

Environment and Conservation Organisations Coronavirus Impact Survey Report

The survey

Between 20 and 24 March 2020, Wildlife and Countryside Link (Link) worked with, NI Environment Link, Scot Link and Wales Environment Link and our members to conduct a UK-wide survey of the impact of the coronavirus on the environment sector.

The aim of the survey was to help DEFRA, the statutory agencies, devolved administrations, and grant funders, like the National Lottery Heritage Fund, to assess the effect that the coronavirus is currently having, and is expected to have, on the funding and operations of environment organisations across the UK. We also gathered input from the environment sector on the support and funding that would be most valuable from Defra and grant providers at this critical time.

Key findings

Our findings are clear. The outbreak poses a threat to:

- (1) frontline functions: conservation, access and animal welfare;
- (2) scientific and policy work; and
- (3) the short-term and long-term viability of a significant proportion of the environment sector.

Several of the organisations surveyed said they were already at a particularly vulnerable time financially before the coronavirus pandemic, due to extra costs from dealing with recent storm and flooding crises. Many organisations with visitor attraction sites are highly reliant on the income they generate, and they see their reserves being quickly consumed with no revenue coming in from these venues.

In the short-term, significant redundancies may need to be made, unless adequate support is provided quickly. There is a high level of concern among environmental and conservation charities about whether and how the government-funded 80% staff furlough scheme, and other support offered to businesses, will apply to charities.

There is a clear need for emergency and replacement funding, and flexibility on grant deadlines and targets, from environmental funders, including government, in order for environment NGOs (eNGOs) to survive this crisis.

Key findings show that:

- Environment and conservation organisations have **almost universally already been affected** by the coronavirus outbreak, with only 2% not yet affected
- Overall, of the 55 groups spoken to in this survey, 15 (**27%**) **said they were either at high risk of becoming financially unviable in the coming months or confirmed that they have less than 4 months' worth of financial reserves** to survive on.
- The 23 organisations that have been able to estimate losses face a combined loss in annual income of around £88 million, or **an average loss of almost £4 million** in 12 months.
- The issue affecting the highest number of organisations currently is the **postponement or cancelling of planned events or projects, affecting 98% of eNGOs**, with this problem and overall loss of revenue hitting them hardest.
- Almost three-quarters of organisations polled said they expect to hit funding restrictions in coming months, with **half already finding their funding affected**.
- eNGOs have three clear priorities for the help they need from environmental funders – **greater flexibility on deadlines** for projects they fund, **replacement funding** for revenue lost through closures and for projects where funding has dried up, and **emergency funding** for organisations at financial risk.
- The priorities highlighted for government were to: provide **emergency funding** which helps cover core costs, in particular staffing; ensure that charities have the **same protections and support as businesses**; and **providing flexibility for existing funding** and guarantees that funding **applications for projects for next year are not delayed**.
- Environmental groups **strongly support people continuing to get outdoors** during the current crisis, with the importance on this for their mental health. Responses suggested that the government's current messaging on getting outdoors responsibly is in line with what eNGOs would advocate.
- There would **potentially be support for a get outdoors campaign after lockdown**, but this would need careful guidance, regulation and enforcement around popular sites, and financial and other support for environmental groups to reinstate infrastructure at their sites.

Responses received to the survey

We received 60 responses from 55 organisations UK-wide.¹ The responses ranged from small local groups to large organisations with a national scope. Fifty seven percent of those surveyed cover the entire UK, with the rest forming a fairly even spread across the four nations.

¹ Please note that we received duplicate responses from ZSL (three response), Butterfly Conservation (three responses) and Plantlife (two responses). We have compared results for two questions, on the proportion of organisations at high risk of becoming financially unviable and with 4 months or less of reserves, and found the same percentages were true whether using all 60 responses or assessing as a proportion of the 55 organisations who responded. We are therefore confident that these duplicate responses have had little impact on the overall robustness of the statistics from the survey.

The respondents consisted of:

Wildlife and Countryside Link and its Members:

A Rocha UK, Amphibian and Reptile Conservation, Bat Conservation Trust, Buglife, Butterfly Conservation, CPRE, Environmental Investigation Agency (EIA), Floodplain Meadows Partnership, Four Paws, Freshwater Habitats Trust, IFAW, Marinelife, National Trust, Plantlife, ORCA, People's Trust for Endangered Species, the Ramblers, Rare Breeds Survival Trust, RSPB, Salmon and Trout Conservation, Shark Trust, Surfers Against Sewage, Whale and Dolphin Conservation, Whale and Dolphin Conservation (WDC), Wildfowl and Wetland Trust (WWT), Wildlife and Countryside Link, the Wildlife Trusts, the Woodland Trust, Zoological Society of London (ZSL – two responses) and Waterwise (a Link partner).

Non Link members:

Belfast Hills Partnership Trust, Bumblebee Conservation Trust, Causeway Coast and Glens Heritage Trust (CCGHT), CIWEM, Ecosystems knowledge network, Enable Leisure and Culture, Fidra, Field Studies Council, Greenspace Information for Greater London CIC, Glens Red Squirrel Group, Hubbub, Institute of Northern Ireland Beekeepers, Julie's Bicycle, Keep Northern Ireland Beautiful, Keep Wales Tidy, NI Environment Link, Operation Noah, Plantlife Cymru, Scottish Badgers, Scottish Wild Land Group, Sustrans, UK:100, The Wildlife Trusts Wales, Women's Environment Network and one anonymous response.

Almost 97% of the groups surveyed are charities, with the remaining three percent being voluntary environmental groups. Of those surveyed more than half receive some funding from DEFRA or a government agency, 45% are funded to some degree by National Lottery Heritage Fund, 38% by the Esmée Fairbairn Foundation, and 3% by the Calouste Gulbenkian Foundation. Almost all cover at least one of National Lottery Heritage Fund's heritage areas, with "Improving habitats and protecting species" by far the biggest heritage area covered. 80% of the organisations working on these issues.

It is worth noting that just over half of those who completed the survey responded before the Prime Minister's lockdown announcement, and the remainder responded to the survey after the country was in lockdown. This will have coloured responses both with regard to their concerns about the current situation for their organisations, and in the activities they are conducting such as encouraging people to get outdoors.

Analysis of responses received

Section 1: The Impact of the Coronavirus Epidemic in the UK

The current situation

Environment and conservation organisations are almost universally feeling hard hit by the coronavirus already, with the majority fearful of the further financial implications for them.

The issue affecting the highest number of organisations currently is the postponement or cancelling of events, or planned projects. This is affecting 98% of eNGOs. This directly ties into many organisations' income generation and is, in fact, the main source of income for multiple groups who responded to the questionnaire.

As well as being the most common problems that environmental and conservation groups are experiencing, they also report loss of revenue and postponed events and projects as being the issues that are hitting them the hardest. Staff absences, additional IT/homeworking costs, and lack of available volunteers are also all affecting around 60% of these groups.

Chart 1: Ways in which environment and conservation organisations are currently affected by the coronavirus outbreak and the associated social distancing measures

60 responses

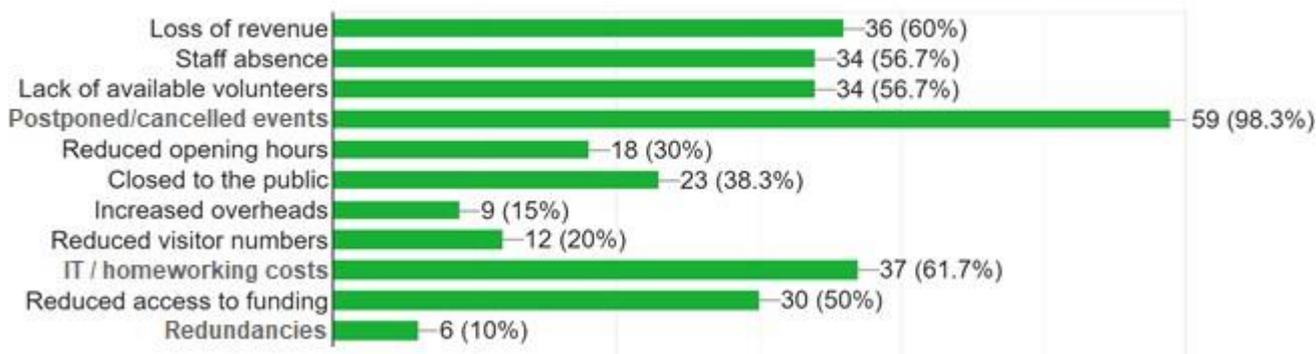
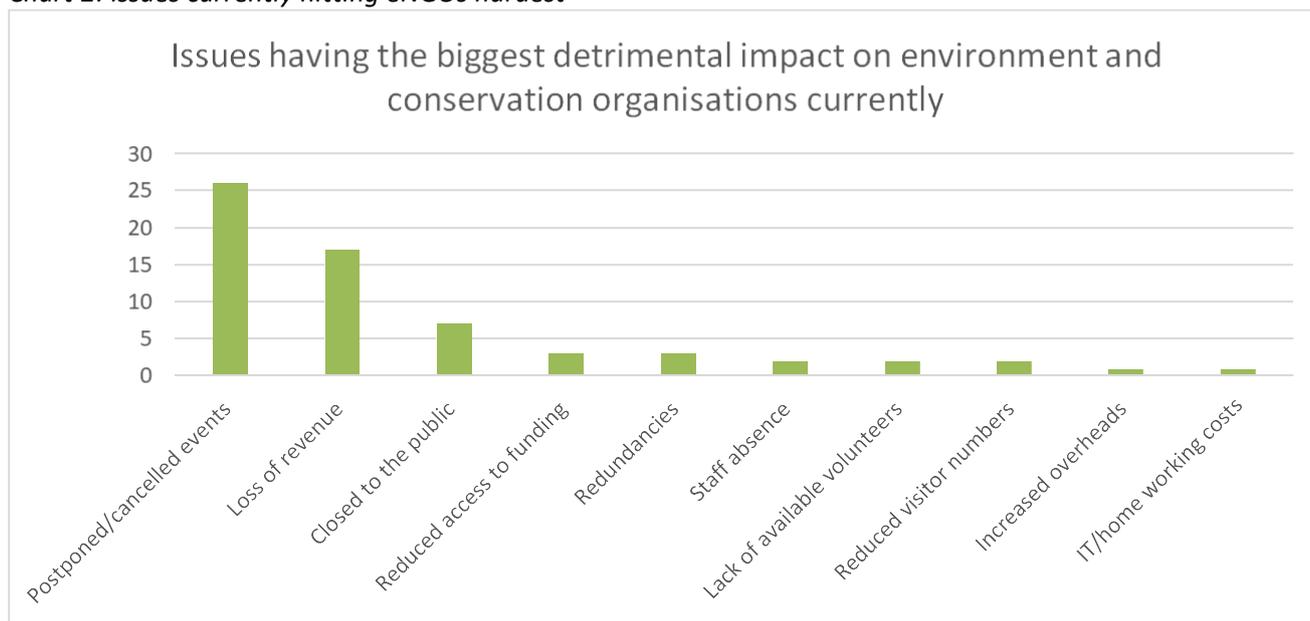


Chart 2: Issues currently hitting eNGOs hardest



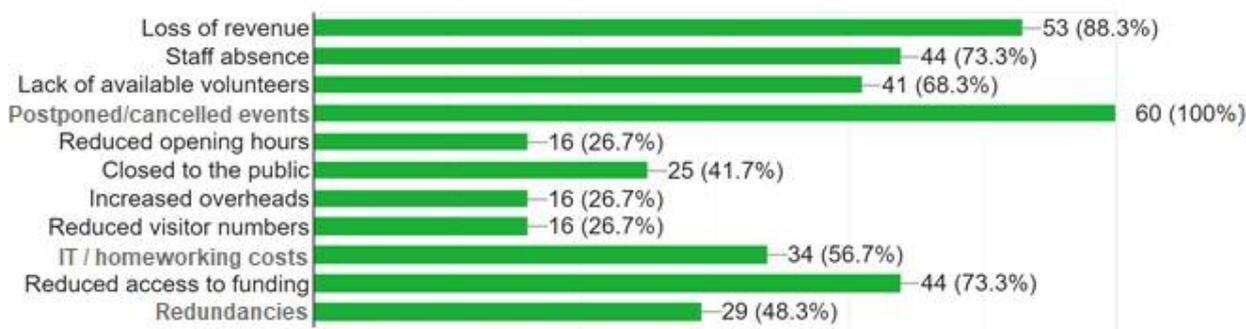
Anticipated impacts in Spring/Summer 2020

The charities and voluntary groups surveyed were asked what they expect their situation to be as the coronavirus crisis continues over the coming months. Lost revenue and postponed/cancelled events and projects are anticipated to continue be the most common and hardest hitting issues facing eNGOs as the pandemic continues. Revenue loss is expected to bite more widely as social distancing restrictions continue, with almost nine out of ten organisations expecting to face losses, compared to 60% experiencing losses today.

Staff absence and lack of available volunteers are also set to impact more widely, with 73% and 68% of organisations expecting to suffer respectively, compared to both issues currently impacting on 58% of the groups surveyed.

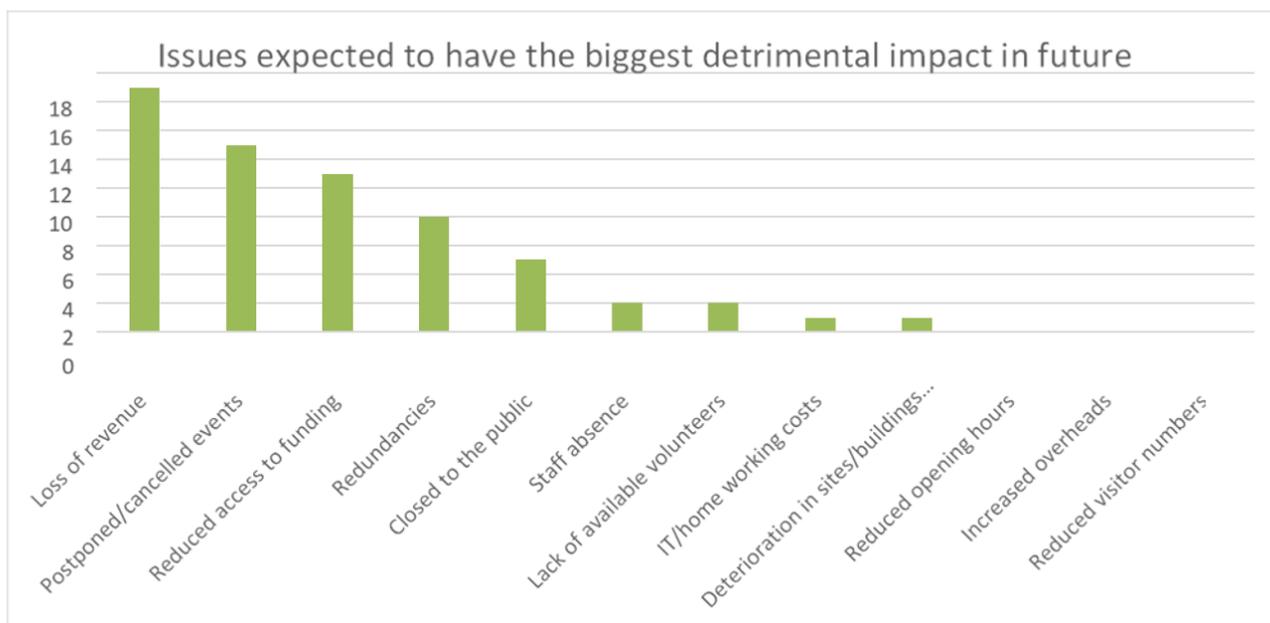
Chart 3: Ways in which eNGOs are likely to be affected by the coronavirus outbreak over the next few months and beyond

60 responses



What is particularly notable about eNGO predictions for the coming months is the expected lack of access to funding. Half of those surveyed say they are already experiencing reduced access to funding, noting that usual applications to government agencies and grant providers are being delayed. This rises to almost three-quarters of organisations saying they expect to hit funding restrictions in coming months. This is cited as likely to have the highest detrimental impact on environmental groups after reduced incomes and postponements and cancellations of events and projects.

Chart 4: Issues expected to hit hardest in future



The scale of the financial risk facing eNGOs

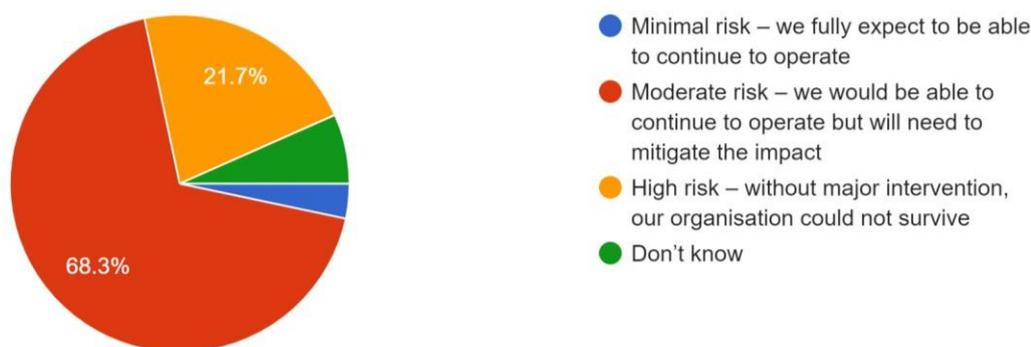
Environment and conservation groups have highlighted that they are facing exceptional and crippling financial pressures. Many of the groups surveyed have struggled to quantify the financial impact on their organisation, but more than half have been able to provide estimates or indications of their likely financial losses. We have used the 23 estimates most able to present an overall loss figure for the year to generate an average loss estimate.

Worryingly, the 23 organisations who have been best able to give estimated losses, are set to face a combined loss in annual income of around £88 million, or an average loss of almost £4 million per organisation. Please see details outlined below. This is likely to be a significant underestimate as it does not, in many cases, factor in losses to the value of revenue from invested funds, or additional costs that have not yet been anticipated/calculated.

Many eNGOs reported that without significant financial intervention from the government and grant providers that they are going to struggle to survive, with extensive redundancies and permanent closures a very real risk.

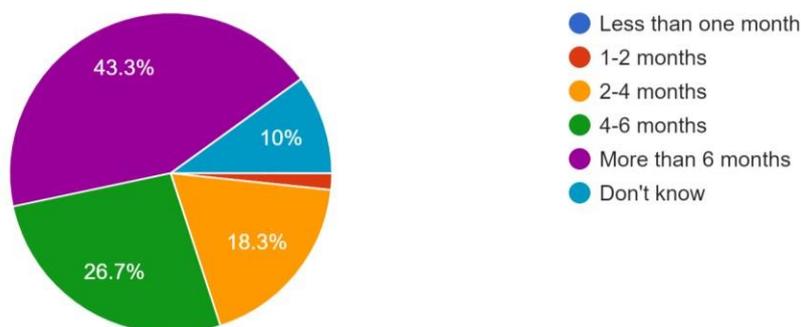
Nine out of ten groups surveyed said they faced either a moderate or high risk to their long-term viability as a result of difficulties around the coronavirus outbreak. One in five of the 55 organisations polled are at high risk of failing to be viable unless they receive financial aid.

Chart 5: The level of risk to the long-term viability environment and conservation organisations
60 responses



A fifth of conservation and environment groups will not be able to operate past four months without financial assistance, with a further 28% unable to survive past six months. These NGOs are geographically dispersed around the UK and are a variety of smaller and larger organisations.

Chart 6. Period of operation for eNGOs that can be covered by financial reserves
60 responses



Overall, of the 55 groups spoken to in this survey, 15 (27%) said they were either at high risk of becoming financially unviable in the coming months or confirmed that they have less than 4 months' worth of financial reserves to survive on.

Help needed from funders

Help from environmental funders and government will clearly be crucial to enable eNGOs to weather this crisis and come out the other side. Three clear priorities came through from the organisations surveyed on the support from grant providers that would be most helpful to them.

The top individual reported priority, which 77% of organisations said would be valuable aid, is for funders to provide flexibility in the deadlines and outcomes expected from projects and work which they are funding. Some projects may need to be deferred for a year, without penalties, to enable work to be carried out at the right time of year.

There was also a huge appetite for grant providers to offer replacement funding for both projects where funding has dried up, and to help cover lost revenues lost through closures around the virus, and emergency funding for organisations that are struggling. In addition to the figures below four organisations said that replacement funding was key to them, but did not specify whether this related to project funding or closures. So **overall replacement funding is the top issue where organisations feel that funders could help them in this crisis.**

Chart 7. Support needed from environmental funders

60 responses

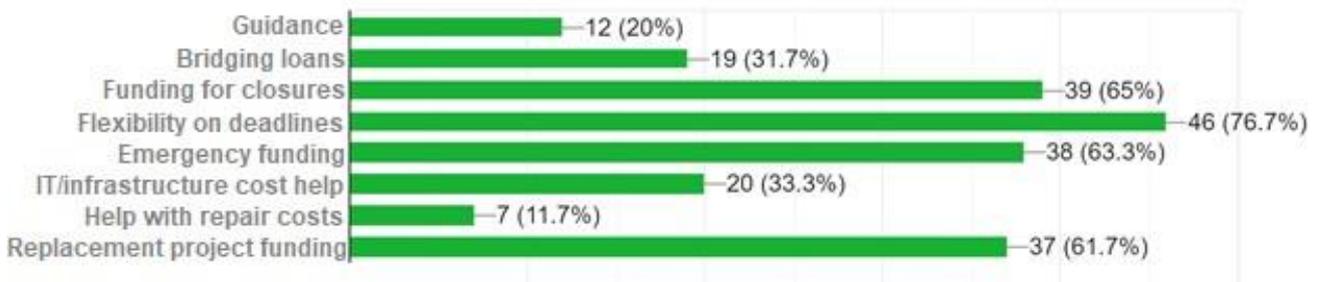
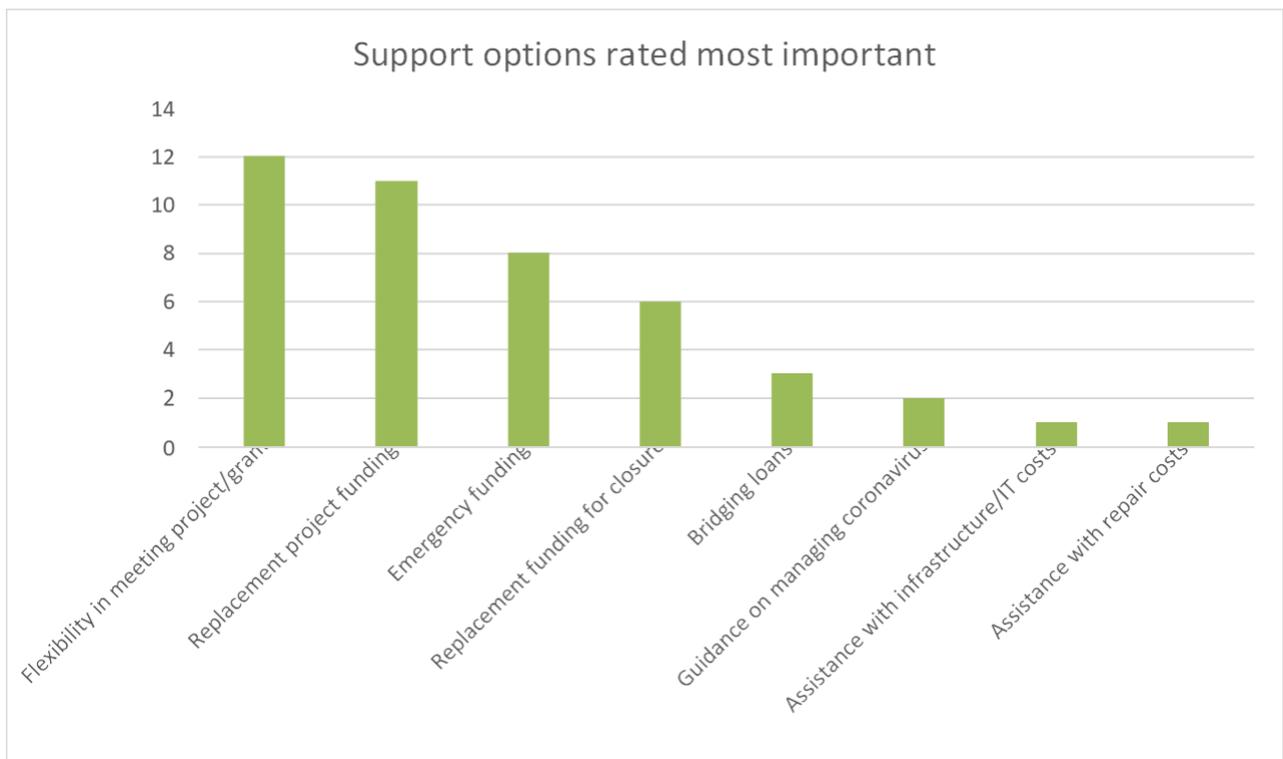


Chart 8. The help from environmental funders that would most help eNGOs



A smaller number of organisations reported a need for guidance or help with repair costs as their top requirements for assistance. One organisation also said that it would need a combination of support as the real need for them is to cover staff time and overheads for any overruns.

Section 2: Help from government

Assistance needed from government

The vast majority of respondents felt that the priority for support from government must be to provide emergency funding for core costs, in particular staffing. A high level of concern emerged that government plans to support businesses and prevent redundancies by employers, will not be applicable to charities – which must be urgently addressed.

The need for government agencies to provide flexibility in targets and deadlines for funded work with eNGOs was also very clear. Many organisations are also very concerned about funding drying up for next year, or being critically delayed, with multiple organisations reporting that application processes have been postponed. This could dramatically affect revenue for next year and impact the organisations’ ability to carry out time critical environmental work (much of which is seasonally dependant). This is a particular worry given the urgency of environmental works needed to tackle the climate and nature crises.

Chart 9: Policy, regulatory and financial steps organisations would you like to see government take to help eNGOs

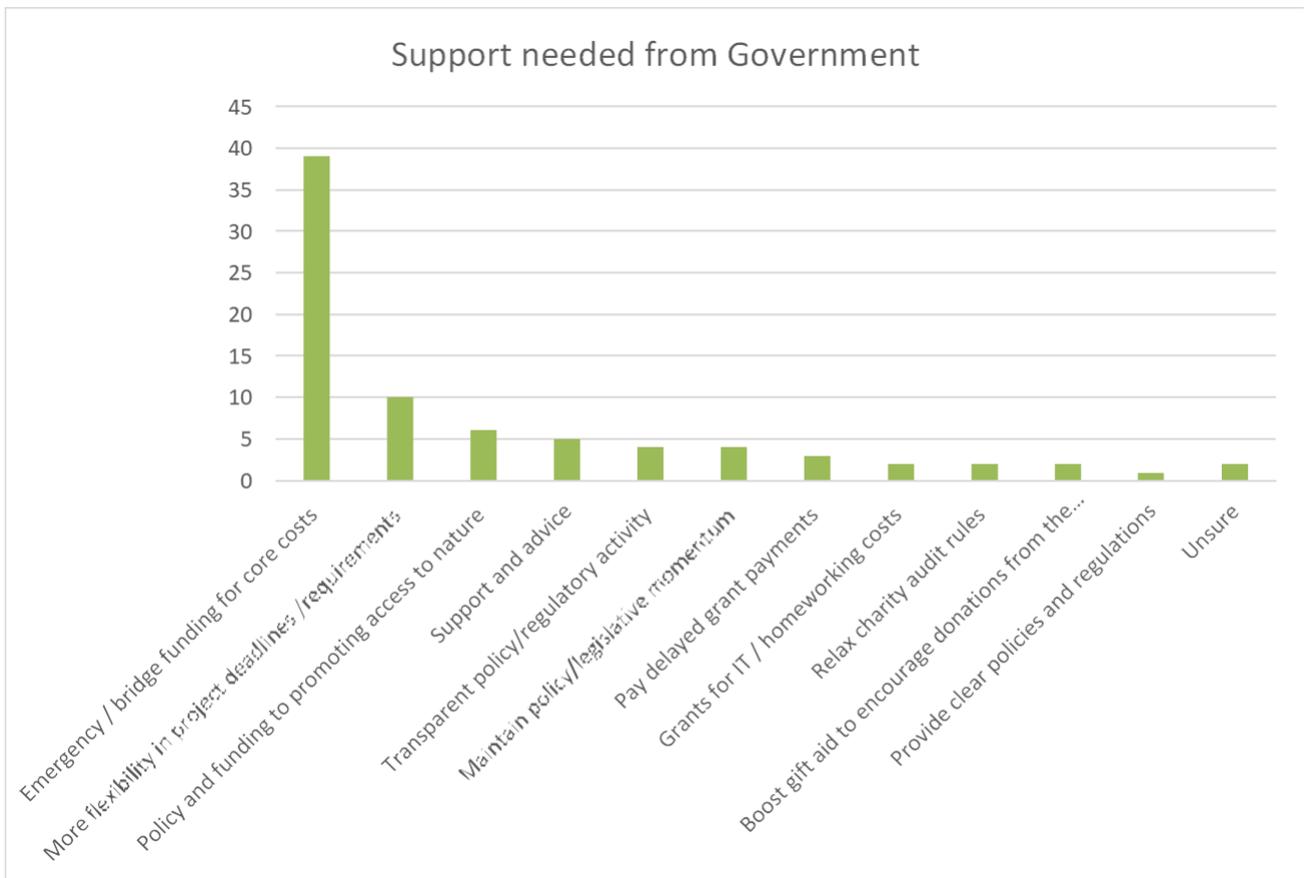


Table 1. Policy, regulatory and financial steps organisations would you like to see government take to help eNGOs

Measures	%
Emergency / bridge funding for core costs, particularly staffing	39
More flexibility in government-funded project deadlines /requirements	10
Policy promoting access to nature and funding to achieve this	6
Support and advice, including clarity on what charities can claim	5
Transparent policy/regulatory activity with extended consultation periods	4
Maintain momentum on environmental legislation, regulations and climate action	4
Ensure delayed grant payments are paid urgently	3
Grants for IT / homeworking costs	2
Relax charity audit rules for this Financial Year	2
Boost gift aid to encourage donations from the public	2
Provide clear policies and regulations	1
Unsure	2

There were a multitude of individual proposals on the best way to provide emergency funding, some of which are outlined below.

Ideas proposed for emergency funding included:

- salary support – including committing to meet salary and overhead costs for shutdown induced project overrun, helping to ensure expertise is retained
- extending commitments made to businesses to the environment sector
- rent relief
- amending banking and NI/pension contribution requirements to protect NGO liquidity
- frontloading grants
- supporting statutory agencies to providing bridging support (not loans) for core recording schemes and reassurance that government grants will be going ahead
- grants currently paid with low overhead recovery rates (e.g. 20% of staff costs from Environment Agency) should be raised closer to actual rates of recovery by raising this to 50% of staff costs).
- funding and safeguarding of spaces that will be more heavily used as other leisure and culture facilities are closed.

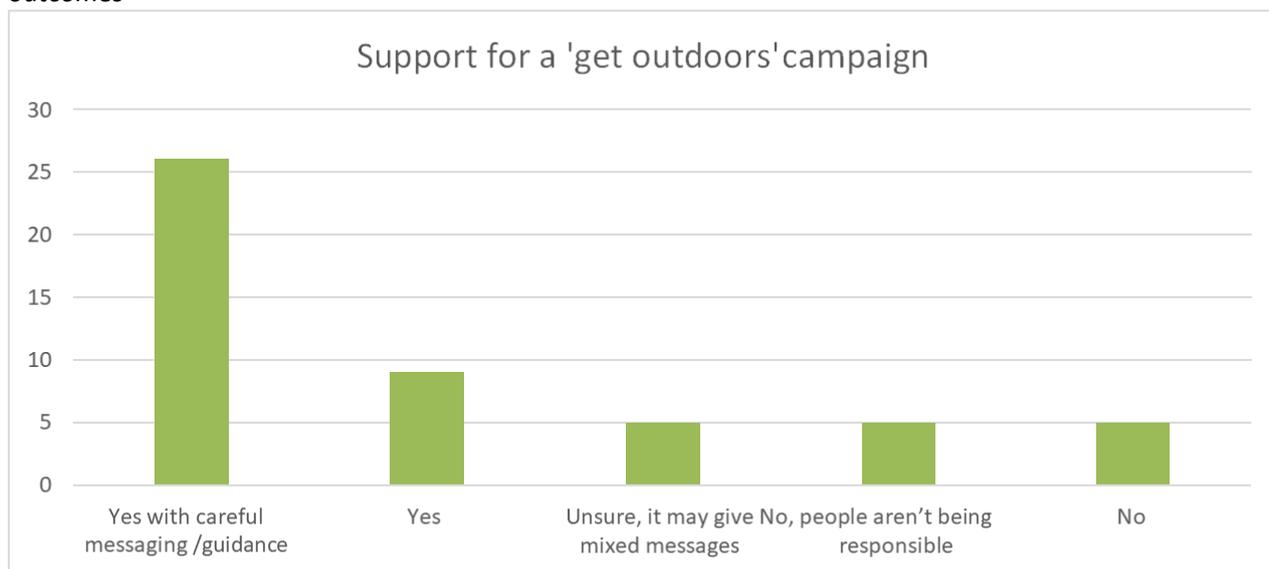
Campaigning and concerns on getting outdoors during the coronavirus crisis

The questions on this issue were outpaced by events, with the Prime Minister announcing the UK was to go into lockdown partway through the survey. Some answers were received before the lockdown and some after, so this cannot be taken as indicative of the sector’s views on the need for a campaign in the current circumstances.

What was, however, front and centre in the responses to the question over support for a ‘get outdoors’ campaign, was just how essential to people’s mental health access to nature is, particularly during this difficult time. ENGOs want to see the public getting outdoors, even during the lockdown, but locally, and in a responsible way with clear guidance from Government.

The positive response to this question would suggest that the Government’s current messaging to get outdoors locally to exercise individually or with household members, is in line with what the sector would want to see advised. Nature groups are also keen to ‘bring the outdoors indoors’ with online resources, engagement and campaigns, and several suggested funding for this from Government would be helpful.

Chart 10: Support for a government campaign on 'getting people to outdoors' to create positive mental health outcomes



The responses to this question indicate a keenness in the sector to encourage people to get outside to keep well, and the detailed comments in the accompanying spreadsheet may be useful in thinking about a campaign after the lockdown is over.

The organisations also revealed concerns over lack of infrastructure, issues of people travelling to access the outdoors, people not adhering to social distancing guidance (see chart 10), and uncertainty over campaigning and messaging at this time.

Less than half (43%) of those organisations with visitor sites who responded to this question said that they would have essential infrastructure in place for visitors (see table 2), and this was obviously dependent on being out of the lockdown period. In reality, the figure may now be lower as more than half of the survey responses were received before lockdown was in place and as the situation has evolved lack of staffing and volunteers will have more of an impact.

Table 2: Would there be the essential infrastructure in place to support visitors at your site and those of other organisations?

Category	%
N/A, no sites	21
No, infrastructure closed	9
Maybe	4
Yes	6
Yes, if not in lockdown	4

Of the 28 organisations who responded on the issue of concerns about travel from urban centres, and felt this was relevant to their organisation, three quarters were worried about people travelling to access countryside sites during the outbreak period. Particular concerns were raised over people not following social distancing guidelines properly and about overcrowding. In a potential post lockdown promotion of getting outdoors addressing behavioural issues must be central to any planned approach.

Table 3: Is your organisation worried about people travelling from large urban centres to the countryside during the epidemic?

Category	%
Yes	12
Yes, mildly	9
No, not applicable	13
No, if advice is clear and adhered to	7

The picture on campaigning and communications plans is blurred given that the lockdown announcement occurred partway through this survey. Multiple organisations are planning or conducting social media activity around enjoying the outdoors from your garden or in the very local area, with several mentioning that some financial support from government on promotion of this would be welcome. The number carrying out similar activity is probably higher than reflected in this survey, given that half of responses were received before the lockdown was in place.

Table 4. Are you planning your own campaigns or communications work to incentivise people to get outside or disincentivise people travelling from urban centres to the countryside?

Category	%
No, not applicable	18
Under review	9
Yes	1
Yes – get outdoors	1
Yes – focussing on home-based options in gardens / via online	7
Yes – local spaces accessible from doorstep keep a distance	7
Yes – social media common approach	1
Yes – disincentivise any travel	1

Issues raised in the survey responses which should be considered for any such post-lockdown campaign include:

- Ensuring adequate guidance, and regulation of the most popular sites to ensure social distancing is possible and to avoid the overcrowding seen on Mothers' Day weekend.
- The support eNGOs would need to get their infrastructure prepared, including whether workers in these areas should also be classed as key workers if access is to be a major government message.
- Utilising any such drive to support charities' aims and funding, to help struggling charities cope with increased demand and infrastructure needs.

Section 3: A Message from Wildlife and Countryside Link

The coronavirus poses an existential threat to a significant proportion of the environment sector.

Short-term shocks are likely to give way to long-term troubles, if funding, membership and charitable giving fall.

Our sector tends not to hold hefty cash reserves, preferring to plough its income into frontline science, conservation and support for public engagement with nature. All of these functions are at risk at exactly the wrong moment.

This was meant to be “super 2020”, the year when critical laws and international deals on nature, oceans and climate were due to be agreed. DEFRA and the environment sector must be at full strength to bring this work back on track with ambition and speed.

This is a time when people need nature more than ever before. Already, the rise of non-communicable disease meant that our “natural health service” was more important than ever. We must help people continue to experience the joy and solace of nature responsibly.

And this is a time when nature needs us more than ever. Without the stellar constellation of conservation organisations that work on the ground to protect our natural world across the UK, our fight against the ecological crisis would surely be lost.

In the days ahead, Wildlife and Countryside Link and its members will come together to help keep policy and practical action for nature on track, finding ways to support one another through the crisis.

Swift financial support from Government and funders can help us keep vital scientific, conservation and engagement work alive.

Of course, people’s health and livelihoods will require urgent investment to enable our nation to recover. We share this report because we know that nature and our conservation sector can play a vital role in that recovery and because this short-term emergency must not exacerbate the long-term climate and ecological crises, which themselves require urgent action.

We hope these findings are helpful.