

UK Heritage Pulse – Survey 1

Panel webinar | 24 March 2022

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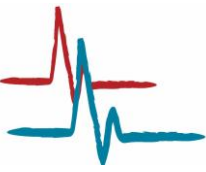


The
Heritage
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Today's webinar



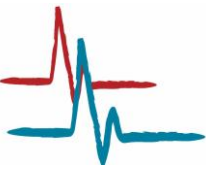
Agenda

1. Introduction to speakers
2. UK Heritage Pulse overview
3. Survey results
4. Response from sector stakeholders and funders
5. Discussion

Webinar format

- Webinar is being recorded – but only the survey results section will be made public
- Interactive – polls and survey
- A discussion and a chance to meet and share with others from across the sector

Today's speakers



Katy Raines
CEO & Founder

indigo



David Reece
Deputy CEO

BAKERRICHARDS



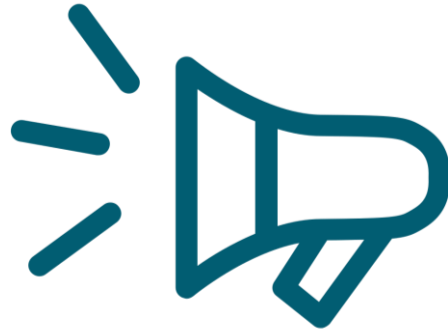
Robin Cantrill-Fenwick
CEO

BAKERRICHARDS

UK Heritage Pulse – what's it all about?



**A collaborative data
and insight project**



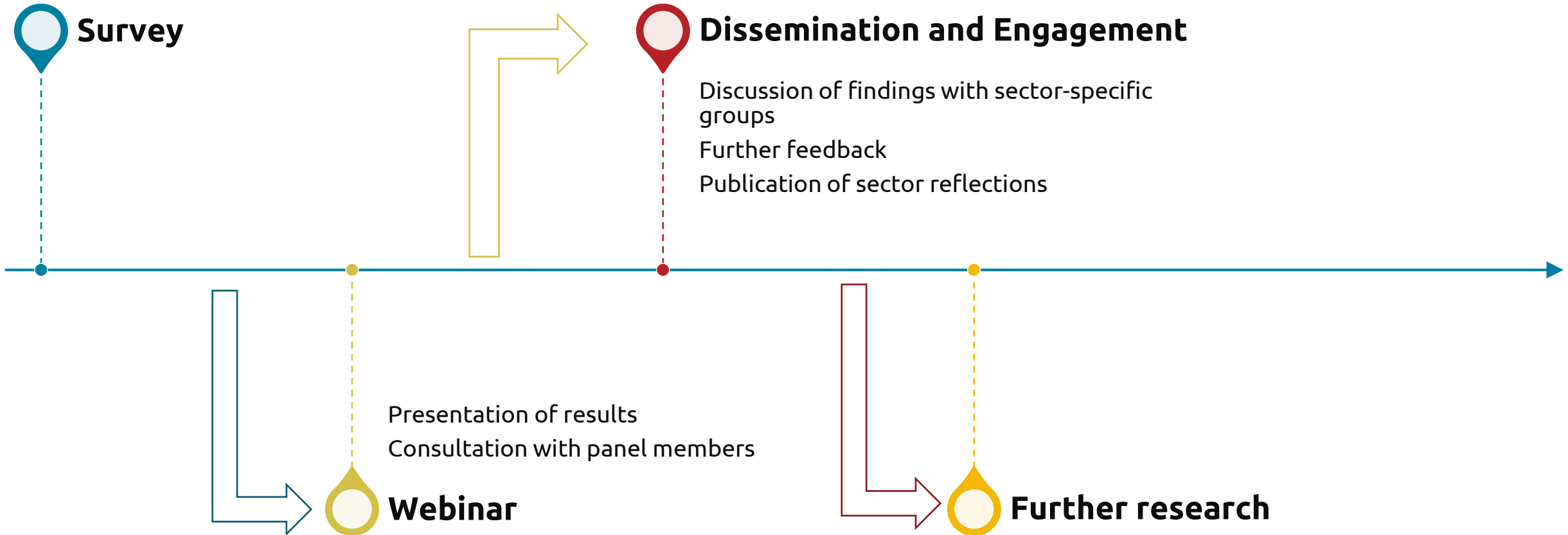
Your voice heard



Insight you can use

We want to hear from you today! Let's launch the first poll...

Heritage Pulse Process





Survey findings

Baker Richards

Indigo



Survey findings: Overview

FOUR KEY AREAS:



Confidence



Covid



Staffing



Strategic priorities



Survey Overview



DAYS IN THE FIELD

4th Feb to 27th Feb 2022



COMPLETE RESPONSES

230



PARTIAL RESPONSES

50



Survey Overview

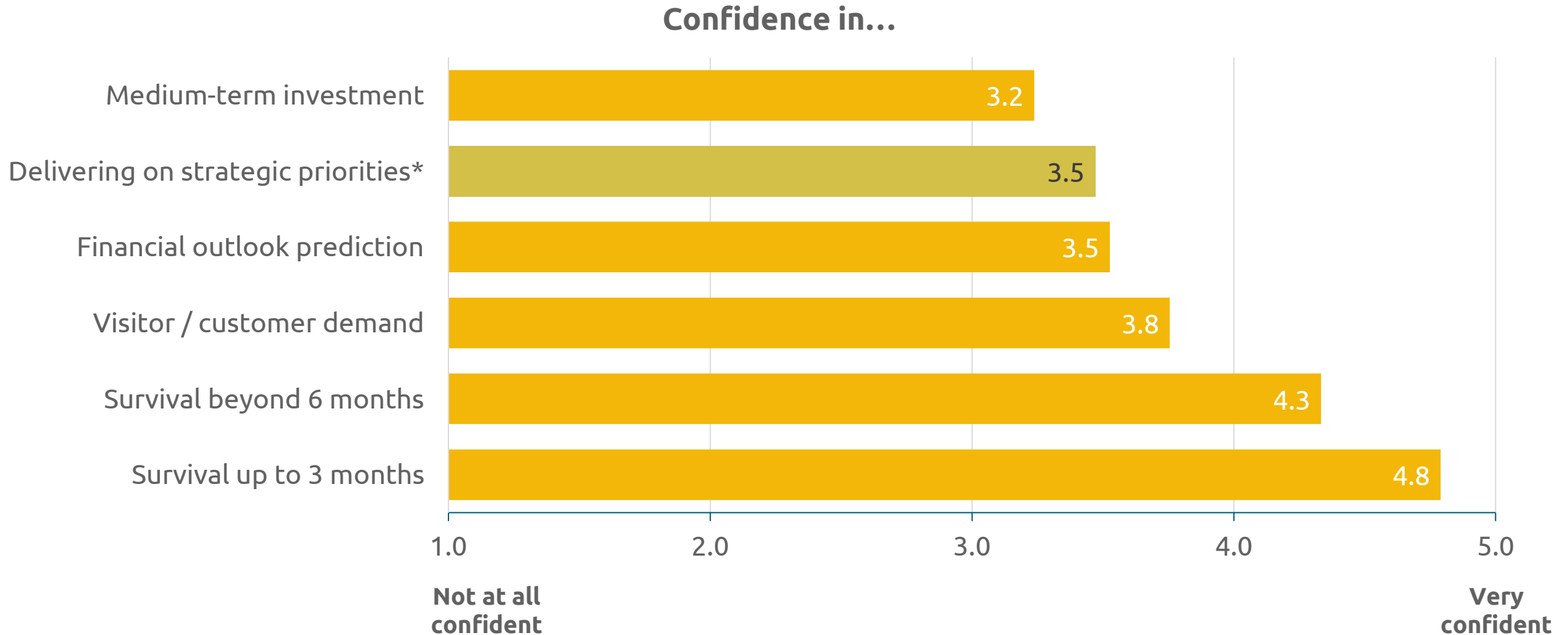
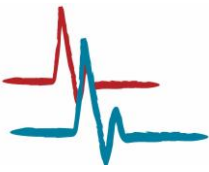
- Over 80% of the responses were from organisations operating either UK wide or exclusively in England. The low number of responses from devolved nations does not allow for separate analysis by nation
- In terms of Heritage sub-sectors, the highest proportion of responses came from Historic Buildings & Monuments at 36%, but still not enough responses to allow for separate analysis



Confidence

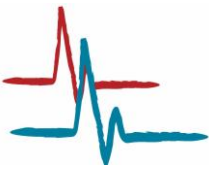


General confidence levels are strong, although organisations are not necessarily ready to make medium-term investments

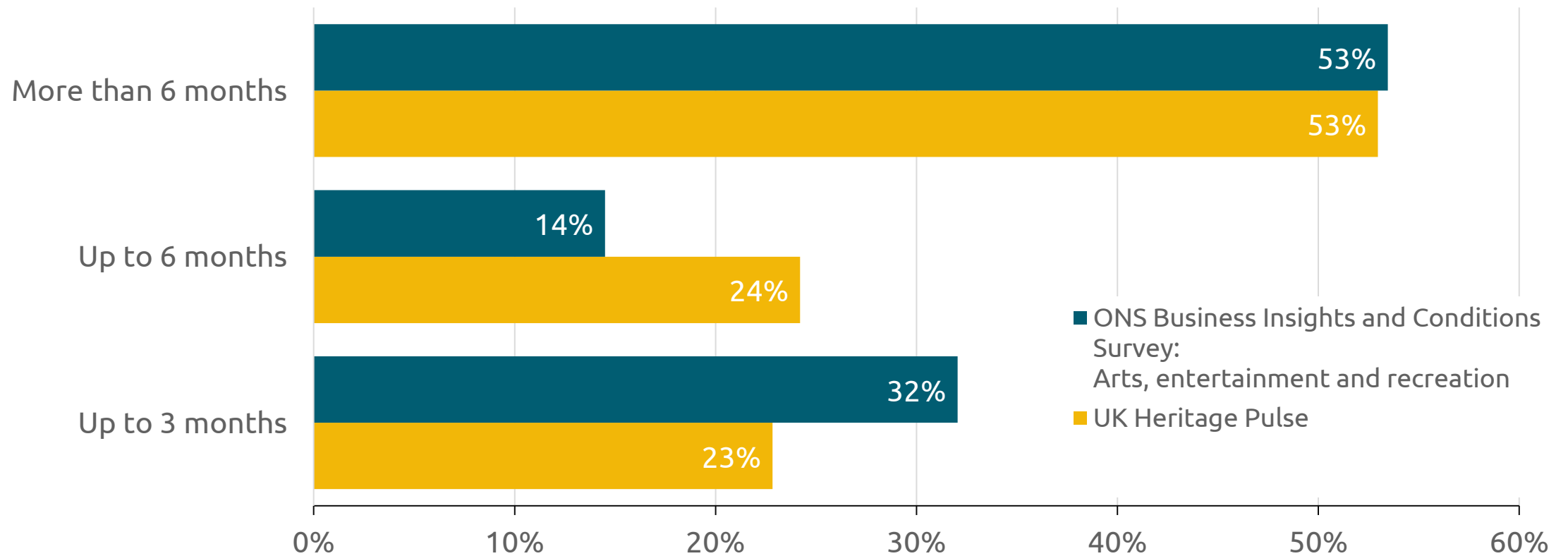


*From the Strategic Priorities section

Current cash reserves for organisations is in line with the wider Arts, Entertainment and Recreation sector



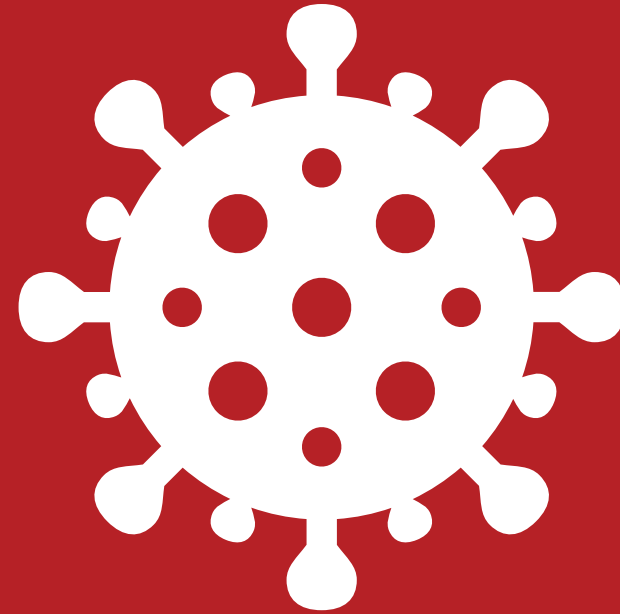
Without generating any further income, how long would your organisation survive on your current cash reserves?



219 respondents: excluding those who replied 'don't know'



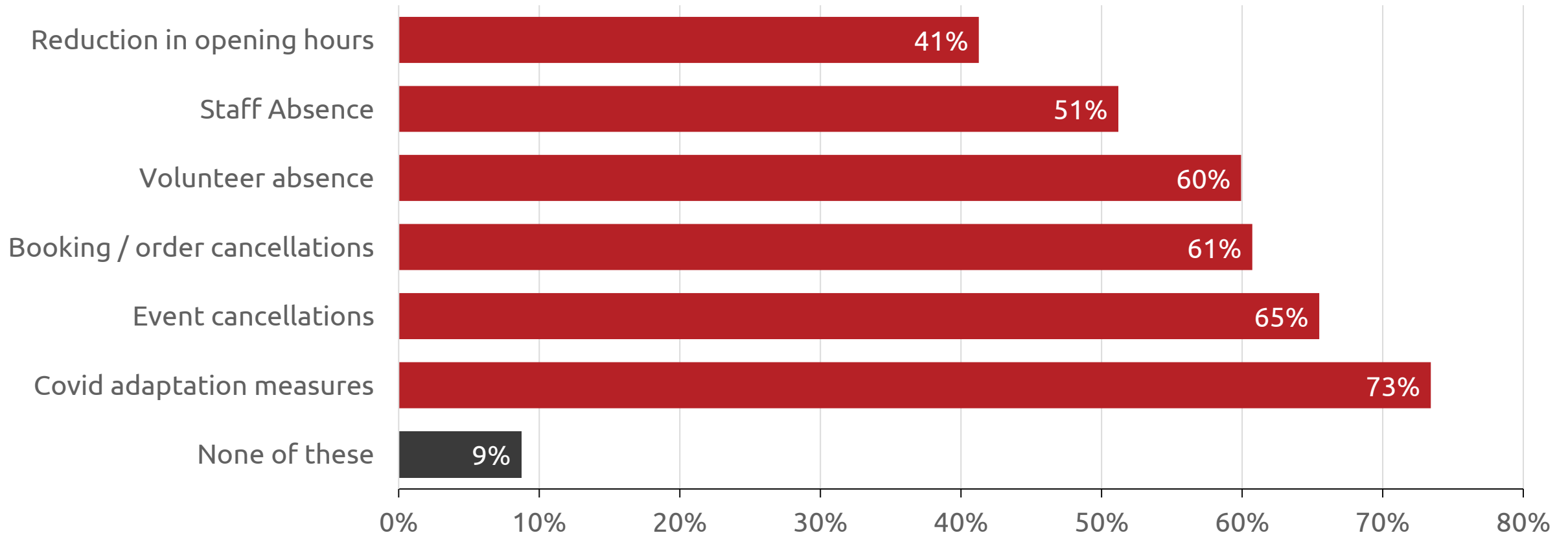
Covid



Only 9% of organisations were not impacted by the emergence of Omicron and changing restrictions



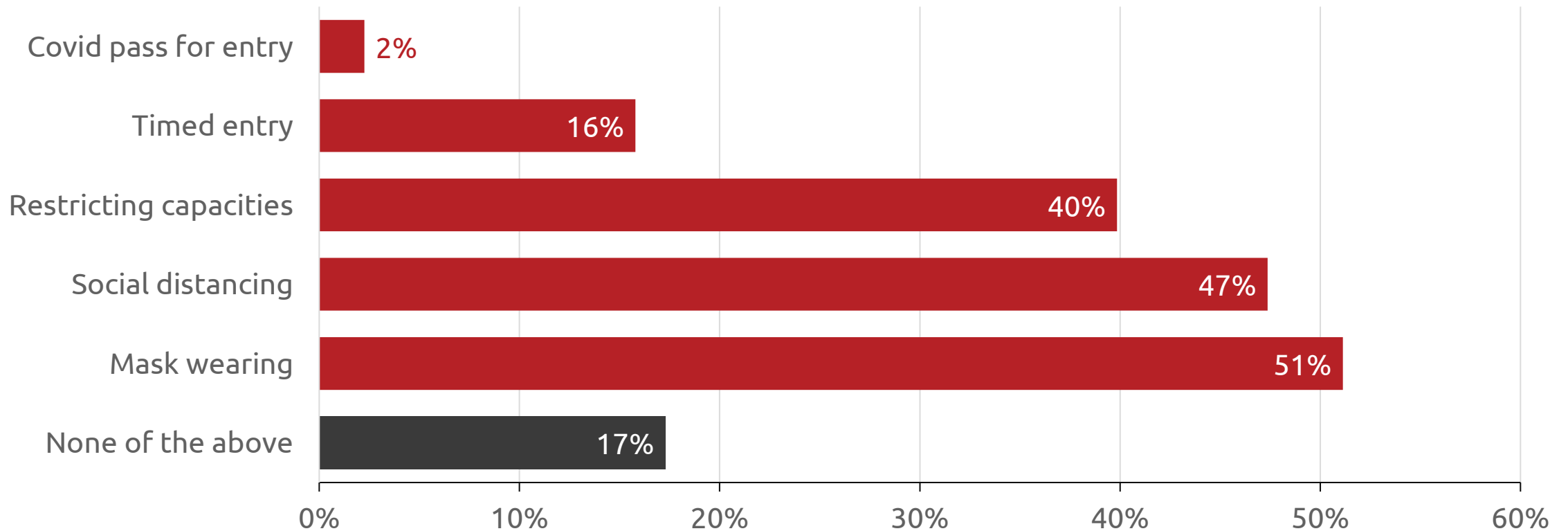
...thinking about the emergence of the Omicron variant in November 2021 and changes to Covid restrictions in each of the 4 nations of the UK, how much has your organisation been affected by any of the following?



In England, only 17% of organisations plan not to keep any safety measures in place

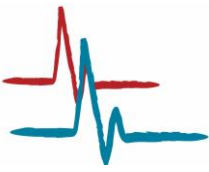


Despite mandatory restrictions having been dropped in England, are you planning to keep any of the following measures in place for visitors for the time being?

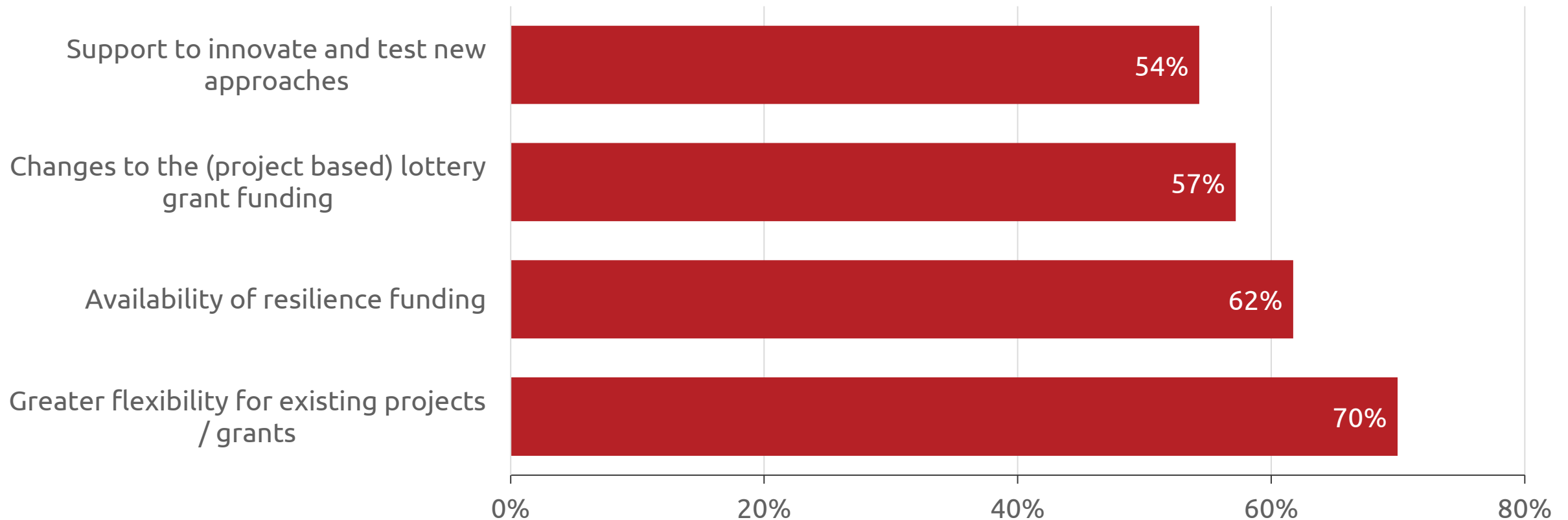


133 respondents: Public facing organisations in England only

Greater flexibility for existing projects is the number one action funding bodies should take to support organisations



What actions do you think governments and sector funding bodies should take to support organisations like yours through another wave of Covid similar to Omicron?



243 respondents



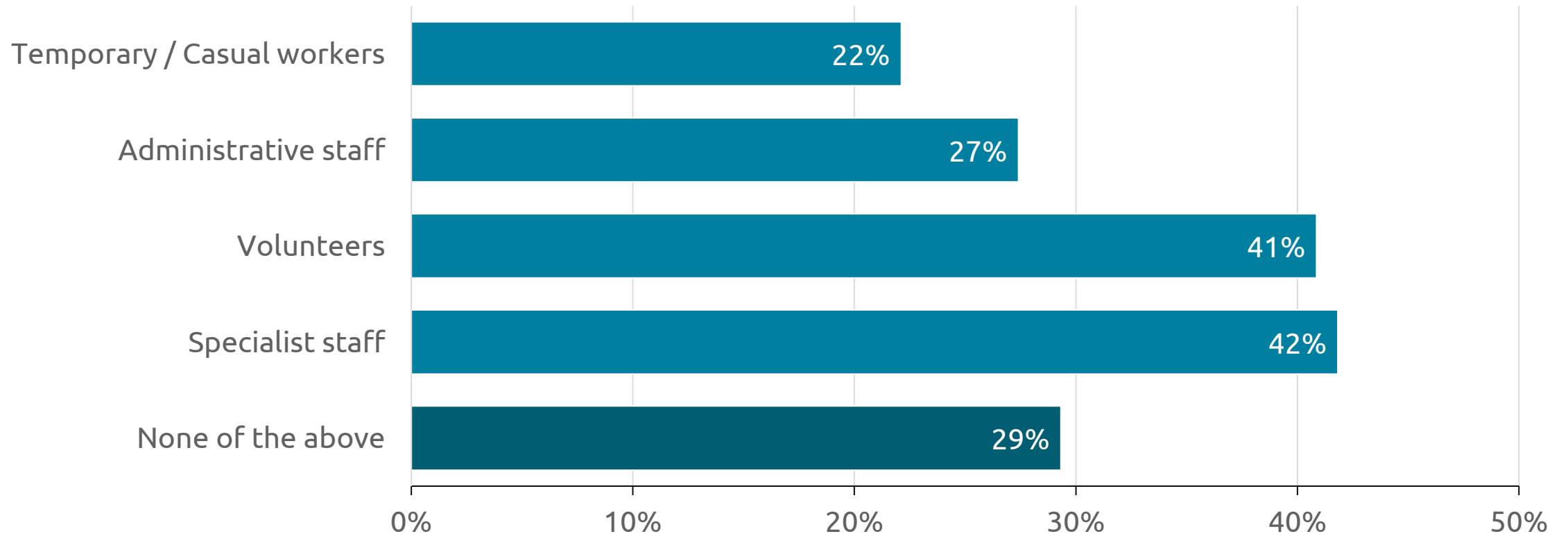
Staffing



71% of organisations have needed to recruit in the last 6 months. Specialist staff and volunteers are the most common



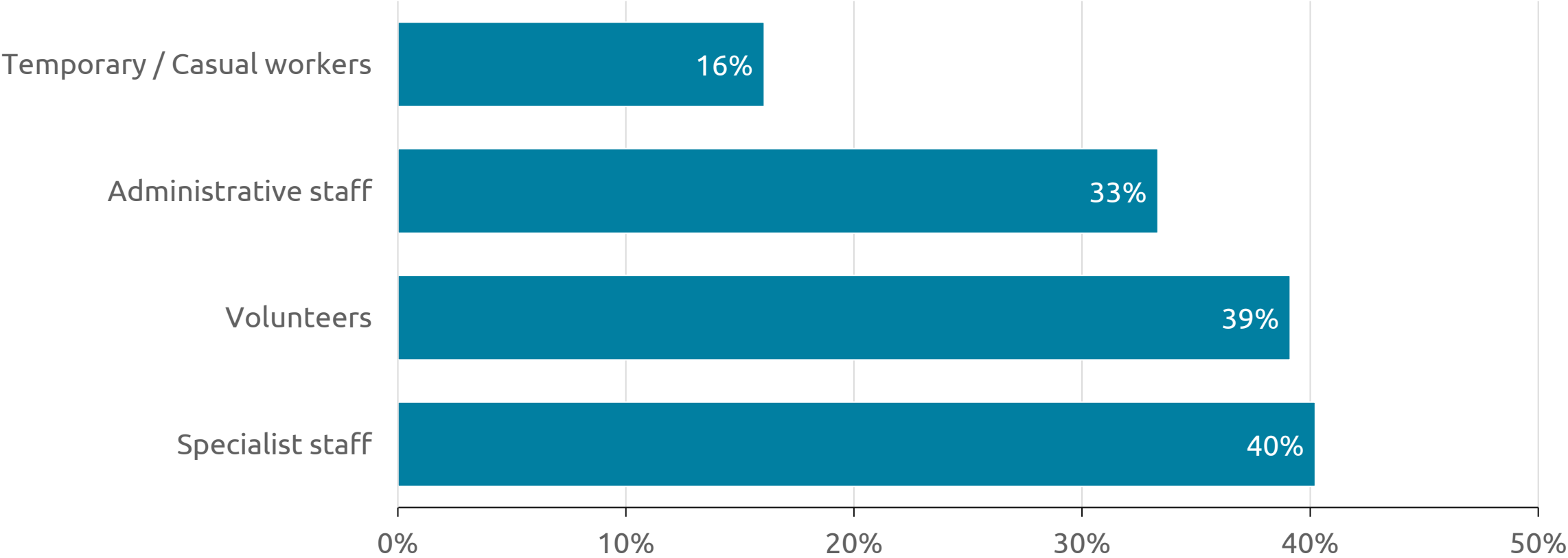
In the past 6 months, has your organisation needed to recruit to any of the following types of roles?



Around 40% of organisations have faced significant challenges, impacting on operations when recruiting specialist staff and also volunteers



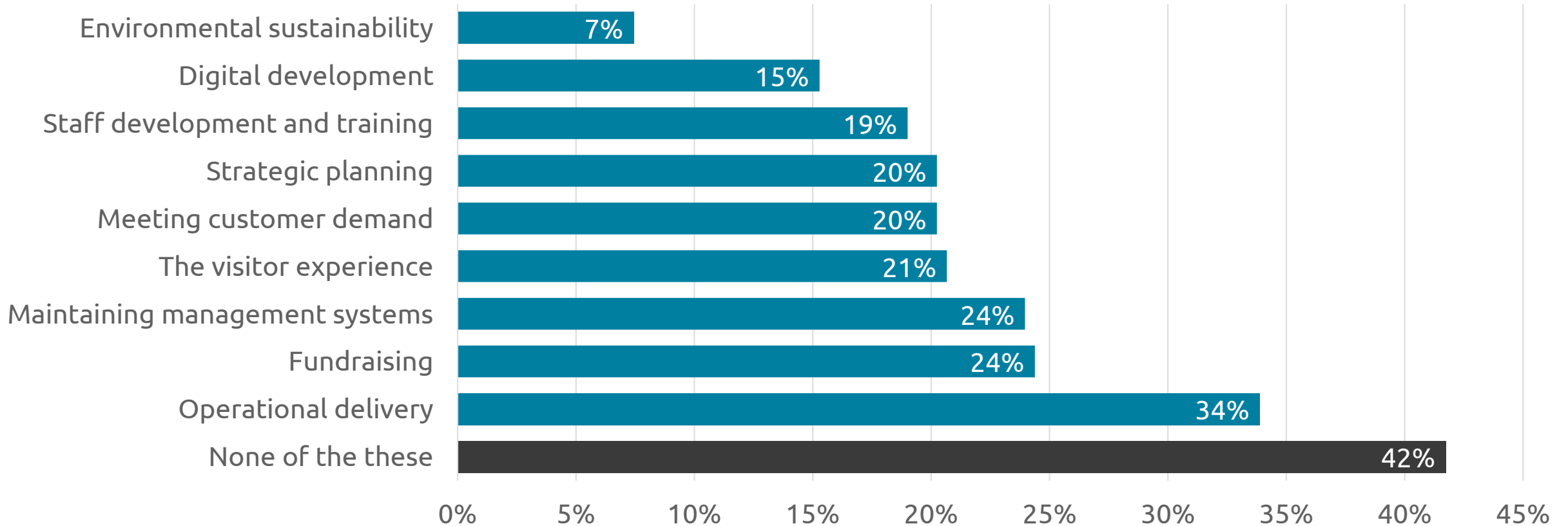
Significant challenges in recruitment, leading to an impact on our operations.



Operational delivery has been most negatively impacted by availability of skilled staff or volunteers

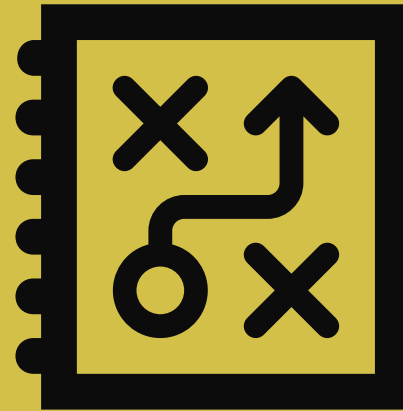


Has the availability of skilled staff or volunteers negatively impacted your ability to deliver any of the following?





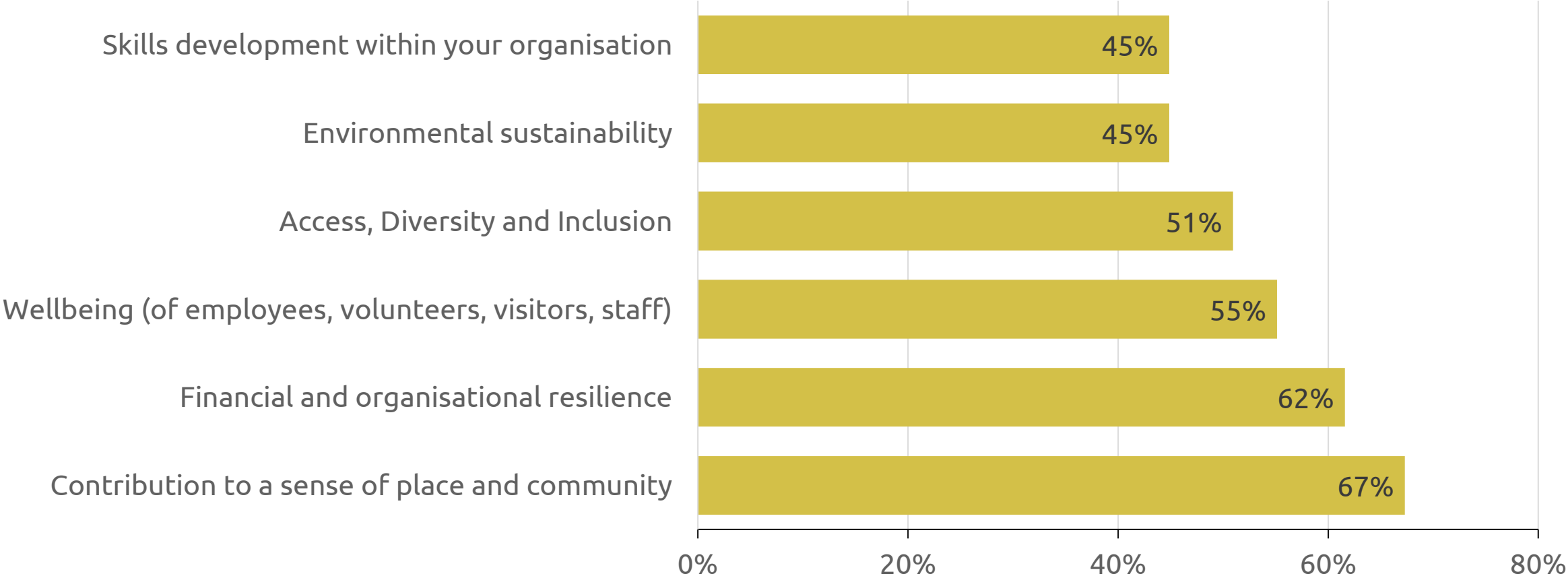
Strategic priorities



A contribution to a sense of place and community has the most relevance for organisations' strategic priorities



Which of the following areas has the most relevance to your strategic priorities?

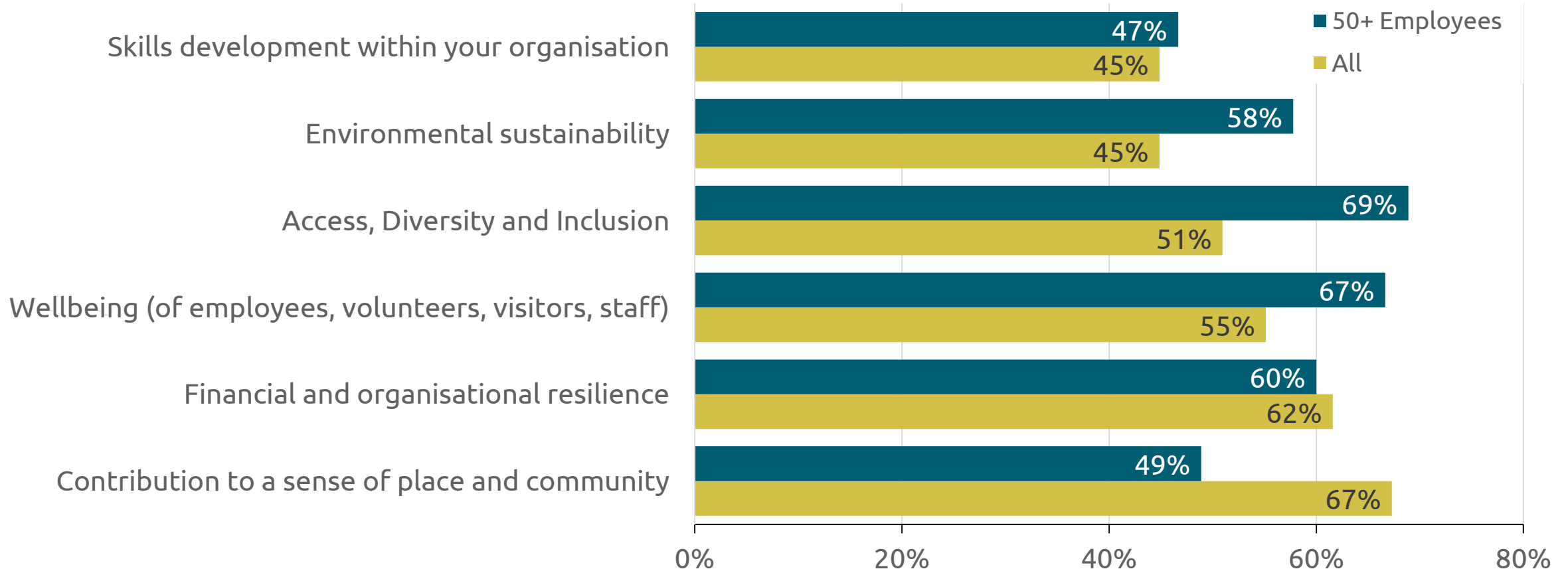


263 respondents

For larger organisations the focus shifts towards Access, Diversity and Inclusion and Wellbeing as the top priorities



Which of the following areas has the most relevance to your strategic priorities?



263 respondents

44 respondents with 50+ employees 24

What would make you feel more confident to deliver on these?



Funding changes

“Funding offers aimed at establishing organisational infrastructure (e.g. core funding) for 1-3 years”

Removal of Covid restrictions

“Lack of further covid restrictions. We have delayed so much for two years and are looking forward to resuming this spring/summer.”

Recognition of unique challenges

“Recognition of the special needs of small rural communities”

Collective approach to broader issues such as climate change

“Environmental sustainability is such a big topic - people don't know where to start and prefer to wait for others to take the lead - particularly around climate change. It needs to be even more mainstream so that it's completely normalised (and fun?) rather than a tick box exercise”

External factors beyond control of organisations

“A national economic context where people aren't under extreme financial pressure and cost of living increases.”



What are the implications for the sector?



Emerging themes

- General confidence levels are good, with most respondents having cash reserves of more than three months
- Omicron had a range of impacts across the majority of organisations – adaptations, cancellations, staffing and volunteers
 - ...leaving in particular a challenge around recruitment



Emerging themes

- Most public-facing respondents in England plan to hold on to some Covid safety measures
- Respondents looking to funders for greater flexibility on existing grants, and different funding approaches



Emerging themes

- Recruitment and staffing challenges have impacted operational delivery for more than a third of respondents
- For our larger organisation respondents access, diversity, inclusion and wellbeing are somewhat more of a priority than for smaller organisations at this time



Responses from partner organisations in UK Heritage Pulse

Introducing



Historic Environment Forum

Claire Flynn

Policy and Public Affairs
Manager,
Northern Ireland

Andy Brown

Analytics Director

Emma Adler

Head of
Communications &
Analysis

Mike Heyworth

Team Leader &
Manager, HEF COVID-19
Recovery Task Group

Tom Walters

Head of Research,
Data and Insight



Financial Stability

- More locally-based Landscape & Nature organisations surveyed are slightly **more confident about their survival and financial forecasting** compared with others
- However wider research and anecdotal evidence suggests continued financial difficulties for many larger national organisations
- Anecdotal evidence also shows the cost of living crisis beginning to impact on nature charity incomes

COVID

- Landscapes & Nature organisations were most affected by having to implement **adaptation measures**

Recruitment

- Landscapes & Nature organisations have been most negatively impacted in **operational delivery** and more so than other organisations
- They are also **slightly less confident** they can achieve required staffing and volunteers levels, particularly in the short-term

Strategic Priorities

- The top three priorities with equal importance were:
 - **Contribution to a sense of place and community** (in line with other organisations)
 - **Access, Diversity and Inclusion** (more relevant compared with others)
 - **Environmental sustainability** (more relevant compared with others)



Discussion & questions

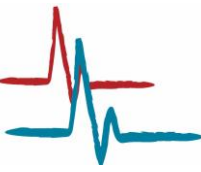
Do the results reflect what you are seeing in your organisation?

Do you have any questions about the results?



What happens next?

What happens next?



- **Thank you** for completing the survey
- Get in touch – we want to hear from you, to inform the next phase of research
- These slides available on the UK Heritage Pulse website now
 - Full results to follow, look out for an email
- Help us to spread the word – to make research even more useful
 - Social media #UKHeritagePulse
 - Email a contact or a friend
- When you leave this call you'll be asked a very short three question survey