



THE INSTITUTE OF CONSERVATION

# CORONAVIRUS & CONSERVATION IMPACT STUDY

Feb 2021

**Report on Employers**





Part 1

# INTRODUCTION

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THE WHAT, WHY AND HOW BEHIND  
OUR RESEARCH

# ABOUT THIS RESEARCH

## Background and aims

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The ongoing Coronavirus (Covid-19) crisis presents challenges to the heritage sector and the people who work in our field.

Icon's first Coronavirus Impact report, published in April, presented a worrying situation for conservation professionals, with 90% of respondents reporting serious economic consequences arising from lockdown restrictions.

In November 2020, as most of the UK returned to a state of lockdown, Icon launched a second survey to gather further information and data on how the pandemic was affecting the conservation sector.

The research aimed to capture reliable data specific to conservation and its workforce across the UK.

Icon is grateful to all members who helped to build our evidence base by taking part in the research or by sharing case studies through other means.

Icon will use the findings to develop effective response strategies and coordinate support for conservators and the wider heritage sector.

# METHODOLOGY

## Two surveys

We collected our data through a survey which ran from 25 November to 9 December 2020. In order to capture concerns unique to employers and employees, we ran the survey as two separate questionnaires with questions tailored to both groups.

Some questions referred to Icon's first Coronavirus survey to allow us to assess the course of the crisis, while others took into account how the situation had evolved. We aimed to align questions to ONS Coronavirus surveying to ensure data can be cross-referenced to national reporting.

**This report summarises the results of the Employers Survey.**

### EMPLOYEES

for employees of organisations and businesses  
AIM: to capture sentiment on future employment, working patterns and career plans.

### EMPLOYERS

for business owners, freelancers and the self-employed  
AIM: to build a picture of the current private practice environment.



Part 2

# THE DATASET

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WHO TOOK PART IN OUR RESEARCH

# THE DATASET

**We heard from 69 respondents...**

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## FROM SOLE TRADERS TO FREELANCERS

The majority indicated they worked as sole traders (43%) or freelancers (40%). Private limited companies were also represented.

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## RUNNING MICROBUSINESSES

95% of respondents employed 0-5 employees. The majority (69%) had an annual turnover of under £50,000.

## FROM AROUND THE WORLD

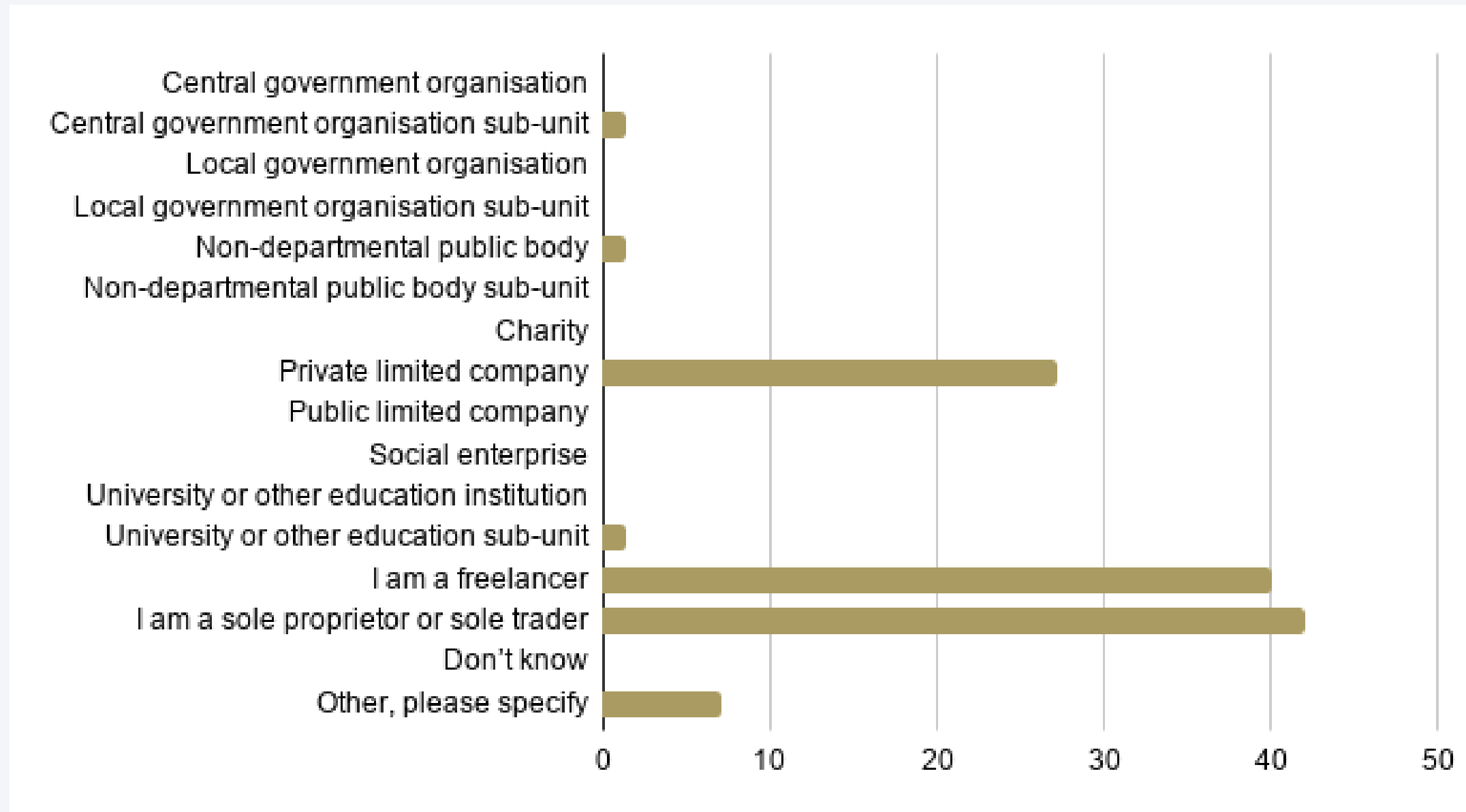
While the majority of respondents operated in England, all UK nations were represented. 27% of respondents said they worked abroad.

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## WITH MANY SPECIALISMS

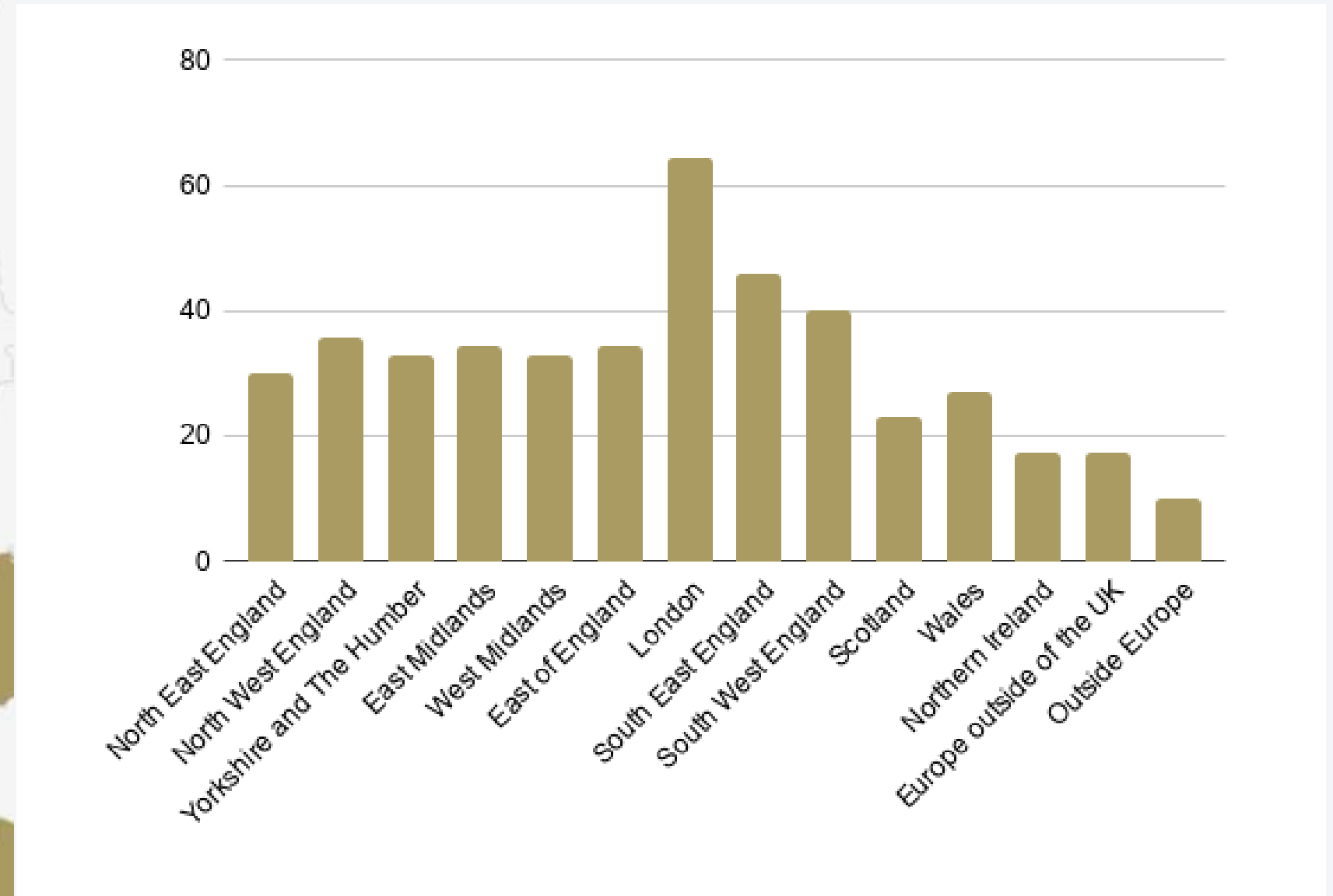
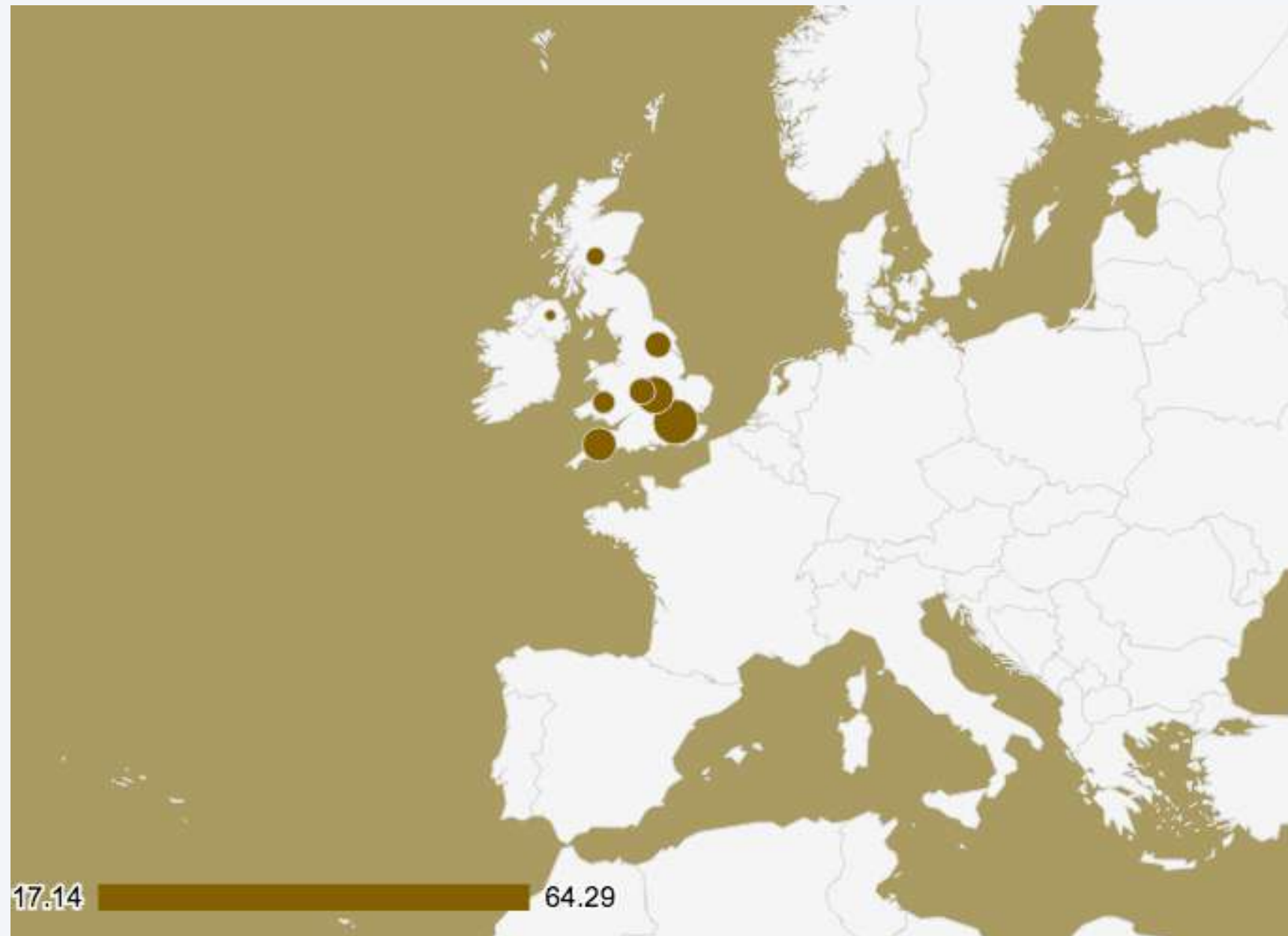
Conservators working in book & paper, historic interiors, contemporary art, paintings and textiles were represented the most strongly.

The majority of respondents worked as sole traders or freelancers or represented private practices.



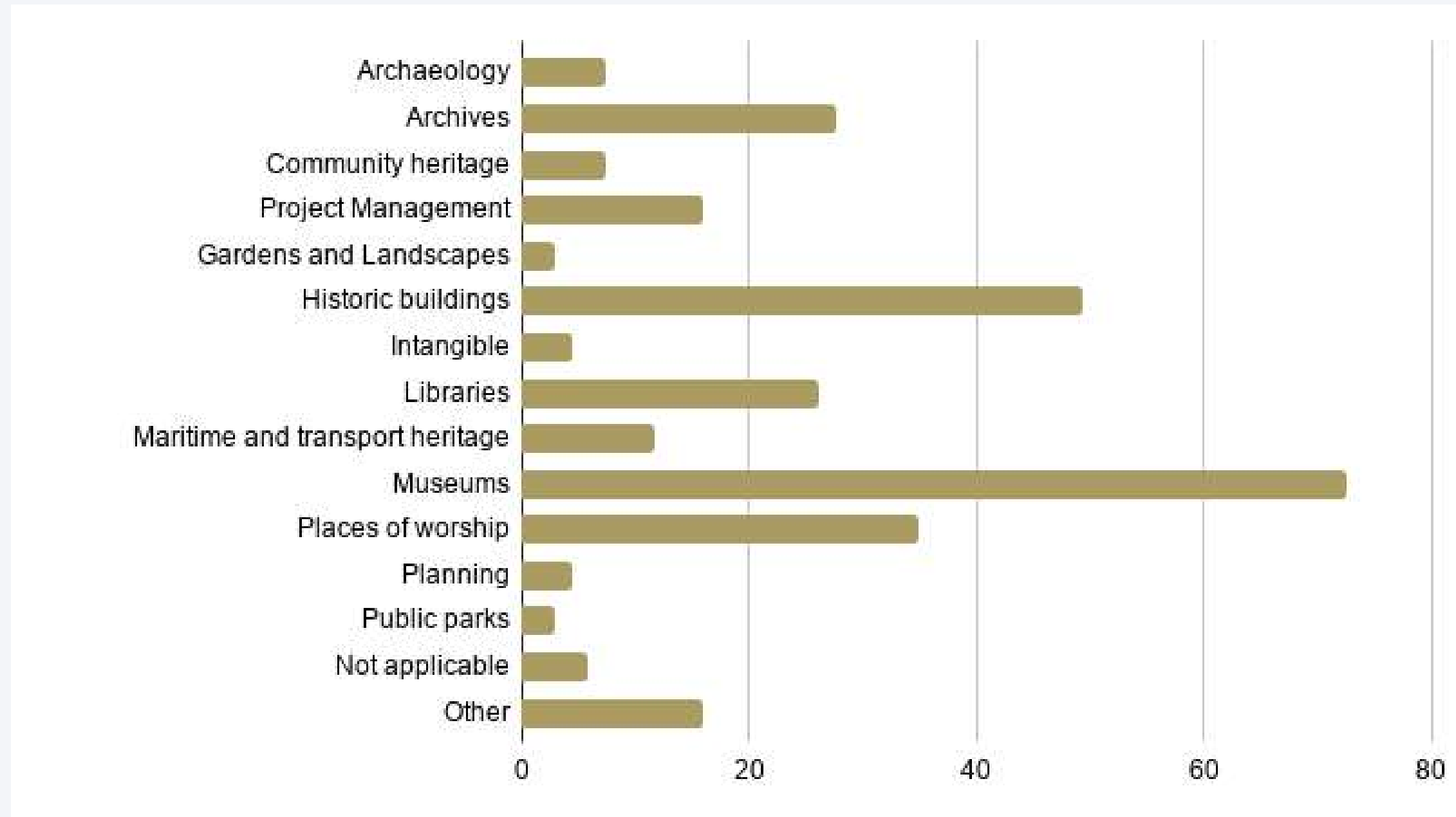
What type of organisation do you represent?

While the majority of respondents operated in England, all UK nations were represented. 27 % of respondents said they worked abroad.



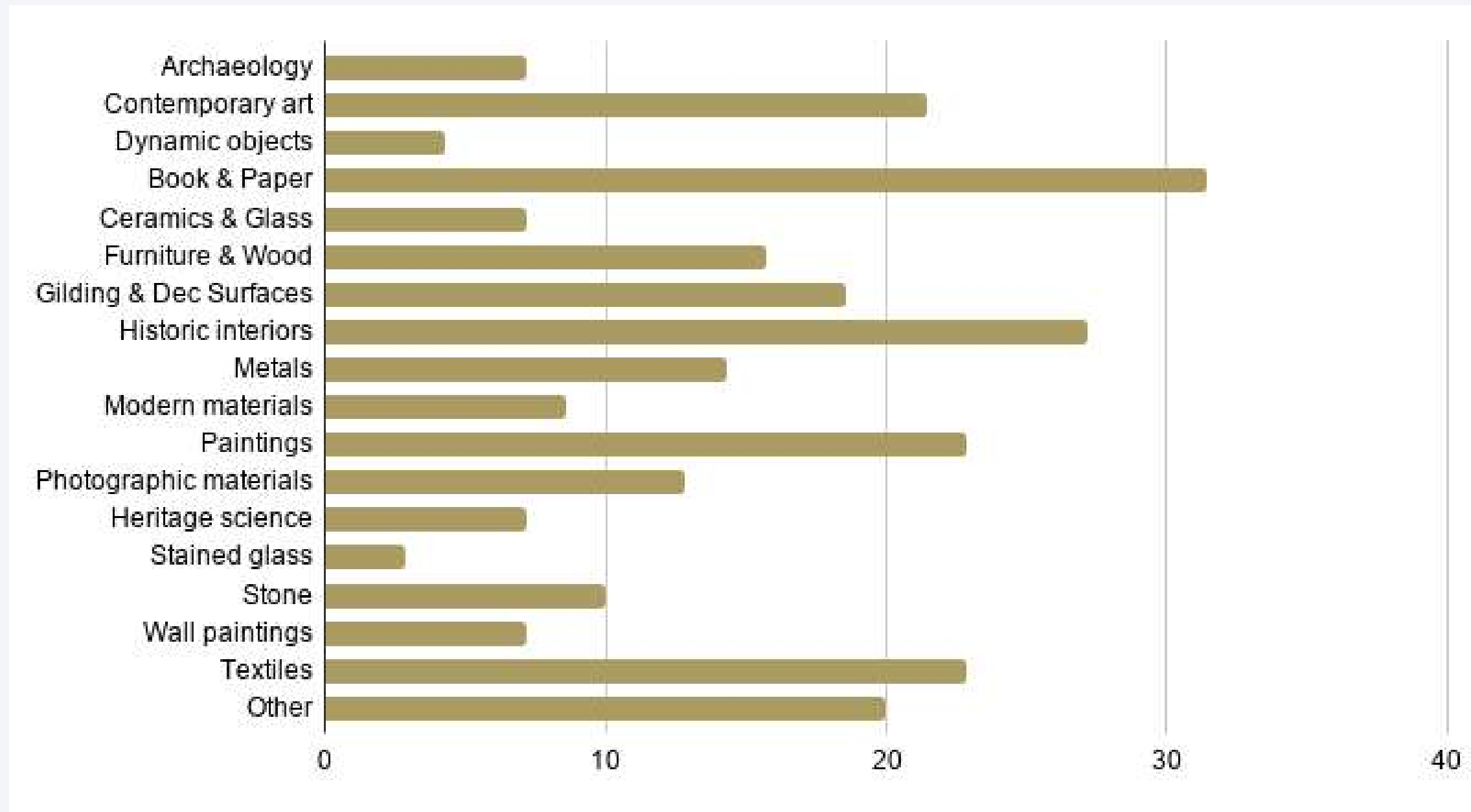
In which geographic areas do you operate?

Respondents worked across museums, historic buildings, places of worship and other heritage fields:



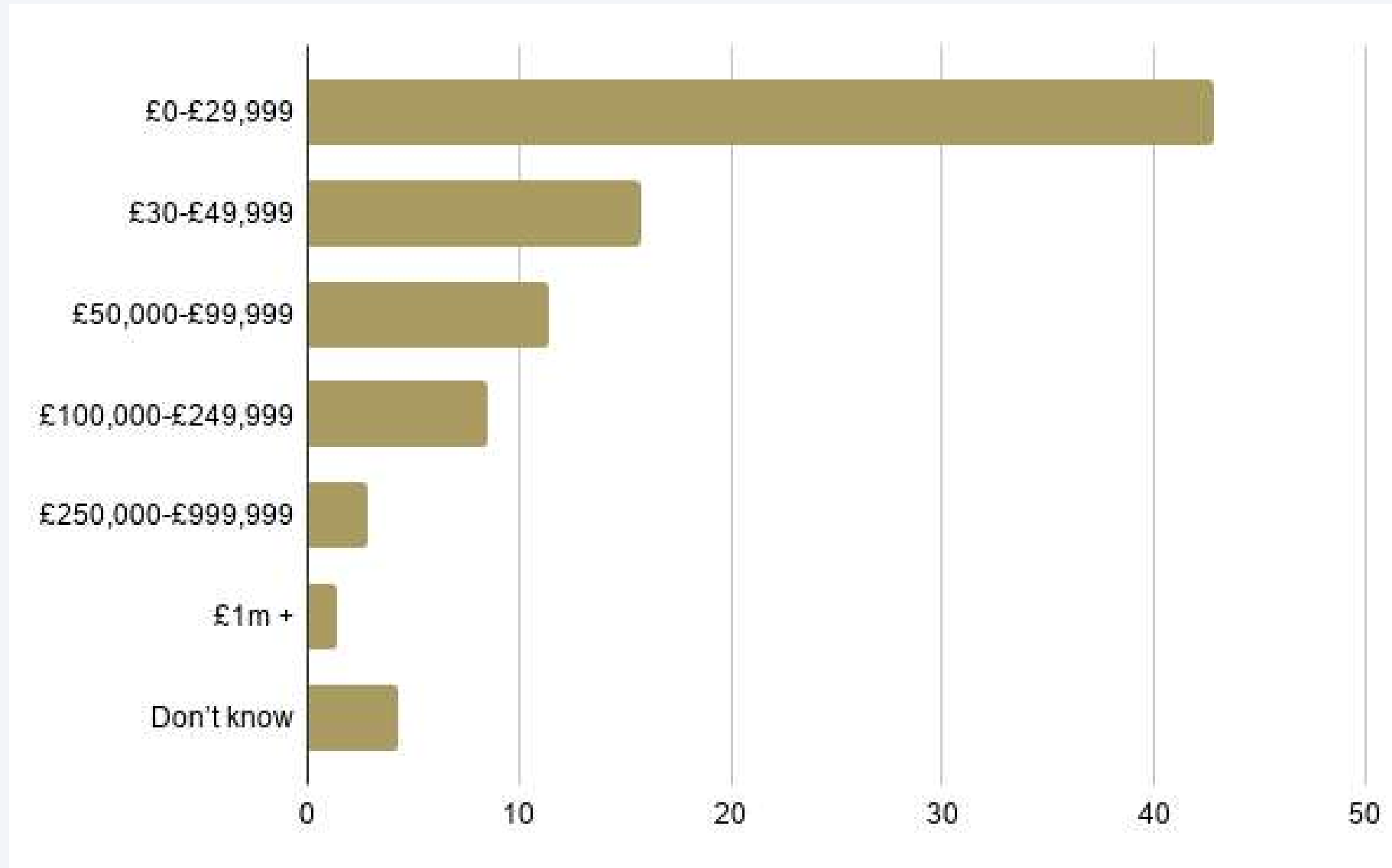
Does your organisation work in or represent any of the following heritage areas? Please select all that apply.

Participants represented businesses working in or representing a range of conservation specialisms:



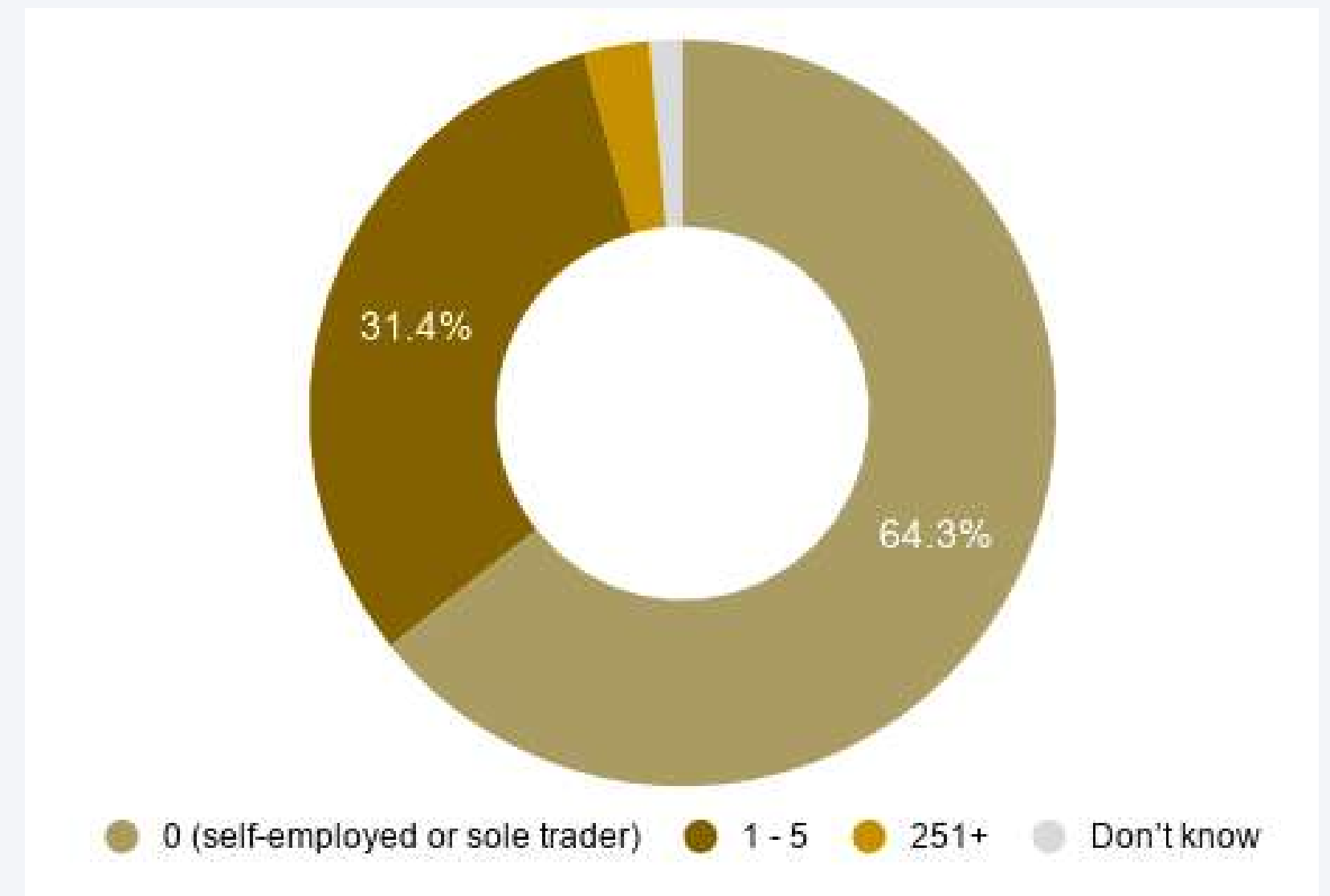
Does your organisation work in or represent any of the following conservation specialisms?

The majority reported a turnover/income of under £50,000 for the 2019/20 financial year...



What was your turnover/income for the 2019/20 financial year?

...and employed up to 5 people.



How many people does your business employ?



Part 3

# FINDINGS

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HOW OUR PARTICIPANTS RESPONDED

# TRADING & REVENUE

**The Coronavirus pandemic has severely affected the revenue and operations of conservation businesses.**

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Only a quarter of respondents indicated that they were operating as prior to the outbreak. A quarter also estimated they had up to 3 months left of viable operations.

Almost half of respondents reported their revenue had decreased by more than 50% compared to normal expectations.

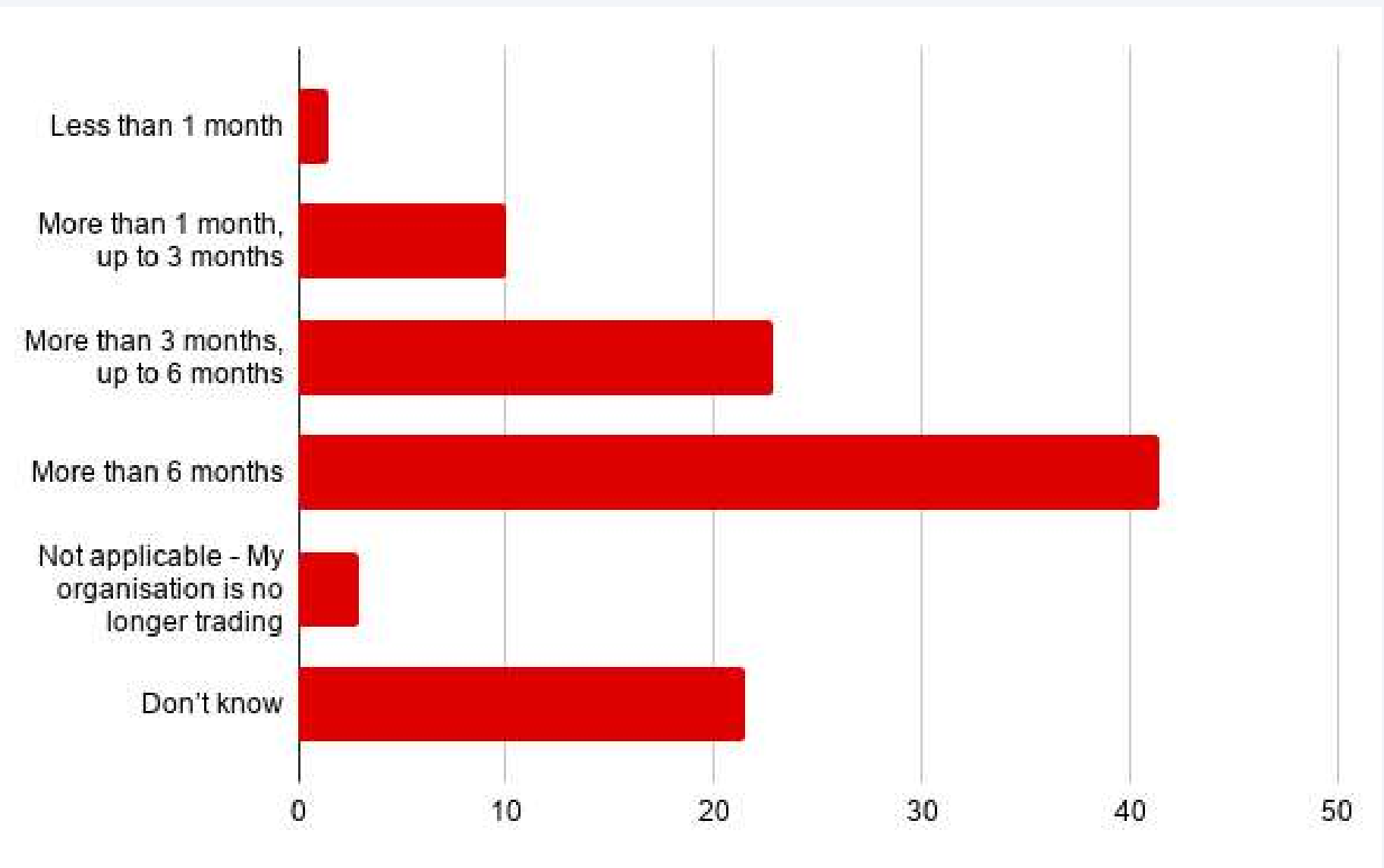
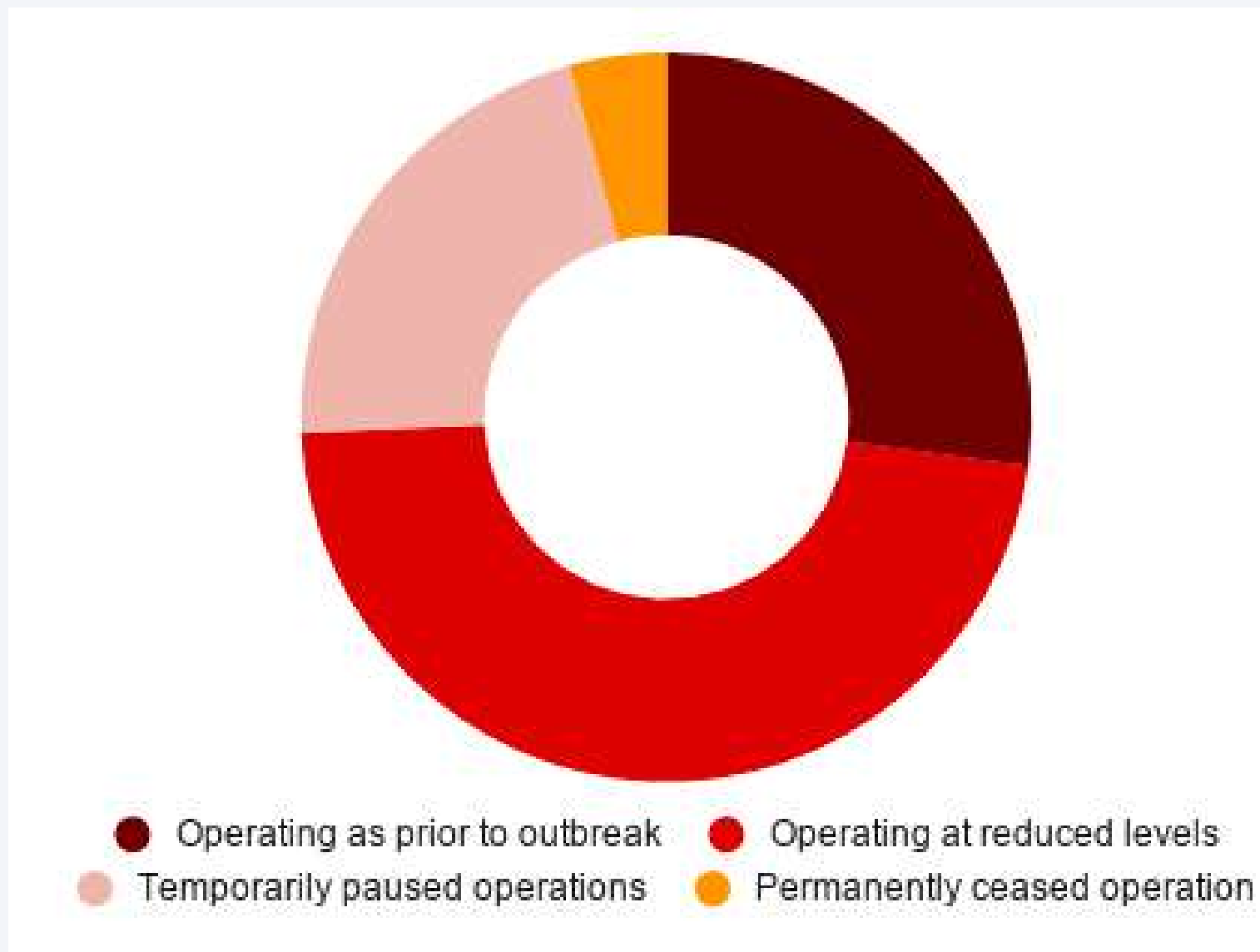
Reduced client spending and cancelled contracts were the main cause of decreased revenue.

Social distancing regulations and insufficient client interest had contributed to business owners closing down operations. Over 50% had closed their workshop at least once since the outbreak.

**This has resulted in conservators feeling widely uncertain about the health of their business.**

Only a quarter of respondents indicated they were operating as they were prior to the outbreak, with another quarter reporting they had temporarily or permanently ceased operations.

Over 40% predicted they could continue trading for more than 6 months but nearly a quarter estimated they had up to 3 months of viable operations.

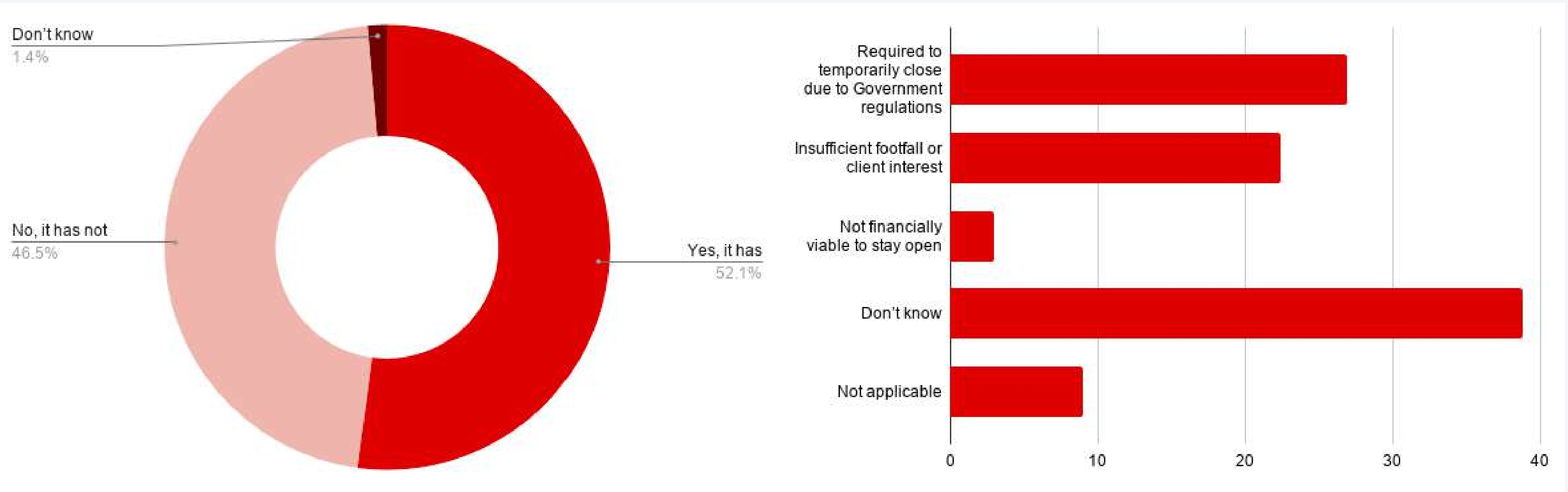


What is the current work/ operational status of your organisation/ business?

Approximately, how long do you estimate that your organisation can continue to trade/ be a viable entity?

The majority of participants answered yes when asked if they had ceased trading at any point since March 2020.

Government social distancing regulations and insufficient client interest contributed to closing down operations.

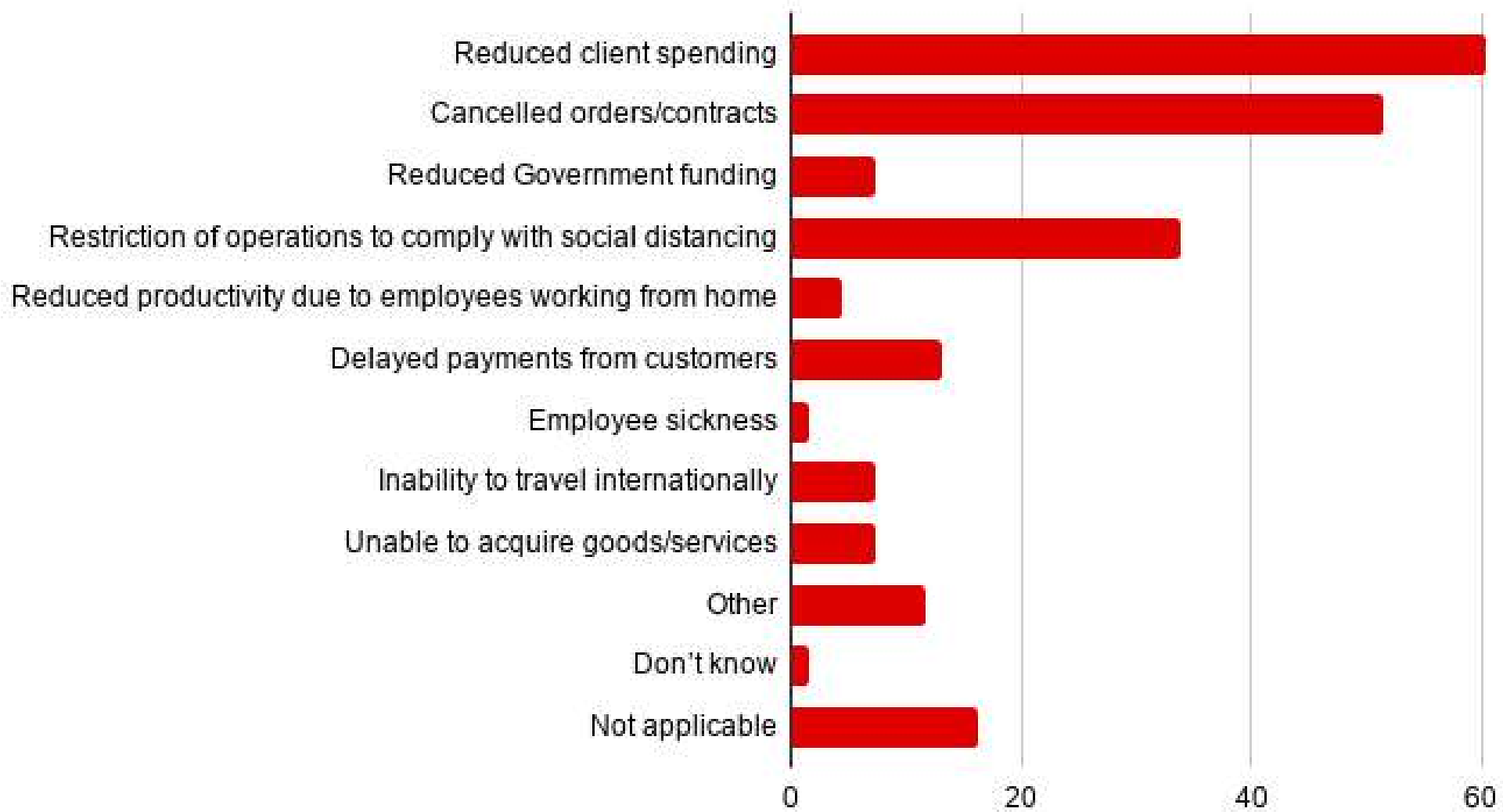
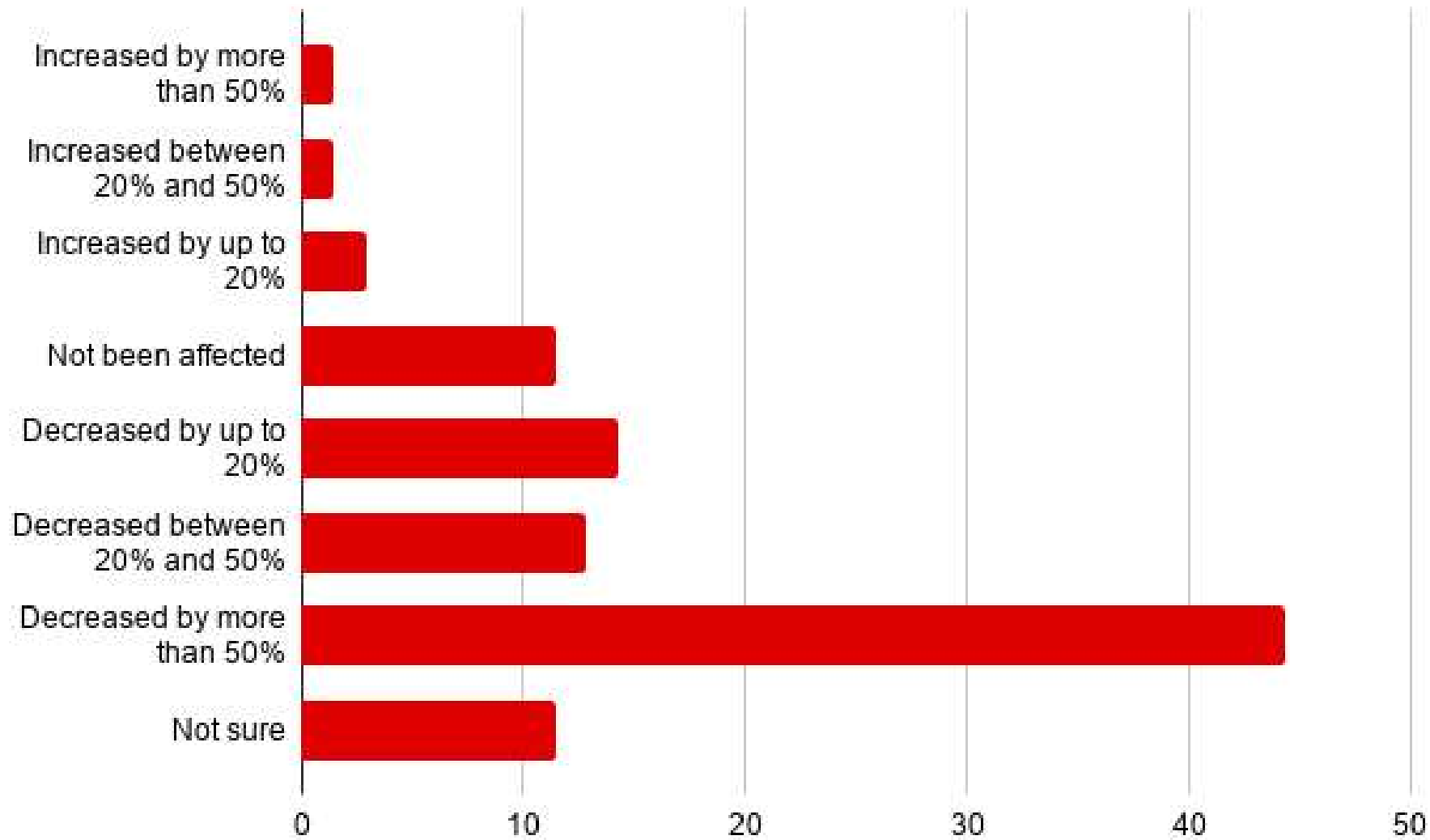


Has your organisation entirely paused trading at any point since March 2020?

Why have you had to temporarily or permanently close down operations?

Almost half of respondents reported their revenue had decreased by more than 50% compared to normal expectations for the time of year.

Reduced client spending and cancelled contracts were the main cause of decreased revenue.



How has the pandemic affected your business's revenue, compared with normal expectations for this time of year?

If your organisation's revenue decreased compared to its expected monthly revenue for this time of the year, which of the following have contributed to this?



# ADAPTING & RESILIENCE

**From staffing issues to working practices, business owners had adapted their activities in response to the pandemic.**

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71% of respondents had adjusted their activities including changing working practices, moving planned services and increasing remote working.

The furlough scheme had been used with nearly a quarter furloughing the majority or entirety of their workforce. Most were unclear about what they would do at the end of the furlough scheme.

Redundancies had been largely avoided, with just 6% reporting making employees redundant.

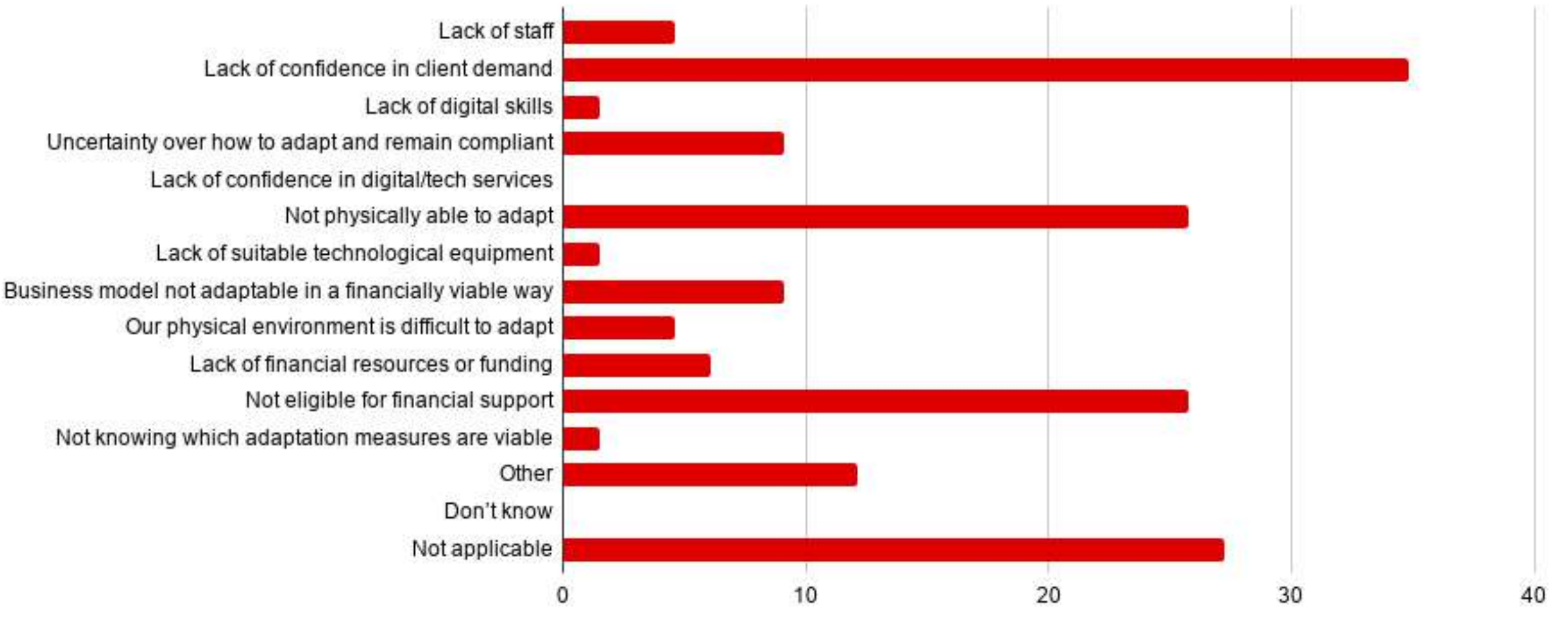
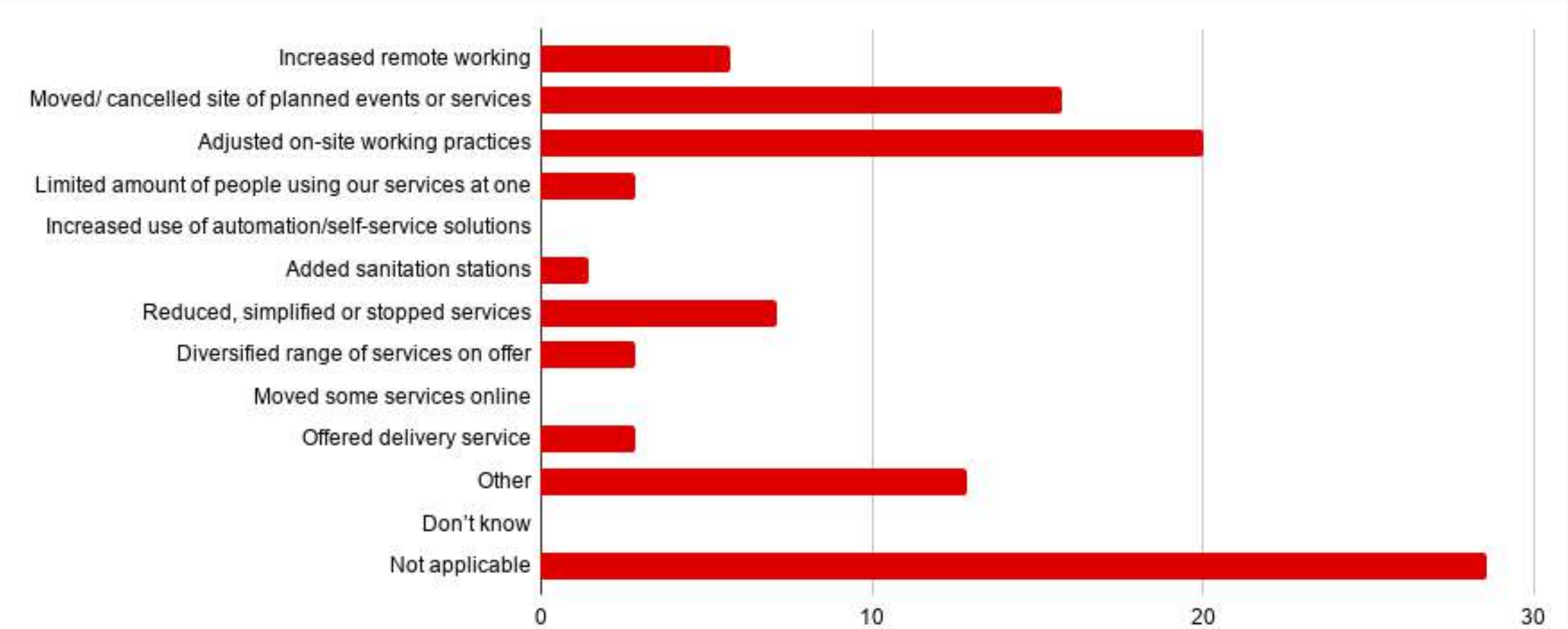
Respondents' mental health had been widely affected by loss of income (57%) and isolation (53%).

Respondents had adjusted on-site working practices, moved planned services and increased remote working to adapt business activities.

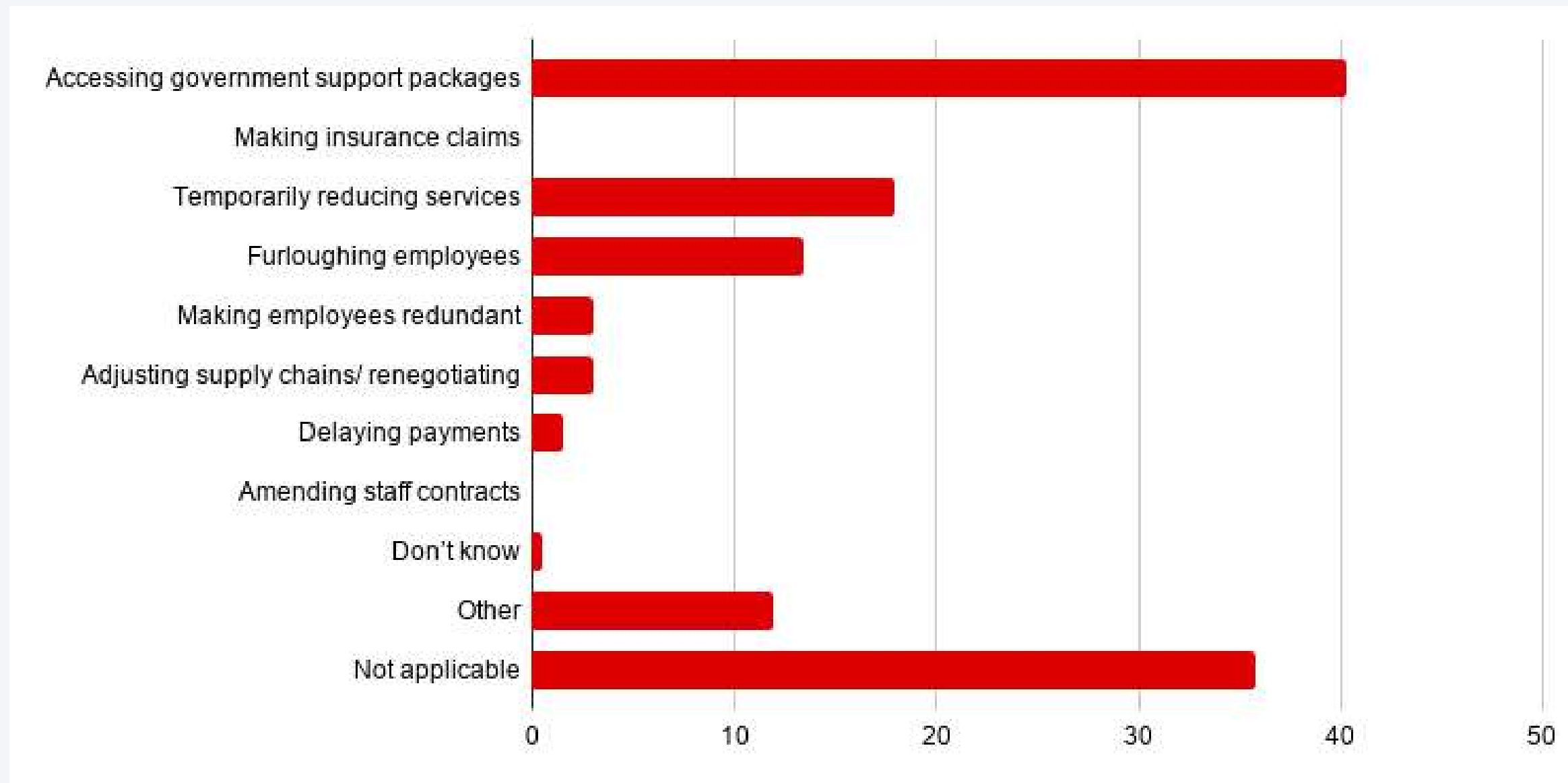
In which ways has your organisation had to adapt its business activities as a result of the Coronavirus outbreak?

Lack of confidence in client demand, inability to adapt and being ineligible for financial support presented barriers to adapting business activities.

Which barriers has your organisation faced when adapting its business activities as a result of the Coronavirus outbreak?

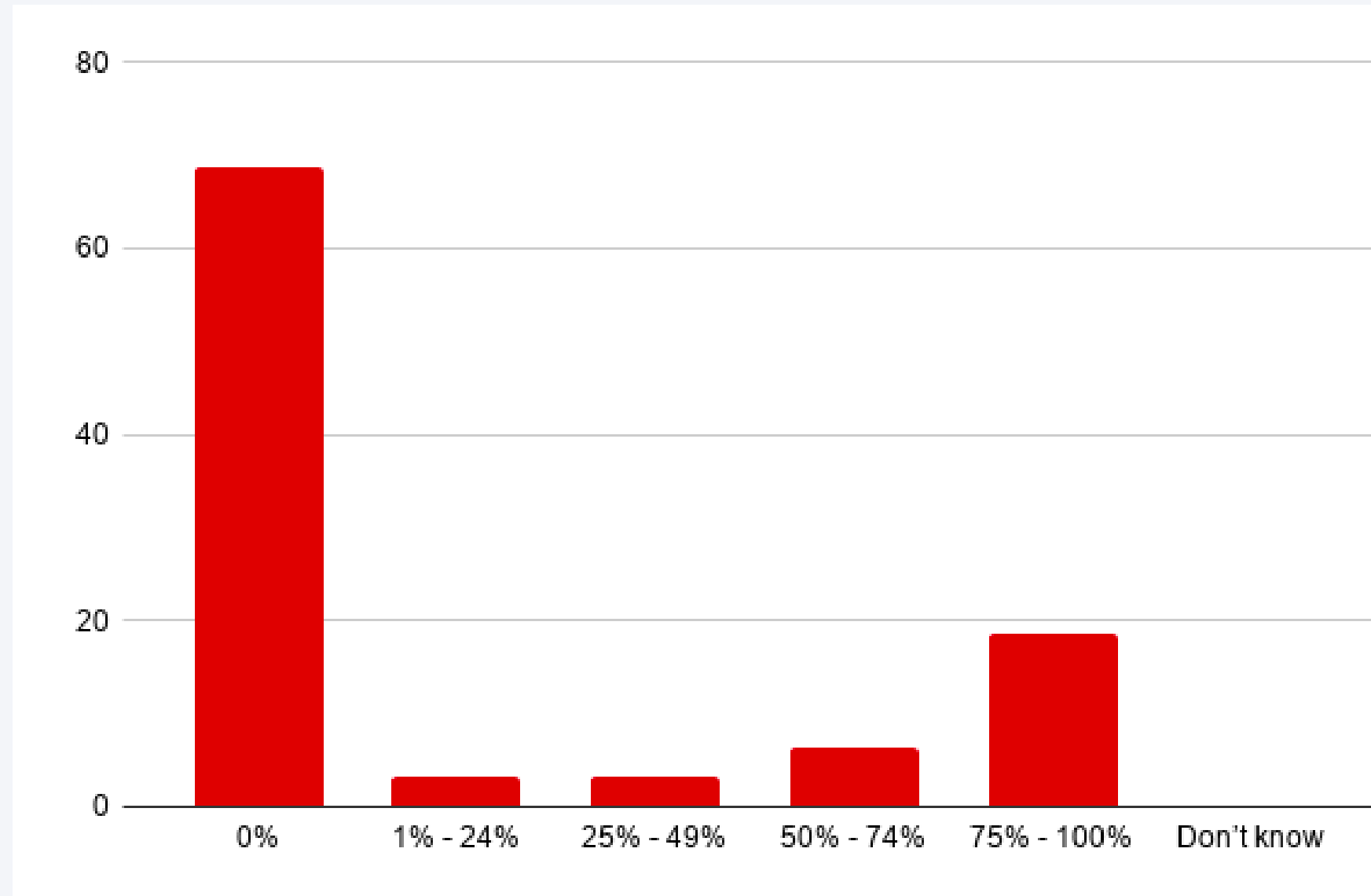


40% of participants had accessed government support packages while 18% had reduced services to maintain revenue and reduce costs.



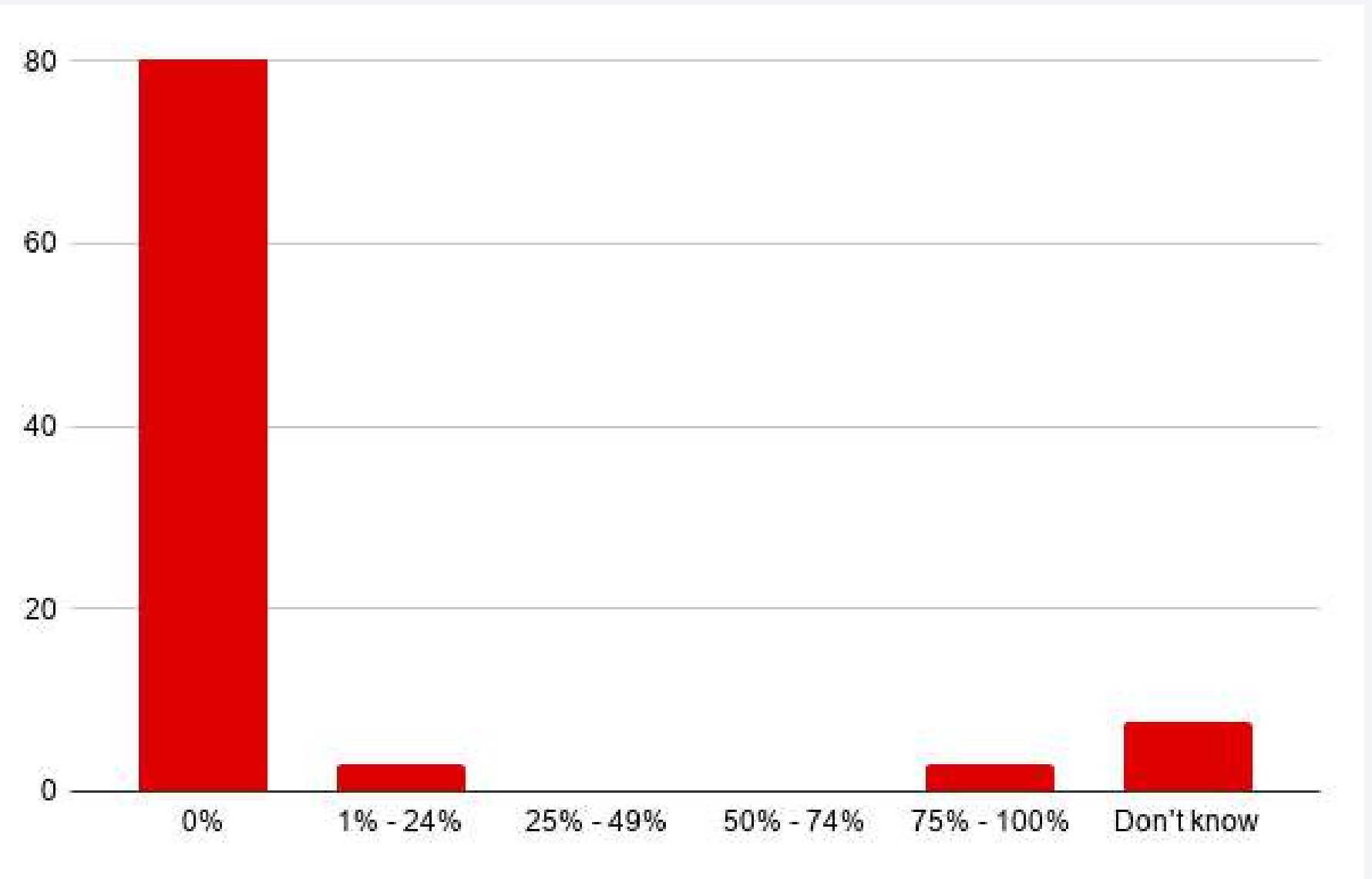
Which mitigating actions has your organisation taken to maintain revenue or reduce costs in response to the Coronavirus outbreak?

Nearly a quarter had furloughed the majority or entirety of their workforce.



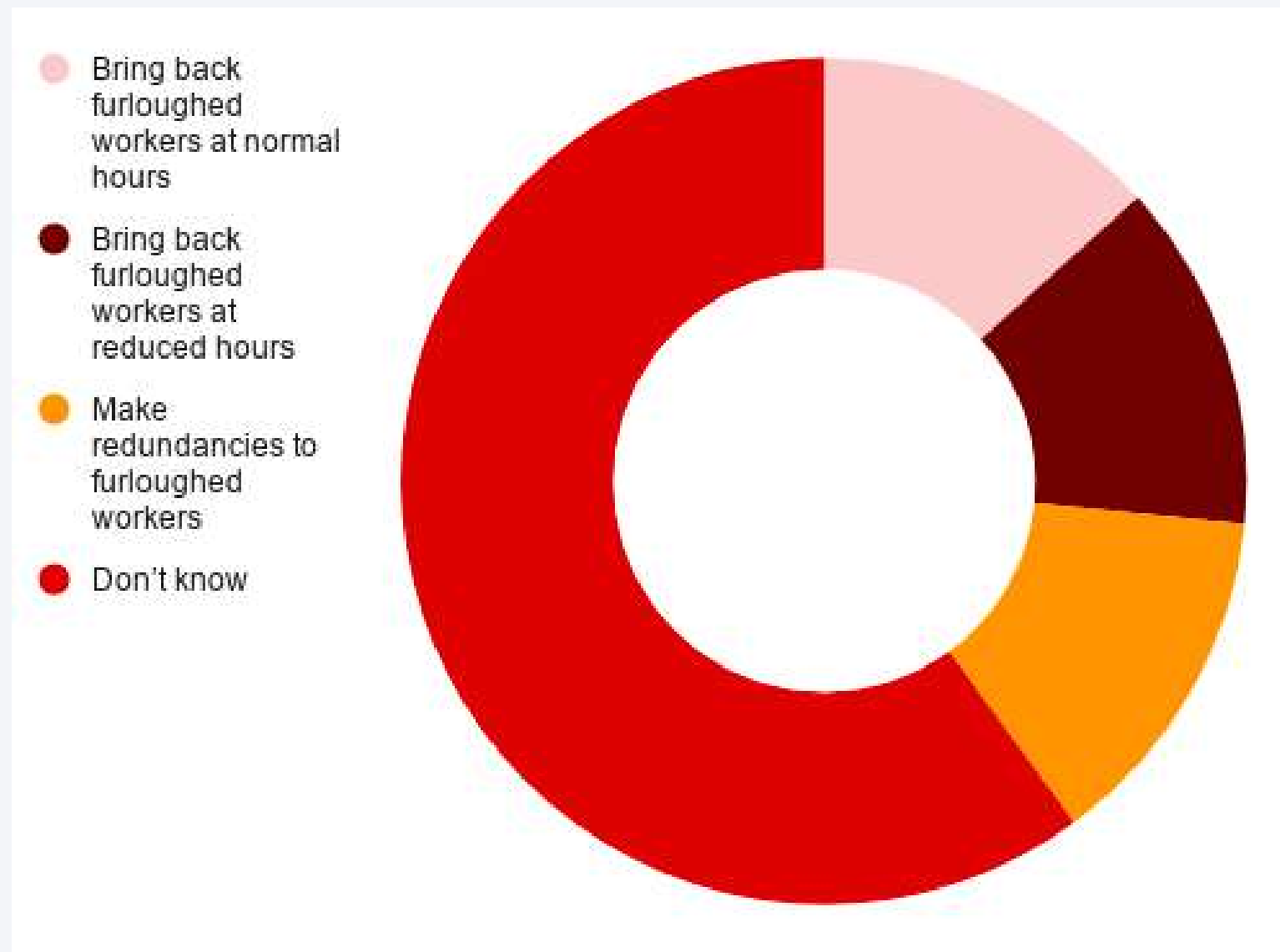
Approximately, what proportion of your business's employees have been furloughed?

Redundancies had been largely avoided, with just 6% reporting making employees redundant.



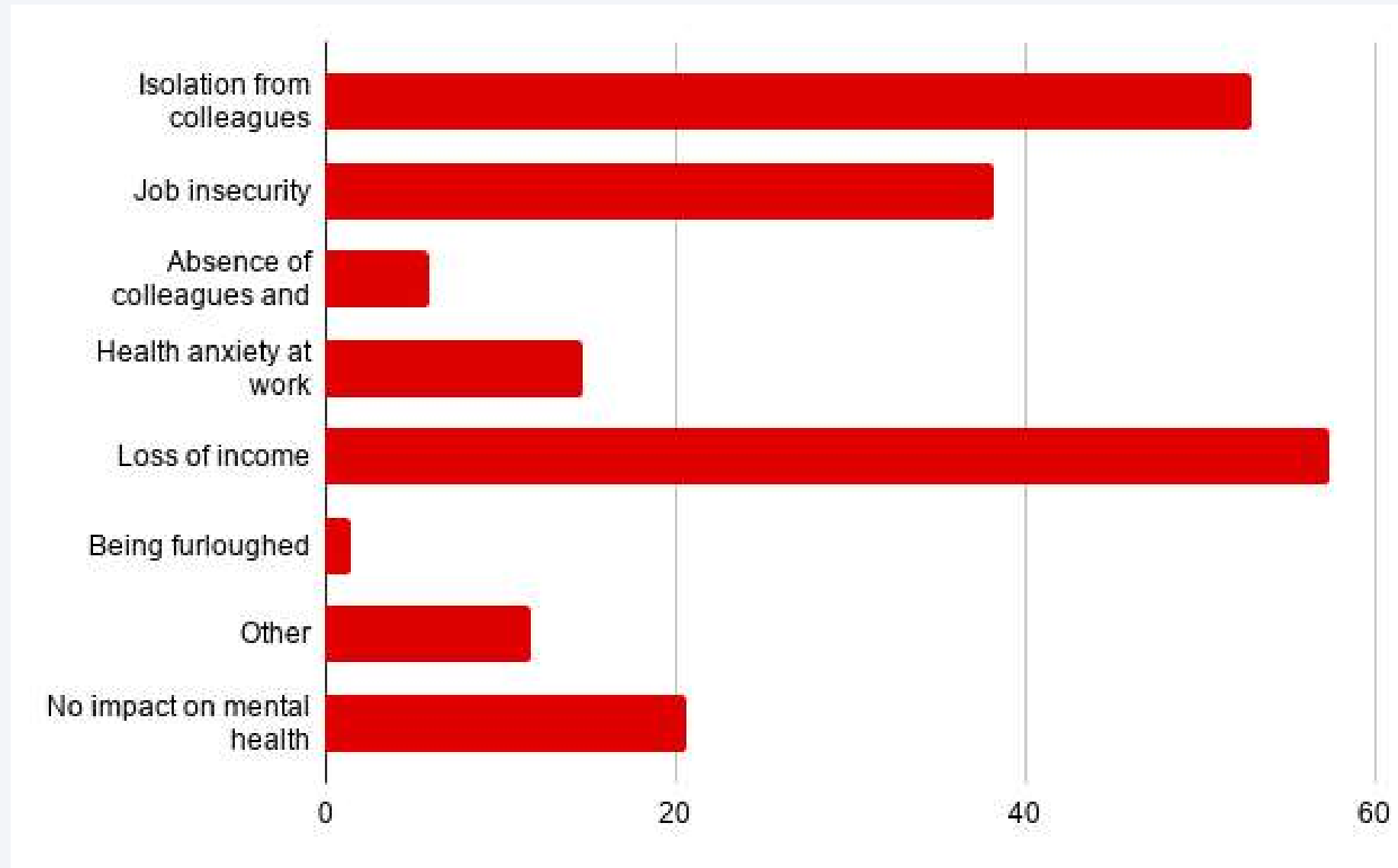
Approximately, what proportion of your organisation's employees have been made redundant?

60% of respondents were unclear about what they would do at the end of the furlough scheme with the remainder split between bringing workers back at normal or reduced hours or making redundancies.



The Coronavirus Job Retention Scheme is due to continue until the end of March 2021. What does your business currently anticipate doing when the furlough scheme ends?

Loss of income, isolation and job insecurity had an impact on respondents' mental health.



Has the Covid-19 pandemic affected your mental health in any of the following ways?

# FUTURE PLANS

**Respondents remained committed to conservation related work and private practice.**

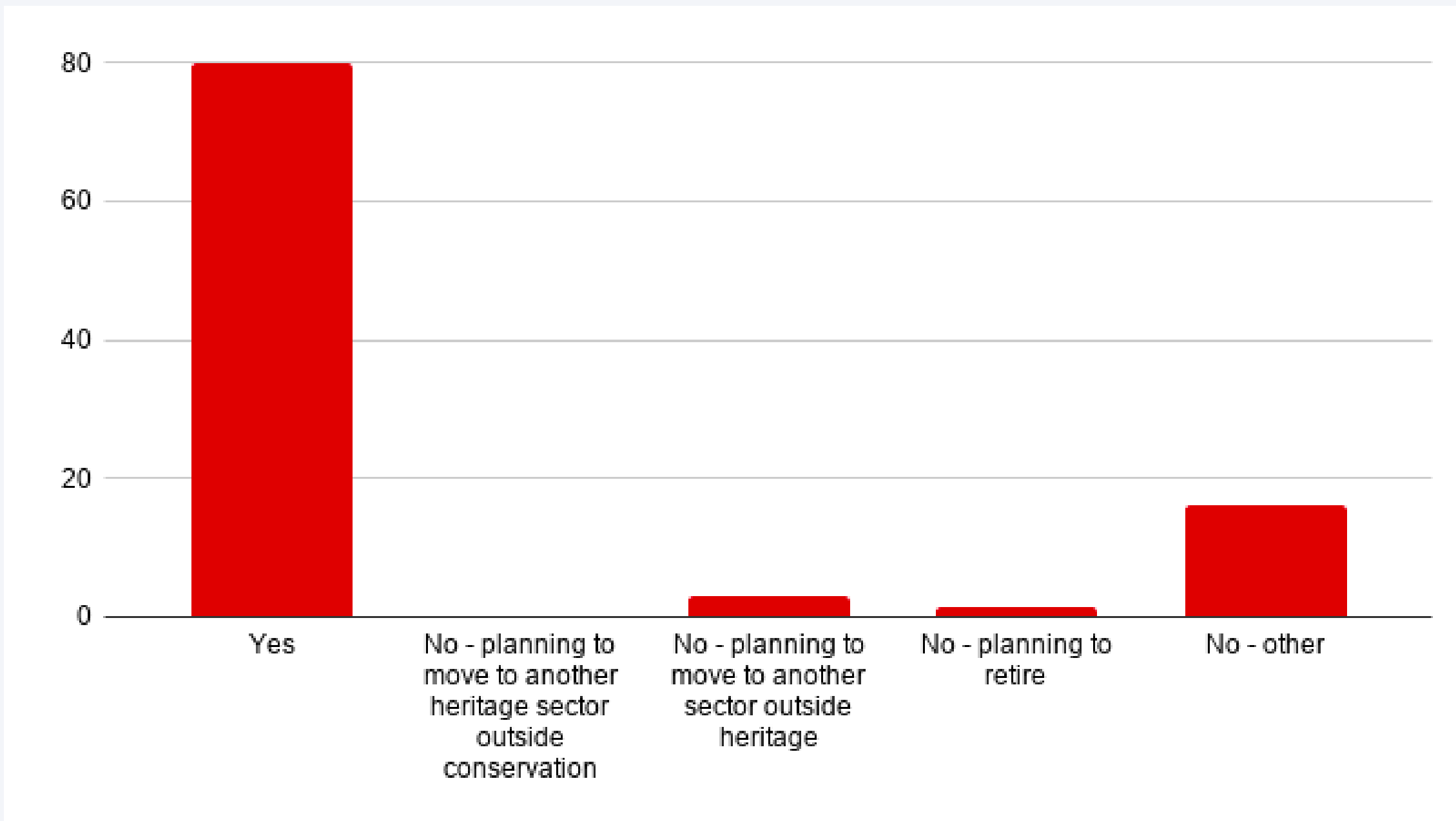
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Only 3% were planning a move out of the heritage sector.

A third had plans to apply for Icon Accreditation within the year.

Nearly half were planning to stay within private practice but 15% were uncertain about their future plans.

The majority of respondents were planning to stay within conservation related work with only 3% planning a move out of the heritage sector. However, some 'Other' responders indicated they had already transitioned to different work while some suggested a desire to stay within conservation but acknowledged that the future was uncertain.



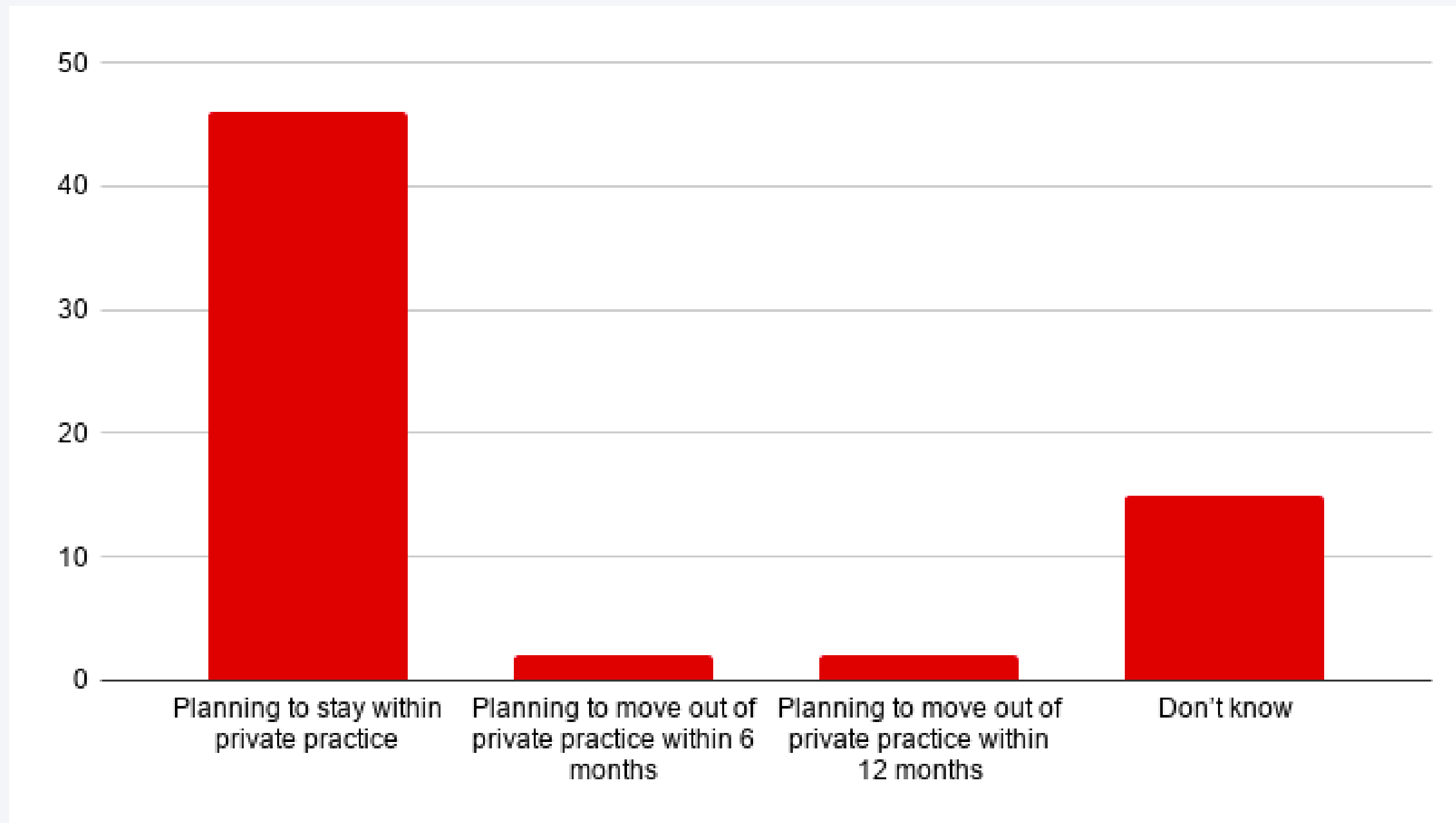
*"If I could get out, I would. The prospect is too depressing. But all my knowledge and dedication has been in this field."*

*"We have already diversified into other areas as the conservation work has dried up completely; we hope some will return but no idea if it will."*

*"If there is any work then I will stay in it. Currently working outside the sector to pay the bills."*

Are you planning to stay in conservation related work?

Many respondents were planning to stay within private practice but 15% did not know about their future plans.



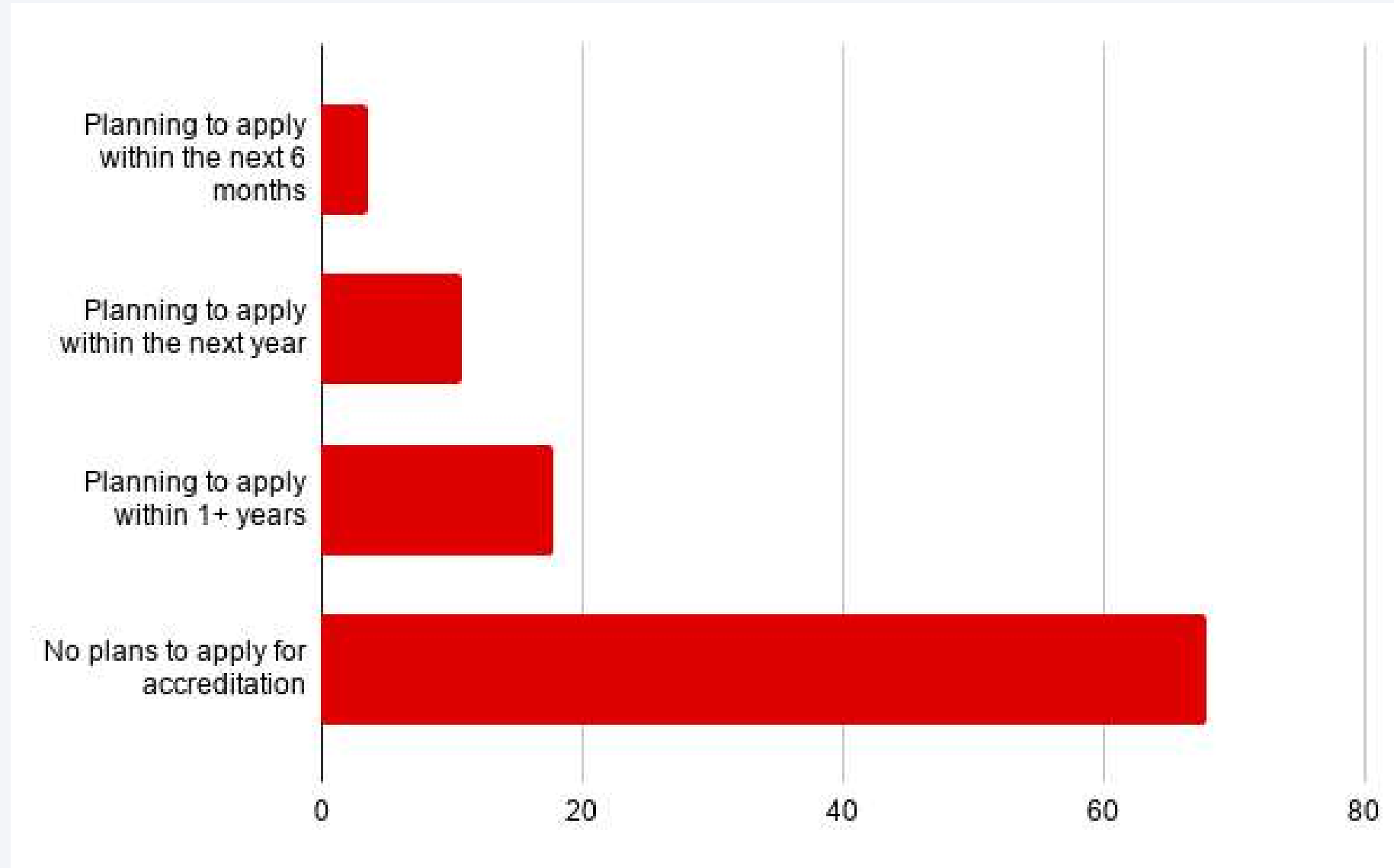
*"It is difficult to plan for the future as freelance conservation was not easy before the pandemic and it is likely to be much worse with all the cutbacks and staff losses being made now."*

*"Private practice offers me the flexibility that I require and the greatest opportunities at the current time to maximise potential income routes."*

*"There aren't exactly an abundance of jobs outside of private practice even if I wanted to apply."*

If you are in private practice, which of the following best describes your plans?

A third of self-employed and business owners had immediate plans to pursue Icon Accreditation.



Icon Accreditation is awarded by the Institute of Conservation and aligned to Icon's Professional Standards.

Accredited Conservator-Restorer (ACR) status demonstrates that a practitioner is a fully qualified and capable professional.

If you are not an Icon Accredited member which of the following statements best reflect your plans for Icon Accreditation?

# SUPPORT

**Many had made use of government support measures but some remained ineligible for schemes.**

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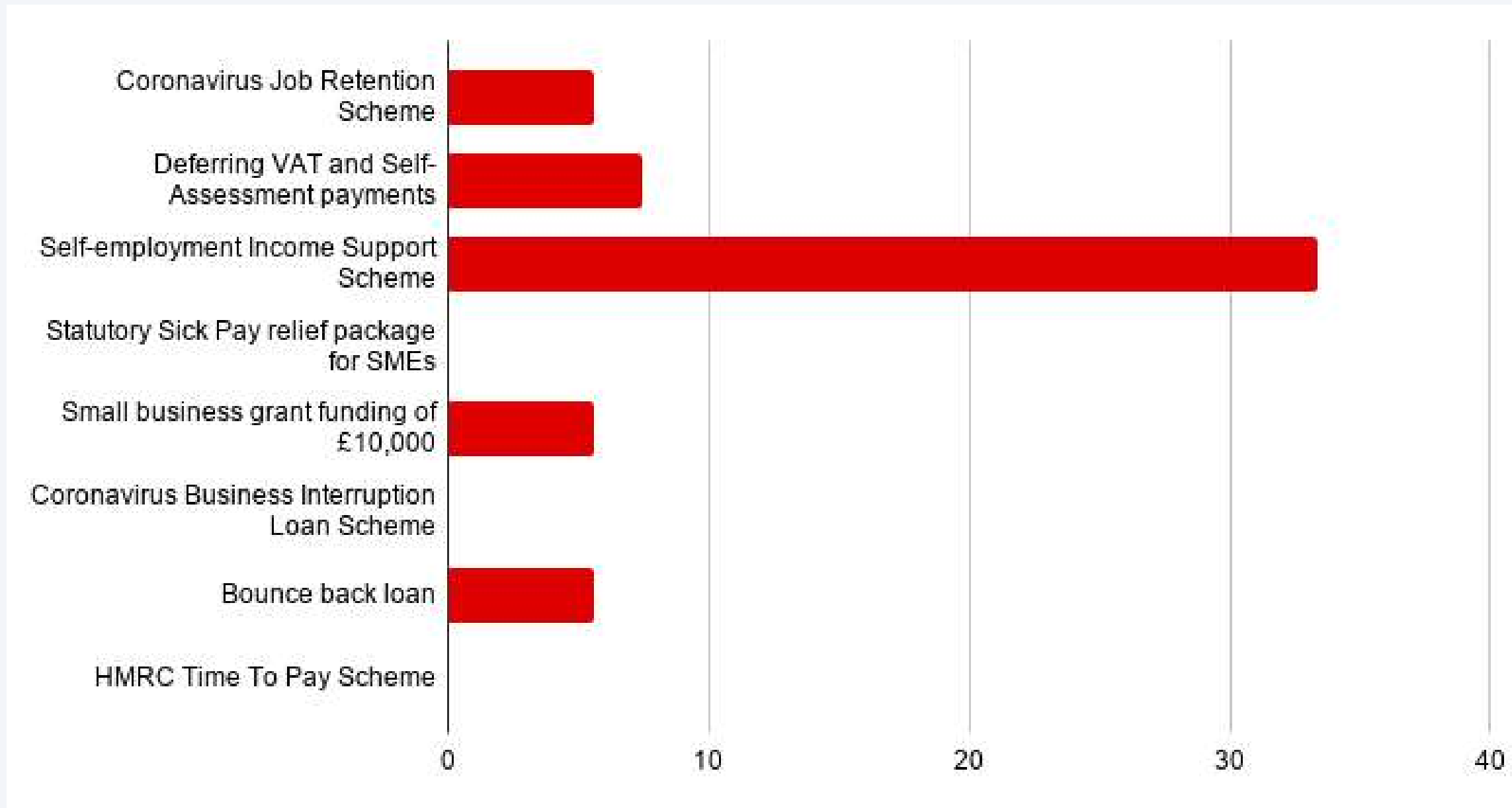
70% of those who had applied had been successful in their applications for Government support.

Over a third had applied for the Self-employment Income Support Scheme.

Over half of respondents had made use of Icon's online community when seeking support.

From advocacy to further information and online events, respondents had diverse suggestions for Icon to support the conservation profession in 2021.

Respondents had applied for a range of Government support measures, with the Self-employment Income Support Scheme being the most popular.



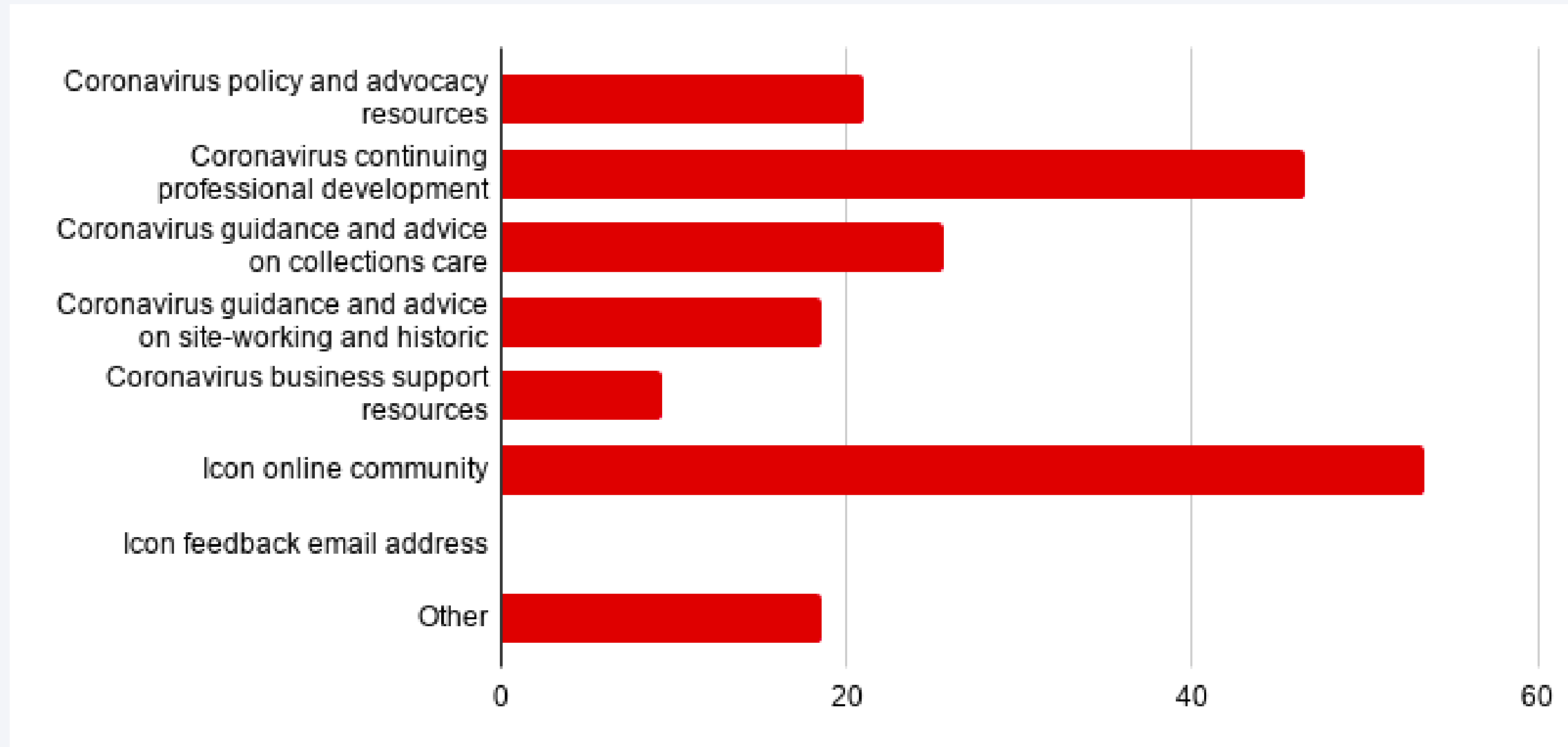
70% of those who had applied had been successful in their applications for Government support.

Only 3% had applied to the first round of the Cultural Recovery Fund.

No one had been commissioned to undertake work supported by a Covid-related grant for cultural and heritage organisations such as the Heritage Stimulus Fund

Which measures announced by the Government have you applied for?

Over half of respondents had made use of Icon's online community when seeking support. Continuing Professional Development resources and guidance on collections care had also been used.



Icon has provided the following types of support this year as a response to the Covid-19 pandemic. Which of these resources have you made use of?

Funding for conservation projects and the extension of support schemes were suggested as further measures for the Government to take to support conservators in 2021.

*"Provide support for recently graduated freelancers... no tax history so not able to apply for the current government support."*

*"Secure the future of funding for museums so they feel able to spend money."*

*"Extension of furlough scheme to directors of ltd companies taking dividends into account when calculating salaries."*

*"Provide funding to Local Authority Museums for conservation projects."*

*"Funding for projects for accredited conservators in heritage institutions."*

What further measures do you think the Government should introduce to support you and/or your organisation over the next 6 to 12 months?

From advocacy to further information and online events, respondents had diverse suggestions for Icon to support the conservation profession in 2021.

*"Continue with online meetings and talks. Keep conservation in the public eye, such as the brilliant lecture on 21st October about conservation of the Houses of Parliament."*

*"Information about business support and encouraging the government to view heritage projects as part of getting the country going again."*

*"To create set of rules for conservators (employers) to pay for freelance work they commission, i.e. to stop overservicing by freelancers."*

*"Highlight mentoring scheme for those who may be feeling isolated."*

*"Continue to advocate for the profession to the heritage and cultural sectors of government to raise the profile of our work and gain future support."*

*"Continue to encourage the use of qualified professionals for heritage conservation work."*

What practical steps could Icon tackle to support the conservation profession in 2021 in addition to the resources that we have developed and the action we have taken in 2020?



Part 3

# OUR RESPONSE

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WHAT WE PLAN TO DO WITH THE  
FINDINGS

The results of this research are vital evidence about the impact of the pandemic on the conservation profession. Icon will use them to provide evidence for policy briefings, develop effective response strategies and coordinate support for conservators and the wider heritage sector.

## 01

### SHARE

We will share the results widely and encourage our partners and stakeholders to use the information in their own work so that support for the wider heritage sector is coordinated.

## 02

### INFORM

We will use the findings to inform the priorities of our lobbying activities so that government and funders are urged to provide support where it is most needed.

## 03

### DEVELOP

We will develop our own resources, support measures and projects in line with the findings and suggestions provided by respondents.

## We'll naturally carry on supporting conservators through the several projects already in the pipeline, including:

### NEW RESOURCES

Launching in February 2021, Icon's new digital membership platform will enable members to apply for and maintain their Icon accreditation, file essential documents securely online, and keep training plans on track.

The simplified platform will help members to achieve their fullest potential in their professional careers, while serving their clients and employers effectively. A fully integrated website portal will mean resources and information are more accessible than ever before.

### FUNDING

Made possible through the generous support of the Radcliffe Trust and others, we have launched the Collections Care Stimulus Fund to support the care and conservation of collections at a time when budgets for the conservation of collections and objects are diminishing.

The Fund will support organisations that have suffered from a major drop in income over the last 12 months and are less able to commission conservation projects as a result.

## ADVOCACY

Promoting the value of Accreditation and high standards of practice remains top on our agenda. This year's ACR Conference and Pathway Week take place in June aiming to celebrate the achievements of ACRs and to offer support for those on their way to accreditation.

Our continued promotion of the Conservation Register is building awareness of the free online tool to accessing conservators you can trust, helping enhance the profile of our members and their businesses.

## RESEARCH

We are planning to undertake comprehensive research of the labour market to better understand issues like skills, demographics, employment and salaries.

Icon's LMI research will offer a vital boost to our evidence base in 2021 as well as provide conservators with up to date information upon which to base important career decisions.

## POLICY

Icon continues to work hard to lobby for support for conservators with Government and decision makers.

Our correspondence and briefings have already proven effective, reflected in conservators being made eligible for key sector funding.

Icon is a charity and the professional body for conservation, seeking to create positive change for cultural heritage.

We represent the interests of conservation and conservators to decision makers on issues that affect cultural heritage, from skills to education to funding.

[www.icon.org.uk](http://www.icon.org.uk)

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