

Paper	<b>Market research summary</b>
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To	
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## Background

- In order to understand the needs of ecological consultants and confirm there is a business need to develop a national website (in the way that we assume), market research is being undertaken.
- The format of this research is two fold:
  - Contact individuals who have recently used the LERC service, so it is not a cold call, and ask them their perceptions on the service and then broaden out the conversation to the national picture
  - Contact directors/heads of ecology in leading ecological consultancies as these would be key customers for a new website and would be able to give a range of views from their team in a quicker manner than trying to contact the same number of self employed consultants
- It is recognised that this research does not cover the whole of the consultancy market as yet and is not a properly representative sample. However research is still ongoing and attempts will be made to include more consultancies covering the full range of size, function and geographic distribution

## Format of research

- Due to time constraints all research has been via telephone conversations, frequently followed up with email
- The research followed a semi-structured interview style
- To prevent the consultee being prejudiced broad questions were asked at the start, for example:
  - How do they feel about the service they get from LRCs?
  - What are the good areas?
  - What are the not so good areas?
  - What things would they like to see improved in the future?
- Only after these questions were asked were more detailed points picked up, the specific order and format depended on the responses to the first questions, for example:
  - How would you like to receive data – pdf, excel, GIS?
  - In what way should it be ordered – taxonomically, BAP, legally protected species?
- Then questions relating to the project were asked, for example:
  - Would a national data request website be of interest/overcome the issues you have described?
  - How would you feel if this was a subscription based service?
- As you would expect there was much discussion around these questions on how it could practically work.
- The last questions focused on the consultee, for example:
  - How many ecologists did they have?

- Did they know how much they spent on data requests in a year and were they able to share that information?
- To date responses have been received from 21 consultancy companies. The number of actual consultant responses is far higher as a number of these firms asked their entire ecology staff and sent their responses back.

## Summary of responses so far

- There are several strong themes that have emerged from the research yet the responses are wide ranging depending upon the particular interests of those consulted
- Many responses highlighted completely new issues that LERC was not aware of, strengthening the business case for a national data request website – of particular note is the text in red below. If this is true across a large proportion of the sector it highlights that LRCs are failing in their role to ensure data is used and even if there is no other need to change this provides a compelling reason
- Yet there must also be a note of caution, the research must be continued to confirm these findings further given the small sample size

## State of the LRC sector

- On the state of the sector and whether LRCs are providing a good service there are a variety of views. Some feel that ‘the system works’ and are happy with their local LRC (for example) but could still be improved by a national website ranging to those who are incredibly angry with the poor service they receive and feel that something needs to radically change soon
  - Most consultants are frustrated by the different processes for requesting data between LRCs and not knowing how long it will take
  - Many consultants are frustrated with locked PDF documents provided by LRCs as these cannot be copied and pasted and the information has to be manually transcribed into another format in order to be useful. Where excel spreadsheets are provided as well this overcame much of the problem but still doesn’t help with sites as these still have to be redrawn in GIS (especially for the LRCs that state their document cannot be reproduced as part of the report)
  - Some consultants are frustrated by the unclear charging policies or having to request a quote, as this then takes even longer to get the data
  - Some consultants stated that they were not going to some LRCs because of the high cost of their service with seemingly nothing to justify it but are continuing to request data from other LRCs
  - Some consultants explained that they are held to high standards (i.e. CIEEM) and are annoyed when they are provided with shoddy data from LRCs leading to their reports being called into question in the planning process
  - Some consultants described how they know the data they get from LRCs is missing information because they have either received it before or submitted it themselves (personally or professionally)
  - A few consultants mentioned the quality of data, it is often not clear what is verified or validated. They feel that using un-validated data puts their reports at risk and if LRCs want to send such data it should not be charged
- Most consultants are frustrated with the time it takes to receive data back, even just a timeline saying when they will get it would help with their work planning

- A couple of consultants said they would be happy to pay online with a card if it would make it quicker
- All consultants were frustrated when they have to go to several data providers in one area to get the information. Particularly bearing in mind the time and cost and then the consultants time in analysing the information
- Proportionality of the data request compared to the value of the job was frequently mentioned. If it is only a small ecology job many will either not include a data search in the quote or the client will say not to get it as it adds such a significant proportion on to the value
- Several consultants mentioned a fast track service, they need the data quickly and like that some LRCs provide this although of course they don't like the extra fees
- **One director at a large consultancy firm described in detail how consultants work and their interactions with LRCs**
  - He appreciated that sometimes consultants forget to put in the request early enough but even when they do it most often takes days to come back
  - Many jobs are small jobs that only take one or two days on site
  - In these cases the data request is put in, the ecologist goes to site does the survey and comes back and writes the report
  - The last thing to go in the report is most often the data search due to the time it takes to come back
  - In this way the data is not useful and does not inform the survey work, it is a tick box exercise to demonstrate they have done the due diligence
  - Yet it would be far preferable to get the data first as it may be the only context they get in areas they are unfamiliar with
  - He feels they are getting data at the wrong stage in the project cycle

### **Format of data**

- It appears there is somewhat of a divergence between the format in which smaller and larger consultants would like their data. The smaller firms prefer a pdf report (that they can append whole to their report) and the larger ones a GIS file. A filterable excel spreadsheet seems to be liked by all. A couple of consultants liked a map of records to look at.
- Knowing the distance (and direction) of the record from the grid reference supplied seems to be something that almost all ecologists would like.
  - Apparently this is something they have to work out themselves once the data is provided and can take days (depending on the volume and format of the data). As such knowing this up front would save a significant amount of time for them and make their job much easier
- Most consultants felt that the most important thing is getting accurate and up to date information
- No consensus on the structure of data e.g. should it be taxonomically ordered or by protected species or by records closest.
  - On delving into this further it seems that perhaps the only way to provide data in a format suitable for all ecologists is to provide a filterable format, such as an excel spreadsheet so that each ecologist can filter on the information most relevant to them
- Several consultants mentioned the precision of the data provided is important – consultants need the recording precision
  - They understand the need for confidentiality with some records but blurring of data hinders their job
- Several consultants mentioned that some LRCs give too much information, this takes too long to sort through as it is not clear what is relevant and what is not

- One consultant mentioned that notes with records can be useful – was it a bat roost or just flying over

### **A national website**

- All ecologists liked the idea of a national website<sup>1</sup>, with consistent data format, quicker access and uniform price
  - All agreed that this would help with cross boundary search issues
  - All found that receiving data in a standard format regardless of location would help them as they would know exactly how the data was arriving and what to do with it – much of their time is spent sorting the data and working out what is relevant. This is much easier if the data format is the same everywhere. So this reduces their costs overall and speeds up their jobs
- All those who mentioned it felt that if there was to be a national website it would need to be better than the current service from LRCs or at least representative of the best service currently received – there is to be no ‘lowest common denominator’ effect
- Several consultants mentioned that having other information on the website such as SSSIs would be very useful

### **Subscription models**

- Lots of questions about how a subscription system would work but key was how they would charge their clients as it was frequently stated they simply charge the cost of the search
  - On delving into this it seemed that if a ‘certificate’ could be provided that gave a nominal figure for the data search then this could easily be added into the standard costs of the quote and it would be useful as it would be a fixed price
- Larger consultancies in particular felt that a subscription model would work as it would not only save the ecologists time but also create a huge saving in their finance departments as they wouldn’t need to raise purchase orders all the time
  - There were discussions around how this would practically work for them however as changing the data requests charges from an expense to an overhead may require some discussion with their accounts teams. All seemed happy that this could be achieved, especially if the service was better and costs were reduced

### **Current costs for consultants**

- Few consultancies knew how much they spent on data requests – as it is an expense that is passed on to the client
- Those consultancies that did look into the costs as part of this research were all surprised at the amount they spent, finding it to be higher than they expected
  - This meant that they were more inclined to agree to a subscription service as it would reduce both the time it takes them to analyse the data (as it is coming in a standard format) and the time taken on the financial side.
- A couple of consultants then admitted that with a subscription it would be possible to use data for all their work rather than making a choice of which jobs to get data on

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<sup>1</sup> The only negative response received was from an office administrator whose entire role was to request and sort the data requests. They did not feel a national website would help them.

## **Practical issues**

- Some comments that sometimes the NBN is used but ecologists know they should not/cannot reference this data and it is at a very poor resolution for the work they do
- Several consultants commented that it was frustrating when it's not clear what the charges are for, more so given the huge variety of charges between LRCs which doesn't necessarily equate to quality of data/service
- Several consultants mentioned whether the website could then be a portal to accept records as they want to feed them back but have not found an easy way to do so
  - Some went even further asking if there could be a discount on the subscription for those that send records back
- Some consultants asked how such a national system would be run and who would do it. The NBN was mentioned, others wanted to be reassured that it wouldn't be an excuse to put prices up further
- Several consultants mentioned the need to get other organisations such as CIEEM on board
- Confusion between the BRC, NBN and LRCs was mentioned a couple of times. More clarity on who does what would be appreciated by consultants
- A few questioned how consultants would know the national website existed and that marketing it would be important
- Several consultants commented on how difficult it would be to set up a national website, knowing their own patches

## **Conclusion**

- From the information above it is clear that while some LRCs may be delivering an acceptable service to their customers as a sector LRCs are failing to deliver a product that truly meets the needs of their customers
- Consultants are still willing to work with the vast majority of LRCs but this is because they perceive that there is no alternative, and that they need the data for their business
- This does not mean that consultants are happy with the service. There are a range of opinions but even those who think that the current system is workable believe it could be improved and have issues with the current delivery
- When presented with an alternative of a national data request website that delivers a standard product almost immediately it was realised this would meet their needs and overcome most of the concerns they have about working with LRCs
- No other alternatives to the current model or a national website were discovered in the process of the market research
- As described above more market research is needed to ensure that these conclusions are representative of the whole consultancy sector