



COVID-19 SECTOR SURVEY REPORT

JUNE 2020



HISTORIC
ENVIRONMENT
SCOTLAND

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EACHDRAIDHEIL
ALBA

EXECUTIVE SUMMARY

Historic Environment Scotland designed an online survey on the Coronavirus (COVID-19) pandemic. This was completed between 9 and 30 April by the historic environment sector in Scotland.

265 responses were received from community or voluntary groups; charity or third sector organisations; faith-based or church organisations; social enterprises; sole traders or partnerships; and private sector organisations.

Key Findings

- Most common effects: Loss or postponement of work (78%), Loss of revenue (78%), Cancellation of planned income-generation events (71%)
- Unprompted comments about uncertainty expressed by over a quarter of respondents (27%). Difficulties included planning in a changing situation, waiting for news on when and how lockdown would ease, waiting for decisions on whether they had successfully secured support, and consciousness that the full socio-economic impacts of the pandemic were still unclear.
- On risk and mitigation: approximately equal split: high risk/ reshape to survive versus low risk/ resume to continue.
- For the minority of respondents at low risk (13%) some earlier respondents thought that the crisis would quickly pass, and they had enough savings or reserves for a few months. Others were pausing their operations and not incurring costs, or had successfully applied to schemes. A few worked within larger organisations in public and higher education sectors.
- Museums and Education, training and lifelong learning categories of the historic environment sector reported the highest level of risk.
- Through necessity and/ or choice, the areas of the historic environment acknowledging respondents needed to reshape their operations were urban & rural development and traditional building skills.
- By respondent type, sole trader or partnership reported the highest level of risk for not surviving (32%). Cashflow and future orders were immediate concerns.
- On their mitigating actions, a third were collaborating with other organisations already (32%), few were training staff and volunteers (15%).
- At the time of the survey, some wider schemes and measures were in place at UK and Scottish levels to mitigate effects of the crisis for different types of organisation. Most were pursuing at least one scheme or measure of the fourteen we listed (73%).
- For those who had not pursued any schemes or measures (27%), some explained they were waiting to see how the situation would unfold. Others did not believe they were eligible for support at that time.

- A quarter responded that there were no opportunities arising from the crisis (26%). Opportunities included digital adoption, flexible working and time to refocus operations.
- Concern for the future of their organisations, the sector and wider society was widespread. At the same time respondents were thinking of ways to contribute going forward and there was some optimism around the implications for climate action and sustainable tourism agendas.

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1.0 INTRODUCTION

Historic Environment Scotland (HES) designed an online survey to help understand the impacts of the COVID-19 pandemic for the historic environment sector in Scotland.

The survey was open on HES's consultation platform from Thursday 9 until Thursday 30 April.¹ Therefore, the survey period came after 24 March, when Prime Minister Boris Johnson had announced compulsory 'stay at home' measures for the UK's population.²

In total, the survey included sixteen questions, with a mix of answer options and text boxes for responses (see Annex 1 for all questions). Questions and answer options were based upon an earlier survey by the National Lottery Heritage Fund (NHLF)³ and a similar survey issued by Historic England.⁴ Questions and answers were adjusted to have relevance for the Scottish context.

The survey was targeted at:

- Community or voluntary groups supporting a specific heritage-based project
- Charity or third sector organisations with a heritage purpose (not for profit)
- Faith-based or church organisations
- Social Enterprise/ Community Interest Companies/ SCIOs
- Sole traders or Partnerships dealing in heritage products or services
- Private sector organisations in the historic environment sector

The survey was promoted in multiple ways. These included information and links to the survey through the HES website, HES social media accounts, and by HES email distribution lists.⁵ The survey was also shared by many historic environment stakeholder organisations with whom HES works through their social media, e-newsletters and direct communications.

265 valid responses were received and then analysed (see Annex 2 for method details). These responses were from across Scotland, cross sector and included different types of organisation (see Annex 3 for sample details).

In total, the responses related to organisations/groups/ businesses employing 2,749 FTEs and involving 11,015 volunteers.

The findings in this report are one source of intelligence and can be considered alongside other insights into the historic environment sector in Scotland.

¹ <https://consultations.historicenvironment.scot/>

² <https://www.bbc.co.uk/news/uk-52014472>

³ <https://www.heritagefund.org.uk/publications/economic-insight-impact-covid-19-march-2020>

⁴ <https://historicengland.org.uk/coronavirus/heritage-sector/survey/>

⁵ <https://www.historicenvironment.scot/coronavirus/>

2.0 FINDINGS

2.1 Effects of COVID-19 Pandemic

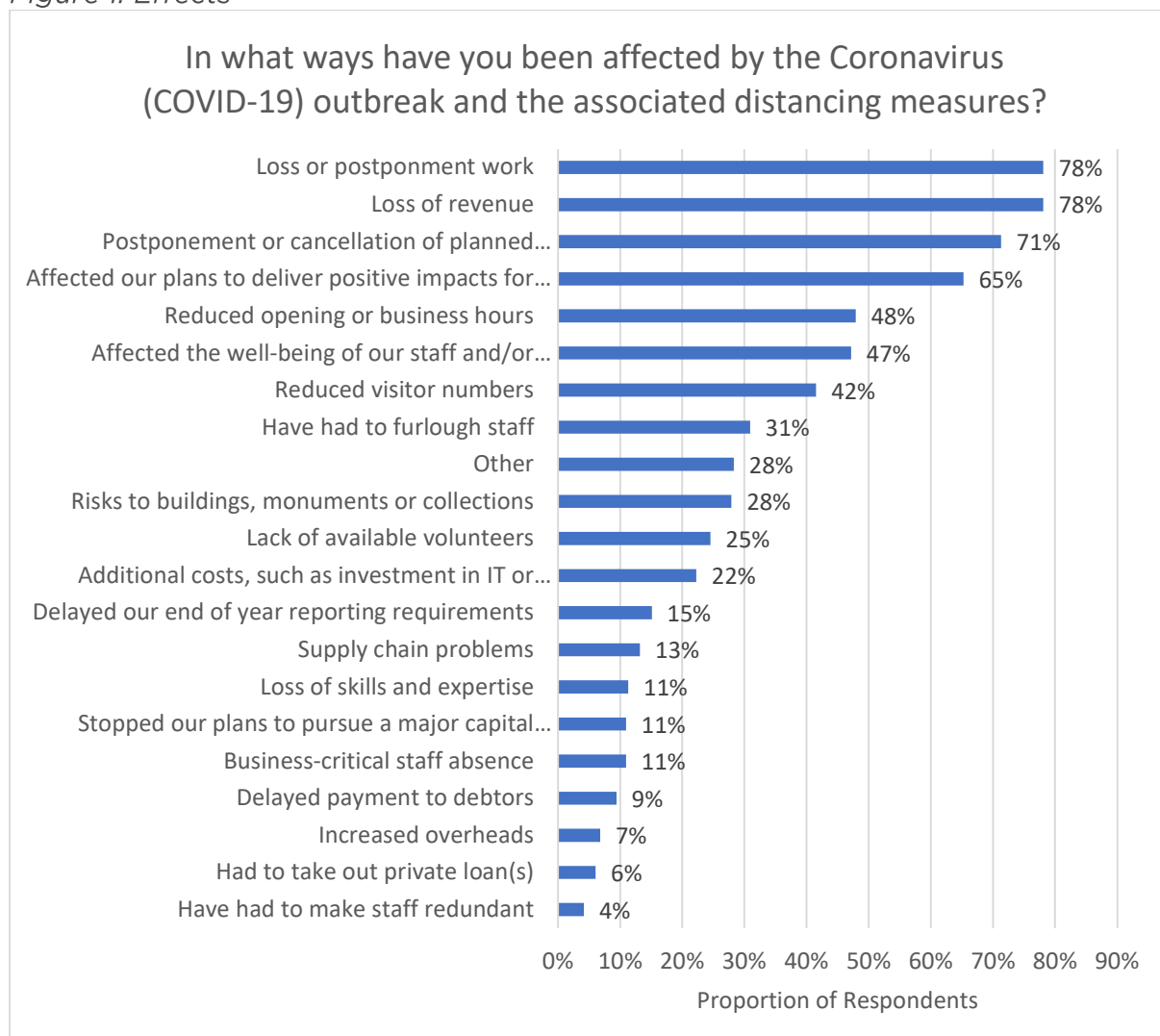
Twenty potential effects of the COVID-19 pandemic were listed in the survey (for full options see Annex 1: Q7).

Around three quarters of respondents reported experiencing loss or postponement of work (78%), loss of revenue (78%), postponement or cancellation of planned income-generation or marketing events (71%) (see Figure 1).

A majority selected that the COVID-19 crisis had ‘affected our plans to deliver positive impacts for our beneficiaries’ (such as members, communities, public audiences) (65%).

All respondents had experienced at least one of the effects listed at the time of the survey. On average, respondents reported six each.

Figure 1: Effects



Additional effects experienced were:

- Delayed payments from creditors
- Depletion of charitable reserves
- Decline in membership and loss of subscription income
- Loss of impetus/ momentum/ support and enthusiasm for projects
- Collaborations breaking down with other organisations experiencing difficulties e.g. schools, local authorities.

Concerns for effects on maintenance of the built historic environment were reported, including:

- Postponement of essential maintenance
- Delay of regular maintenance schedules and worry of backlog
- Impact on public access to paths and bridges
- No staff or volunteers to conduct maintenance and repairs
- Uncertainty over what constituted 'essential' maintenance under regulations

When expanding more on the effects:

- Many comments about income depleting or stopping completely, whilst they still had much outlay and expenditure.
- Respondents indicated that other effects were to come e.g. furloughing staff.
- There was frustration expressed by those who thought they had followed due diligence, building reserves, mitigating risk through diversifying income streams and still suffering effects.
- Stress was mentioned as an effect for them and others.
- The emotive wording of some responses expressed the pressure people were under to cope with the crisis on a personal and professional level.

2.2 Actions taken to Mitigate Effects

Twelve potential actions to mitigate the effects of the COVID-19 pandemic were listed (for full options see Annex 1: Q10).

8% were not taking any of the mitigations we suggested in the question (see Figure 2).

Around two thirds were planning for after the restrictions are lifted (64%), keeping in touch with their clients or beneficiaries (63%) and moving to remote working arrangements (61%).

A third (32%) were collaborating with others. One umbrella organisation explained:

As an organisation we will need to collaborate much more closely with other groups in responding to the impact of the Covid 19 crisis but also in the longer term, to increase the resilience of our respective organisations.

Only 15% indicated that staff or volunteers were undergoing training.

Respondents told us of actions they were taking to support their staff, their volunteers, the sector and the wider community.

Figure 2: Mitigation of Effects



For voluntary-run organisations, a notable concern was for the health and welfare of elderly volunteers living alone. In staffed organisations there was concern for high-risk groups, and those juggling additional commitments in caring and schooling. Actions to mitigate these effects included contact through phone calls, emails and video chats, as well as circulating blogs and organising quizzes and activities to keep up morale.

Some were active in sharing learning through sector networks. Support and membership bodies were tailoring their advice to individual businesses and charities:

We have set up a mentoring programme to connect our members with specialist consultants, offering 3 days of tailored support to help them through this time. We hope that this will be particularly helpful. (Membership body)

Extremely busy in providing support to community heritage sector, including pro-bono buddying on funding applications, and sifting and translating from the information overload on selected grants they might be eligible for, and clarifying who qualifies. (Support organisation)

Respondents took the opportunity to thank membership and support organisations who were waiving their fees and extending subscriptions.

2.3 Examples of Adapting Services

Analysis of textual responses explored whether the respondents were adapting their services. Many were moving activities already planned online, including training and events. Others were producing new online content to respond to a general rise in the public's online engagement.

Other examples of adapting were related to raising income:

- Reassessing income sources and creating better margins on goods sold
- Tourism-related businesses concentrating more attention towards domestic markets
- Reaching out to international audiences online who would be potential donors for their activity
- Responding to consumer trends towards slow-paced and wellbeing experiences

Many talked in theory of adopting a flexible approach, without giving specific examples:

As a small organisation with small overheads we are able to be dynamic and contract in the short term and prepare in readiness for a lifting of restrictions. This cannot however be maintained indefinitely. (Building surveyor partnership)

There were examples of organisations reviewing larger long-term plans to scale them back, introducing phasing and review for what they think will be realistic post-lockdown.

Respondents gave more detail of their work under the lockdown:

- Many respondents were having to make very quick business decisions e.g. holding off on new orders, deciding who to furlough.
- Giving attention to the immediate needs of all areas of their operations was all-consuming. Planning, then re-planning was taking thought, effort and time.
- Financial planning, including filling in forms for loans and grants, was being prioritised.

- Individual difficulties were expressed by business owners, and steps they were taking to cope such as mortgage holidays and interest free overdraft for business bank account.

In addition to adapting their own services, there were examples of organisations using their resources to feed into community-organised efforts including running shopping deliveries and prescriptions to the vulnerable.

2.4 Context of Uncertainty

This survey was administered during a period of change. Replies to textual questions were peppered with references to uncertain conditions. Indeed, unprompted comments about uncertainty were expressed by over a quarter of respondents (27%).

Most partners I have spoken to usually give an air of suspended animation due to the lack of knowledge on an end to the current lockdown. (Historical re-enactment business)

The period of the lockdown, waiting for news of their eligibility or success with applications they had made for help, were immediate concerns.

We just don't know if there will be something left of the season this year - and we don't even know what the impact on tourism/our clients will be for next year. (Tour guide)

Some respondents were unsure of how they, and the sector, would work through easing of lockdown:

Re-opening a visitor attraction and hospitality business with social distancing measures will be interesting... (Historic house)

They also wrote of the uncertainty around what the future will be like for their organisation/ business, wider industry and for the country. Many pointed out that it was hard to plan for the unknown.

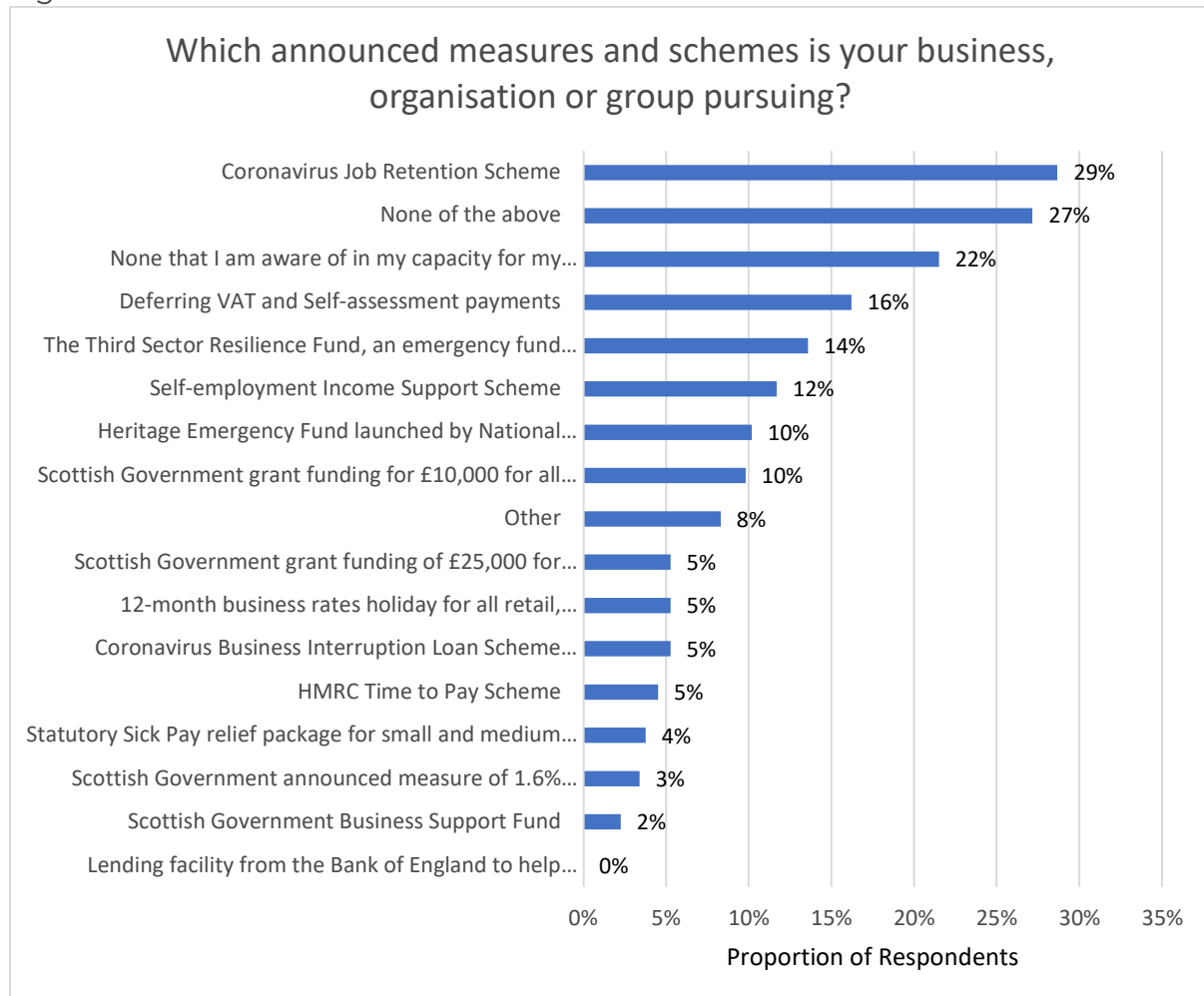
Businesses of all shapes and sizes are locked in a Darwinian 'survival of the fittest' struggle to stay afloat for long enough to receive the government support that has been promised. (Destination Management organisation)

Respondents were also unsure about the full implications of the pandemic, what impacts it would end up having and whether any opportunities would come from this period.

The first thing we need is certainty, in terms of the route back to normality (or whatever approximates it) as this has a direct impact on everything we do. (Cultural Trust)

2.5 Experiences of Measures and Schemes

Figure 3: Measures and Schemes



Fourteen measures and schemes were listed to gain an idea of uptake (see Annex 1: Q13). The measures and schemes listed were current at the time of the survey going live. Some were subsequently paused, others have been added since. In addition, some automatically apply, others would have to be applied for.

Three quarters selected at least one measure/ scheme (73%), whilst a quarter had not pursued any measures or schemes listed (27%) (see Figure 3).

This question acted as an information source for some respondents, stating they were thankful for this list of potential schemes and measures.

Several respondents commented that they were waiting to see what the situation was like later before pursuing anything.

Over a quarter of respondents made specific comments around eligibility (28%) including:

- Those saying they found it hard to work out eligibility.
- Those not thinking they were eligible for any support.

- Those stating they had been advised they were not eligible for particular schemes or measures.

Issues with eligibility included:

- Seasonal staff not being eligible for Job Retention Scheme as they were not due to start until after the cut-off period.
- Not having a business premises preventing them applying for Small Business Grant.
- Owners finding schemes excluded their particular type of business.
- Directors of limited companies being advised they cannot go on furlough as this contradicts their statutory duty.

We find we are slipping through the cracks and many of the schemes are not accessible to this organisation; due to seasonal staff, high rateable value and our sole trader status. (Historic visitor attraction)

Barriers to accessing financial support included:

- Lack of success in the Third Sector Resilience Fund was reported as due to their charitable reserves, and other charities in greater financial need. Also, an acknowledgement that there was a limited pot and other charities doing more direct work with communities to respond to immediate health and welfare needs from the pandemic were successfully applying.
- Self-employed income support was slow to be announced. There was disappointment that this was calculated on profits, with no allowance for business overheads.
- Support options predicated on one main area of income, therefore not suitable for their diversified business.
- Their income across a three year average was considered even though they hadn't been operating that long as a business, or they had taken maternity leave which lowered their average.

Other funds not listed in the original question were mentioned:

- Applications submitted to the Museum Galleries Scotland Emergency fund.
- One organisation working to preserve built heritage across the UK said they had successfully applied to the Historic England Emergency response fund
- One respondent was applying to The Pivotal Enterprise Resilience Fund.

An organisation involved in World Heritage explained:

We're taking a sequential approach - government funding first and then charitable. We are thinking about applying for funding for engagement programmes to address social dislocation.

Respondents included wider asks for additional support such as:

- Adjustment to terms of furlough
- Speeding up of decisions and communications for schemes
- Schemes catering for seasonal businesses
- Holidays from associated payments for premises they cannot use during lockdown
- Income support for company directors
- Universal Basic Income
- Lifting of lock-down measures for outdoor work, including surveying and archaeology
- Development of longer-term collaborative projects which can place heritage and culture within recovery efforts
- Improvements to rural broadband

A Trust for a historic venue asked for help to refocus their work:

For us, independent support and facilitation on any discussions on where we may head and which route or paths we look at would be great. Sometimes being too ingrained or close to the organisation can cause you to not see the wider picture.

There were general asks for funding and financial assistance. Some were immediate support, whilst others felt they would need support at a later date. A community-run historic building explained they desired:

Medium term, rather than short term response. There are enough emergency funds. The crunch will come next year onwards.

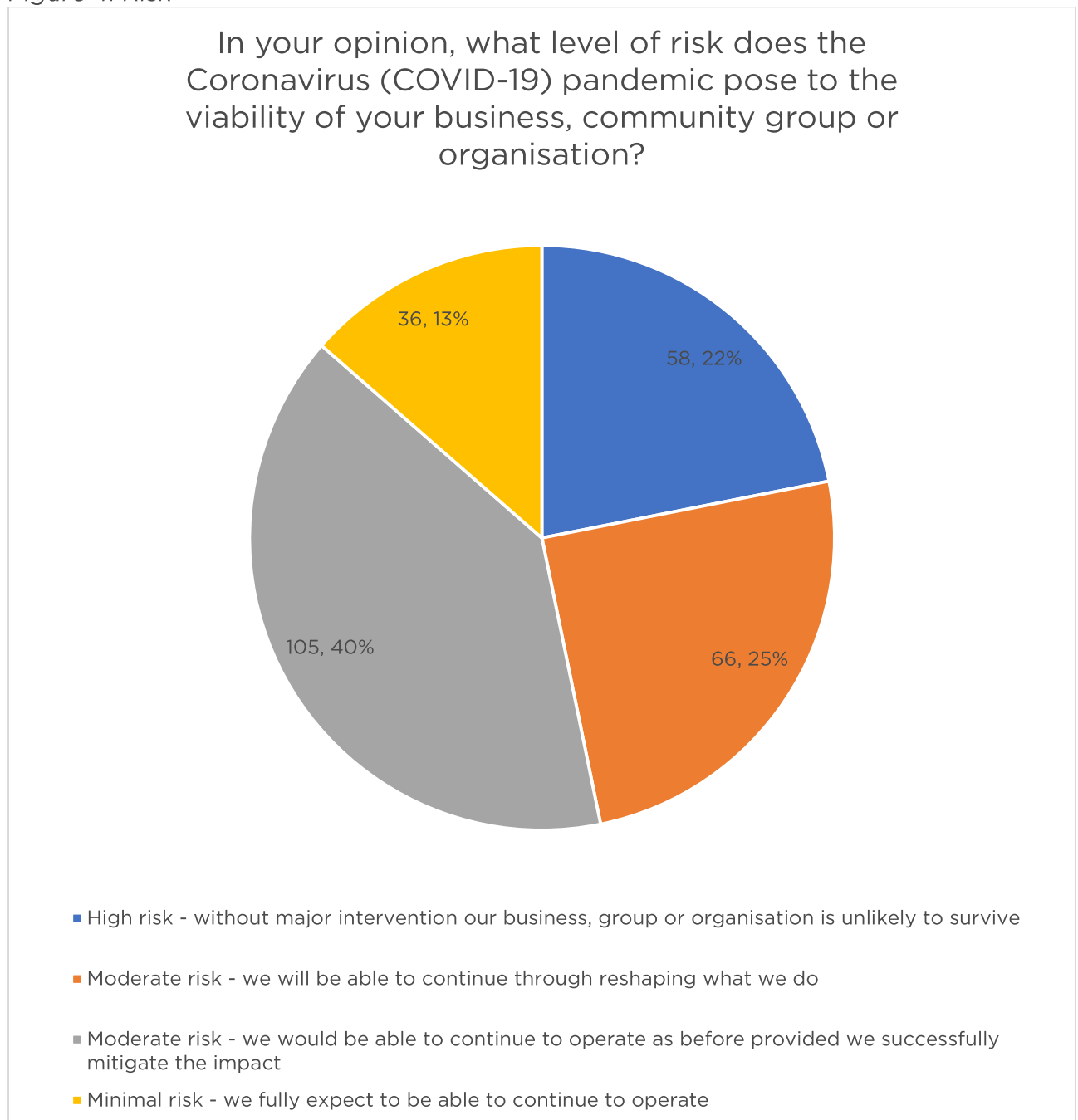
Elsewhere in the survey, respondents also expressed concerns for future public funding, whether that would be available, and whether future funds and rounds would be delayed, or even cancelled.

2.6 Opinions on Risk

The survey asked, *In your opinion, what level of risk does the Coronavirus (COVID-19) pandemic pose to the viability of your business, community group or organisation?*

Over a fifth of respondents (22%) selected the answer 'High risk - without major intervention our business, group or organisation is unlikely to survive' (see Figure 4).

Figure 4: Risk



Respondents who regarded risk as minimal (13%) justified this on the basis that:

- They thought the lockdown would end soon, and the crisis would pass quickly. Tended to be earlier responses to the survey.
- They could pause or delay plans, often the case for voluntary-run organisations.
- They had successfully accessed schemes to 'tide them over'.
- Funders for any existing projects were 'being understanding'.
- They already had healthy reserves or savings to keep them going for a few months without additional income.
- They were a historic environment-focused part of a larger organisation, such as a Local Authority or a University.

An archaeological society explained:

Fortunately, we have no employees or financial commitments, so the loss is to our social and archaeological endeavours rather than anything more serious. If we survive until next year, we'll pick up then where we left off.

2.7 Relative Risk for Different Groupings

Analysis was conducted on groupings of respondents in relation to their opinions on risk (Annex 1: Q11).

The areas of the historic environment reporting most risk were the museums sector (31% reporting high risk) and education, training and life-long learning (30%) (see Figure 5).

The areas of the historic environment reporting most moderate risk, with a need to reshape, were Urban and Rural Development (43%) and Traditional Building Skills (32%).

All organisation types face difficulties, with sole traders/partnerships the worst affected (34% at high risk) (see Figure 6). The respondents explained lack of cashflow and lack of new projects in the pipeline put them at risk.

Highest risk by employee size was for those employing between 50 and 249 Full Time Equivalent (FTE) staff (40% reported at high risk) (see Figure 7). Only half the proportion of organisations with under 10 FTE staff reported a level of high risk (20%).

One Cultural Trust elaborated:

We are a £2m turnover organisation, which is losing all our spring/ summer money- this keeps us solvent during the loss-making winter months. We are facing a £500k cash shortage after using our reserves. We will run out of cash in the autumn and won't be able to fund our winter. Redundancies currently seem inevitable. We employ 59 staff.

Figure 5: Areas of Historic Environment at most risk

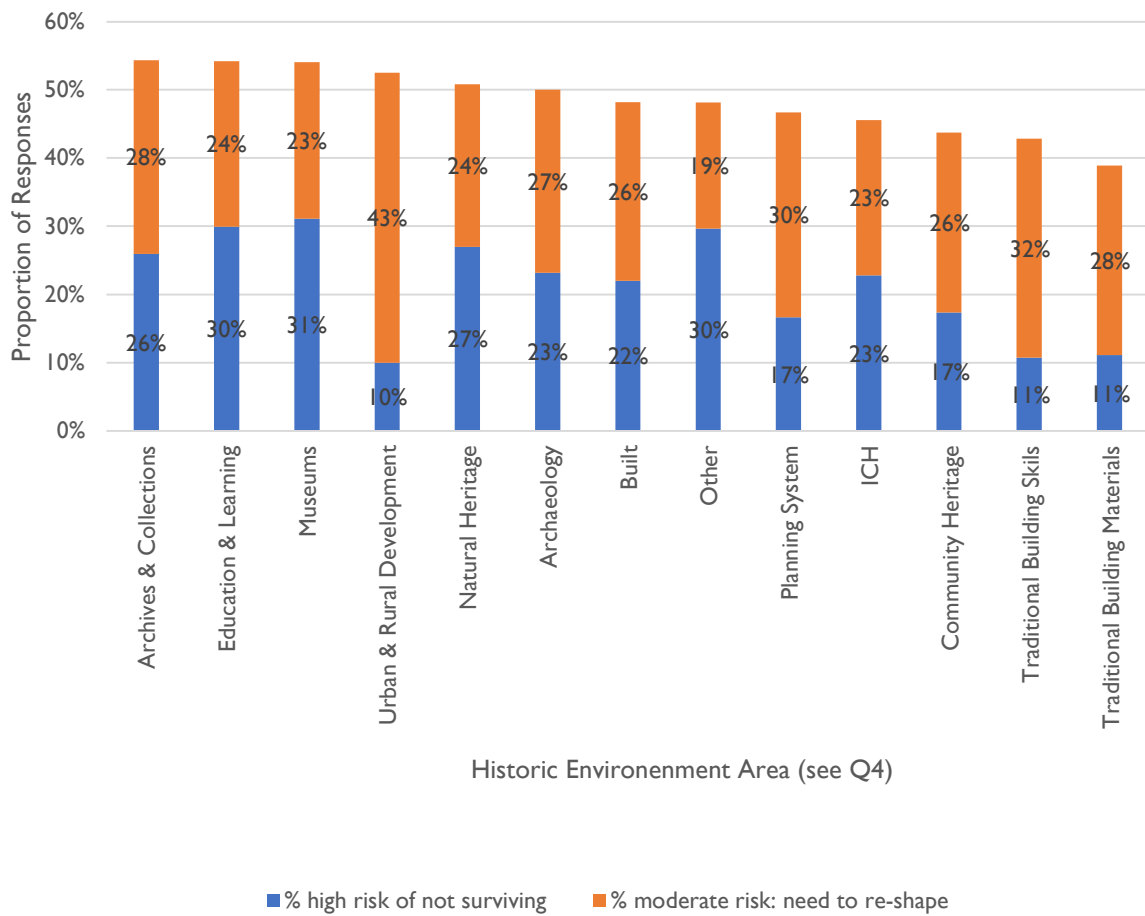


Figure 6: Areas of Risks by business model

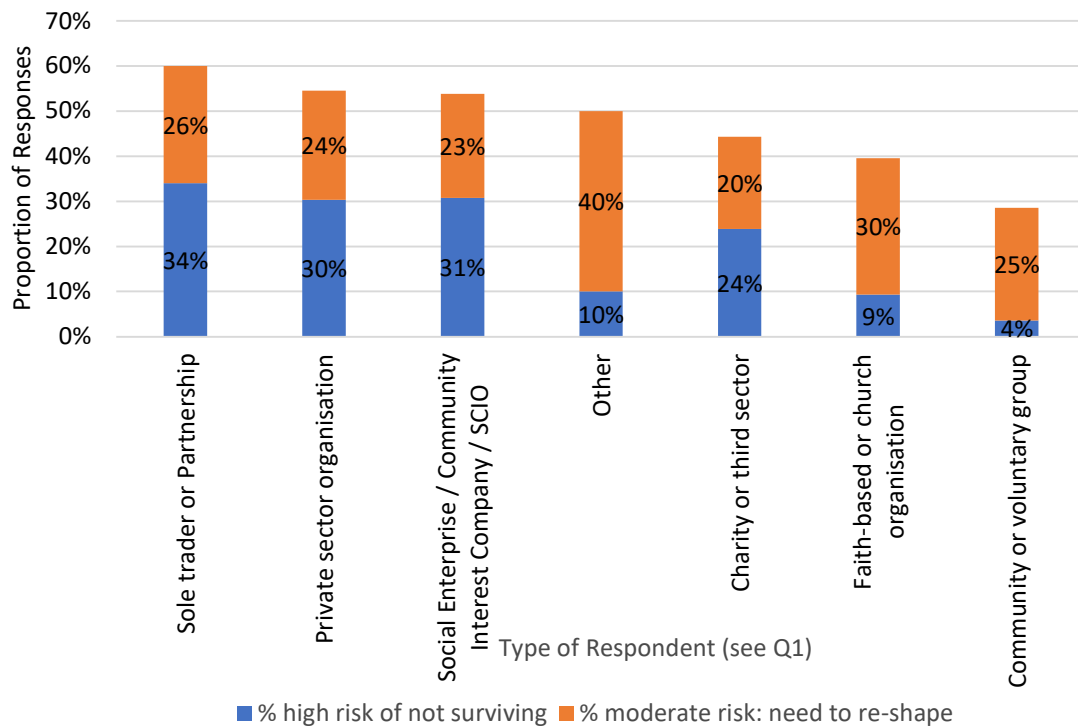
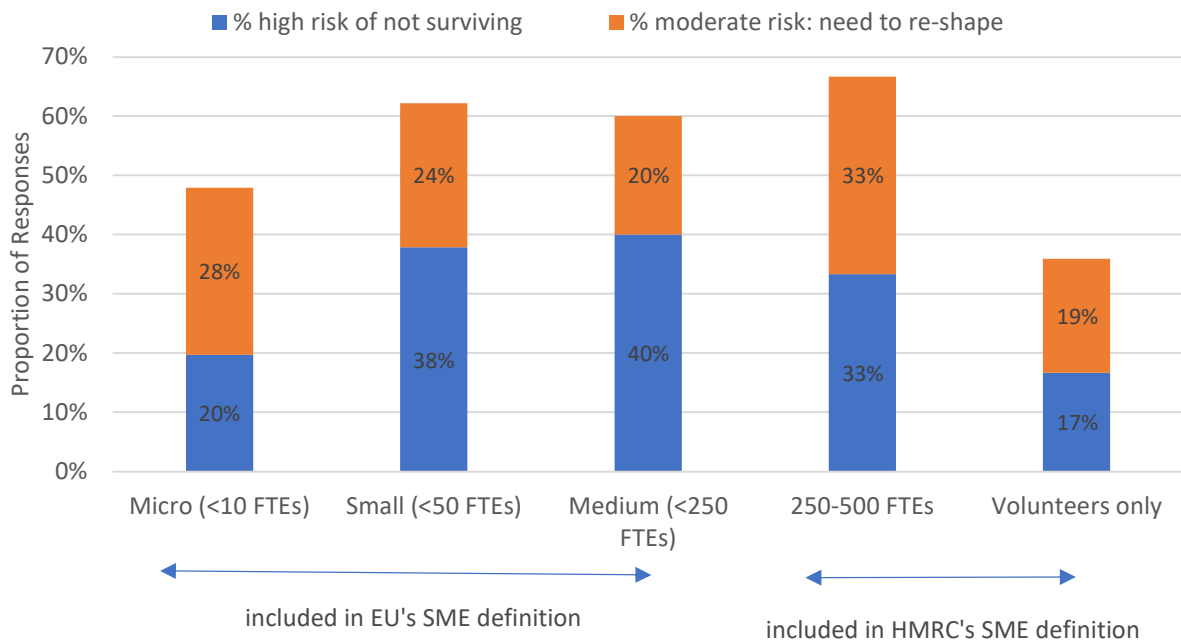


Figure 7: Risk by organisational size



Further analysis was conducted to look at risk in relation to Enterprise Areas, Scottish Index of Multiple Deprivation Quintiles and Urban Rural Classifications (see Annex 2).

Based on postcodes the second and fifth quintiles of the Scottish Index of Multiple Deprivation had the least prevalence of reported high risk (16%, 15%) (see Figure 8).

Respondents based within the South of Scotland Enterprise Area had the largest proportion of respondents reporting high risk (30%) (see Figure 9). However, this was only based on 20 replies to the survey.

Figure 8: Risk by SIMD from Postcode Analysis of Question 3

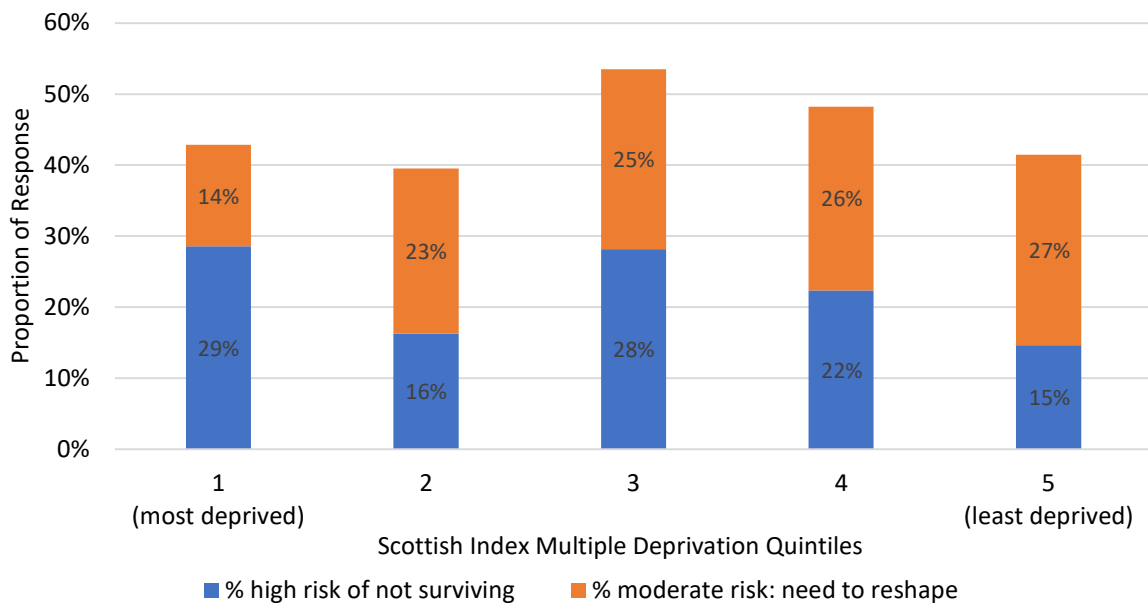
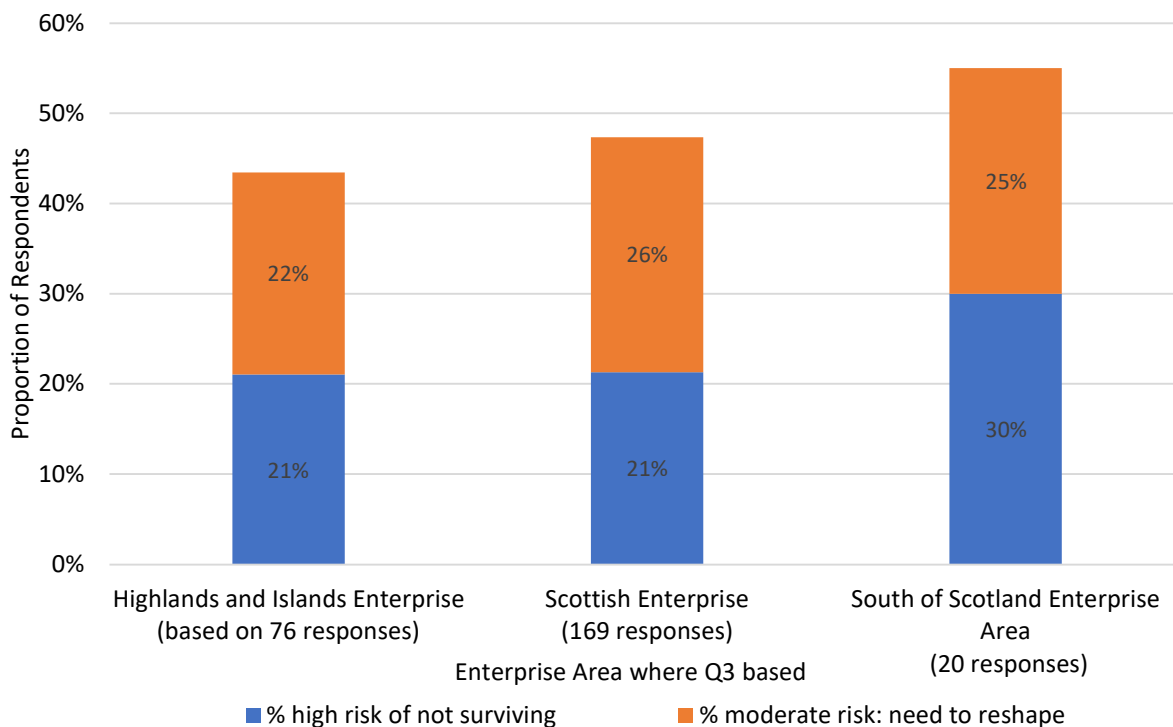
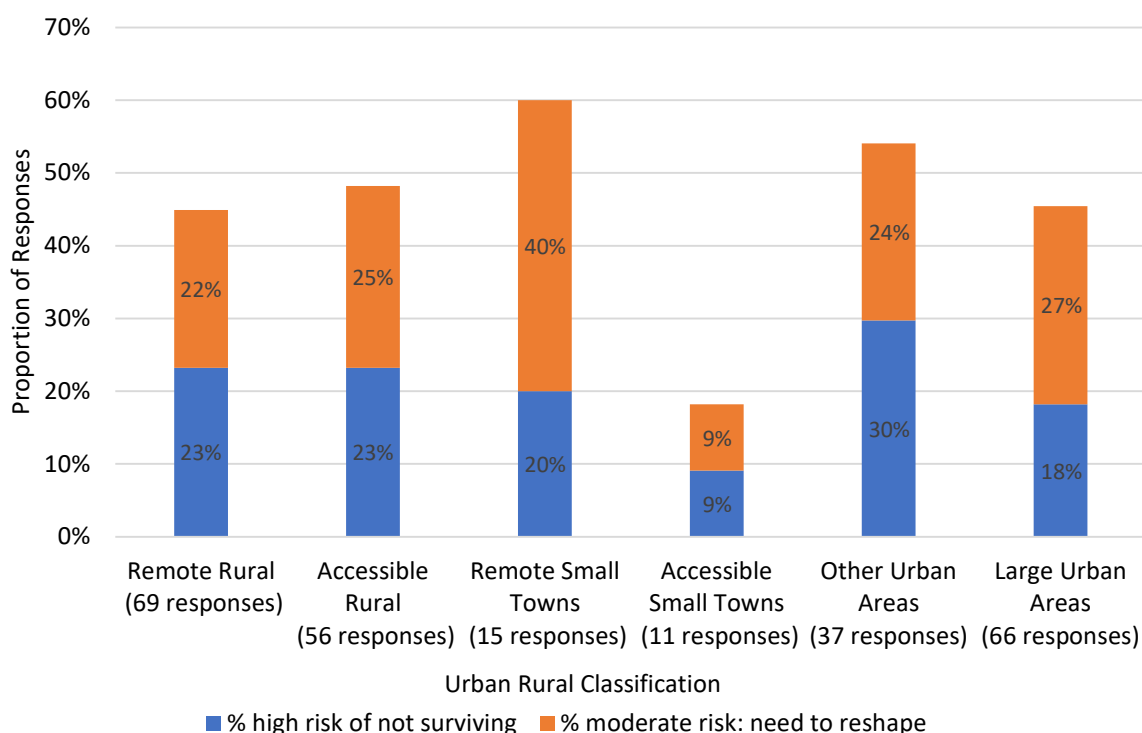


Figure 9: Risk by Postcode Analysis of Question 3 to correspond to Enterprise Areas



40% of organisations, business and groups based in Remote Small Towns selected they needed to reshape their operations. This compared to only 9% in Accessible Small Towns (see Figure 10). However, both sub-samples were small (15 and 11 responses to the survey).

Figure 10: Risk by Urban Rural Classification from Postcode Analysis of Question 3



2.8 Views of Opportunities

A quarter (26%) of the respondents were adamant that there were no opportunities arising from this crisis.

Half of respondents (49%) could think of an opportunity, but many added qualifications to their answers.

Sole traders tended to say there were no opportunities, and those sole traders that acknowledged any opportunities emphasised these were unpaid tasks.

Respondents stated some individual-level benefits from lockdown. Opportunities included time to think, research, reassess, reset and pursue continuing professional development.

An opportunity to develop and investigate greater resilience for the future...cement our working structure in terms of home-based working...develop more online accessibility (Heritage consultancy)

However, a few explained that commitments were not allowing them time to pursue opportunities:

Any chance I might have of increased connection and contact with the wider community of the sector, with my professional body, and with investigating any potential CPD opportunities is compromised by the time requires to care for, support and home-school my young children, as well as remotely managing immediate issues with the business. (Conservation business)

There was mention of the crisis acting as a catalyst for planning and business improvements:

Something that came out of a session I attended is for us to approach our volunteers, staff and board and see what their 'dream' scenarios would be for the organisation...We were planning to look at our business plan anyway, but it was always something that was pushed further down the agenda. Now we have been forced to 'stop the bus' and take stock, it is a great opportunity. (Trust for historic venue)

Others mentioned the implications of furlough for resourcing thinking and planning about opportunities:

There will be opportunities for us as an organisation. However, having to furlough all staff except two to keep the business going has meant that we are unable to plan to take up these opportunities at the moment, and be in a position to maximise these when we return after lockdown. (Trust for historic buildings)

There were examples of the crisis speeding up overdue development in digital services, products and skills within charities. However, there was also mention of the digital divide and how some staff, volunteers (including Trustees) or beneficiaries were not able to make the most of these opportunities.

2.9 Views on the Future

Detail was given in the textual responses about the implications the respondents saw from the crisis for their organisations, for the sector and for society. These were largely framed in negative terms.

For society:

- Many mentioned a bleak outlook
- Austerity, poverty, lack of disposable income, physical and mental health concerns.
- Economic recession, with depleted public and private funds.
- Consciousness that humanitarian demands will outweigh the needs of the heritage sector.

For the historic environment:

- Concern for historic sites going back to nature, due to lack of resource for maintenance.
- Concerns for livelihoods of specialist craftspeople conserving and repairing the built historic environment.
- Local authorities and churches mentioned diverting funds from fabric repairs or improvements and discussions on the need for historic buildings going forwards.
- Fears of a downturn in the sector as money and resource is diminished and diverted.
- Concern for new entrants to heritage and culture - including young people - not being able to secure skilled employment.

A heritage consultant remarked:

A major contraction in public sector expenditure will be required to pay for lockdown and this will have a significant national impact on the heritage sector at all levels. The map of the heritage sector will change and some organisations will close. This reset will require serious and inclusive consultation, debate across the sector, clear consensus among stakeholders, trusted leadership and high quality communications.

For their business/ organisation:

- Uncertainty of survival.
- Continuation of operations subject to their success in accessing support measures and schemes.
- Expectation that their suppliers or business clients will go out of business, bringing knock on effects.
- New orders not coming in, and not expected in event of recession.

- Scaling back their operations and ambitions for improved productivity or growth.
- Working on the basis of trading and income being wiped for whole year.
- Opinion that redundancies will likely follow end of furlough period.
- Organisations expecting their supply chains will collapse.

One business, not regarding itself at high risk, explained the implications for their future:

We largely work on infrastructure projects around the UK. We have a full order book waiting for us when we can resume work, so we are not unduly worried. What it has meant is it will affect growth targets if the situation drags on for months. This will affect investment in the business e.g. recruitment, training and development, innovation will all suffer. (Archaeology firm)

Respondents were thinking of ways to contribute to societal outcomes post-crisis. Some charities felt their services and role would be in higher demand and they were part of solutions post-crisis.

Several respondents commented on how the crisis was helping the climate action agenda. Some mentioned how changes had reduced their carbon footprint and expressed hope that ways of working involving less travel would be sustained.

We hope that the recovery from the crisis will enable a focus on a new green economy, and a greater recognition of the value, creativity and social benefit of arts and culture. (Environmental support body for culture)

There were examples of optimism around the positive impacts for the tourism sector including both environmental and social:

Hard to be positive in the face of such a threat, but we can use the opportunity to reshape the tourism industry to one that better meets the needs of our communities (Destination Management organisation)

Lastly, some expressed opinions that there was an increased interest for tangible and intangible heritage amongst the population. Historic environment sector work going forward was seen by some to focus on economic and social recovery:

During this period of uncertainty people have reflected on the past, their own identity and the importance of preserving their heritage to create a better future and wellbeing (Umbrella body)

2.10 Comparison with other Sector Surveys

National Lottery Heritage Fund (NLHF) made a survey available until 27 March.

Historic England issued a similar survey, based on the NLHF questions, which closed 20 April.

Some answer options were different across the three surveys (see Annex 1). The nature of the samples was different, NLHF received responses from charities and third sector organisations they had supported through grants; Historic England

targeted heritage businesses. There is some scope for cautious comparison across the surveys.

In the NLHF survey 82% reported high or moderate risk to long-term viability of their organisation. 87% selected high or moderate risk options in the Historic Environment Scotland survey.

Table 1: Results from COVID-19 Sector Surveys

	National Lottery Heritage Fund survey	Historic England survey	Historic Environment Scotland survey
Effects (see Annex 1: Q7)	Frequency of effects reported		
Postponement or cancellation of planned events	91%	58%	71%
Loss or postponement of work		76%	78%
Loss of revenue	69%	n/a	78%
Reduced opening/ business hours		43%	48%
Have had to furlough staff		39%	31%
Reduced visitor numbers		34%	42%
Additional costs, such as investment in IT or home working		31%	22%
Lack of available volunteers	55%	27%	25%
Supply chain problems		22%	13%
Delayed payment by debtors		24%	9%
Business critical staff absence		17%	11%
Increased overheads		8%	7%
Have had to lay staff off/ Have had to make staff redundant		5%	4%

n.b. blank cells for unreported results

2.11 Key Findings

- Most common effects: Loss or postponement of work (78%), Loss of revenue (78%), Cancellation of planned income-generation events (71%)
- Unprompted comments about uncertainty expressed by over a quarter of respondents (27%). Difficulties included planning in a changing situation, waiting for news on when and how lockdown would ease, waiting for decisions on whether they had successfully secured support, and consciousness that the full socio-economic impacts of the pandemic were still unclear.
- On risk and mitigation – Approximately equal split: high risk/ reshape to survive versus low risk/ resume to continue.

- For the minority of respondents at low risk (13%) some earlier respondents thought that the crisis would quickly pass, and they had enough savings or reserves for a few months. Others were pausing their operations and not incurring costs or had successfully applied to schemes. A few worked within larger organisations in public and higher education sectors.
- Museums and Education, training and lifelong learning categories of the historic environment sector reported the highest level of risk.
- Through necessity and/ or choice, the areas of the historic environment acknowledging they needed to reshape their operations were urban & rural development and traditional building skills.
- By respondent type, sole trader or partnership reported the highest level of risk for not surviving (32%). Cashflow and future orders were immediate concerns.
- On their mitigating actions, a third were collaborating with other organisations already (32%) few were training staff and volunteers (15%).
- At the time of the survey, some wider schemes and measures were in place at UK and Scottish levels to mitigate effects of the crisis for different types of organisation. Most were pursuing at least one scheme or measure of the fourteen we listed (73%).
- For those who had not pursued any schemes or measures (27%) some explained they were waiting to see how the situation would unfold. Others did not believe they were eligible for support at that time.
- A quarter responded that there were no opportunities arising from the crisis (26%). Opportunities included digital adoption, flexible working and time to refocus operations.
- Concern for the future of their organisations, the sector and wider society was widespread. At the same time respondents were thinking of ways to contribute going forward and there was some optimism around the implications for climate action and sustainable tourism agendas.

3.0 CONCLUSION

This survey captures a period in time during an evolving situation.

The quantitative and qualitative results of this survey are an important information source from a representative sample of the historic environment sector in Scotland. The findings in this report are informing further discussion, and collaborative action by sector stakeholders delivering across Scotland's strategy for the historic environment, *Our Place in Time*.⁶

We are publishing an anonymised data set of survey responses along with this report.

We plan to repeat key questions in poll format to ensure we have up to date information to inform the historic environment sector response to COVID-19 in Scotland.

Thanks to:

- Partner organisations for helping HES design the survey and promote through their networks.
- All respondents to the survey for telling us their first-hand experiences. We have gained valuable insights from people working in difficult, changing, and uncertain circumstances.

⁶ <https://www.historicenvironment.scot/about-us/who-we-are/our-place-in-time/>

ANNEX I: SURVEY QUESTIONS

Questions (Q) and Answers (A) in Order of Appearance	
SECTION- INTRODUCTION	
Q1	Which of the following are you responding on behalf of? (Please select one)
A1	<ul style="list-style-type: none"> • Community or voluntary group supporting a specific heritage-based project • Charity or third sector organisation with a heritage purpose (not for profit) • Faith-based or church organisation • Social Enterprise/ Community Interest Company/ SCIO • Sole trader or Partnership dealing in heritage products or services • Private sector organisation in the historic environment sector • As an individual member of the public [exclusion criteria] • Other (please specify):
SECTION- ABOUT YOUR ORGANISATION, BUSINESS OR COMMUNITY GROUP	
Q2	Name of organisation, business, charity or group (We ask this to help us prepare our data before analysis)
A2	Text field
Q3	The post code for its main office, base or location (Your answer will help us group into different geographic areas for our analysis)
A3	Post code field
Q4	Which areas of the historic environment sector is your business/ organisation involved with? (Please select all that apply)
A4	<ul style="list-style-type: none"> • Archaeology • Archives or Collections • Museum sector • Community heritage • Education, training and life-long learning • Built Heritage including historic buildings, monuments and industrial heritage sites • Intangible Cultural Heritage such as cultural traditions • Natural heritage (including landscapes) • Traditional building skills • Traditional building materials • Planning system • Urban and rural development • Other (please specify):
Q5	Approximate number of paid employees (full time equivalent) (Please enter a number of 0 or greater)
A5	Numeric field
Q6	Approximate number of volunteers (Please enter a number of 0 or greater)
A6	Numeric field
SECTION- EFFECTS OF CORONAVIRUS (COVID-19) ON YOUR BUSINESS, ORGANISATION OR GROUP.	
Q7	In what ways has it been affected by the Coronavirus (COVID-19) outbreak and the associated distancing measures? (Select all that apply)

A7	<ul style="list-style-type: none"> • Loss of revenue • Loss or postponement of work • Business-critical staff absence • Lack of available volunteers • Postponement/ cancellation of planned income-generation or marketing events • Reduced opening or business hours • Supply chain problems • Increased overheads • Reduced visitor numbers • Have had to furlough staff • Have had to make staff redundant • Additional costs such as investment in IT/ home working • Had to take out private loan(s) • Delayed payment by debtors • Delayed end of year reporting requirements • Risks to buildings, monuments or collections • Loss of skills and expertise • Affected the wellbeing of our staff and/or volunteers • Affected our plans to deliver positive impacts for our beneficiaries (such as members, communities, public audiences) • Stopped our plans to pursue a major capital project • Other (please specify):
Q8	Please tell us more about these effects
A8	Text field
Q9	How is the Coronavirus (COVID-19) outbreak and the associated distancing measures affecting those you work with closely- your suppliers, your partners, your clients, your members?
A9	Text box
Q10	What has your business, organisation or group tried to mitigate the effects of the Coronavirus (COVID-19) outbreak?
A10	<ul style="list-style-type: none"> • Renegotiation with our suppliers • Renegotiation with our funders • Moving to remote working arrangements • Moving our services online • Keeping in touch with our clients or beneficiaries • Fundraising • Lobbying • Looking towards sector support bodies for advice • Collaborating with other organisations, groups and businesses • Training of staff and/or volunteers • Pivoting our operational model • Planning for after the restrictions are lifted • None of the above
Q11	In your opinion, what level of risk does the coronavirus (COVID-19) outbreak pose to the viability of your business, community group or organisation? (Select one option)

A11	<ul style="list-style-type: none"> • Minimal risk- we fully expect to be able to continue to operate • Moderate risk- we would be able to continue to operate as before provided we successfully mitigate the impact • Moderate risk- we will be able to continue through reshaping what we do • High risk- without major intervention our business/ organisation is unlikely to survive
Q12	Please tell us more about your views on the viability of your group, business or organisation
A12	Text field
SECTION- YOUR VIEWS ON SUPPORT FOR ORGANISATIONS, GROUPS AND BUSINESSES	
Q13	Which announced measures and schemes is your business/ organisation/ group pursuing? (Please select all that apply)
A13	<ul style="list-style-type: none"> • Coronavirus Job Retention Scheme • Deferring VAT and Self-assessment payments • Self-employment Income Support Scheme • Statutory Sick Pay relief package for small and medium sized businesses (SMEs) • Coronavirus Business Interruption Loan Scheme offering loans up to £5 million for SMEs through the British Business Bank • Lending facility from the Bank of England to help support liquidity amongst larger firms, helping them bridge coronavirus disruption to their cash flows through loans • HMRC Time to Pay Scheme • 12-month business rates holiday for all retail, hospitality and tourism businesses in Scotland • Scottish Government grant funding for £10,000 for all small business in receipt of small business rate relief or rural rate relief • Scottish Government grant funding of £25,000 for retail, hospitality and leisure businesses with a property with a rateable value between £18,001 and £51,000 • Scottish Government Business Support Fund • Scottish Government announced measure of 1.6% relief for all non-domestic properties • Heritage Emergency Fund launched by National Lottery Heritage Fund • The Third Sector Resilience Fund, an emergency fund for charities, community groups, social enterprises and voluntary organisations working in Scotland. • None that I am aware of in my capacity for my organisation or business • None of the above • Other (please specify):
Q14	Please tell us more about your experience of accessing any of these measures and schemes.
A14	Text box
Q15	What opportunities, if any, do you think the Coronavirus (COVID-19) outbreak represents for your organisation, group or business?
A15	Text box
Q16	What intervention and support would help your business, group or organisation mitigate any risk and make the most of any opportunities?
A16	Text box

Source: Historic England, NLHF (Historic England was based upon NLHF), Additional wording by HES after considering a range of C19-related survey questions and discussions at Our Place in Time CEO's Forum.

ANNEX 2: METHOD DETAILS

Before completing the survey, respondents were given information on processing of Personal Data, a link to HES's privacy notice. Respondents had to tick that they had read and agreed to this.

Within the first question we asked respondents in which capacity they were responding. Those who selected 'As an individual member of the public' were diverted to the end of the survey.

Data was exported from HES's consultation platform, Citizen Space.

Quantitative data was cleaned, analysed and visualisations were produced using Microsoft Excel.

Postcode analysis was conducted based upon:

- Scottish Index of Multiple Deprivation⁷
- Scottish Government Urban Rural Classification⁸

Qualitative data was imported to QDA Miner Lite freeware.

Qualitative coding is a way of categorising text to establish a framework for thematic ideas on the text. Codes were created to encompass three themes (see Figure 11):

- Impacts of the changing situation.
- Actions in response to COVID-19's impacts.
- Value of our sector following COVID-19.

Frequency of coding was examined and reported.

Extracts were selected from coded text to lend more understanding to reported quantitative results.

⁷ <https://www2.gov.scot/Topics/Statistics/SIMD/>

⁸ <https://www2.gov.scot/Topics/Statistics/About/Methodology/UrbanRuralClassification>

Figure 11: Codebook

- 1. Impacts
 - ◆ weakness
 - ◆ threats
 - ◆ uncertainty
 - ◆ non-covid
 - ◆ no opportunities
 - ◆ negligible
 - ◆ comparison
- 2. Actions
 - ◆ Them
 - ◆ HES
 - ◆ others
 - ◆ now
 - ◆ future
 - ◆ eligibility
 - ◆ for others
- 3. Value
 - ◆ adapt
 - ◆ opportunities
 - ◆ key

ANNEX 3: SAMPLE DETAILS

265 valid responses to our survey

Type of respondent (see Figure 12):

- Largest proportion (33%) from Charity or third sector organisations with a heritage purpose
- Other organisations (4%) included responses by staff within Higher Education organisations, Planning Departments of Local Authorities and a representative of a Landscape Partnership Scheme.

Area of the historic environment their organisation/ group/ business is involved with (see Figure 13):

- Almost three quarters (74%) are involved with the built environment
- Over half (54%) with community heritage.

Geographic classifications for sample:

- Respondents provided us the post code of their main office or base.
 - 30 of the 32 Local Authorities in Scotland were represented.
 - No respondents worked for a group/organisation/business based in either Inverclyde or the Shetland Islands.
 - All six types of Urban Rural Classification were represented.
 - All five quintiles of the Scottish Index of Multiple Deprivation were represented (see Figure 14)

Figure 12: Sample by Survey Question 1

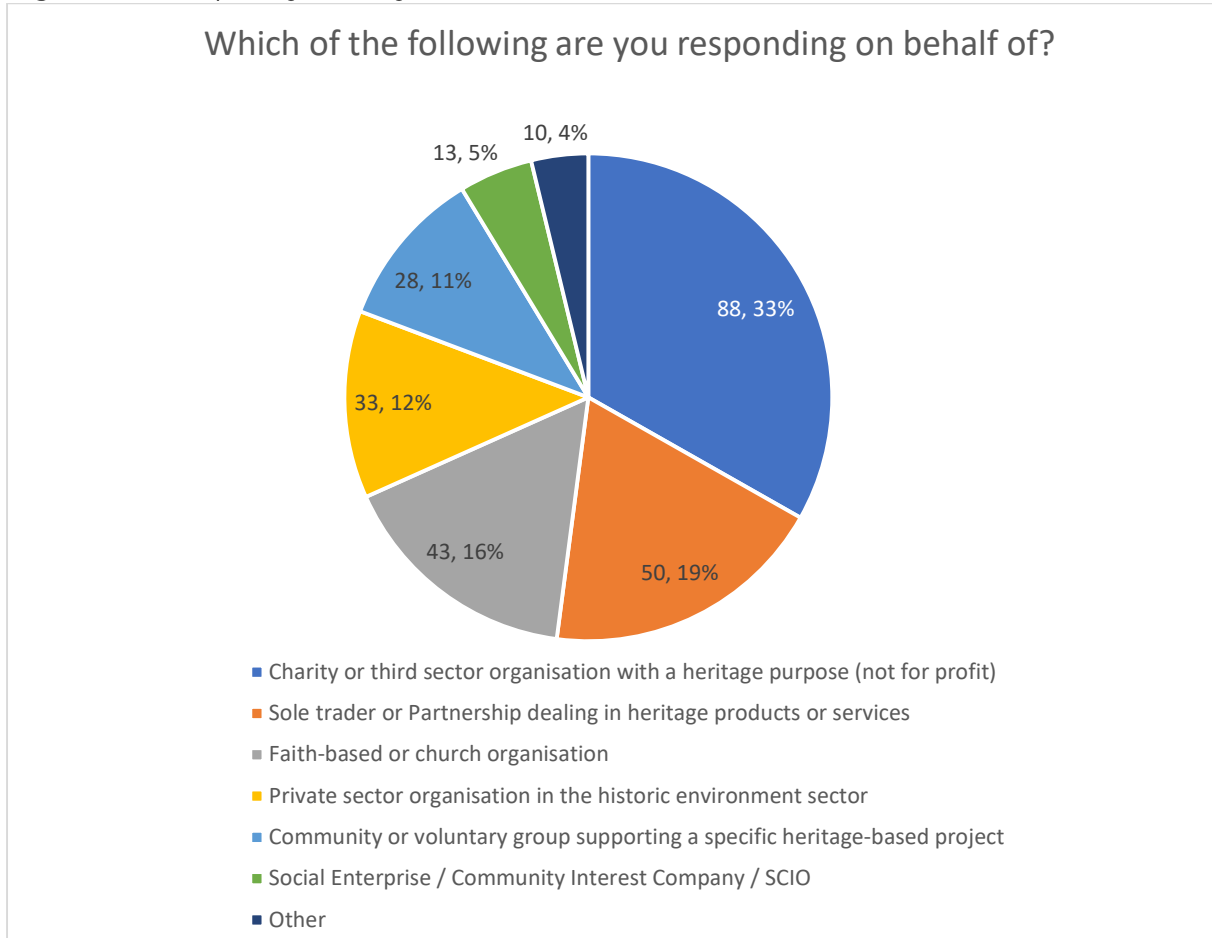


Figure 13: Sample by Survey Question 4

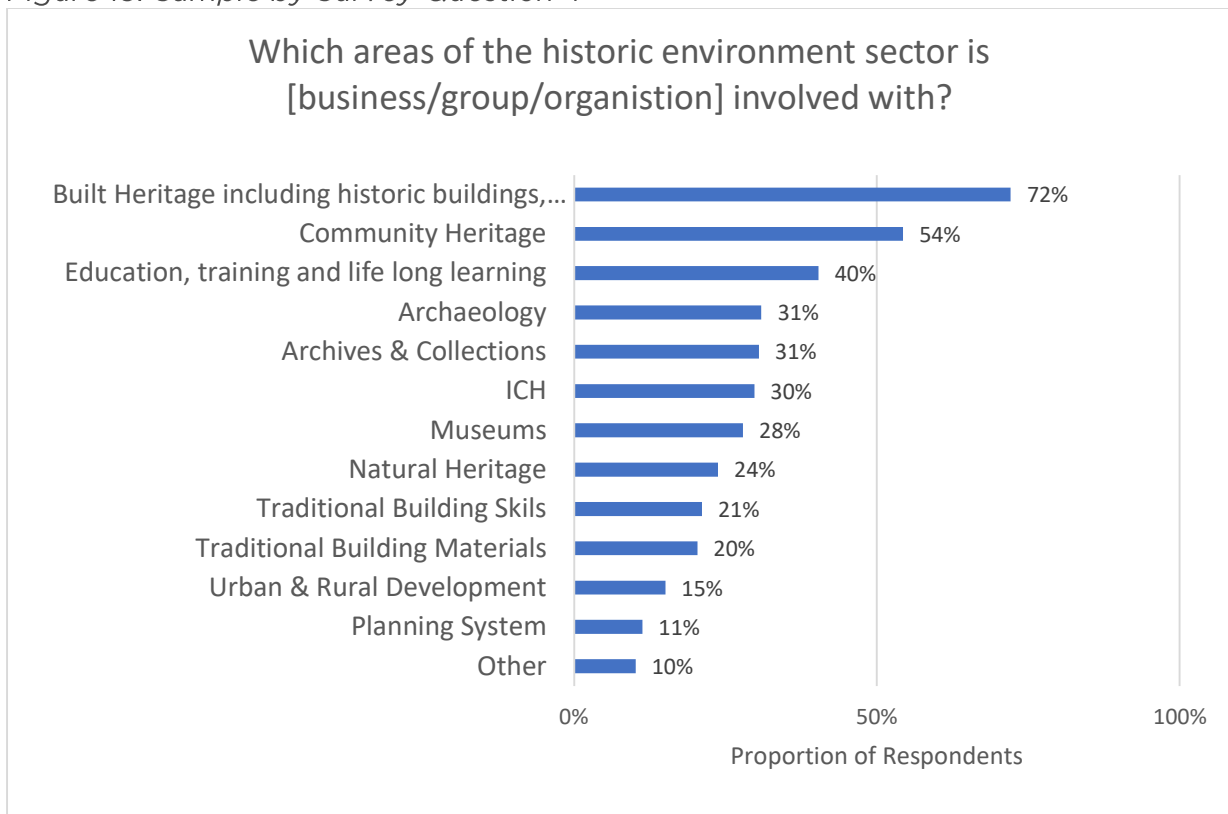
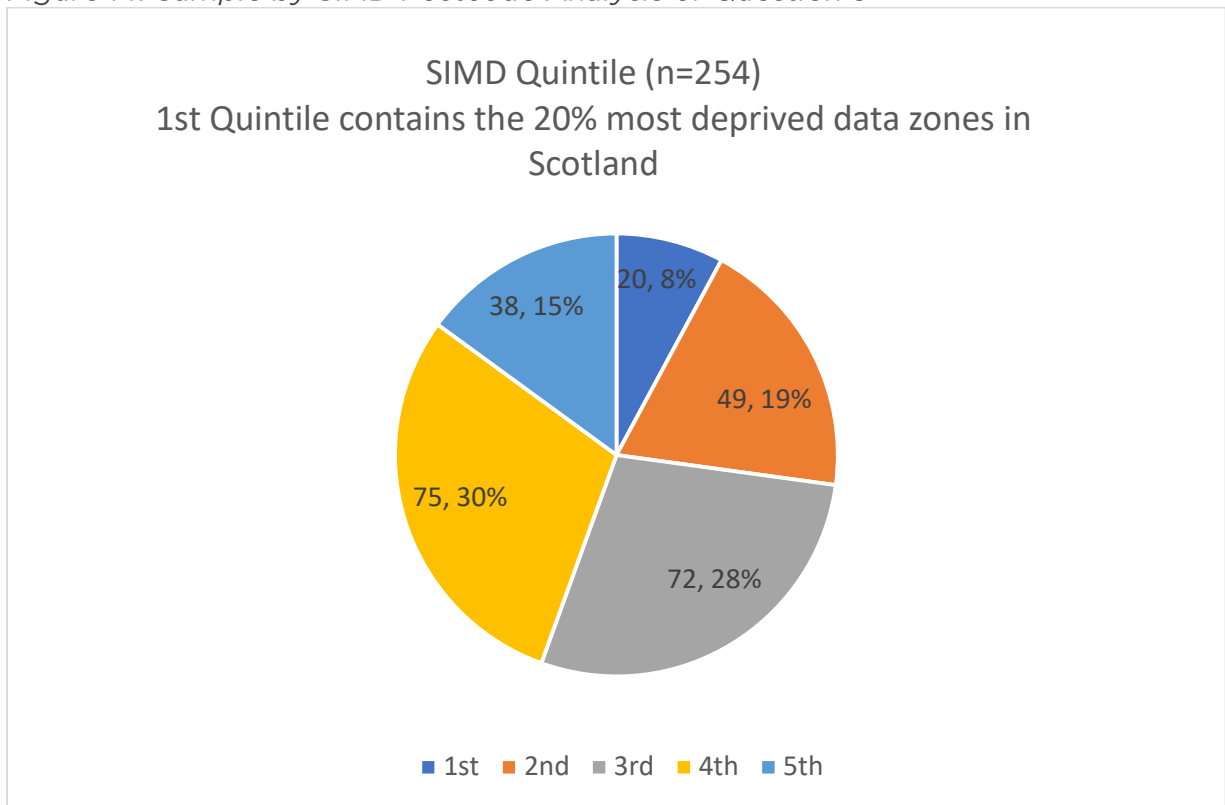


Figure 14: Sample by SIMD Postcode Analysis of Question 3



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