HISTORIC ENVIRONMENT SCOTLAND | ÀRAINNEACHD EACHDRAIDHEIL ALBA

COVID-19 SECTOR SURVEY- INITIAL FINDINGS

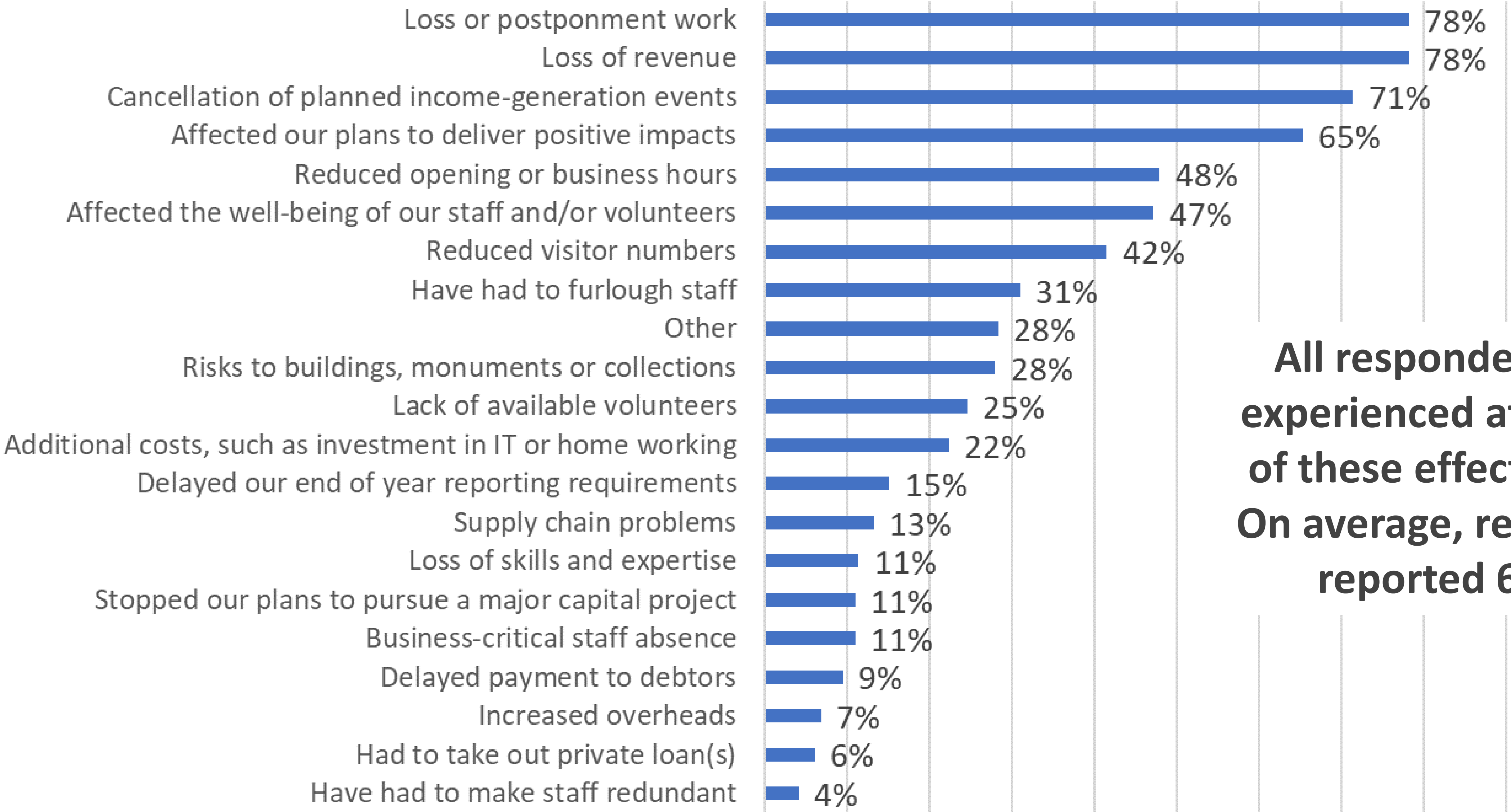
May 2020

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 Inverclyde) ; 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



All respondents have experienced at least one of these effects to date. On average, respondents reported 6 each.

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EFFECTS OF COVID-19 PANDEMIC

EXTRA POINTS RAISED

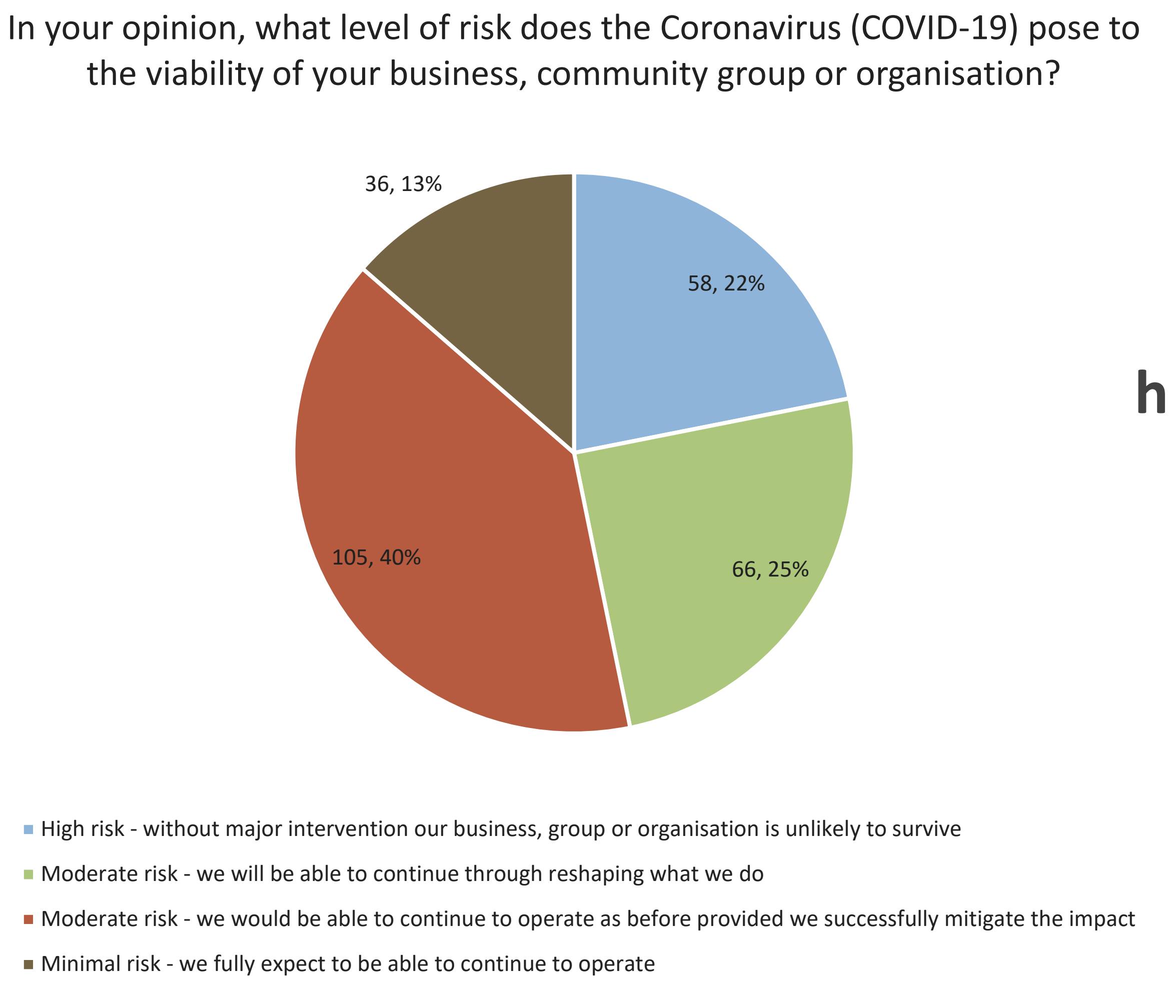
Respondents mentioned effects on maintenance on the built historic environment:

- 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

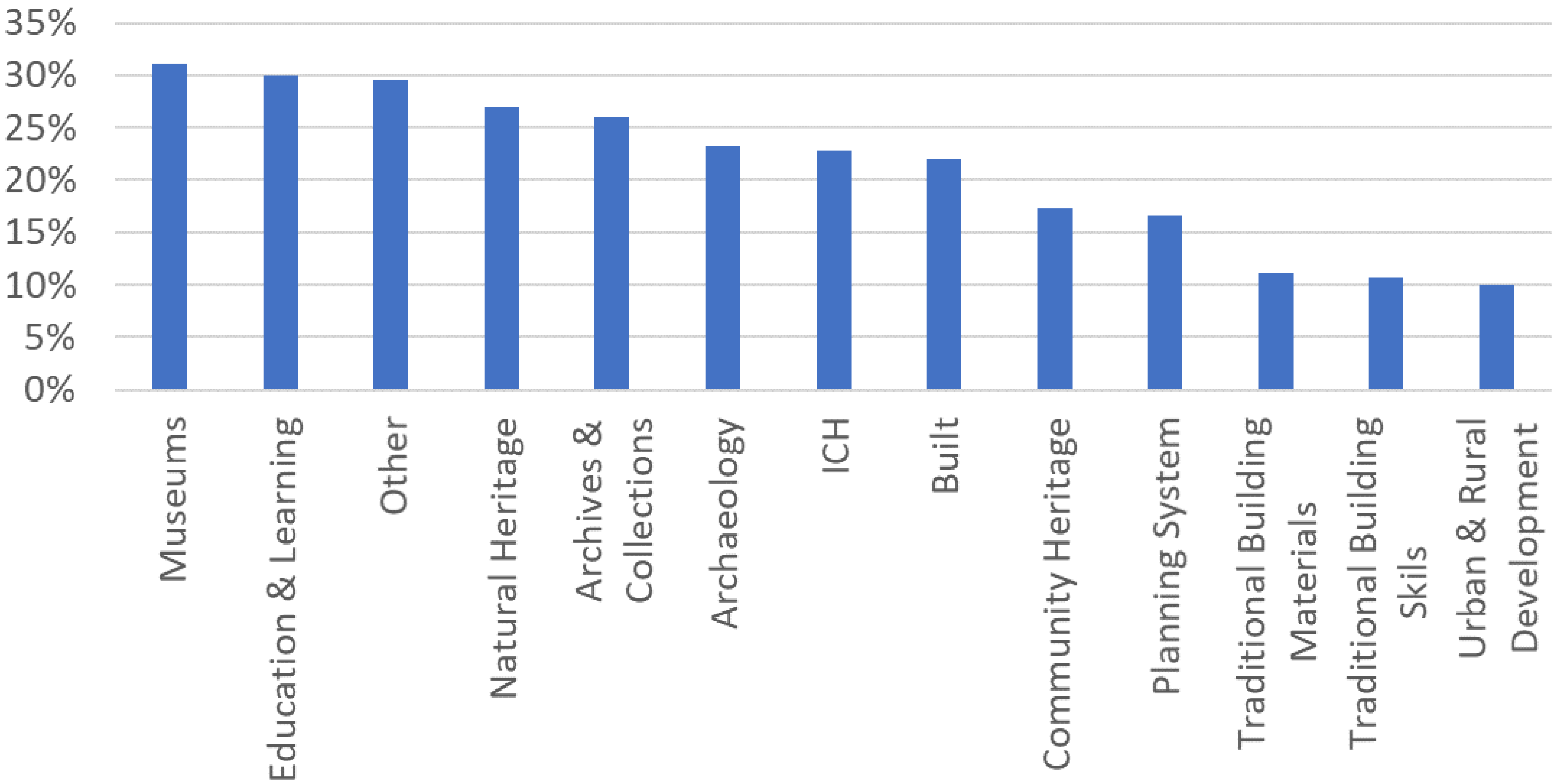
OPINION OF RISK



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

AREAS REPORTING HIGHEST RISK

% HIGH RISK BY HISTORIC ENVIRONMENT AREA



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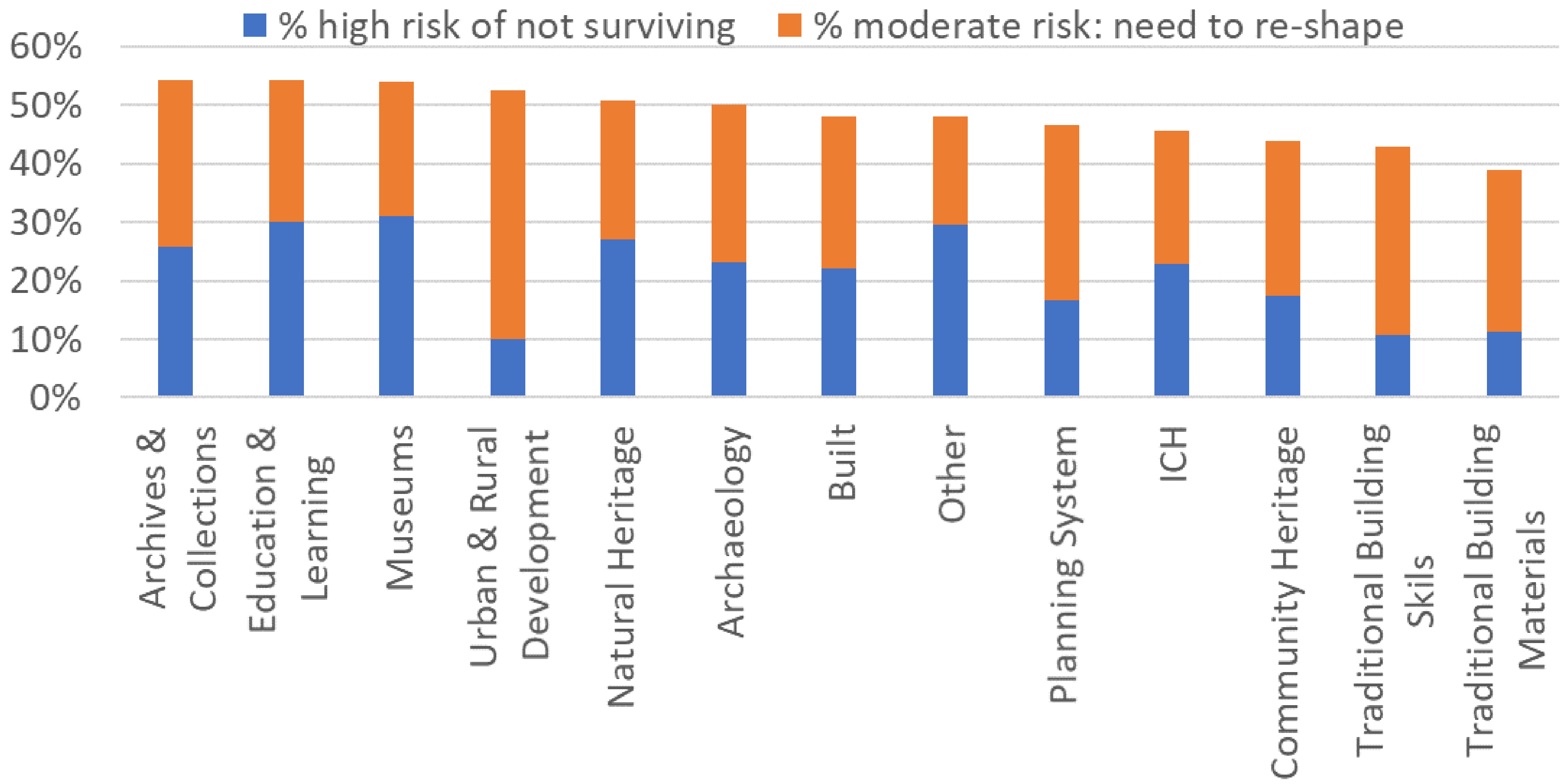
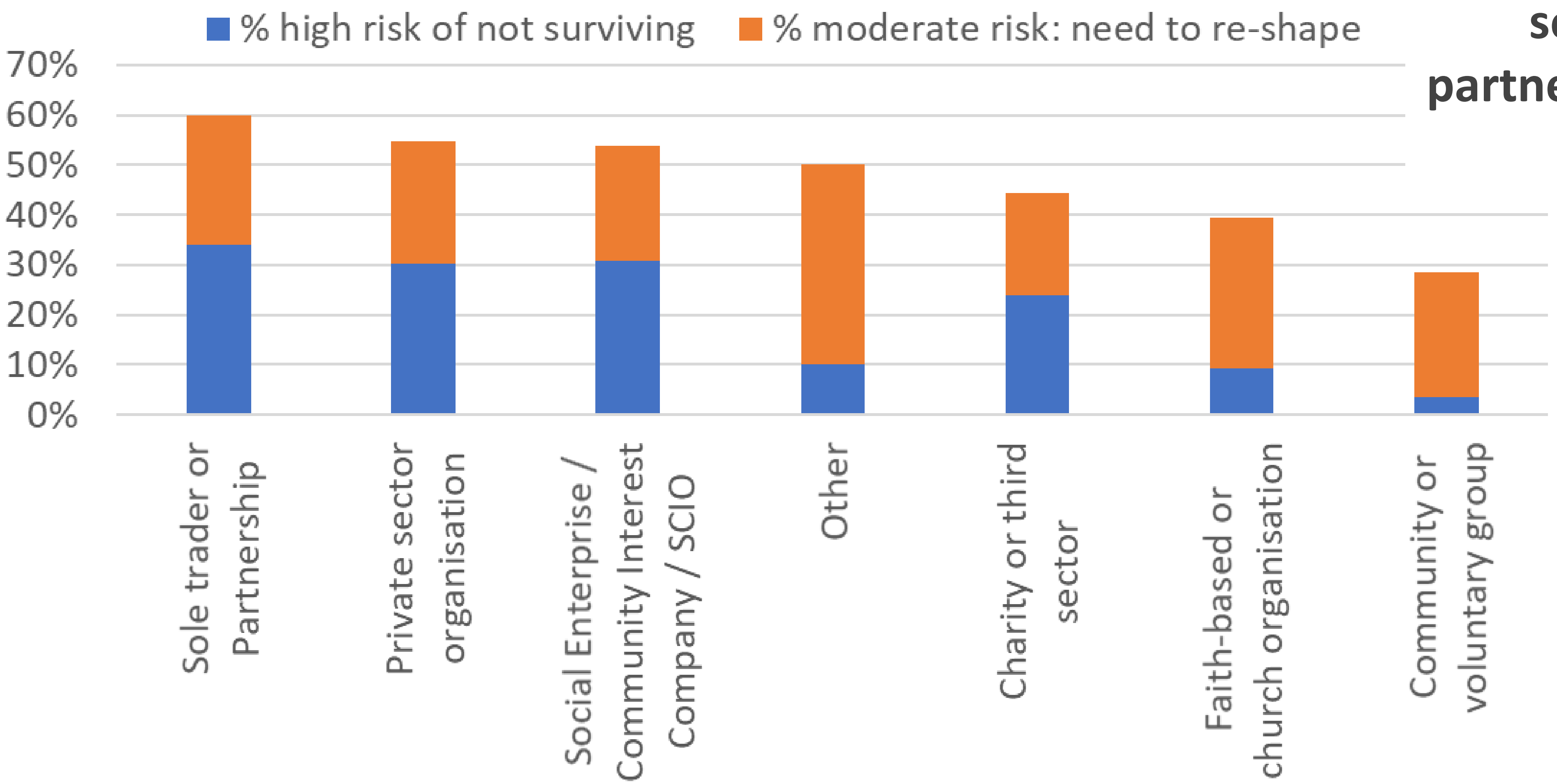
AREAS EXPECTED TO CEASE OR TRANSFORM

% RISK BY HISTORIC ENVIRONMENT AREA



RELATIVE RISKS

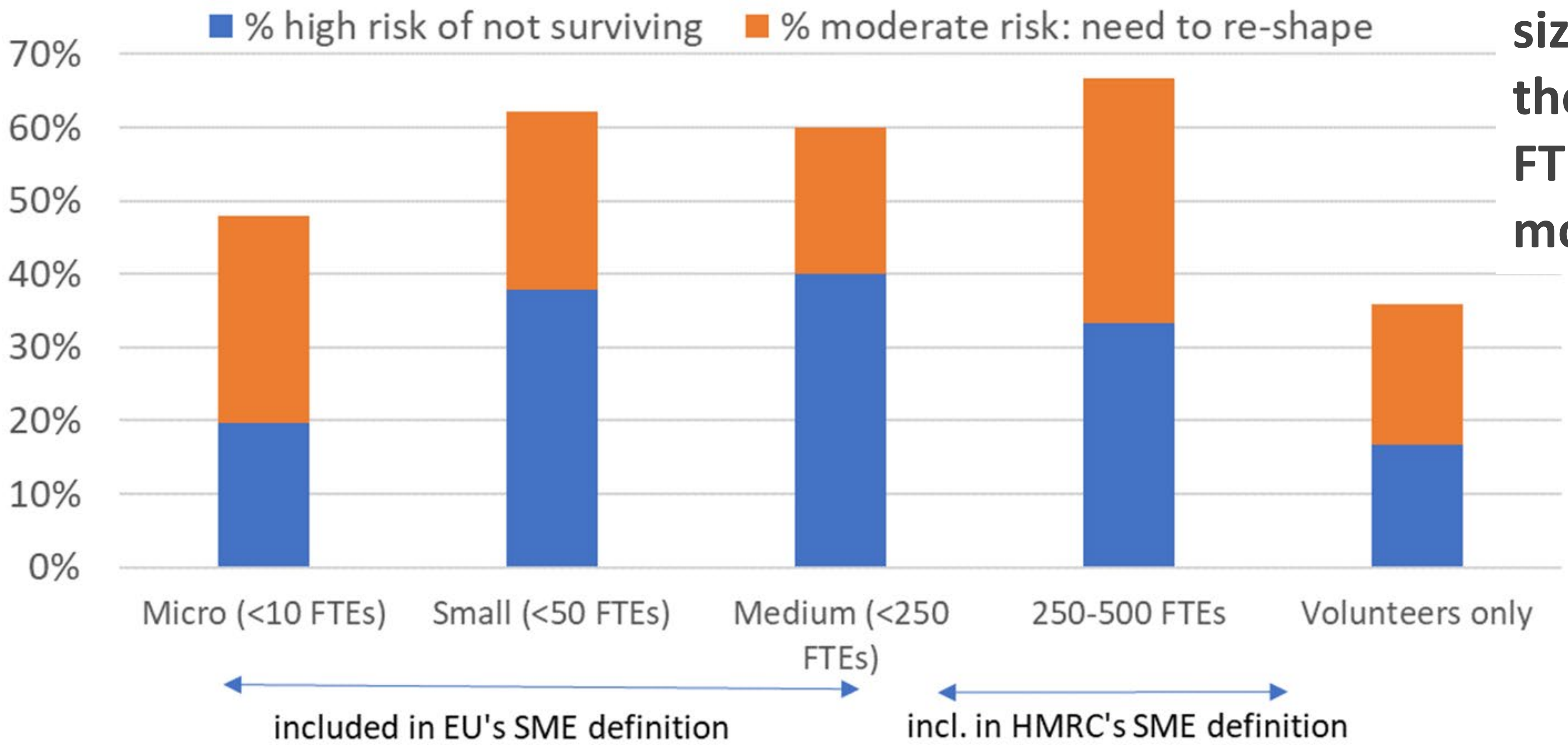
% RISK BY ORGANISATION TYPE



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

RESPONDENTS REPORTING HIGHEST RISK

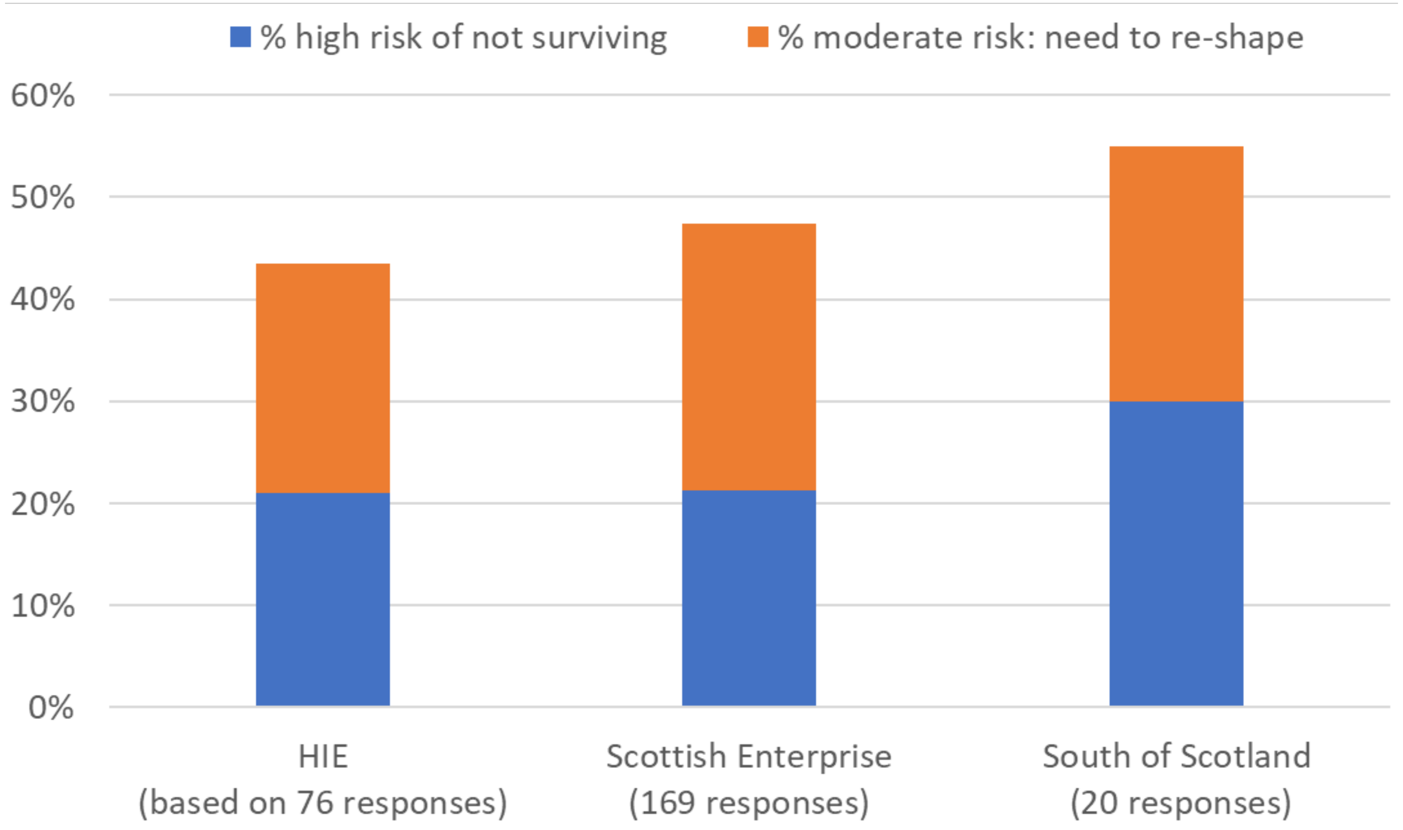
% RISK BY SIZE



All organisation sizes will struggle, though Micros (<10 FTEs) look a little more resilient

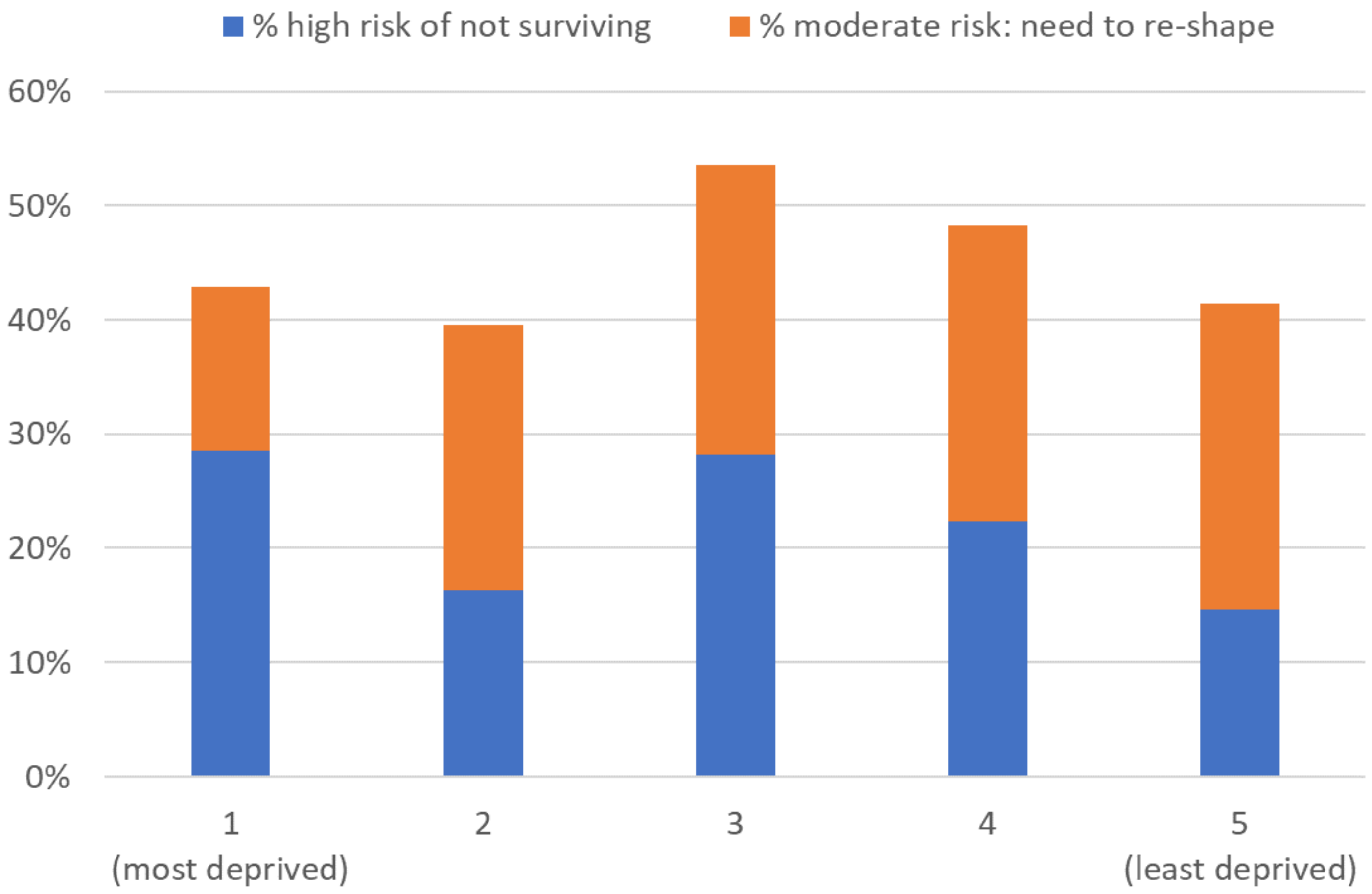
BUSINESS VIABILITY RESULTS

BY ENTERPRISE AGENCY AREA



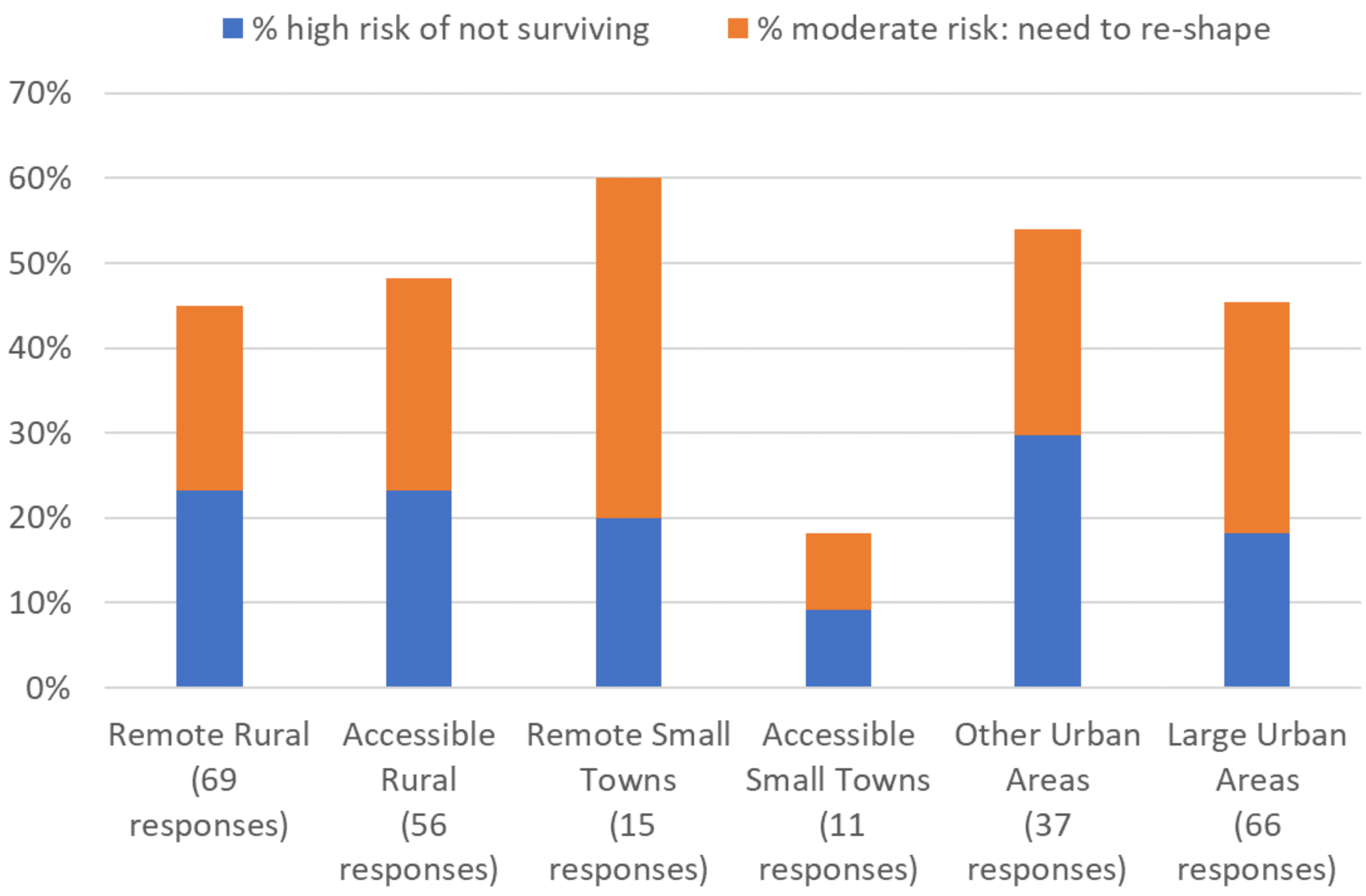
BUSINESS VIABILITY RESULTS

BY SCOTTISH INDEX OF MULTIPLE DEPRIVATION QUINTILE

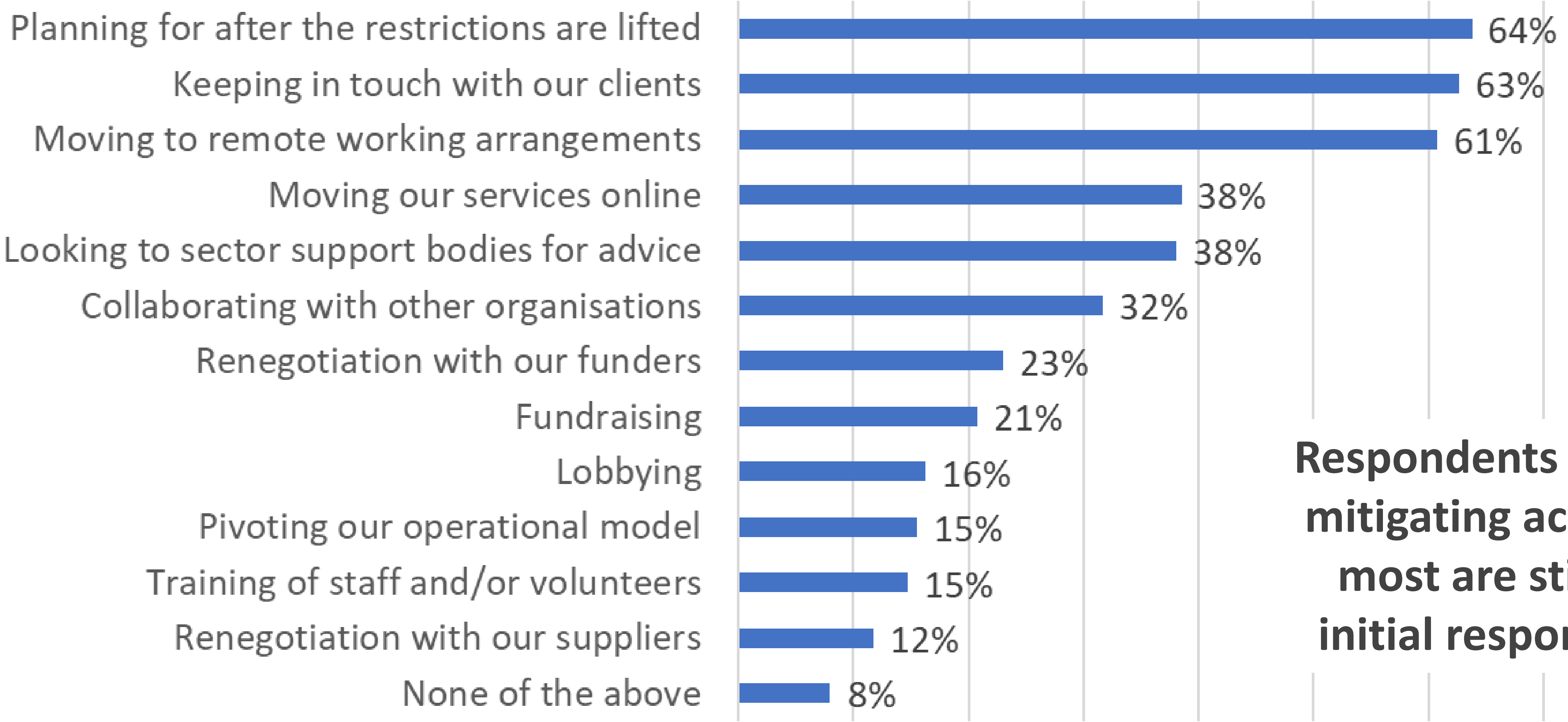


BUSINESS VIABILITY RESULTS

BY 6-FOLD URBAN-RURAL CLASSIFICATION



MITIGATING ACTIONS



Respondents are taking mitigating actions, but most are still in the initial response stage

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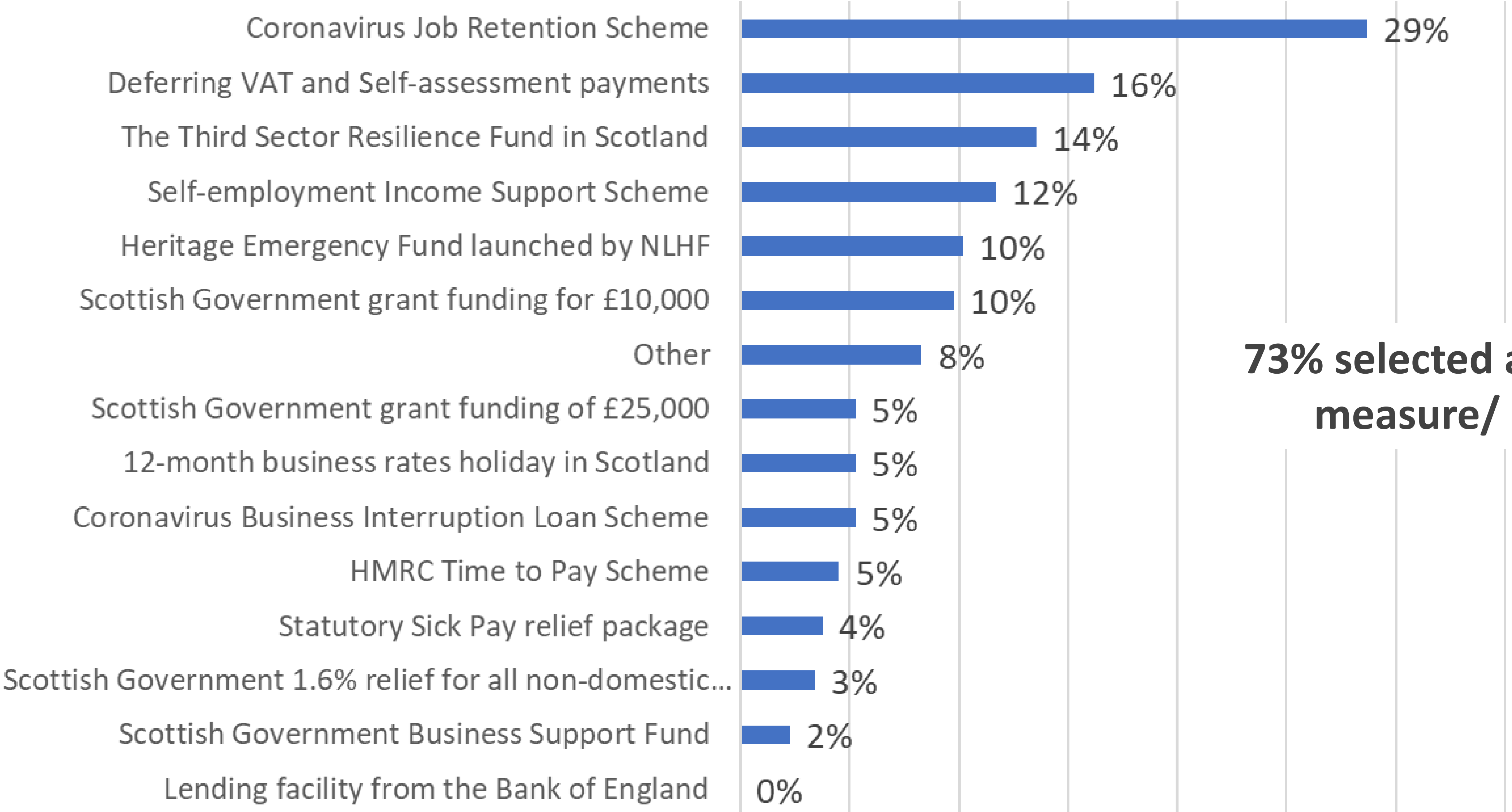
SUPPORT SCHEMES/ MEASURES BEING PURSUED



73% selected at least one measure/ scheme

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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.

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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%)