and challenges associated with demolition and redevelopment, participants recognised that this option was often easier and provided more design freedom to developers than retrofit. Some participants noted, however, that the choice between retrofit and demolition and redevelopment is a false dichotomy as there are many instances where the final solution can fall somewhere between the two. Retrofit, however, was often suggested by participants to be 'the right choice' in the context of climate change and net zero, with multiple participants suggesting that they supported the concept of 'retrofit first, not retrofit only.'

### **Existing policy and potential changes**

101. Not all of those interviewed in the qualitative research were aware of relevant planning policy or guidance regarding demolition and redevelopment vs retrofit.
102. The NPPF was believed to be deliberately ambiguous in order to support flexibility at a local level. However, there was a broad consensus among participants that existing national planning policy needed to be clearer considering demolition and redevelopment vs retrofit.
103. Significant variation was noted between LPA approaches to both embodied carbon and requirements for developers to consider retrofit over demolition. This variation presents challenges for developers working across multiple planning authority jurisdictions and results in higher costs, more confusion and negative impacts on project viability.
104. The aims of conserving heritage and achieving net zero in decision-making related to the demolition and redevelopment or retrofit of buildings were seen to be in conflict. Participants called for clarity and guidance to help navigate these tensions and help determine their relative importance.

105. The desire for the introduction of a policy and clear guidance for embodied and whole life carbon was a clear emerging theme of the qualitative research. The research indicated a desire for government to introduce national policy and guidance that standardises the calculation of embodied and whole life carbon emissions, and to support this with associated limitations or requirements for developments to minimise emissions. Participants felt that this would still enable developers to demolish and redevelop in situations where this may be a better redevelopment option than retrofit. A current lack of standardisation and guidance at a national and local level is believed to undermine arguments for embodied and whole life carbon accounting in decision-making. The practicalities of the implementation of any policy were not clear cut from the perspective of stakeholders due to perceptions of resource shortages and a lack of relevant technical skills in relevant areas.
106. It was acknowledged by the qualitative respondents that the complexity of the current system, competing policy objectives (such as housebuilding, biodiversity and net zero targets) and the need to maintain development viability meant that policy changes would be difficult and require a considered and coordinated approach.

## 5 Conclusions

107. This research was commissioned to explore how national planning policy and guidance are understood and applied in decision making relating to demolition and retrofit. As such, the evidence base primarily reflects planning led perspectives, with relatively smaller representation from housing associations, residents' groups and local authority housing management functions. Decisions relating to large scale estates and social housing often involve additional considerations – including stock condition, resident preferences, financial viability, funding arrangements and delivery capacity – which are not fully captured within the scope of this study. Findings should therefore be interpreted as most directly relevant to planning policy contexts, rather than as a comprehensive account of estate regeneration or social housing asset management decision making.
108. This research gathered new evidence on the perspectives of a range of different respondents from those working in the area of demolition and redevelopment or retrofit.
109. Respondents reported that the key reasons for choosing to demolish and redevelop rather than retrofit were primarily related to profitability and financial viability, the relative ease of demolition, and (to a lesser extent) VAT relief for new builds. On the other hand, the key reasons for choosing to retrofit were related to the local appreciation of the building, the ability to retain and repurpose a building, and the desire to improve sustainability. Qualitative interviews reinforced these findings, highlighting that developers often prioritise cost and VAT advantages over sustainability, and that decisions are frequently made before planners or technical specialists are involved. Interviewees also noted that

while heritage and net zero considerations feature in decision-making, they are secondary to economic viability.

110. Evidence suggested that the decision on whether to demolish and redevelop or retrofit a building is typically made early, at the project feasibility stage and less likely to be made pre-application, though it can be made at any stage. Interviews confirmed this pattern, with participants reporting that early decisions often limit opportunities for planners and engineers to influence outcomes or introduce retrofit options.
111. Amongst respondents, there was a clear endorsement that retrofitting buildings has positive benefits for the environment and can conserve local heritage. However, there was a strong feeling that national planning policy does not provide a clear sense of direction to support decision-making about whether to demolish and redevelop or retrofit buildings. PDRs were also not considered to clearly support demolition and redevelopment over retrofit or vice versa. Qualitative evidence echoed this, describing the National Planning Policy Framework as deliberately flexible but insufficiently directive, creating inconsistency across local authorities and uncertainty for developers. Stakeholders called for clearer national guidance and consistency to reduce confusion and improve certainty.
112. When considering current national policy on demolition and redevelopment or retrofit, respondents had a clear view that harmonising VAT rates for retrofit with new builds would act as a strong incentive to support retrofit over demolition and redevelopment. Views on the NPPF were mixed, with a third viewing policy as neutral in the extent to which it encourages demolition and redevelopment or encourages retrofit, and a quarter indicating that they were unclear on the policy. However, three in ten felt that the NPPF encourages demolition compared to just one in ten thinking it encourages retrofit.
113. Additionally, this research found that the majority of respondents were familiar with the NPPF and PDRs. However, only a minority (under 20%) reported finding it easy to understand national legislation, policy, and guidance around the planning process regarding demolition and redevelopment or retrofit.
114. When looking at the use of instruments and tools by respondents, the majority of respondents indicated that they were generally familiar with carbon assessments and carbon reduction approaches and had experience using these instruments and tools. However, respondents were considerably less familiar with material passports and demolition audits, and they used them less frequently. Among respondents there was near universal consensus that the government should provide national guidance on carbon assessments, carbon reduction approaches, demolition audits, and material passports. Interviews added depth here, noting that embodied and whole life carbon are rarely considered in practice due to a lack of standardised methodologies and financial incentives. Participants expressed strong support for introducing national policy on carbon accounting and harmonising VAT rates to encourage retrofit.

115. Regarding the views of respondents towards local planning policies, opinions were mixed on whether LPA policies support organisations to make decisions concerning the demolition and redevelopment or retrofit of buildings. Here, a third of respondents (32%) agreed that local policies support decision-making on whether to demolish and redevelop or retrofit a building, but a similar proportion (27%) disagreed. Other respondents replied here that they were unsure of the policy of their LPA or that their LPA did not have a local policy.
116. Finally, with regards to the seven policy options on potential changes to national planning policy and guidance about demolishing and redeveloping or retrofitting buildings, there was widespread support for all the options, with between 80% and 90% of respondents supporting each. Qualitative insights confirm this appetite for change, while stressing the need for practical implementation support, addressing resource shortages within local authorities, and balancing competing objectives such as housing delivery, heritage conservation and net zero commitments.

# 6 Appendices

## 6.1 Appendix A – Full list of research questions for the qualitative research

1. What are stakeholders' roles in relation to decision making on demolition and retrofitting?
2. What processes and stakeholders are involved in decision making with regard to demolition or retrofitting?
3. What factors influence decision-making with regard to demolition or retrofitting?
  - a. Financial – e.g. return on investment, relative cost of each option
  - b. Regulatory and policy – e.g. local and national planning policy
  - c. Logistical – e.g. established processes, supplier networks, etc.
  - d. Psychological – e.g. established norms
  - e. Knowledge and Skills – e.g. retrofit experience
  - f. Environmental – e.g. carbon emissions, sustainability, heritage
4. Is national planning policy used to inform decision making around demolition and retrofit? How?
5. What are stakeholders view on national policies relating to demolition and retrofit.
6. How clear are current national policies and guidance relating to demolition/retrofit and how could they be improved?
  - a. Planning policy
  - b. Heritage/conservation
  - c. Retrofit/renovation
7. How clear are current local policies and guidance relating to demolition/retrofit?
  - a. Planning policy
  - b. Permitted development
  - c. Heritage/conservation
  - d. Retrofit/renovation
8. Are there useful local polices that can inform decision-making relating to demolition / retrofit that national policy could learn from?
9. What processes are involved in delivering demolition?

- a. Demolition audits
  - i. Costs/resource
  - ii. Logistics
  - iii. Drivers (e.g. certification, circular economy opportunities)
  - iv. Challenges
- b. Waste management
  - i. Costs/resource
  - ii. Logistics
  - iii. Drivers (including recycling/re-use targets)
  - iv. Challenges
- c. Challenges
- d. Benefits

10. What processes are involved in delivering retrofit?

- a. Materials and supply chain
- b. Compliance with Building Regulations, PAS2035/38, etc.
- c. Challenges
- d. Benefits

11. What gaps exist in national policy around demolition and retrofit?

12. What changes to policies and guidance could help stakeholders in their decision-making regarding demolition vs. retrofit?

13. What are stakeholders' opinions on potential policy options as presented to them?

- a. Consider APEASE – Acceptability, Practicability, Effectiveness, Affordability, Side-effects, Equity
- b. What improvements could be made to these options?

## 6.2 Appendix B – MHCLG Building Redevelopment in Planning Policy: Demolition and Retrofit Research Questionnaire V1.9

This appendix contains the complete wording of all survey questions used in the quantitative research. Full routing logic and scripting instructions are available on request.

### Definitions

- Demolition: Full or partial demolition of an existing building to redevelop and deliver a new building.
- Retrofit: Modifying the majority of an existing building's systems and/or structure after its initial construction. Includes reuse, retention, refurbish, repurpose, repairing, and refitting.

### Survey Questions

#### Section 1: Roles, Responsibilities and Decision-Making

1. What type of organisation do you work for or with?
2. Does your role influence decisions about whether to demolish or retrofit buildings?
3. What is your current occupation or role?
4. Approximately how many people are employed or volunteer at your organisation?
5. What region is your organisation based in?
6. What is the postcode of your organisation's main office?

#### Section 2: Challenges, Benefits, Decision Timing, Incentives, Policy and Guidance

7. What are the key reasons stakeholders choose to demolish and redevelop rather than retrofit?
8. What is the most important reason for choosing demolition and redevelopment?
9. What are the key reasons stakeholders choose to retrofit rather than demolish and redevelop?
10. What is the most important reason for choosing retrofit?
11. When is the decision typically made to demolish or retrofit a building?
12. To what extent do you agree or disagree with statements about demolition and retrofit (e.g., cost, bureaucracy, heritage, sustainability)?

13. In which circumstances do you think retrofit would be incentivised over demolition?
14. Are there any other circumstances that would incentivise retrofit?
15. Which national policies or guidance are you familiar with?
16. Which policies or guidance do you use in decision-making?
17. How easy or difficult is it to understand national policy/guidance for different types of developments?

### **Section 3: Incentivisation**

18. What is your view on whether the National Planning Policy Framework encourages demolition or retrofit?
19. What is your view on whether local planning policy encourages demolition or retrofit?

### **Section 4: National and Local Planning**

20. Do you agree that national planning policy supports effective decision-making?
21. Do local planning policies support decision-making in your area?
22. Why did your local authority create policies about demolition or retrofit?
23. How do Permitted Development Rights impact decision-making?

### **Section 5: Community Considerations**

24. Do you think national policy/guidance promotes retrofit for buildings meaningful to the local community?

### **Section 6: Instruments and Tools**

25. Are you familiar with tools like carbon assessments, demolition audits, materials passports?
26. Which of these tools does your organisation regularly use?
27. Should these tools be included in national planning guidance?

### **Section 7: Policy Options**

28. Do you agree with proposed changes to national planning policy (e.g., retrofit-first approach, carbon assessments)?
  29. Do you have any other suggestions for policy changes?
- Do you have any final comments about planning policy or guidance?

## 6.3 Appendix C – Sample list

Below is the list of known stakeholders, experts and businesses that the survey link was distributed to. Please note that this list may not be exhaustive as participants were able to redistribute the survey link to other groups that they felt may be interested in the research.

- Royal Institution of Chartered Surveyors (RICS)
- Royal Institute of British Architects (RIBA)
- Royal Town Planning Institute (RTPI)
- Home Builders Federation
- National Federation of Demolition Contractors (NFDC)
- Federation of Master Builders
- Future Homes Hub
- British Property Federation (BPF)
- Institute of Structural Engineers (IStructE)
- Locality
- Institute of Civil Engineers (ICE)
- Institute of Demolition Engineers (IDE)
- Chartered Institution of Building Services Engineers (CIBSE)
- Civic Voice
- Architects' Journal
- Homes England
- Arup
- Deloitte
- UK Energy Research Centre
- Savills
- Construction Industry Council (CIC)
- Local Planning Authorities from across the country
- Historic England

## 6.4. Appendix D – Data tables

**Annex Table D1: Organisation worked for (data for Figure 4.1.1)**

Organisation worked for	Count	% of total
Local Planning Authority	192	19%
Architecture practice	188	19%
Civic society or community organisation (e.g., a voluntary body or society which aims to represent the needs of a local community)	109	11%
Planning consultancy	65	7%
Structural engineering firm	54	5%
Commercial property developer	41	4%
Environmental consultancy	36	4%
Professional body (e.g., RTPI, RIBA, RICS)	35	4%
University or other academic / research institution	30	3%
Interest group with active focus / interest in demolition/retrofit	25	3%
Neighbourhood planning group (e.g., a parish or town council, or a neighbourhood forum (in an unparished area), that chooses to produce a neighbourhood development plan or order)	21	2%
Housebuilder / housing developer	20	2%
Residents' association (e.g., a group of residents who come together to represent the shared interests of those who live in a local area or community)	17	2%
Housing association / registered provider of social housing	15	2%
Demolition / deconstruction contractor firm	14	1%
Civil engineering firm	9	1%
Quantity surveyor firm	7	1%
Demolition engineering / consultant firm	3	-%
Other organisation involved / engaged in demolition / retrofit projects	107	11%

**Source:** Q1. Which of the following types of organisations do you currently either work for (for example, as an employee) or work with (for example, in a volunteer capacity)? Please select one answer only. If you work for or with more than one organisation, please select the one you spend the most time working for or with. Results are based on all 988 respondents, without adjustments to make them representative.

**Annex Table D2: Current occupation / role of respondent (data for Figure 4.1.2)**

<b>Current occupation</b>	<b>Count</b>	<b>% of total</b>
Architect	197	20%
Planner – local government / public sector	140	14%
Employee or volunteer at a civic society or community organisation	98	10%
Engineer – structural / environmental / civil	85	9%
Planning consultant	77	8%
Environmental consultant	39	4%
Property developer – private / commercial	38	4%
Project manager in the building industry	30	3%
Employee of a university or other academic / research institution	24	2%
Demolition contractor / engineer / consultant / specialist	20	2%
Managing director	17	2%
Elected representative with a council, governmental or other official body	16	2%
Employee or volunteer with a neighbourhood planning group	14	1%
Employee of a professional body	10	1%
Commercial director	7	1%
Employee of a housing association	6	1%
Building contractor	3	<1%
Quantity surveyor	2	<1%
Tradesperson	1	<1%
Other	153	15%
None of the above	11	1%

**Source:** Q3. Which of the following best describes your current occupation / role? Please select one answer only. If your role encompasses multiple aspects, then please select the role you spend the most time doing. Please note that this could involve a professional capacity, role in the voluntary sector or a role as an elected official. Results are based on all 988 respondents, without adjustments to make them representative. Percentages may not sum to 100% due to rounding.

### Annex Table D3: Regional dispersion of respondents

Region	Count	% of total
Greater London	434	44%
South East	116	12%
South West	88	9%
North West	76	8%
East of England	63	6%
Yorkshire and the Humber	59	6%
West Midlands	55	6%
East Midlands	37	4%
North East	25	3%
Don't know	11	1%
Prefer not to say	24	2%

**Source:** Q5. Thinking again about the organisation you mainly work for or with, even if you predominately work at home, please select the region in which the main office used by this organisation is situated? Results are based on all 988 respondents, without adjustments to make them representative. Percentages may not sum to 100% due to rounding.

### Annex Table D4: Size of organisation

Organisation size	Count	% of total
Sole trader	67	7%
1 - 9 employees	149	15%
10 - 24 employees	117	12%
25 - 49 employees	79	8%
50 - 249 employees	167	17%
250 employees+	364	37%
Don't know	30	3%
Prefer not to say	15	2%

**Source:** Q4. Approximately how many people are employed / volunteer at the organisation or body you work for or support? Results are based on all 988 respondents, without adjustments to make them representative. Percentages may not sum to 100% due to rounding.

**Annex Table D5: Whether role informs or influences the process or decision-making around whether to demolish and redevelop or retrofit buildings**

<b>Role in decision-making</b>	<b>Count</b>	<b>% of total</b>
Yes – I work in building development / construction	403	41%
Yes – I help develop evidence for planning applications or plan-making	371	38%
Yes – My role means I am involved / engaged in another way	328	33%
Yes – My role means that I am consulted on planning decisions	267	27%
Yes – I am involved in making planning decisions	228	23%

**Source:** Q2. Thinking about your current work or role with this organisation, does your role inform or influence the process or decision-making regarding whether to demolish and redevelop or retrofit buildings? Results are based on all 988 respondents, without adjustments to make them representative. Percentages may not sum to 100% due to multicoding.

**Annex Table D6a: Grouping of organisation types for subgroup analysis**

Explains how Q1 responses were mapped into the broader analysis groups.

<b>Original Organisation Type (Q1 response)</b>	<b>Organisation group used in analysis</b>
Local Planning Authority	Local Planning Authority (LPA)
Architecture practice; Planning consultancy, Environmental consultancy; University or academic / research institution; Professional body (e.g., RTPI, RIBA, RICS)	Consultancy / Professional / Academic
Commercial property developer; Housebuilder / housing developer	Builder / Developer
Structural engineering firm; Civil engineering firm; Quantity surveyor firm	Engineering / Surveying
Demolition / deconstruction contractor firm; Demolition engineering / consultant firm	Demolition
Civic society or community organisation; Residents' association; Neighbourhood planning group	Community bodies
Interest group with active focus / interest in demolition/retrofit	Community bodies (or "Other", see D6 "Interest group" row)
Other organisation involved / engaged in demolition / retrofit projects	Other

**Source:** Derived from Q1. Which of the following types of organisations do you currently either work for (for example, as an employee) or work with (for example, in a volunteer capacity)? Grouping applied for the purposes of subgroup analysis. Base: all respondents (988)

## Annex Table D6b: Number of respondents by organisation group

Shows the actual bases used for subgroup analysis.

Organisation group	Number of respondents
Local Planning Authority (LPA)	192
Consultancy / Professional / Academic	354
Builder / Developer	61
Engineering / Surveying	70
Demolition	17
Community bodies	187
Other	107
Total	988

**Source:** Q1. Which of the following types of organisations do you currently either work for (for example, as an employee) or work with (for example, in a volunteer capacity)? Please select one answer only. If you work for or with more than one organisation, please select the one you spend the most time working for or with. Results are based on all 988 respondents, without adjustments to make them representative.

**Annex Table D7: Agreement with statements about the demolition and redevelopment or retrofit of buildings (data for Figure 4.2)**

<b>Agreement with statements</b>	<b>% Agree</b>	<b>% Neither/ nor</b>	<b>% Disagree</b>	<b>% Don't know</b>	<b>% No opinion</b>
Retrofitting existing buildings has positive benefits for the environment and reduces whole life carbon emissions	85%	10%	3%	2%	1%
The preservation of local heritage is a key reason for choosing to retrofit a building rather than demolishing and redeveloping	84%	11%	4%	1%	1%
Retrofit projects require greater levels of skill and expertise than demolition and redeveloping	73%	15%	9%	2%	2%
As an organisation we examine the option to retrofit, as well as demolish and redevelop for all sites	67%	13%	9%	3%	8%
It is possible to retain key heritage features of a building whilst demolishing and redeveloping a significant part of the structure	55%	17%	25%	2%	1%
There is too much bureaucracy involved in retrofitting buildings	35%	30%	26%	6%	2%
It is more cost effective to demolish and redevelop than retrofit a building	33%	35%	26%	5%	2%
Demolishing old structures means they can be replaced with better designed buildings / developments	27%	30%	41%	1%	1%
Changing the use of a building / structure makes retrofitting difficult	26%	30%	40%	3%	2%
As an organisation we have a preference for demolishing and redeveloping over retrofitting buildings	10%	20%	61%	3%	5%

**Source:** Q12. *To what extent, if at all, do you agree or disagree with the following statements? Results are based on all 988 respondents, without adjustments to make them representative. Percentages may not sum to 100% due to rounding.*

**Annex Table D8: Key reasons to demolish and redevelop over retrofitting (data for Figure 4.3.1)**

<b>Reasons for demolishing and redeveloping</b>	<b>% of total</b>
Profitability / financial viability	67%
Easier to demolish and redevelop than retrofit	66%
VAT is not applied for demolition and redevelopment projects	49%
Enables greater density and capacity of buildings	48%
Existing building is not appreciated or valued in the local area	40%
Lower level of technical skill required to demolish and redevelop a building	40%
Speed / efficiency	36%
Lack of technical information to assess other redevelopment options	33%
Creates the opportunity for a new building	29%
Improves sustainability (e.g., improve energy performance)	27%
Enables sites to be cleared for future sale	26%
Customers prefer new builds to retrofitted buildings	24%
Enables improvement of provisions (e.g., parking / access)	23%
Reduces / avoids bureaucracy	16%
Minimises public hazard (e.g., asbestos removal, structural uncertainty)	16%
Other	13%
None of the above	-%
Don't know	2%

**Source:** Q7. Which of the following, if any, do you think are key reasons why stakeholders involved in decision-making about planning and building redevelopment, choose to demolish and redevelop, rather than retrofit buildings? Results are based on all 988 respondents, without adjustments to make them representative. Totals may exceed 100% because respondents could choose more than one answer.

**Annex Table D9: Most important reason to demolish and redevelop over retrofitting (data for Figure 4.3.2)**

<b>Most important reason for demolishing and redeveloping</b>	<b>% of total</b>
Profitability / financial viability	30%
Easier to demolish and redevelop than retrofit	14%
VAT is not applied for demolition and redevelopment projects	13%
Enables greater density and capacity of buildings	12%
Lack of technical information to assess other redevelopment options	5%
Improves sustainability (e.g., improve energy performance)	3%
Existing building is not appreciated or valued in the local area	2%
Lower level of technical skill required to demolish and redevelop a building	2%
Creates the opportunity for a new building	2%
Customers prefer new builds to retrofitted buildings	2%
Enables improvement of provisions (e.g., parking / access)	2%
Speed / efficiency	1%
Enables sites to be cleared for future sale	1%
Minimises public hazard (e.g., asbestos removal, structural uncertainty)	1%
Other	5%
None of the above	1%
Don't know	2%

**Source:** Q8 - Which of the following do you think is the most important reason why stakeholders involved in decision-making about planning and building redevelopment, choose to demolish and redevelop, rather than retrofit buildings? Base: All respondents (988).

**Annex Table D10: Key reasons to retrofit over demolishing and redeveloping  
(data for Figure 4.3.3)**

<b>Reasons for retrofitting</b>	<b>% of total</b>
Local appreciation for an existing building	70%
Enables the retention and repurposing of an existing building	69%
Improves sustainability (e.g., protect embodied carbon)	64%
Speed / efficiency	19%
Customers prefer retrofitted buildings to new builds	19%
Profitability / financial viability	18%
Financial subsidies for retrofit projects	16%
Easier to retrofit than demolish and redevelop	15%
Retaining buildings enables future sale	15%
Reduces / avoids bureaucracy	15%
Minimises public hazards (e.g., asbestos removal, structural uncertainty)	5%
Enables greater density and capacity of buildings	5%
Enables improvement of provisions (e.g., parking / access)	4%
Lower level of technical skill required to retrofit a building	3%
Lack of technical information to assess other redevelopment options	3%
Other	12%
None of the above	2%
Don't know	2%

**Source:** Q9. Which of the following, if any, do you think are key reasons why stakeholders involved in decision-making about planning and building redevelopment, choose to retrofit, rather than demolish and redevelop buildings? Results are based on all 988 respondents, without adjustments to make them representative. Totals may exceed 100% because respondents could choose more than one answer.

**Annex Table D11: Most important reason to retrofit over demolishing and redeveloping (data for Figure 4.3.4)**

<b>Most important reason for retrofitting</b>	<b>% of total</b>
Improves sustainability (e.g., protect embodied carbon)	24%
Enables the retention and repurposing of an existing building	21%
Local appreciation for an existing building	19%
Profitability / financial viability	8%
Speed / efficiency	4%
Financial subsidies for retrofit projects	2%
Easier to retrofit than demolish and redevelop	2%
Reduces / avoids bureaucracy	2%
Lack of technical information to assess other redevelopment options	1%
Lower level of technical skill required to retrofit a building	1%
Retaining buildings enables future sale	1%
Customers prefer retrofitted buildings to new builds	1%
Minimises public hazards (e.g., asbestos removal, structural uncertainty)	0%
Enables greater density and capacity of buildings	0%
Other	7%
None of the above	3%
Don't know	4%

**Source:** Q10 – Which of the following do you think is the most important reason why stakeholders involved in decision-making about planning and building redevelopment, choose to retrofit, rather than demolish and redevelop buildings? Base: All respondents (988).

**Annex Table D12: Familiarity with national legislation, policy and guidance (data for Figure 4.4.1)**

Items familiar with	% of total
National Planning Policy Framework (NPPF)	87%
Permitted Development Rights (PDR)	74%
Net Zero Strategy 2021	55%
National Planning Practice Guidance (this includes the National Design Guide (NDG) & the National Model Design Code (NMDC))	50%
National Planning Policy for Waste (NPPW)	14%
Industrial Decarbonisation Strategy 2021	14%
None of the above	5%
Don't know	2%

**Source:** Q15. Which of the following national legislation, policy, guidance, or strategies, if any, are you familiar with? Results are based on all 988 respondents, without adjustments to make them representative. Totals may exceed 100% because respondents could choose more than one answer.

**Annex Table D13: Use of national legislation, policy and guidance (data for Figure 4.4.1)**

Items use	% of total
National Planning Policy Framework (NPPF)	65%
Permitted Development Rights (PDR)	38%
National Planning Practice Guidance (this includes the National Design Guide (NDG) & the National Model Design Code (NMDC))	33%
Net Zero Strategy 2021	27%
Industrial Decarbonisation Strategy 2021	6%
National Planning Policy for Waste (NPPW)	6%
Other	10%
None of the above	6%
Not relevant for my role	18%
Don't know	3%

**Source:** Q16. Which of the following national legislation, policy, guidance, or strategies, if any, do you use / refer to when informing or influencing decision-making regarding whether to demolish and redevelop or retrofit buildings? Results are based on all 988 respondents, without adjustments to make them representative. Totals may exceed 100% because respondents could choose more than one answer.

**Annex Table D14: Ease of understanding national legislation, policy and guidance for particular development types (data for Figure 4.5.1)**

Ease of understanding legislation/policy/guidance	% easy / very easy	% Neither easy nor difficult	% difficult / very difficult	% It varies case by case	% Don't know	% No opinion
An individual home	21%	21%	28%	12%	10%	7%
Culturally significant buildings	19%	16%	35%	15%	10%	6%
Minor / small-scale residential developments	18%	21%	31%	12%	11%	7%
Major / large-scale residential developments	12%	20%	34%	15%	12%	7%
Commercial / industrial developments	12%	21%	32%	14%	13%	8%
Community / leisure developments	10%	22%	29%	13%	16%	10%

**Source:** Q17. From your experience, how easy or difficult is it to understand national legislation, policy, and / or guidance around the planning process for demolishing and redeveloping and / or retrofitting buildings in the following cases? Please consider things like the National Planning Policy Framework (NPPF), National Planning Policy for Waste (NPPW), National Planning Practice Guidance (including the National Design Guide (NDG) & the National Model Design Code (NMDC)), Permitted Development Rights, prior approval and planning permission. Base (unweighted): All respondents not working for / with Neighbourhood Planning groups, Civic Societies or Residents' Associations (841). Answers may not sum to 100% due to rounding.

**Annex Table D15: Familiarity with instruments and tools (data for Figure 4.5.2)**

Instruments and tools	% Yes, I am familiar with this and I know a lot about it	% Yes, I am familiar with this and I know a little about it	% Yes, but I have only heard the name	% No, I have never heard of this	% Don't know
Carbon assessment	27%	47%	20%	3%	4%
Carbon reduction approaches	26%	43%	19%	7%	5%
Demolition audits	12%	29%	27%	27%	5%
Material passports	10%	34%	25%	27%	4%

**Source:** Q25. To what extent, if at all, are you familiar with the following instruments and tools to aid and inform decision-making regarding whether to demolish and redevelop or retrofit buildings? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.

**Annex Table D16: Use of instruments and tools (data for Figure 4.5.3)**

Instruments or tools	% of total
Carbon assessment	43%
Carbon reduction approaches	39%
Demolition audit	23%
Materials passports	12%
Something else	6%
None of these	19%
Not relevant for my organisation / role	22%
Don't know	5%

**Source:** Q26 - Use instruments - Which of the following instruments and tools, if any, does your organisation regularly use to help inform decision-making regarding whether to demolish and redevelop or retrofit buildings? Base (unweighted): All respondents who have heard of any instruments / tools to aid and inform decision-making (937). Answers may not sum to 100% due to multicoding.

**Annex Table D17: Inclusion of instruments and tools in national planning practice guidance (data for Figure 4.5.4)**

Instruments and tools	% Included	% Not included	% Don't know
Carbon assessment	93%	4%	2%
Carbon reduction approaches	93%	2%	4%
Demolition audits	90%	5%	6%
Material passports	84%	9%	7%

**Source:** Q27. Which of the following instruments and tools, if any, do you think should be included in national planning practice guidance to help inform decision-making regarding whether to demolish and redevelop or retrofit buildings? Base (unweighted): All respondents who have used any instruments / tools to aid and inform decision-making (Carbon assessment 403; Carbon reduction approaches 369; Demolition audit 217; Material passport 117). Answers may not sum to 100% due to rounding.

**Annex Table D18: Timing of decisions to demolish and redevelop or retrofit buildings (data for Figure 4.6.1)**

<b>Decision timing</b>	<b>% of total</b>
At project feasibility stage, when viability assessments and building surveys are undertaken	30%
At site due diligence stage, before purchasing or leasing a building	28%
At project creation stage, when the project requirements, business case and budget are established	24%
At pre-application stage, when the project proposal is discussed with the Local Planning Authority	5%
Other	3%
Don't know	10%

**Source:** Q11. *In your experience, when is the decision typically made to demolish and redevelop or retrofit a building? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.*

**Annex Table D19: Agreement with statements about the NPPF (data for Figure 4.7.1)**

<b>Statements about the NPPF</b>	<b>% Response</b>
Current policy encourages demolition and redevelopment over retrofit	29%
Current policy encourages retrofit over demolition and redevelopment	10%
Current policy is neutral towards demolition and redevelopment or retrofitting buildings	33%
I am unclear on what the current policy is	24%
Prefer not to say	4%

**Source:** Q18. When considering the National Planning Policy Framework (NPPF) as a whole, which of the following statements would you agree with most? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.

**Annex Table D20: Agreement with statements about local planning policy (data for Figure 4.7.2)**

<b>Statements about local planning policy</b>	<b>% Response</b>
Current policy encourages demolition and redevelopment over retrofit	21%
Current policy encourages retrofit over demolition and redevelopment	26%
Current policy is neutral towards demolition and redevelopment or retrofitting buildings	31%
I am unclear on what the current policy is	18%
Prefer not to say	4%

**Source:** Q19. When considering the local planning policy / policies for an area in which you operate frequently (i.e., your local authority area), which of the following statements would you agree with? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.

**Annex Table D21: Extent to which retrofit would be incentivised over demolition and redevelopment in the listed circumstances (data for Figure 4.7.3)**

<b>Agreement with statements</b>	<b>% Agree</b>	<b>% Neither/nor</b>	<b>% Disagree</b>	<b>% Don't know</b>	<b>% No opinion</b>
If VAT rates for retrofit were harmonised with new builds	83%	8%	2%	5%	2%
If retrofit applications had a presumption of approval	76%	14%	6%	2%	1%
If planning consents were processed quicker for retrofit projects compared to new builds	73%	15%	10%	2%	1%
If new build applications had higher planning fees than retrofit applications	60%	19%	17%	2%	2%

**Source:** Q13. *To what extent, if any, do you think retrofit would be incentivised / favoured over demolition and redevelopment in the following circumstances? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.*

**Annex Table D22: Agreement with statements about decision-making for projects which involve demolishing and redeveloping and / or retrofitting buildings (data for Figure 4.8.1)**

<b>Agreement with statements</b>	<b>% Agree</b>	<b>% Neither/nor</b>	<b>% Disagree</b>	<b>% Don't know</b>	<b>% No opinion</b>
National planning policy clearly indicates how and why decisions should be taken by local planning authorities regarding demolition and redevelopment	16%	23%	42%	14%	5%
National planning policy clearly indicates what actions developers can and cannot take regarding demolition and redevelopment	13%	24%	44%	14%	5%
National planning policy clearly supports effective decision-making to determine whether to demolish and redevelop or retrofit buildings	10%	23%	50%	12%	4%
National planning policy should be updated to encourage decisions that prioritise a “retrofit first” approach to redeveloping buildings	10%	19%	56%	11%	3%

**Source:** Q20. *Thinking about decision-making for projects which involve demolishing and redeveloping and / or retrofitting buildings, to what extent, if at all, do you agree or disagree with the following statements? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.*

**Annex Table D23: Agreement about whether local planning policies support organisations and inform decision-making about whether to demolish and redevelop or retrofit buildings (data for Figure 4.8.2)**

Agreement	% response
Strongly agree	5%
Agree	28%
Neither agree nor disagree	23%
Disagree	24%
Strongly disagree	3%
My local planning authority does not have policies of this kind	9%
Don't know	5%
No opinion	3%

**Source:** Q21. *To what extent, if at all, do you agree or disagree that the planning policies in place in your Local Planning Authority (LPA) support organisations and inform decision-making regarding whether to demolish and redevelop or retrofit buildings? Base (unweighted): All respondents who work in Local Authority Planning (192). Answers may not sum to 100% due to rounding.*

**Annex Table D24: Reasons that LPAs created local planning policies about demolition and redevelopment or retrofit (data for Figure 4.8.3)**

Statements	% response
LPA net zero commitments	49%
LPA climate emergency declaration	44%
To protect heritage buildings and other buildings of local importance	42%
To expand on the National Planning Policy Framework (NPPF)	25%
To align building redevelopment practices with other LPAs	5%
Other input such as public request	5%
To manage the volume of demolition proposals	4%
Other	10%
None	6%
Don't know	13%

**Source:** Q22. *For what reason(s), if any, did the Local Planning Authority (LPA) create planning policies about demolition and redevelopment / retrofit? Please select the three options you believe had the most significant impact on the creation of LPA planning policies in this area. Base (unweighted): All respondents who work in Local Authority Planning and have an opinion on whether planning policies in place in local LPA support organisations and inform decision-making (159). Answers may not sum to 100% due to multicoding.*

**Annex Table D25: Agreement with statements about demolishing and redeveloping or retrofitting buildings meaningful to the local community**

<b>Statements</b>	<b>% response</b>
National planning policy promotes retrofit in this instance	4%
National planning practice guidance promotes retrofit in this instance	6%
Both national planning policy and guidance promote retrofit	10%
Neither national planning policy nor guidance promote retrofit	35%
Varies on a case-by-case basis	27%
Don't know	15%
No opinion	4%

**Source:** Q24. *When thinking about demolishing and redeveloping or retrofitting buildings meaningful to the local community, which of the following statements do you agree with? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.*

**Annex Table D26: Agreement with statements about potential policy options on potential changes to national planning policy and guidance regarding demolishing and redeveloping or retrofitting buildings (data for Figure 4.9.1 and Figure 4.9.2)**

Statements	% Agree	% Neither/nor	% Disagree	% Don't know	% No opinion
The Government should provide standardised national guidance on how to use whole life carbon calculations in decision-making regarding whether to demolish and redevelop or retrofit buildings	87%	5%	5%	2%	2%
The Government should endorse a standardised approach to the reporting of whole life carbon assessments for building redevelopment options involving demolition and redevelopment and/or retrofit	86%	6%	5%	2%	1%
The Government should provide standardised national guidance on the following instruments / tools: carbon assessments, carbon reduction approaches, demolition audits and material passports	86%	7%	4%	1%	1%
All planning applications for major developments must include an assessment of whole life carbon emissions	85%	5%	6%	2%	1%
All planning applications for major developments involving demolition must evidence that retrofit has been considered in the first instance	85%	6%	7%	1%	1%
The Government should provide standardised national guidance on how to assess and weigh up considerations including carbon emissions, social and economic impacts and other environmental factors, to determine if demolition and redevelopment or retrofit is most appropriate for a site	85%	6%	6%	2%	1%
The National Planning Policy Framework (NPPF) should support the exploration of retrofitting buildings first before considering their demolition, using appropriate data and assessment tools	83%	7%	7%	1%	2%

**Source:** Q28. To what extent, if at all, do you agree or disagree with the following statements? Results are based on all 988 respondents, without adjustments to make them representative. Answers may not sum to 100% due to rounding.

## 6.5. Appendix E – Qualitative analysis of Responses Q14, Q29 and Q30

### Methodology for qualitative survey questions

Responses to the three qualitative questions included in the survey (Q14, Q29 and Q30; full questions outlined in Appendix B) were first anonymised by Verian. Each question had a different number of qualitative responses (Q14, n=607; Q29, n=372; Q30, n=242). Following anonymisation, three individuals from MHCLG each analysed one of the three questions. Each individual carried out an inductive thematic content analysis, taking an exploratory, bottom-up approach, to identify the main themes that emerged from the qualitative responses to each of the three questions (Q14, Annex Table 30; Q29, Annex Table 31; Q30, Annex Table 32; Appendix G). The qualitative responses were coded manually and the themes identified for each question were then checked for consistency by the three individuals. Representative quotations have been used in the research findings section to illustrate the themes.

**Annex Table E1: Themes associated with qualitative responses Q14 in the survey**

Theme	Description	Illustrative Quote	% of respondents	Number of respondents
Community engagement	Wider community awareness or engagement can be used to incentivise retrofit	<i>"As the public becomes more aware of the environmental cost of making concrete/cement and steel it will pressure the industry to conserve and reuse these elements"</i>	15%	91
Upskilling	Upskilling of those working in construction and planning could drive retrofit	<i>"More skilled workers, more and better trained planner"</i>	11%	65
Financial incentives	Financial incentives, such as VAT harmonisation, could incentivise retrofit	<i>"We retrofit most buildings rather than develop based on a client's appraisal and their timeline to gain ROI. If there were further financial benefits to retrofit buildings, this would make Client appraisals for retrofit more difficult to ignore (Rather than demo and redevelop)"</i>	28%	172
Policy that deters demolition	Retrofit could be incentivised by deterring demolition and redevelopment	<i>"Creation of a presumption against demolition within the NPPF. This would recognise the value of embodied resources, carbon and energy in all existing buildings..."</i>	15%	89
Changes to planning system	Changes to planning policy could incentivise retrofit	<i>"Stronger planning policies in favour of retention and retrofit."</i>	44%	267
Disagree that retrofit should be incentivised	Attempting to incentivise retrofit over demolition may have negative consequences.	<i>"It would be wrong in my view to incentivise retrofit over demolition and redevelopment. It is too simplistic to consider the issue in respect of any one individual building."</i>	2%	14
Retrofit first	Retrofit should be default	<i>"Retrofit must always be considered first before demolition and redevelopment. Demolition and redevelopment are a last resort."</i>	5%	28
Changes to building regulations	Incentivising retrofit should be addressed through changes to building regulations.	<i>"A loosening of regulations for retrofit to accommodate existing structures and buildings would incentivise retrofit more. A lot of the issues around retrofit are the standards that can be achieved for fire ratings and insulation"</i>	8%	49
Other	Responses that raised points outside of the identified themes.	N/A	21%	129

**Source:** Q14. Are there any other circumstances in which you think retrofit would be incentivised/favoured over demolition and redevelopment? Results are based on all 988 respondents, without adjustments to make them representative., Total coded responses: 607.

**Annex Table E2: Themes associated with qualitative responses Q29 in the survey**

Theme	Description	Illustrative Quote	Percentage of respondents	Number of respondents
Heritage reform	Responses that call for reform to "heritage" in planning	<i>"Potentially a greater emphasis on 'heritage' buildings in consideration of planning applications involving major change or retrofit"</i>	8%	29
Assessments/targets for carbon emissions	More weight given to carbon assessments including WLCA	<i>"All of the proposals to require Whole life carbon Assessments as part of the planning process should apply to all demolitions and rebuild proposals, including minor development from one building upwards."</i>	16%	58
Local/community decisions	Increasing weight of local decisions when considering applications	<i>"Local organisations should be consulted more at the Pre-planning application stage. The actual planning application should detail why local opinion is being ignored when a significant building is demolished."</i>	4%	14
Care should be taken in changing policy	Attempting to incentivise retrofit over demolition and redevelopment may have negative consequences.	<i>"There is a real danger in standardising the approach. Each situation is different and if you are too specific then all that will happen in that retrofit/redevelopment will be slowed down and interest groups given a greater role in disrupting and delaying the process."</i>	9%	33
Retrofit first	Retrofit should be default	<i>"I think it is retrofit first but not retrofit always. Some buildings have got the end of their life span. But guidance on how best to deconstruct and recycle the building is currently lacking."</i>	9%	33
Burdensome process	Current planning process is burdensome.	<i>"The overriding intention should be to simplify national policies and guidance. This should include setting mandatory assessment practices to avoid a proliferation of standards at the local authority level, which are often subject to lengthy debate/delay at the application stage."</i>	8%	31
PDR reform	Responses calling for reform to PDRs.	<i>"Change of use PDR are used as a fallback position to justify demolition and rebuilding in unsustainable locations (e.g. open countryside)"</i>	6%	23
Financial incentives	Responses calling for financial retrofit incentives.	<i>"Key thing is money more often than not. VAT rules need to incentivise retrofit over new rather than the other way around as at present because financial viability rules all in most cases. Planning guidance should heavily favour retrofit/change of use also so that the retrofit is commercially the better option."</i>	11%	42
Sustainability/reuse of materials	Greater emphasis on reuse or sustainability of materials in construction.	<i>"There is nothing about reclamation and reuse apart from footnotes which chain to EU legislation. Reclamation and reuse targets should be recommended, or perhaps enforced"</i>	12%	44
Case-by-case basis	Decisions to retrofit or demolish and redevelop should be made on a case-by-case basis.	<i>"Avoid 'one approach fits all' policy proposals. Oversimplification will often just cause more problems than they solve."</i>	15%	54
Reform planning policy/guidance	Retrofit should be incentivised by changing planning policy or guidance.	<i>"Putting policies in places to ensure retrofitting is considered before demolition would help LPAs make better decisions. Removing PDR rights for demolition for locally listed"</i>	13%	50

Theme	Description	Illustrative Quote	Percentage of respondents	Number of respondents
		<i>buildings would also be significant and providing technical guidance for officers and applicants to understand how historic buildings can be retrofitted would also be beneficial</i>		
Improve clarity and/or enforcement	Existing policy and/or guidance should be made clearer or should be better enforced.	<i>"Local authorities are already doing a lot of good work in this area; the problem is the lack of consistency between authorities which makes it difficult for developers and how far do you go when considering alternative schemes for a site to allow retrofit. Consistency at a national level would help."</i>	14%	53
Other	Responses that raised points outside of the identified themes.	N/A	27%	102

**Source:** Q29. Do you have any other thoughts or suggestions about potential changes to national planning policy and/or guidance regarding demolition and redevelopment or retrofit that you would like us to pass on in confidence to MHCLG? Results are based on all 988 respondents, without adjustments to make them representative., Total coded responses: 372.

**Annex Table E3: Themes associated with qualitative responses Q30 in the survey**

Theme	Description	Illustrative Quote	Percentage of respondents	Number of respondents
Financial incentives	Financial incentives, including VAT harmonisation, to incentivise retrofit over demolition and redevelopment	<i>"As long as VAT is in favour of new build, demolition will continue to be the norm. [...]"</i>	16%	39
Retrofit first	Retrofit should be default	<i>"Suggested presumption in favour of retention and retrofit of all existing buildings, unless there is strong and convincing evidence that repair, retrofitting and retention is not structurally viable."</i>	12%	30
Planning policy/guidance	Support for additional and/or improved national policy and guidance	<i>"A standardised approach should be encouraged to ensure all development is held to the same standard consistently across the Country, providing this is ambitious enough to meet local net zero carbon targets and nuanced enough to make decisions based on local context, and on a case by case basis."</i>	31%	75
Speed up planning for retrofit	Faster approvals/processes for retrofit	<i>"Speeding up the current process would help immeasurably. It takes too long for developers/clients to understand whether they have a real project or not and the investment required means investigating the most viable option is often the only route they can fund."</i>	3%	7
Case-by-case basis	Decisions should be made on a case-by-case basis	<i>"There is merit in keeping and retrofitting some buildings of merit, but often the removal of existing building does no harm and facilitated good development."</i>	9%	21
PDR issues	Permitted Development Rights should be amended	<i>"It is important that PDR is reviewed at the same time as new planning legislation to identify an avoid any unintended consequences and to ensure they don't work against each other."</i>	3%	6
Building regulations	Issue best addressed in Building Regulations	<i>"Ideally ambitious embodied carbon requirements for new buildings should form part of the building regulations regime, and these need to be fully aligned with net zero by 2040 at the latest and not diluted by industry interests."</i>	10%	25
Carbon accounting	More weight given to carbon assessments including WLCA	<i>"Assessments (e.g. of embodied carbon) at early design stages should be verified by a requirement to report actual values at the Practical Completion stage, with scope for penalties for missing targets."</i>	10%	25
Heritage	Responses that call for reform to "heritage" in planning	<i>"There needs to be a more consistent approach to decisions relating to heritage assets. There is a huge inconsistency in approach, and we are often left at the mercy of an individual's opinion on the importance of heritage assets, or even finishes within the building, and this may be different one week to the next. It is not helped by the"</i>	12%	44

Theme	Description	Illustrative Quote	Percentage of respondents	Number of respondents
		<i>woefully under-resourced planning department.</i>		
Brownfield sites	Policy should encourage development on brownfield sites.	<i>"We would argue that policies on demolition and retrofit should be part of a wider suite of policies encouraging the use of brownfield land in preference to greenfield development."</i>	15%	54
Sustainable materials	Greater emphasis on sustainability of materials in construction	<i>"the materials being used in retrofit / in particular as standard need strongly regulating; there is huge risk of tonnes of horrible petrochemical based materials being applied in effectively to buildings which are not retrofit ready (namely water tight and with appropriate maintenance regimes in place) - which will all need stripping out and end up in landfills, or will create problems in the future; the opportunity for retrofit cowboys in particular in the domestic sphere is huge and represents substantial risk; look back to traditional methods - be led by historic England and STBA etc."</i>	13%	50
Community participation/consultation	More weight should be given to communities in decision-making.	<i>"Community involvement needs better information, be earlier, be taken into account more fully and involve more sectors, i.e. not just LPAs and Councillors."</i>	14%	53
Issues with developers	Developers not meeting current set standards.	<i>"The issue is not only 'what policies exist', but whether and how they are enforced. We already have many policies which are *routinely* flouted, such as demolition of listed buildings, developers missing environmental/social benefit targets which they say are unachievable/unviable, etc etc."</i>	2%	7
LPA resourcing/local policy issues	Local authorities do not have appropriate resources to address the issue (either through capacity or policy).	<i>"From a local planning authority officer perspective some of the information that is assessed as part of a demolition/retrofit case is complex and requires specialist input. Therefore, authorities need to be adequately resourced and trained to implement any policy/guidance."</i>	26%	98
Other	Responses that raised points outside of the identified themes.	N/A	23%	55

**Source:** Q30. Do you have any other comments or observations about any aspect of national planning legislation, policy and/or guidance regarding demolition and redevelopment or retrofit that you would like us to pass on in confidence to MHCLG? Results are based on all 988 respondents, without adjustments to make them representative., Total coded responses 242: