

COVID-19 SECTOR SURVEY- INITIAL FINDINGS May 2020

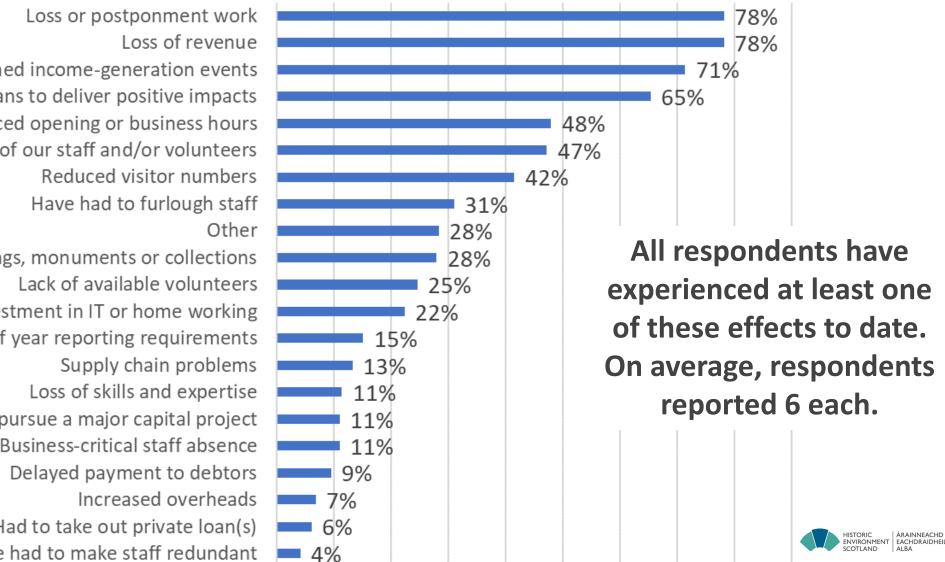
RESPONDENTS

The survey ran from 9-30 April. The full analysis report will be published in early June.

- 265 Valid responses
- Respondents employing 2,749 FTEs and involving 11,015 volunteers.
- By post code: 30 of the 32 Local Authorities in Scotland were represented (all except Shetland and Invercivate); all six types of Urban Rural Classification were represented; all five quintiles of the Scottish Index of Multiple Deprivation (SIMD) were represented
- Diverse range of respondents:
 - Firms specialising in traditional skills and materials
 - Tour guides delivering heritage tourism experiences
 - Historical re-enactment event providers
 - Architects specialising in heritage conservation
 - Workers from community museums



EFFECTS OF COVID-19 PANDEMIC



Cancellation of planned income-generation events Affected our plans to deliver positive impacts Reduced opening or business hours Affected the well-being of our staff and/or volunteers Risks to buildings, monuments or collections Additional costs, such as investment in IT or home working Delayed our end of year reporting requirements Stopped our plans to pursue a major capital project Business-critical staff absence Had to take out private loan(s) Have had to make staff redundant

EFFECTS OF COVID-19 PANDEMIC

EXTRA POINTS RAISED

Respondents mentioned effects on maintenance on the built historic environment:

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

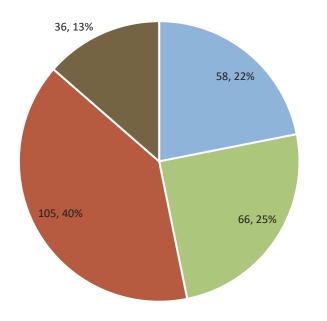
Additional effects:

- Delayed payment from creditors
- Loss of charitable reserves
- Decline in membership and loss of subscription income
- Loss of impetuous/ momentum/ support and enthusiasm for projects



OPINION OF RISK

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



Half and half high risk/ re-shape to survive vs. low risk/ resume to continue

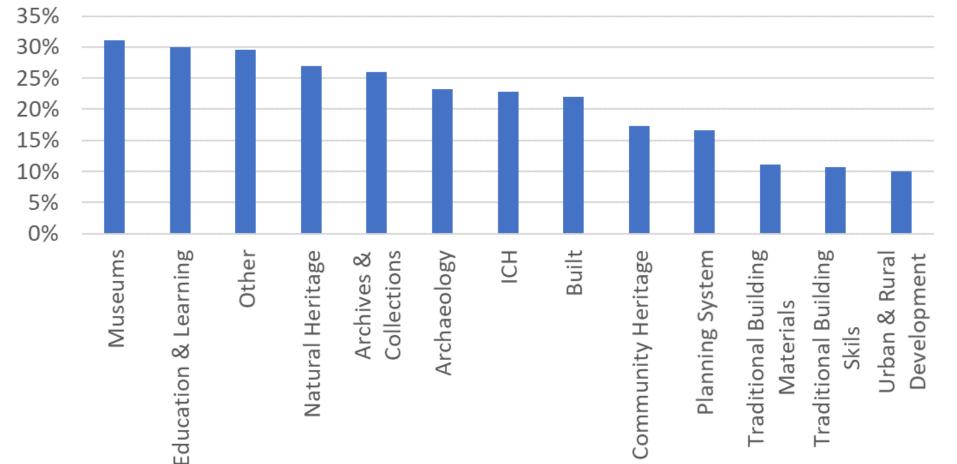
High risk - without major intervention our business, group or organisation is unlikely to survive

- Moderate risk we will be able to continue through reshaping what we do
- Moderate risk we would be able to continue to operate as before provided we successfully mitigate the impact
- Minimal risk we fully expect to be able to continue to operate



AREAS REPORTING HIGHEST RISK

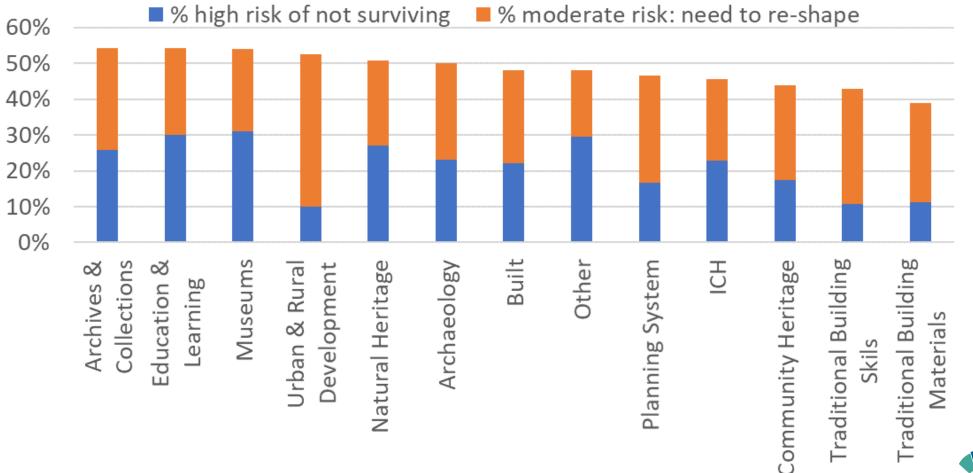
% HIGH RISK BY HISTORIC ENVIRONMENT AREA





AREAS EXPECTED TO CEASE OR TRANSFORM

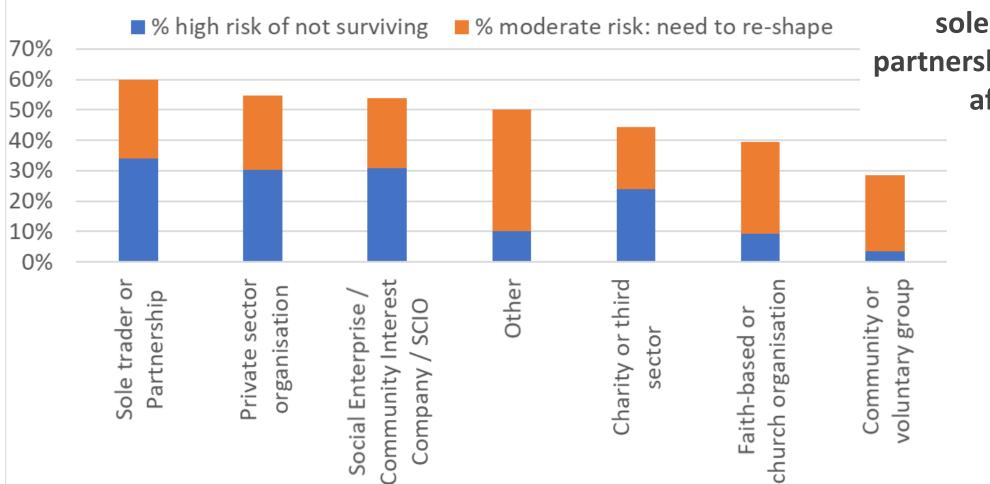
% RISK BY HISTORIC ENVIRONMENT AREA





RELATIVE RISKS

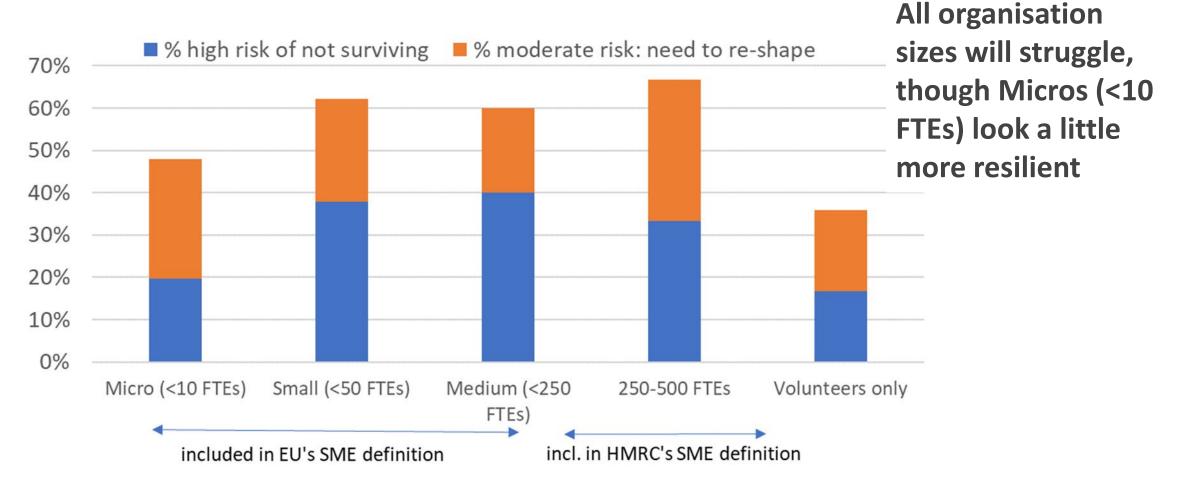
% RISK BY ORGANISATION TYPE



All organisation types face difficulties, with sole traders / partnerships the worst affected



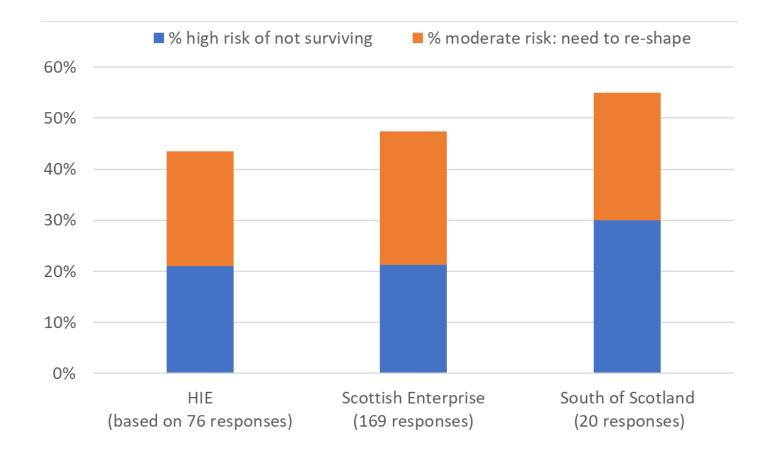
RESPONDENTS REPORTING HIGHEST RISK % RISK BY SIZE





BUSINESS VIABILITY RESULTS

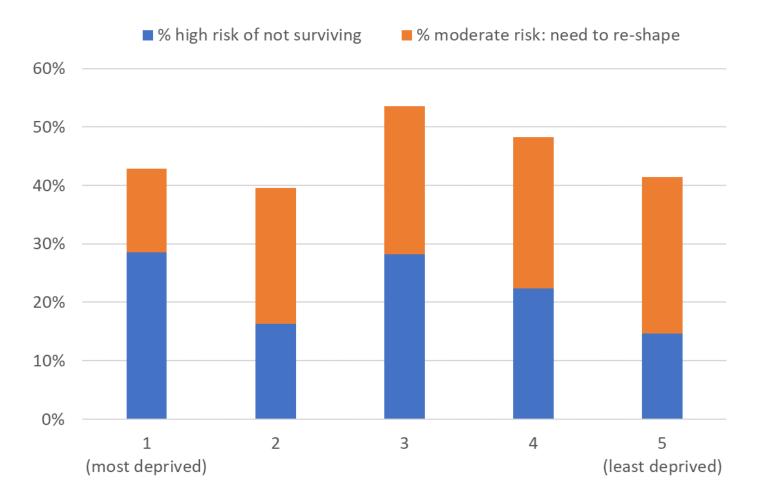
BY ENTERPRISE AGENCY AREA





BUSINESS VIABILITY RESULTS

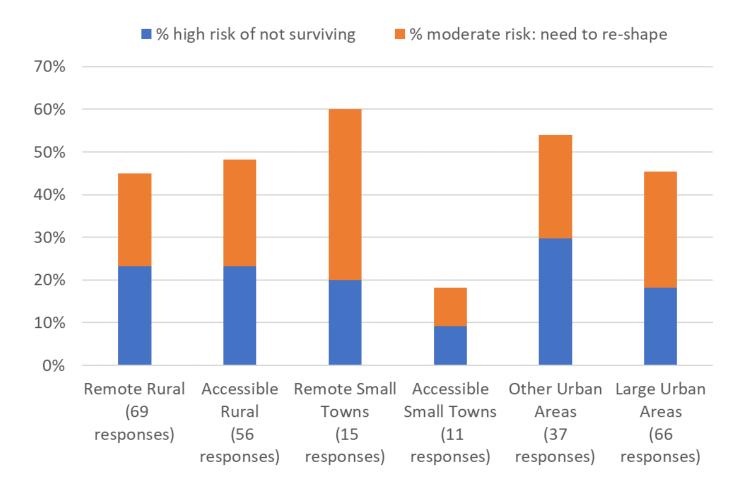
BY SCOTTISH INDEX OF MULTIPLE DEPRIVATION QUINTILE





BUSINESS VIABILITY RESULTS

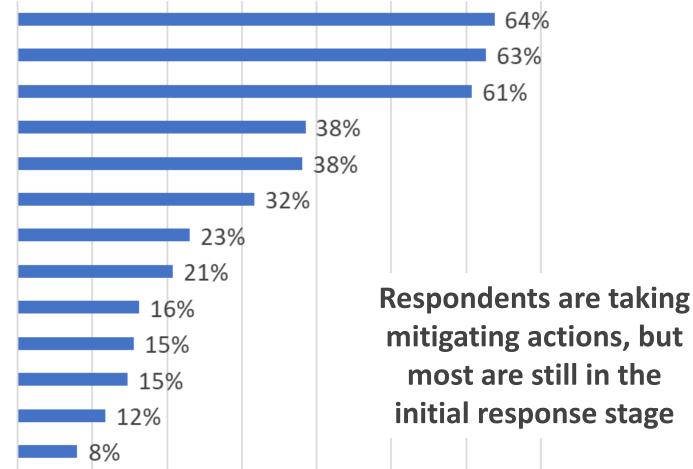
BY 6-FOLD URBAN-RURAL CLASSIFICATION





MITIGATING ACTIONS

Planning for after the restrictions are lifted Keeping in touch with our clients Moving to remote working arrangements Moving our services online Looking to sector support bodies for advice Collaborating with other organisations Renegotiation with our funders Fundraising Lobbying Pivoting our operational model Training of staff and/or volunteers Renegotiation with our suppliers None of the above

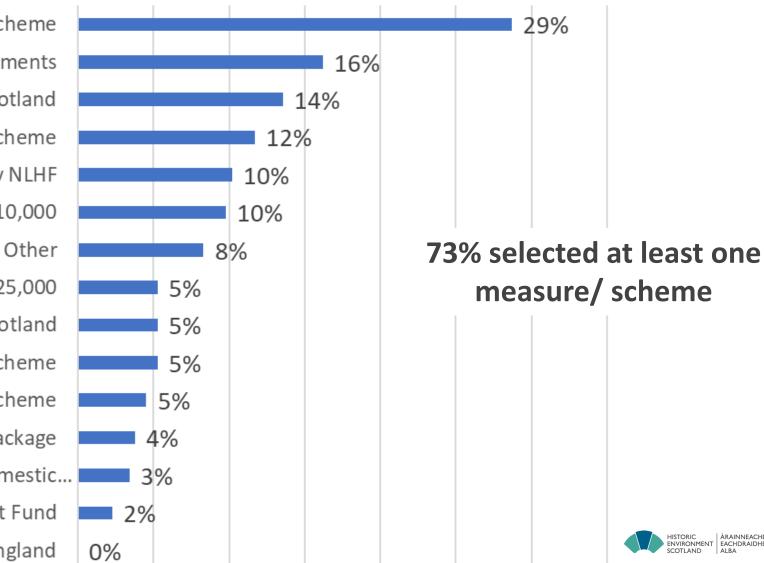




SUPPORT SCHEMES/ MEASURES BEING PURSUED

Coronavirus Job Retention Scheme Deferring VAT and Self-assessment payments The Third Sector Resilience Fund in Scotland Self-employment Income Support Scheme Heritage Emergency Fund launched by NLHF Scottish Government grant funding for £10,000

Scottish Government grant funding of £25,000 12-month business rates holiday in Scotland Coronavirus Business Interruption Loan Scheme HMRC Time to Pay Scheme Statutory Sick Pay relief package Scottish Government 1.6% relief for all non-domestic... Scottish Government Business Support Fund Lending facility from the Bank of England



NVIRONMENT FACHDRAIDH

QUALITATIVE ANALYSIS

'Uncertainty' expressed by (27%) – related to: period of the lockdown; waiting for news of their eligibility/success with applications they had made for help; the full implications/impacts of the pandemic; the future (for their organisation/ business, wider industry and for the country).

'Opportunities' – 26% stated there were no opportunities. 49% could think of an opportunity but qualified their answers.

- Lockdown giving time to think, research, reassess, pursue CPD etc.
- Crisis speeding overdue development in digital services, products, skills
- Sole traders tended to say there are no opportunities or emphasised these were unpaid.
- Limited mention of wider societal opportunities call on services as part of solutions post-crisis, reduction in carbon-footprint, trend to domestic tourism, slow tourism, well-being experiences, renewed appreciation for environment in lockdown.



SUMMARY OF INITIAL KEY FINDINGS

SNAPSHOT OF A CHANGING SITUATION- SURVEY CLOSED 30 APRIL

- Most common effects Loss or postponement of work (78%), Loss of revenue (78%), Cancellation of planned income-generation events (71%)
- On risk and mitigation Approximately equal split: high risk/ re-shape to survive vs. low risk / resume to continue
- Museums and Education learning categories report the highest level of risk.
- The areas of the historic environment acknowledging they need to re-shape their operations through necessity and / or choice are: urban & rural development, traditional building skills, and traditional building materials.
- By respondent type, sole trader or partnership reporting the highest level of risk for not surviving (32%).
- On their mitigating actions, a third are collaborating with other organisations already (32%), few are training staff and volunteers (15%).
- Most selected at least one scheme or measure listed (73%)

