



THE INSTITUTE OF CONSERVATION

Coronavirus and conservation

Icon survey on impact

RESULTS & FINDINGS

May 2020

Introduction

In April 2020, Icon undertook a survey asking conservators to share how they had been affected by the Coronavirus (Covid-19) pandemic.

Our survey aimed to capture information specific to the conservation sector and its workforce across the UK and to complement wider sector surveys run by [Historic England](#) and the [Heritage Lottery Fund](#).

Our questionnaire used question and answer options from our recently completed Labour Market Intelligence [Toolkit](#) but also from surveys run by Historic England and the Creative Industries Federation in order to facilitate the cross-referencing of results.

The survey ran from 16 April to 1 May 2020 on Survey Monkey. Icon members were emailed a direct invitation to participate in the survey while a news story on the Icon website promoted the opportunity to a wider audience.

Dataset



THE INSTITUTE OF CONSERVATION

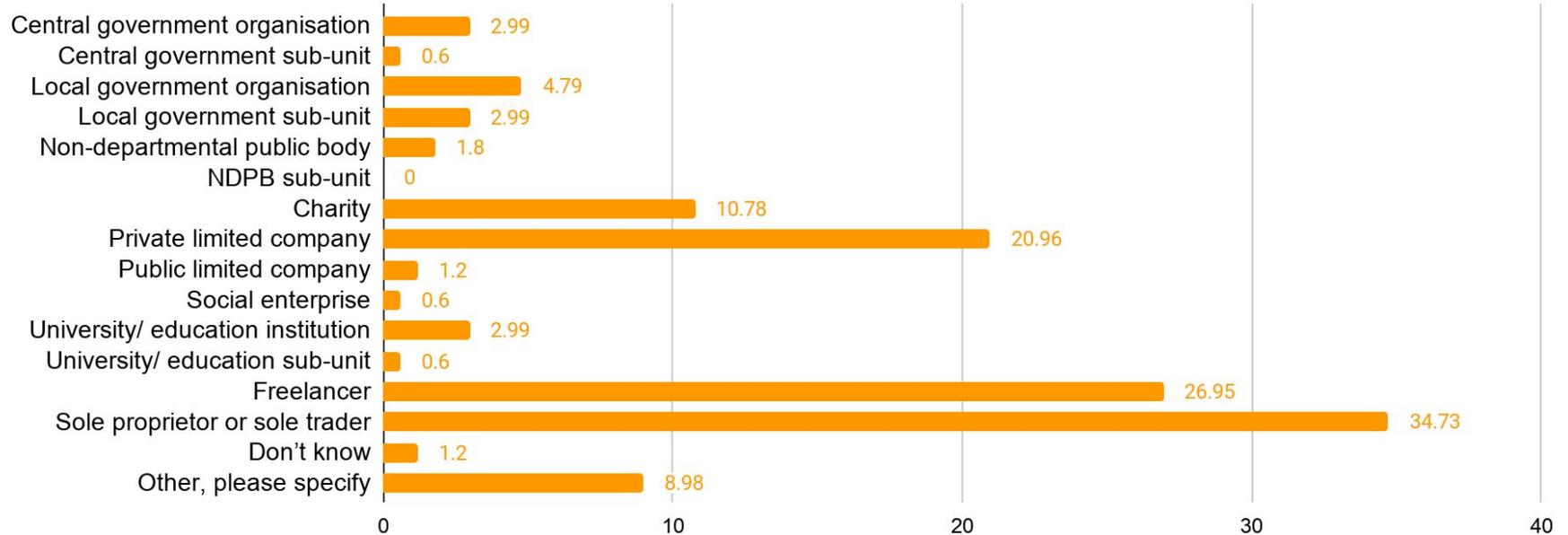
In total, we heard from 168 respondents.

The majority of these contributors represented freelancers, sole traders or private limited companies. 122 micro-enterprises (up to 10 employees) responded, with the majority (68%) employing 0-5 people.

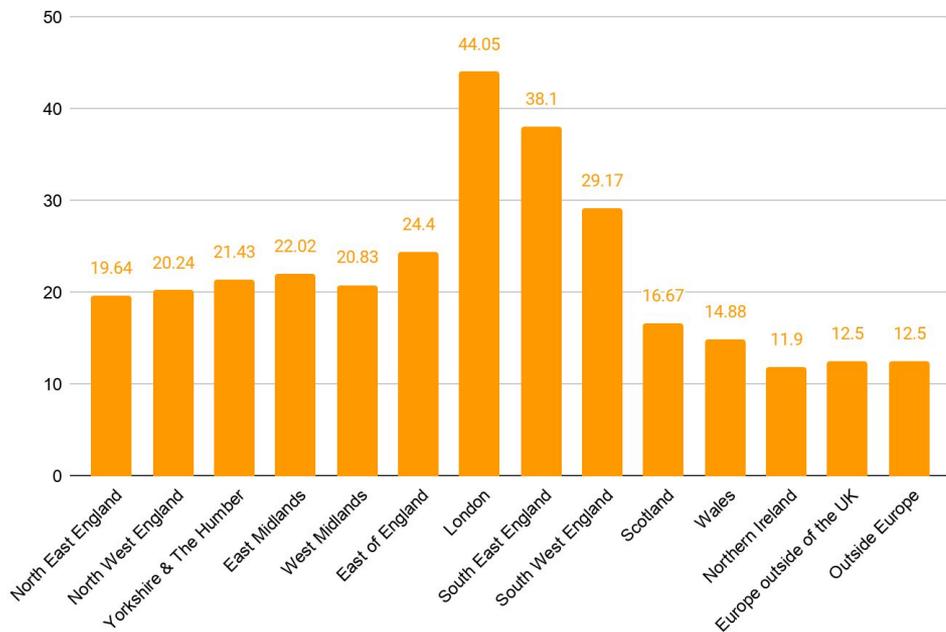
The highest numbers of respondents were book and paper conservators and those working in the field of gilding and decorative surfaces, but other specialisms were fairly evenly represented.

The survey captured a good geographical spread across England, with Wales, Scotland and Northern Ireland also represented. 41 respondents participated from outside the UK.

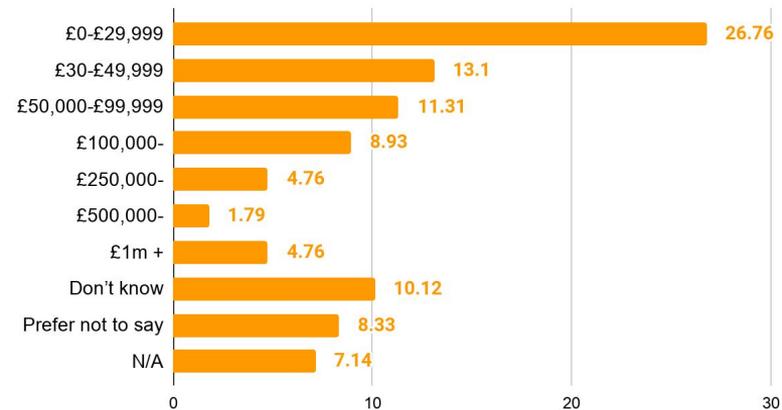
What type of organisation do you represent?



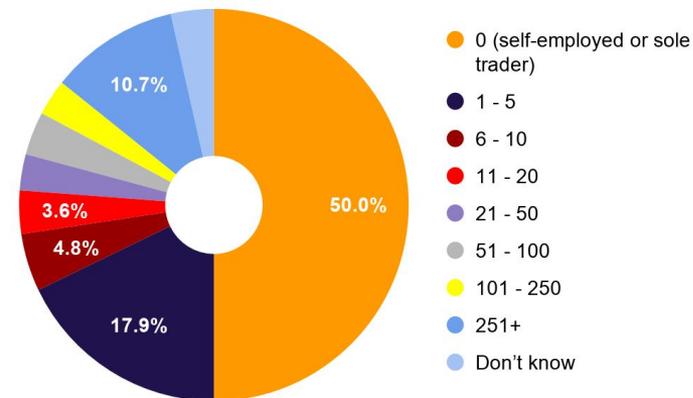
In which geographical areas do you operate?



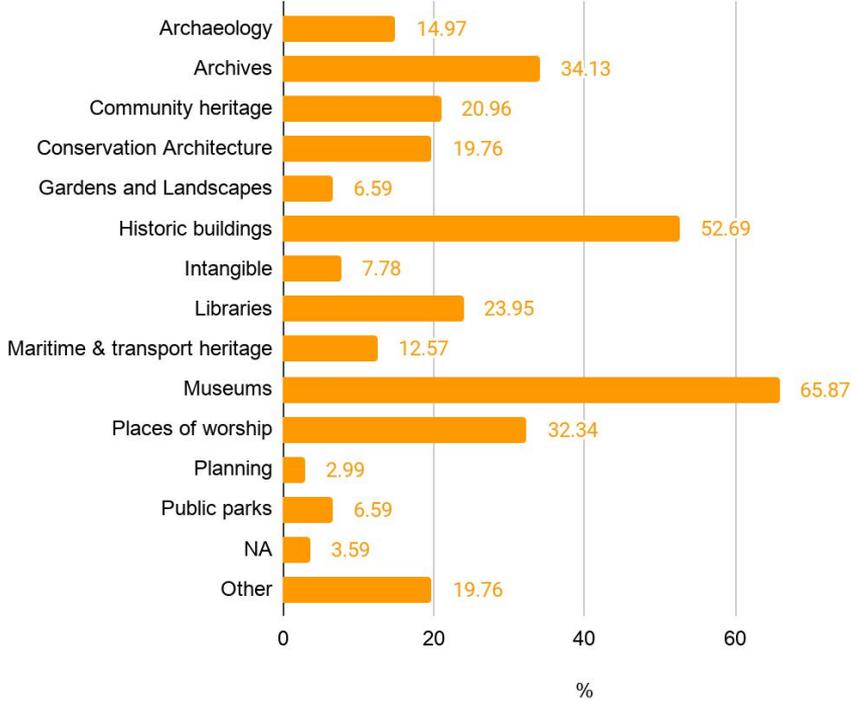
What was your turnover/income for the 2019/20 financial year?



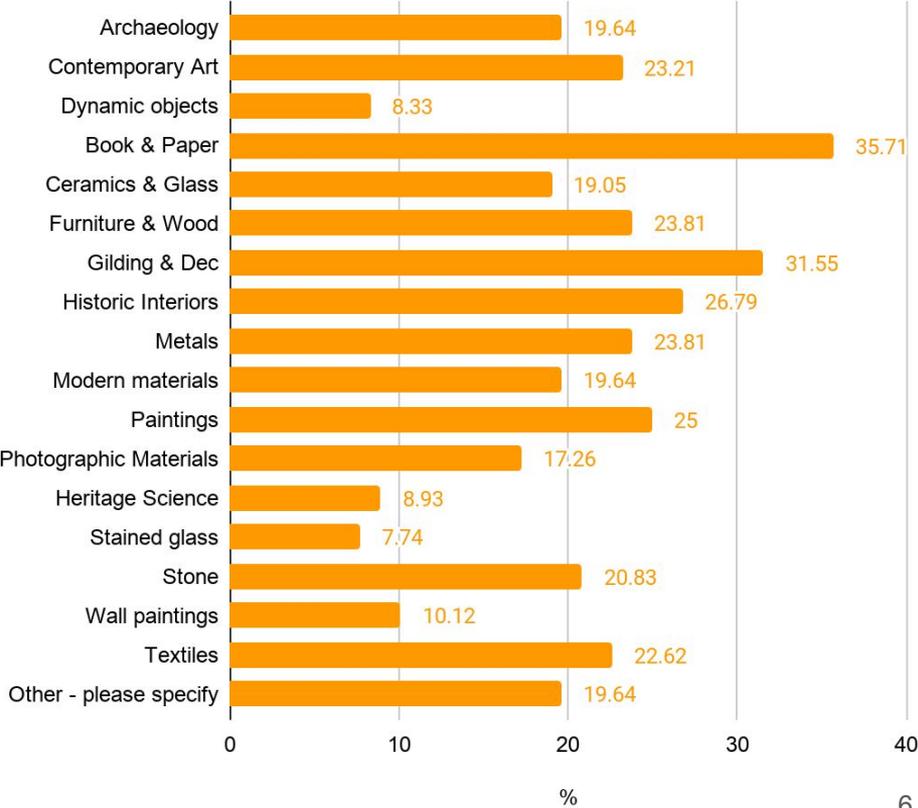
How many employees does your organisation or business employ?



Does your business/organisation work in or represent any of the following heritage areas?



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



Findings

The results demonstrate that the Coronavirus outbreak and associated social distancing measures are having considerable and severe impact on respondents.

Over 90% of respondents reported loss or postponement of work and 70% of respondents said that their monthly income had decreased.

The results suggest that furloughing has helped to mitigate impacts in the short term as four times more respondents had furloughed staff than laid staff off.

There is a clear demand for more information on support measures, as 81 respondents indicated they are awaiting further clarification of Government support when asked which support measures they expected to access.

These themes are explored in the following pages.

1. Decline in work and income

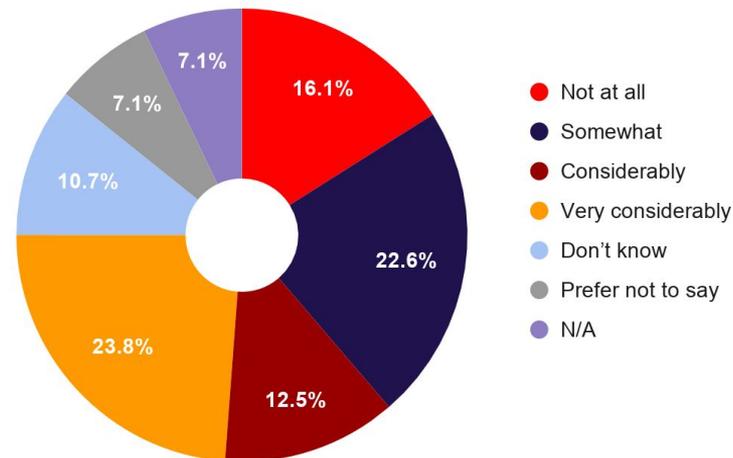
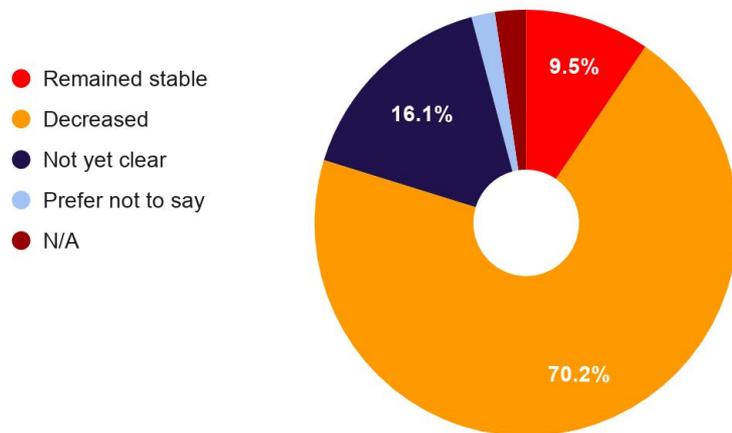
Over 90% of respondents reported loss or postponement of work, while two out of five respondents stated they had been affected by postponement or cancellation of planned income-generating events.

Respondents had also been affected by reduced opening and business hours (36%) and supply chain issues (29%).

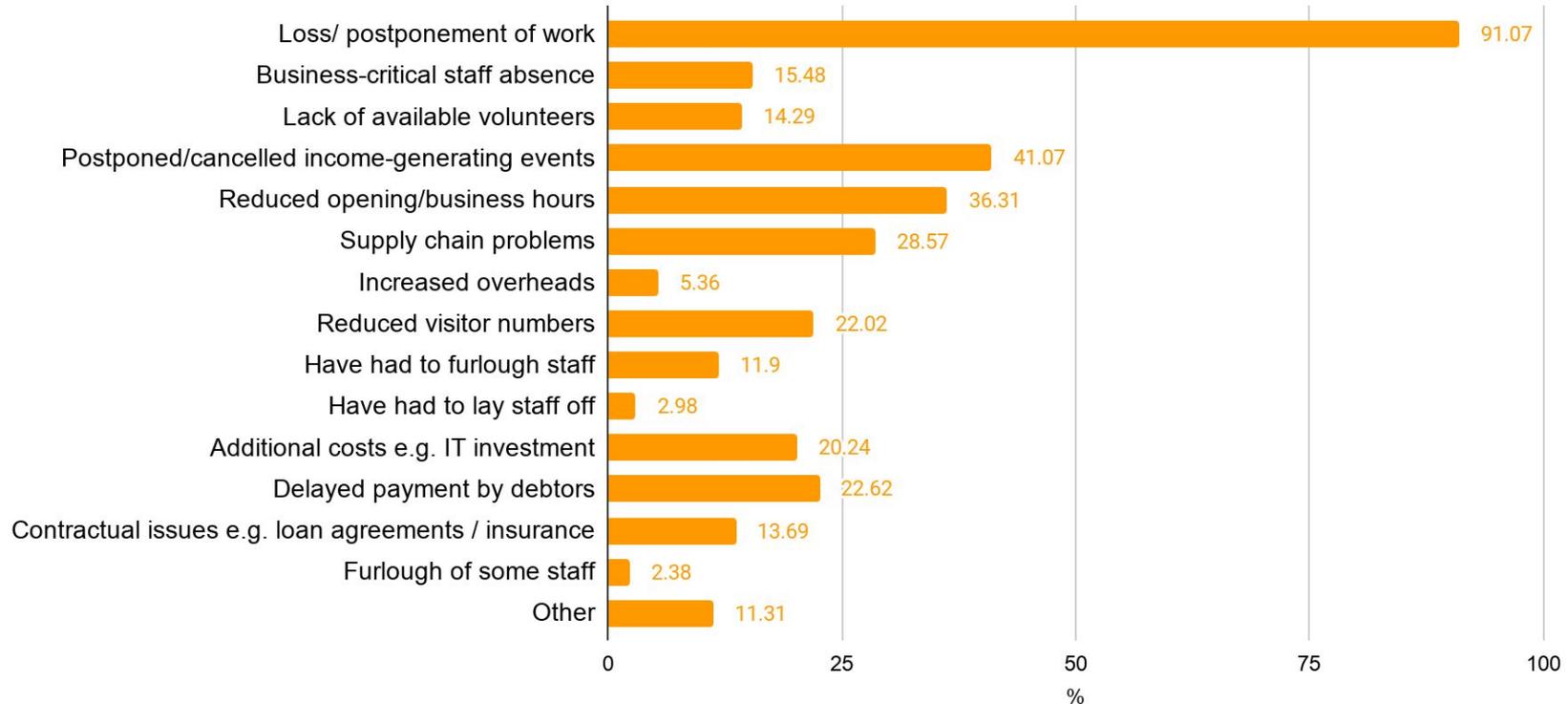
70% of respondents said that their monthly income had decreased and nearly a quarter had suffered from cash flow problems.

Since the coronavirus outbreak, has your or your business/organisation's monthly income:

To what extent have you experienced cash flow issues?



In what ways has your business/organisation been affected by the Coronavirus outbreak and the associated social distancing measures?

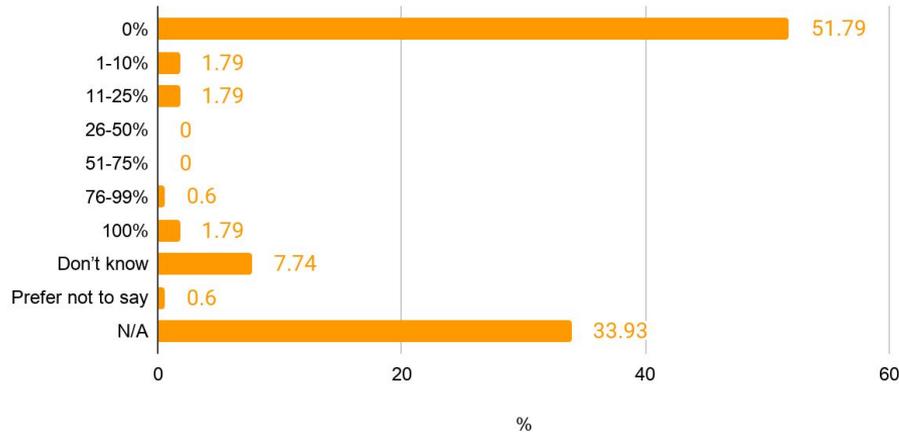


2. Help from furloughing

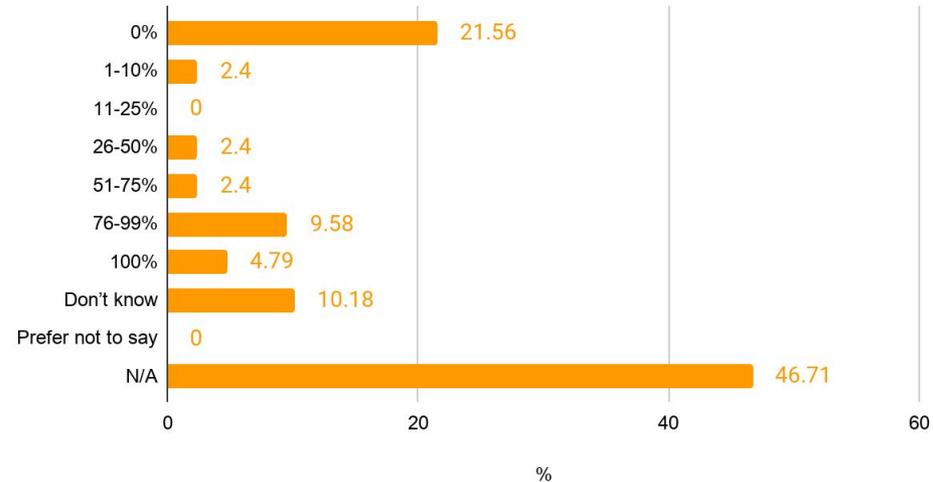
The results suggest that furloughing has helped to mitigate impacts on the workforce in the short term.

22% of respondents said they had furloughed staff but only 5% stated they had laid off staff. Under 5% had furloughed their entire workforce and under 2% had made all staff redundant.

What percentage of employees have you had to make redundant?



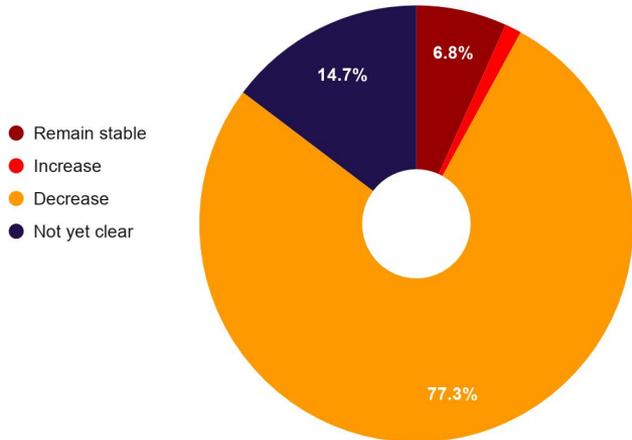
What percentage of your employees have you had to furlough?



3. Apprehensive forecasting

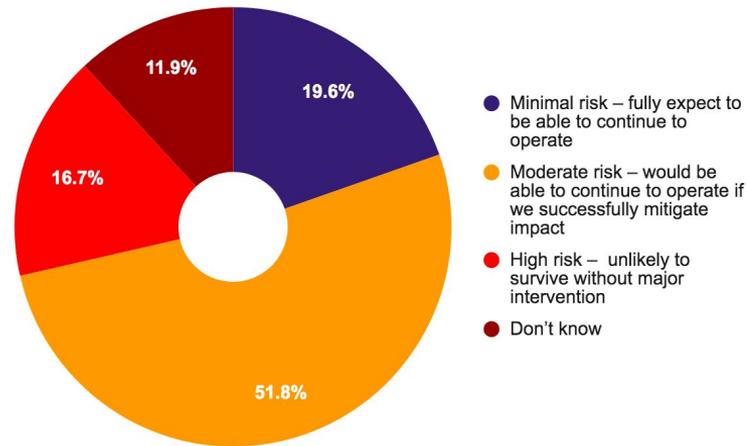
Looking to the future, we encouraged conservators to predict the financial health of their business or organisation in the medium term (6 months).

In 2020 do you predict your annual turnover/income will:



Nearly four out of five respondents forecast a decline in their annual turnover for the year with many describing “uncertainty” and “anxiety” over the future.

What level of risk does the Coronavirus pose to the medium-term viability of your business/organisation?



Please list three words that articulate your feelings about the likely health of your organisation or business in 6 months time.

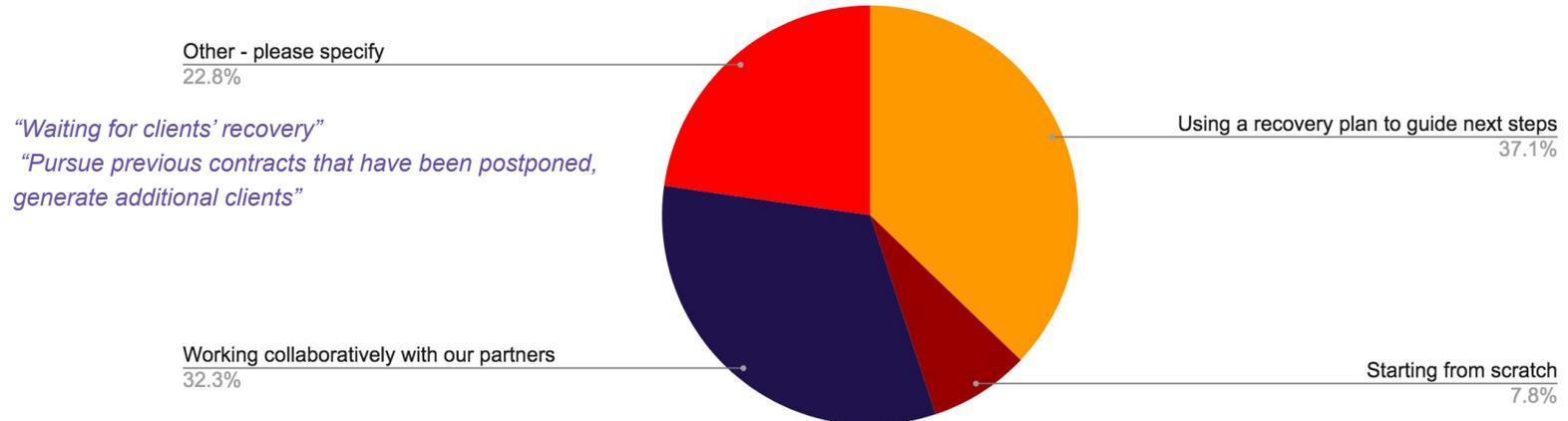


4. Focus on strategic recovery

Responses indicated a strategic approach to resuming work post-lockdown. 37 percent of contributors planned to use a recovery plan, while a third said they intended to collaborate with partners. Less than 10 percent stated they would start from scratch, suggesting preparedness and strategic planning.

However, respondents also noted that resuming operations is dependant on the timescales of clients and their recovery. Some had marketing plans to generate new clients while others said they would focus on rebuilding relations with recurring clients.

How do you anticipate your organisation/business will resume work activities once social distancing restrictions are lifted?



5. Need for further clarity

We asked conservators which government support measures they expected to access to mitigate negative effects. The majority (55%) indicated they are awaiting further clarification of support options.

One contributor called for a “less complicated system” while another said “clearer advice” is needed.

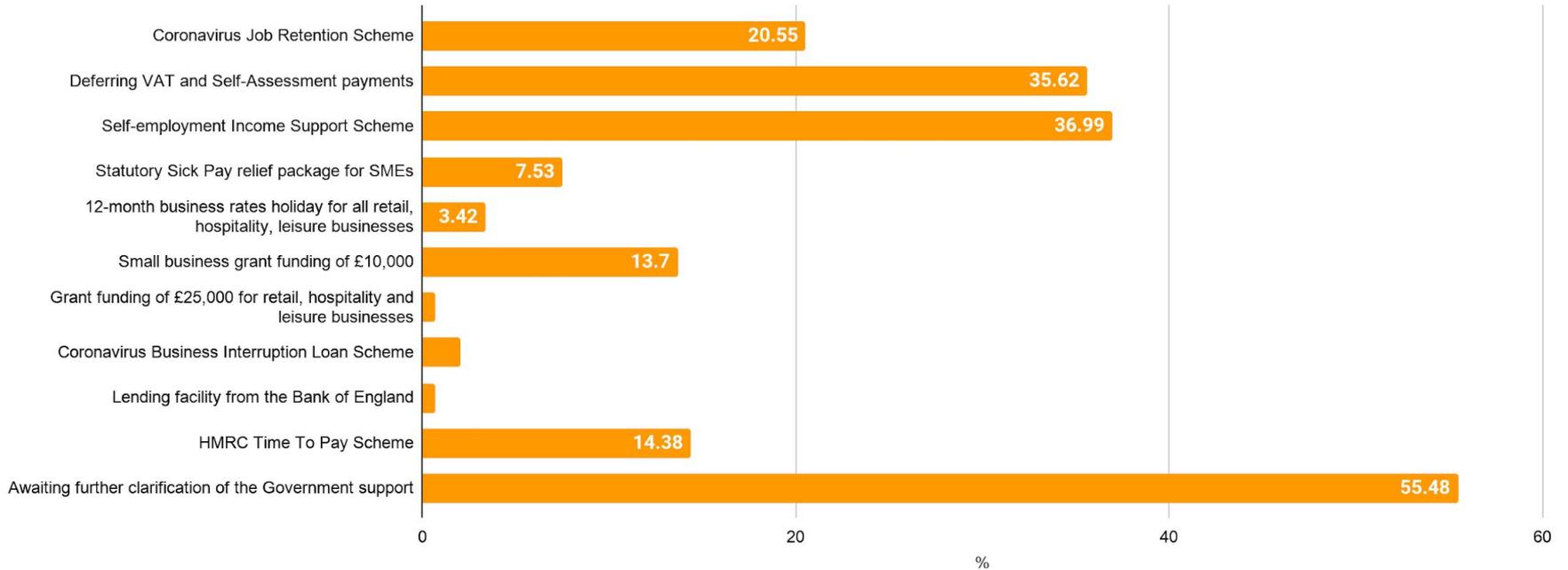
The demand for greater clarity appears to be mirrored by the wider heritage sector. Historic England’s survey of businesses and organisations across heritage fields (including archaeology, gardens, landscapes and historic buildings) showed similar results, with more than 50 percent of respondents stating they were waiting for clarification of measures.

The findings confirm Icon’s view that there is significant demand for more business support advice to help people navigate and access different support options.

“More information on the exit plan for lockdown to know when I might be able to start working again.”

“No information on how long the self-employed income support will run for...”

Which measures announced by the Government do you expect to apply for?



6. Demand for support

We asked participants to tell us (in free text) what further support the government should introduce. 40 percent of respondents had no suggestions but those who did largely argued for more extensive and timely support:

- 16% demanded support aimed specifically at the cultural heritage sector.
- 11% asked for more transparency and “decisiveness” on plans to end lockdown and guidance on returning to work, particularly in relation to construction sites.
- 11% requested more comprehensive support to help those who are ineligible for current schemes (e.g. directors of limited companies and the recently self employed).
- 7% highlighted the need for longer term support “in consideration of longer term impacts”.
- 4% called for more prompt access to assistance.

Other suggestions included ending the lockdown “sooner rather than later,” introducing universal basic income and stabilising the broader economy.

“Finally admit that tourism and heritage is Britain’s real biggest earner”

“Income boosts for museums...it’s unclear whether we’ll reopen”

“As a new sole trader I do not qualify for any government support.”

“Waiting till June for any money is a long time”

7. Impact not yet felt

At the end of the survey we invited participants to share any further thoughts with Icon (in free text). While comments mostly focused on describing individual circumstances and general concern for the sector, some trends were evident:

- Several respondents pointed out that they had not yet been affected by the public health emergency but that this could change if the lockdown carried on.
- Respondents thanked Icon for its work, commending its advocacy efforts and CPD support.
- Participants warned us of the potential impact of hardship on their future ability to pay membership fees and called for more lobbying on behalf of the sector and support resources.

“All as normal as can be...more concerned for recovery of economy later in the financial year, continued closure of museums and exhibitions.”

“I have a year long waiting list. The current situation enables me to reduce the waiting list. Once I get through the list then I may have an issue.”

“My main concern is...for the summer and beyond. Will budgets for conservation be slashed straight away once institutions open up again?”

“Thank you for making me feel like members are your priority.”

Next steps

Icon will use the findings from the survey to tailor our support to members and the wider conservation profession:

- **Advocacy** - using the evidence to inform our advocacy messages and asks to government and decision makers. Sharing the results with our partners to ensure effective collective lobbying for cultural heritage.
- **Excellence** - using the insights to develop our Coronavirus guidance pages with relevant information and resources and plan and develop CPD opportunities.
- **Engagement** - share the effects of the pandemic on the profession widely and promote the role of the sector in post-lockdown recovery and rebuilding.

We are incredibly grateful to all those who took part in the survey and have shared their experiences and case studies with us.

If you would like to tell us how you are being affected, please email us at feedback@icon.org.uk



THE INSTITUTE OF CONSERVATION

Find out more about Icon at [icon.org.uk](https://www.icon.org.uk)