
Market conditions for expert and specialist heritage skills and services **2015 -16**

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Executive summary

The Client Demand Task Group (CDTG), a working group set up by the Historic Environment Forum (HEF), instigated this research project, which was funded by Historic England (HE).

The CDTG's aim is to investigate ways of stimulating demand for skilled / accredited historic environment trades and professions. The groups' initial thought was that there is a lack of informed demand for specialist heritage skills and services and that this affects client behaviour regarding appropriate supplier procurement.

The project complements the work being undertaken by the HEF Heritage Skills Task Group, and a range of labour market intelligence report available at the Historic England website. This project also complements the Heritage Counts 2015 survey of listed residential building owners. The results of this project will feed in to the background data for Heritage Counts 2016/17.

This qualitative research project was designed to establish robust and reliable insight on present market conditions for specialist heritage skills and services. All views are those of the respondents.

Stage 1 involved a series of interviews with 38 respondents from professional, craft and trade bodies representing the supply side of the heritage skills landscape. These respondents are referred to as the "relevant bodies" throughout this report.

Stage 2 involved focus groups and depth interviews with 41 respondents representing different types of clients, including private homeowners. Summary reports for Stages 1 and 2 are included as annexes to this report on pages 24 and 40. The summary reports contain

detailed commentary and a large number of direct quotes from respondents.

The insight gathered in Stages 1 and 2 was compared and conclusions were drawn (see pages 14 to 20) and a set of recommendations developed (see pages 21 to 23) to assist the CDTG and HEF to decide further courses of action.

Introductory information, details of the research design and method and an overview of the respondents are given in the following pages. Our analysis and comparison of the insight gathered from both sets of respondents suggests:

- There is a lack of informed demand, but the client landscape is complex and therefore any approach to resolving this must take into account this complexity.
- Language and the use of certain terms and phrases do not help. Many clients are confused and many terms and phrases have little meaning.
- Clients do appear to appreciate the heritage assets in their care and their responsibilities and obligations. However, some private clients "have no idea what they have bought" and some commercial clients "simply don't care". Others use specialists "where necessary".
- Asking trusted contacts for a recommendation is the main way most clients find specialist suppliers because they are unbiased. Searching websites is the next stage and the first stage where a recommendation is unavailable.
- Clients choose to work with a specialist supplier based on their previous work, a good personal connection, price, proximity and availability. Some clients

then carry out due diligence that includes checking references, recommendations, qualification, memberships and accreditations. But, the level of due diligence depends upon the type of client, the size and complexity of the project.

- Clients feel that being compelled to use certain specialist suppliers, for example those who are accredited, would adversely affect “competitive tension” in the marketplace, restrict trade, create cartels and push up prices.
- Accreditation in some form is seen as a good thing.
- But, clients are unaware of many schemes and are confused by others. A perceived lack of consistency and uniformity, the plethora of schemes and the use of the word “accreditation”, do not help clients.
- There is an appetite for advice, but this must be independent and unbiased.

Recommendations are:

1. **Collaboration:** Pan-sector advocacy via deeper collaboration between professional, trade and craft bodies, heritage bodies and local authorities to drive awareness and understanding amongst clients.
2. **Education:** Message about the benefit of using specialist suppliers should be delivered through a series of marketing campaigns focussing on targeted personas including; private clients living in non-listed homes of merit, professionals and businesses involved in conveyancing, professionals and businesses involved in cost management, local authority officers in touch with clients.

3. **Advice:** This could be paid-for and could be offered digitally via a website and app, via telephone or via third existing parties. The advice needs to be independent and unbiased. It could suggest suppliers and also give more general advice to those less well-informed clients who are working on a “heritage” project.

It is critical in our view that the CDTG / HEF / HE also:

- Identify any knowledge gaps that would impede the recommendations.
- Identify any further research or supplementary research
- Decide if the scope expands to include the other home counties heritage bodies
- Agree the way(s) forward
- Agree who is to take this forward.
- Commit to intensive collaboration
- Commit resources

Introduction

About the author

Loud Marketing is an independent marketing and business development agency working with professional and membership associations, architecture and hospitality clients. We work with our clients on market research, strategic planning, brand identity, communications, engagement and external relations projects. Our aim is to help clients meet their challenges and make the most of their opportunities. Loud Marketing provides a flexible extension to clients' resources and often becomes a trusted advisor and part of a client's team.

Background

The CDTG is a working group set up by the Historic Environment Forum in May 2013 to investigate ways of stimulating demand for skilled / accredited historic environment trades and professions. To assist with this aim, the CDTG identified the need for market and stakeholder research in order to establish a clearer understanding of the present market environment for the provision of services by historic environment trades and professions.

The hypothesis, developed by the CDTG in conjunction with Loud Marketing, is that there is a lack of informed demand for specialist heritage skills and services. For example, clients may not realise the breadth of skills and services available, or where and how to find them. They may not appreciate the importance of using appropriately skilled suppliers or know how to identify such suppliers.

About this project

This is a qualitative research project designed to establish robust and reliable insight on present market conditions for specialist heritage skills and services. This research is intended to provide a clear

perspective in place of the present anecdotal information gathered from the sector and test the CDTG hypothesis described above. There were three stages. Stage 1 involved a series of interviews with professional, craft and trade bodies representing the supply side of the heritage skills landscape. Stage 2 involved focus groups and depth interviews with a range of clients including private homeowners. This final report draws Stages 1 and 2 together, and recommends ways forward. Summary reports for Stages 1 and 2 are included in this document as annexes (see pages 24 and 40).

This project aims to gather insight to enable further decision making about how to address the perceived lack of "informed demand" for accredited and competent heritage skills practitioners and professionals. The overall objective is to help us suggest ways of communicating more effectively with clients to stimulate demand for specialist heritage skills. It does not attempt to pre-empt any decisions on next steps; rather it seeks to inform those decisions based on qualitative evidence.

Project interfaces

The project complements the work being undertaken by the HEF Heritage Skills Task Group, which is mapping routes to skills across the historic environment sector from a supply-side perspective. It also complements a range of previous labour market intelligence reports and builds upon them by broadening the scope to include professions. It will feed in to the background data for Heritage Counts 2016/17. This project also complements the Heritage Counts 2015 survey of listed residential building owners, and used data from that survey to assist in recruiting private homeowners.

It aims to provide information that will assist in meeting historic environment skills capacity issues identified in Historic England's assessment of National Infrastructure Development for the next 15 years and it complements all other heritage capacity building and skills initiatives.

Project personnel

Responsibility for the project within HE lies with the Project Assurance Officer, who will sit on the Project Board and fulfil the role of Project Assurance Officer for HE funding purposes.

An advisory board was composed of members of the HEF CDTG – the key stakeholders in the project.

The Project Board comprised:
Edmund Lee – *Historic England Project Assurance*; Bob Hook – *Historic England Product QA*; Peter Hinton – *Project Executive*; David McDonald – *CDTG and HEF representative*; Stephen O'Reilly – *Project Manager from research agency Loud Marketing*.

Acknowledgements

We would like to thank the following people, listed in alphabetical order, for their invaluable help in developing and activating this research project.

Andrew Dixon, *Federation of Master Builders*
Katherine Pate, *Katherine Pate Limited*
Paul Crisp and Henry Ryde, *Jones Lang LaSalle*
Pete Hinton, *Chartered Institute for Archaeologists*
Peter Moore, *Dorset County Council*
Rachel Campbell, *British Property Federation*
Sheila McCusker, *MSMR Architects*

Research objectives

The objectives of this research project are:

- To provide up-to-date insight about the nature of market demand for skilled practitioners in professions, trades and crafts working in the historic environment sector.
- To provide up-to-date insight about the nature of market demand for accreditation of this pool of skilled workers.
- To supplement existing anecdotal information with an evidence-based knowledge set from the client side.
- To survey relevant professional, trade and craft bodies to ensure we include their current behaviours, programmes and actions to meet demand for skilled heritage practitioners.
- To map the insight gathered from the demand and supply sides to establish where there are barriers to the employment of trained / accredited specialists in the sector, what is currently being done and what could be done to address these.
- To inform the work of the HEF CDTG, HE and partners in the wider sector, in implementing solutions to problems faced by clients and suppliers alike regarding the protection and understanding of the historic environment.
- To allow professional trade and craft bodies to develop strategies that increase public benefit from the historic environment and meet the needs of clients.

Research design and method

Method statement

The methodology used a mix of qualitative research techniques.

In Stage 1 a set of eight solo and dual face-to-face in-depth interviews took place. This simply means we met in person with one or two respondents at each interview. All respondents in Stage 1 worked for a broad range of professional, trade and craft bodies representing the supply side of the heritage skills and services landscape.

Nineteen in-depth telephone interviews supplemented the face-to-face interviews. The face-to-face in-depth interviews took place at the offices of the respondents or other venue of their choice.

In-depth interviews – sometimes called depth interviews – are an intensive, semi-structured qualitative research technique usually lasting between 45 and 90 minutes. Face-to-face research allows us to capture a rich set of insights, while telephone fieldwork allows us to capture insights from those who are unable to attend a face-to-face interview.

A discussion guide was developed, which is included in the annexed Stage 1 summary report (page 37). A discussion guide allows qualitative researchers to cover a consistent set of key topics with each respondent, without the need for structured questionnaires. It acts as reference point for moderators.

In Stage 2 a set of seven focus groups and three face-to-face in-depth interviews took place. The interviews replaced a planned eighth focus group. The respondents in Stage 2 represented the client side of the heritage skills and services landscape, including public sector clients, commercial clients and

private homeowners. The focus groups took place in a variety of venues, chosen because of their convenience and cost-effectiveness. Fieldwork for Stage 2 took place in Oxford, Bath and Dorchester, as well as London. The face-to-face in-depth interviews took place at the offices of the respondents.

A second discussion guide was developed, which is included in the annexed Stage 2 summary report (page 50).

We took a co-creation approach to this research, especially the face-to-face elements. This means we positioned the project as a way of participating in the creation of plans to help address heritage skills issues.

Respondent recruitment in Stage 1

The recruitment strategy for Stage 1 was to secure participation by a broad range of relevant professional, trade and craft bodies. These respondents are collectively referred to throughout this report as the “relevant bodies”. As this was a qualitative research project, we did not aim to capture insight from all relevant bodies. Rather, our aim was to recruit a set of relevant bodies to give a good mix of views, behaviours, programmes and actions to meet demand for skilled heritage practitioners.

We also made sure we included professional, trade and craft bodies representing members who work on a range of project typologies, including buildings, landscapes and moveable heritage.

During research planning we worked with CDTG members to finalise a list of relevant bodies covering the desired broad range of professions, trades and crafts. We developed a recruitment

questionnaire that included an element of screening, to ensure the people we spoke to at each body had an appropriate level of responsibility and authority in areas such as policy, communications, qualifications, training, registrations and accreditation.

Respondent recruitment in Stage 2

The recruitment strategy for Stage 2 was to secure a mix of clients in each group and to ensure that the “less well-informed” clients were recruited where applicable. For example, when researching which contractors, developers or consultants to add to the potential respondent lists, we made sure not to include too many “specialists” who worked solely on heritage projects. These respondents are collectively referred to as “clients” through this report.

We also made sure the respondents were involved in a range of projects from very large-scale projects involving master plans, through to new builds and RMI (repair, maintenance and improvement). Landscapes and interiors were also included to balance the project typologies. For building projects, we specifically made clear that the properties did not have to be listed - they simply had to have some historic, architectural or cultural value.

With the local government group we concentrated on Dorset, as this is a rural county with multiple layers of local government in county, district, borough and town councils. We recruited conservation officers as they could give a dual view – client and supplier. We were not able to recruit local government property or estates representatives, as no one was available or willing to participate within the timeframe.

The group representing large property owners in the public or third sector

comprised senior respondents from a range of well-known organisations.

Recruitment for the final group, large property owners in the private sector, was a challenge simply because of the target respondents’ availability and willingness to participate. We decided to break this group up and carry out three face-to-face, one-to-one in-depth interviews in order to capture what insights we could within the timetable.

Sources of contact data for recruitment

- Desk research by Loud Marketing
- Personal networks of the Loud Marketing team
- The Client Demand Task Group members
- The Federation of Master Builders e-newsletter promoting the research
- The British Property Federation e-newsletter promoting the research
- MSMR Architects
- Dorset County Council
- Historic England

Testing and piloting

The discussion guides for Stages 1 and 2 were tested internally at Loud Marketing to ensure the discussion topic flow was logical, that plain English was used and jargon minimised, and to ensure a meaningful discussion could be carried out within the target time of 45 minutes (in-depth interviews) and 90 minutes (focus groups).

While pilot studies are not usual in qualitative research, two test interviews were conducted before fieldwork began, with volunteers rather than potential respondents. The data captured is not included in the results. It was used to further refine the discussion guides where necessary.

Respondent overview

About the respondents in Stage 1

In total there were 38 respondents from 27 relevant bodies. They included people working in policy, public affairs, CPD, training, client services, project management, sales, marketing and in secretariat and head office functions. These included: two advisors, eleven managers, eight directors, six committee members or Chairs, nine Chief Executives and two past Presidents.

The 27 organisations have over 350,000 members. An individual or company may be a member of two or more respondent organisations, so there may be some duplication. Not all members of all organisations represented work in the

heritage sector. However, this depends on how you define “heritage”. Most professionals, trades and craftspeople work on or in older buildings and landscapes at least some of the time. In the case of builders, around half do so on a regular basis, but this is perhaps because of the large stock of pre-1919 buildings in the country, rather than their preference or specialist skill set.

As mentioned under recruitment, we also made sure we included bodies representing professionals, trades and crafts that work on a range of project typologies including buildings, landscapes and moveable heritage.

Stage 1 supply side respondent organisations

Association of Professional Landscapers
British Association of Landscape Industries
British Woodworking Federation
Chartered Institute for Archaeologists
Chartered Institute of Architectural Technologists
Chartered Institute of Building
Chartered Institution of Building Services Engineers
Conservation Accreditation Register for Engineers
Ecclesiastical Architects & Surveyors Association
Federation of Archaeological Managers & Employers
Federation of Master Builders
Glass & Glazing Federation
Guild of Master Craftsmen
Heritage Crafts Association
Institute of Carpenters
Institution of Civil Engineering
Institute of Conservation
Institute of Historic Building Conservation
Landscape Institute
Lead Contractors' Association
National Federation of Roofing Contractors
National Heritage Training Group
National Society of Master Thatchers
Royal Institute of British Architects
Royal Institution of Chartered Surveyors
Royal Town Planning Institute
The Stone Federation

GRAPHIC 1A

Stage 2 client side respondent organisations

Alan Baxter
Arque Construction
Bovey Construction
Cadogan Estate
Canal & River Trust
Chester Row
Christchurch & East Dorset Councils
City Designer
The Crown Estate
DAC Beachcroft
David Lock Associates
Donald Insall Associates
Dorset County Council
Gerald Eve
Grosvenor Britain & Ireland
Historic Houses Association
Historic Royal Palaces
JLL
Johnston & Mather
LendLease
MSMR Architects
National Trust
Nathaniel Lichfield & Partners
North Dorset District Council
Northbeach
RM Builders & Contractors
The Church of England
U+I

GRAPHIC 1B

**The respondents
in Stage 1 had a range
of roles within their organisations
including the following**

Policy / Public affairs / CPD / Training /
Client services / Project management /
Sales / Marketing / Secretariat /
Membership /
Senior management

GRAPHIC 2A

**The respondents in
Stage 2 represented a broad
range of client and client advisory
types including the following**

Architecture / Conservation / Construction /
Development management / Heritage
consultancy / Homeowners / Legal services /
Planning / Property development /
Property investment /
Property management /
Surveying

GRAPHIC 2B

The 27 organisations that took part in
Stage 1 are:

- Association of Professional
Landscapers
- British Association of Landscape
Industries
- British Woodworking Federation
- Chartered Institute for Archaeologists
- Chartered Institute of Architectural
Technologists
- Chartered Institute of Building
- Chartered Institution of Building
Services Engineers
- Conservation Accreditation Register of
Engineers
- Ecclesiastical Architects & Surveyors
Association
- Federation of Archaeological Managers
& Employers
- Federation of Master Builders

- Glass & Glazing Federation
- Guild of Master Craftsmen
- Heritage Crafts Association
- Institute of Carpenters
- Institution of Civil Engineering
- Institute of Conservation
- Institute of Historic Building
Conservation
- Landscape Institute
- Lead Contractors' Association
- National Federation of Roofing
Contractors
- National Heritage Training Group
- National Society of Master Thatchers
- Royal Institute of British Architects
- Royal Institute of Chartered Surveyors
- Royal Town Planning Institute
- The Stone Federation

About the respondents in Stage 2

The 41 client respondents included
employees and business owners from
30 organisations working in heritage,
planning, conservation, construction,
property development, property
investment, surveying, legal services,
property management and various
advisory roles. The respondent set also
included six private individuals.

Respondents included: one architect, one
solicitor, three advisors, three officers, six
managers, two surveyors, two partners,
one principal, eight directors, four MDs,
one chairman and one senior volunteer.
(see GRAPHIC 3 on page 11).

The respondents were involved in a wide
range of project typologies from very
large-scale projects that involved master
plans and new build developments that
involved a heritage element such as
archaeology, through to listed building
refurbishments and smaller-scale RMI
and conservation work.

Word cloud showing the breadth of
respondent job roles in Stage 2



GRAPHIC 3

The private individuals had five properties between them:

1. Georgian town house in a north London conservation area
2. Grade II listed Georgian town house in Henley-on-Thames
3. 400-year-old farm on the outskirts of Canterbury
4. Grade II listed house on the outskirts of Bath
5. Grade II listed house on the outskirts of Bath

The 28 organisations that took part in Stage 2 are:

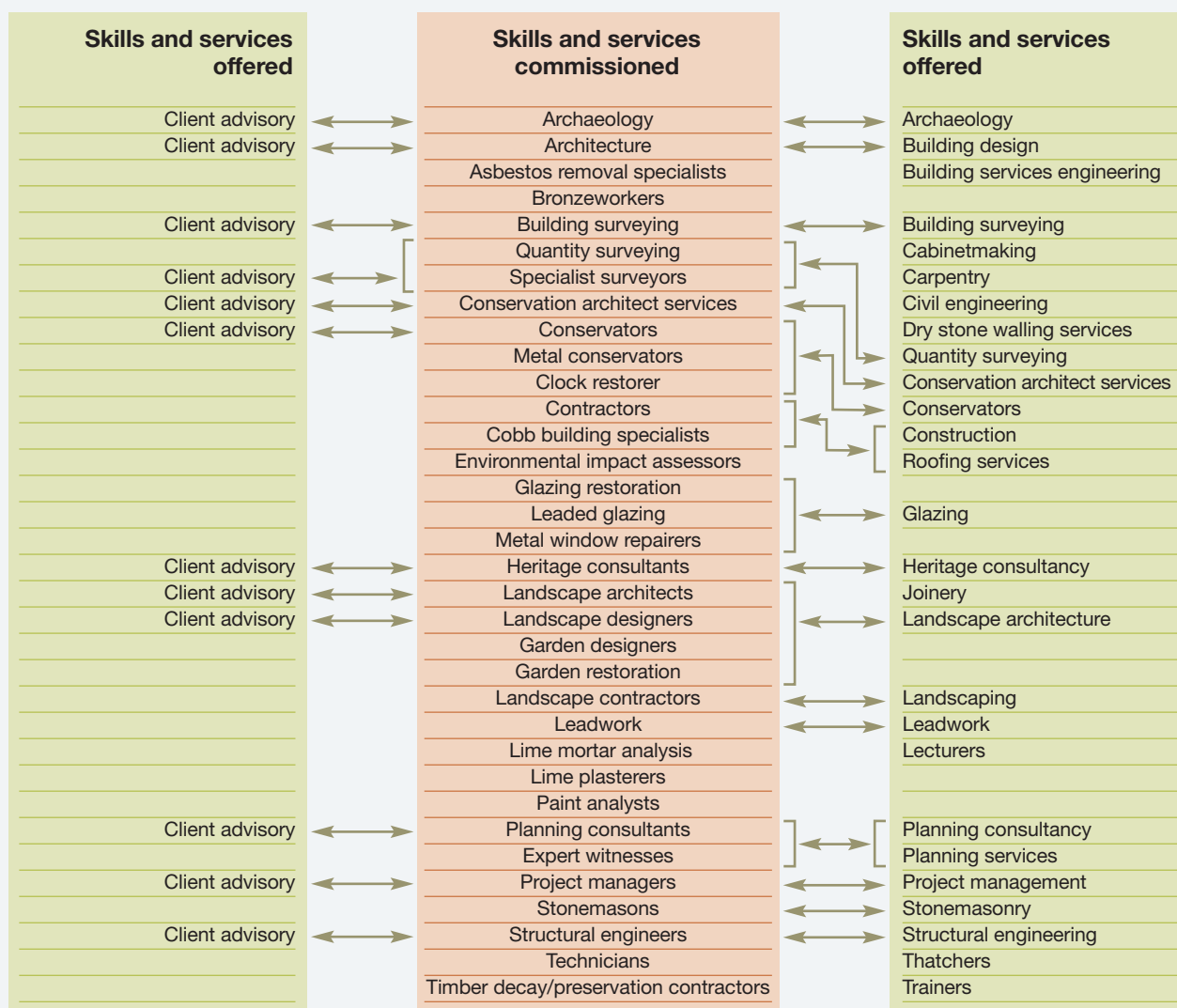
Alan Baxter Associates
Arque Construction
Bovey Construction
Cadogan Estate
Canal & River Trust
Chester Row
Christchurch & East Dorset District Council
City Designer
Crown Estate
DAC Beachcroft

David Lock Associates
Donald Insall Associates
Dorset County Council
Gerald Eve
Grosvenor Britain & Ireland
Historic Houses Association
Historic Royal Palaces
JLL
Johnson & Mather
LendLease
MSMR Architects
National Trust
NLP Planning Senior
North Dorset District Council
Northbeach
RM Construction
The Church of England
U+I

Specialist heritage skills and services offered and commissioned

Not all members of respondent relevant bodies work on heritage projects or older properties. Those that do offer a range of services primarily concerned with the repair, maintenance and improvement of these buildings and sites: in other words,

Skills and services offered by members of respondents to Stage 1 and commissioned by respondents to Stage 2



This shows that 12 different professions, trades and crafts identified “client advisory” (or a very similarly phrased service) as one of the services they offer. Some clients find this choice confusing and are unclear where to turn for advice.

GRAPHIC 4

not new-build projects. The list below is not exhaustive but gives an idea of the breadth of specialist heritage skills and services offered.

- Archaeology
- Building design (by architects, architectural technologists and technicians)

- Building services engineering
- Building surveying
- Cabinetmaking
- Carpentry
- Civil engineering
- Client advisor
- Conservation architect services
- Conservators

- Construction / contracting
- Dry stone walling services
- Glazing
- Heritage consultancy
- Joinery
- Landscape architecture
- Landscaping
- Leadwork
- Lecturers
- Planning consultancy
- Planning services
- Project management
- Quantity surveying
- Roofing services
- Stonemasonry
- Structural engineering
- Thatching
- Training

In addition, a whole range of traditional craftspeople such as furniture restorers, blacksmiths and a whole range of conservators such as specialists in archives, stained glass and sculpture are represented.

Specialist heritage skills and services commissioned by Stage 2 respondents

Architectural services, including building design and client advisory/consultancy services, are the most common services used by respondents, alongside contractors (referred to as main contractor or builder depending on the client). Contractors may or may not be specialists.

The complete list of specialist heritage skills and services used by clients:

- Archaeology
- Architecture
- Asbestos removal specialists
- Bronzeworkers
- Building surveying
- Clock restorer

- Cobb building specialists
- Conservation architect services
- Conservators
- Contractors
- Environmental impact assessors
- Expert witnesses
- Garden designers
- Garden restoration
- Glazing restoration
- Heritage consultants
- Landscape architects
- Landscape contractors
- Landscape designers
- Leaded glazing
- Leadwork
- Lime mortar analysis
- Lime plasterers
- Metal conservators
- Metal window repairers
- Paint analysts
- Planning consultants
- Project managers
- Quantity surveying
- Specialist surveyors
- Stonemasons
- Structural engineers
- Technicians
- Timber decay / preservation contractors

Results overview

Language – terms and phrases

Throughout this research project, the language used to describe heritage skills was repeatedly raised as an issue. All the terms and phrases in GRAPHIC 5 appear to have ambiguous, confusing or in some other way misunderstood meanings.



GRAPHIC 5

At this stage we have not attempted to define these terms and phrases for the benefit of the respondents or readers of this report. The list is here simply to highlight that inconsistent and ambiguous terminology and an apparent lack of clarity in the use of language do not help clients make the right decisions. This list is by no means complete and is illustrative only.

Defining “Specialist” – Stage 2 respondents

- “Best”
- “Complex”
- “Expensive”

Defining “Heritage” – Stage 2 respondents

- “Old”
- “Architectural value”
- “Importance”
- “History”
- “Expensive”
- “Slower”

Defining the client

Throughout this report, by “client” we mean the person who makes the decisions that affect who works on the project. There is no such thing as an average client.

Sometimes this is a straightforward relationship. A homeowner engages the services of thatcher and pays them for their work. In other examples, there may be a chain of suppliers from architect to main contractor to sub-contractors to specialists. In other, usually more complex larger projects, a client may engage directly with a team and be more active in project management. This team could include architect, planning consultant, heritage consultant and in some cases main contractor.

So, the client/supplier landscape is not fixed, may be complex and may differ depending on who the ultimate client is, who is paying for the work to be done, the size of the project and if there are any other external factors at play, for example planning applications, grant funding, etc.

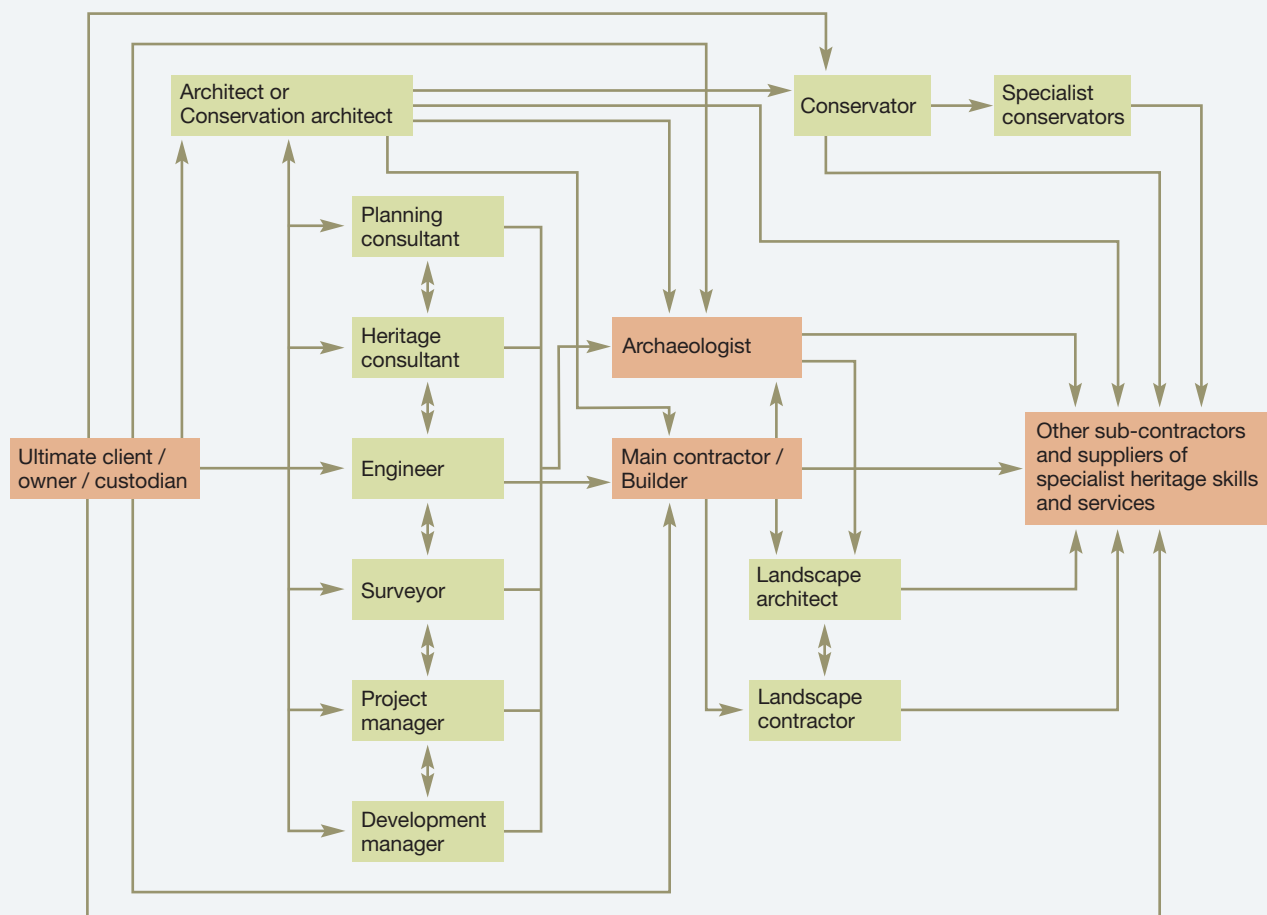
We use the term client in this wide sense. It's about who makes the decisions.

Below is a short list of the types of individuals and organisations we mean when we use the term “client”:

- Architects
- Charities and Trusts
- Churches – including lay members
- Contractors
- Custodians
- Domestic / private homeowners
- Government departments / agencies
- Heritage consultants
- House builders
- Housing associations
- Landowners
- Local authorities
- National heritage bodies
- Property developers / investors

Defining the client

This illustrates the complex nature of heritage projects and the relationships between clients and suppliers.



GRAPHIC 6

The informed / uninformed client

From our discussions with respondents from bodies representing suppliers of specialist heritage skills and services in Stage 1 of this research and with client respondents in Stage 2, the general consensus is that there is a lack of informed demand amongst clients.

As noted in the summary report to Stage 1, whether a client is informed or uninformed is more complex than a binary choice between those two terms.

We suggest breaking informed / uninformed into a more targeted list of four client knowledge levels based on their

appreciation for the heritage assets in their care (including private homes), their awareness and understanding of responsibilities, obligations, availability of assistance, knowledge of specialist and so forth. The knowledge level would also be applied based on the client's actions.

1. Educated client – acts appropriately.
2. Informed client – may act appropriately.
3. Knowledgeable client – they are aware but may not always act.
4. Novice client – little or no appreciation, understanding, awareness or action.

Knowledge levels amongst clients of specialist heritage skills and services	Novice Client			Knowledgeable Client			Informed Client			Educated Client		
	Awareness	Understanding	Action	Awareness	Understanding	Action	Awareness	Understanding	Action	Awareness	Understanding	Action
Appreciation for the heritage asset in their care				✓	✓		✓	✓	✓	✓	✓	✓
Personal responsibility to the historic environment			*	✓	✓		✓	✓	✓	✓	✓	✓
Obligation to do the best for a particular asset			*	✓	✓		✓	✓	✓	✓	✓	✓
Availability of suppliers of specialist heritage skills and services	✓			✓			✓	✓	✓	✓	✓	✓
The need to use suppliers of specialist heritage skills and services				✓			✓	✓		✓	✓	✓
Existence of specialist heritage accreditation schemes							✓			✓	✓	
Usage of specialist heritage accreditation schemes							✓			✓	✓	

* Only if the asset is listed and/or there is compulsion through the planning system

GRAPHIC 7

Client understanding of their responsibilities and their need for specialists

On the whole clients do appear to appreciate the heritage assets in their care. They also have an understanding of their responsibilities and obligations, the availability of and importance of using appropriately skilled suppliers and to some extent the existence of accreditation schemes. This does vary and some respondents have personal experience of private clients who “have no idea what they have bought”. Other respondents have personal experience of developers and investors who “simply don’t care” about their responsibilities and for whom cost and profit are more important.

Most relevant bodies feel that a large proportion of clients, perhaps the majority, do not fully appreciate their heritage assets, their responsibilities, the availability

of and need for appropriate specialist heritage skills and services.

Clients may have a greater understanding of their responsibilities and their need for specialists than relevant bodies think. But, in any case, they do not fully understand the breadth and depth of assistance available, which different relevant bodies exist and what they offer, what different professions and trades can achieve for them, etc.

There is a need to communicate more effectively to clients, and in an unbiased manner, the range of specialist heritage skills and services available. The supplier landscape appears complex, confusing and competing. This affects clients’ readiness, willingness and ability to navigate the options and therefore how they find and choose relevant skills and services.

Level of demand for specialist heritage skills and services offered by members of relevant bodies

We asked the relevant body respondents in Stage 1 if they felt demand is increasing, reducing or staying the same, for the specialist heritage skills and services offered by their members. The respondents did not particularly raise the level of demand as a current issue at time of research mid 2016.

How relevant bodies promote members

Relevant bodies primarily link clients to members through their websites, where they generally have a list of individuals or companies offering specialist heritage skills and services. They are keen to point out that their member lists are not commercial advertising services or the “check-a-trade” type. Social media, awards, chartered status and partnering with other organisations were highlighted as useful “push” strategies (strategies to ensure clients hear the message).

Most relevant bodies do not actively employ “pull” strategies (strategies that draw clients toward their members and attempt to link them to members offering specialist heritage skills and services). For those that do, these “pull” strategies appear to be successful. Using best practice case studies, other relevant bodies could be encouraged to investigate how they could employ “pull” strategies to link clients with appropriate members.

Some professional bodies do not see it as their role to link their members and clients, using either “push” or “pull” strategies. Even though their primary role is to protect the public, we feel this is a lost opportunity. “Promoting” their

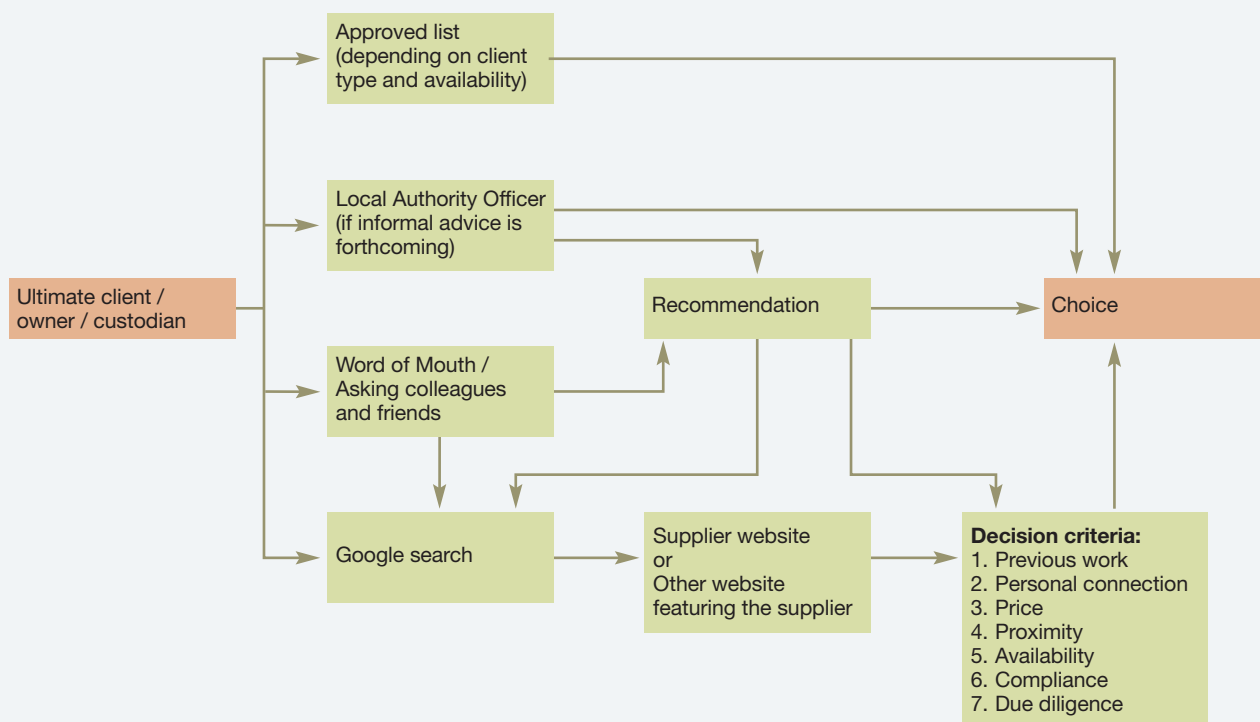
members to clients could fit within the “public good” role as it would mean clients were more likely to choose a supplier who is a member of a particular professional body and so, presumably, would carry out the work in the most professional manner.

How clients find suppliers

On the whole, relevant bodies’ understanding of how clients find suppliers is correct, but their views on whether or not this is easy are mixed. Clients ask colleagues, friends and family for recommendations when looking for suppliers, as it is quick and easy and seen as unbiased.

Some clients approach local authority conservation officers to help them find suppliers of specialist heritage skills and services and on the whole these officers are willing to offer this help informally. However, the help conservation officers can offer is severely constrained for a number of reasons. Resource issues due to budget cuts mean workloads are higher and there is less time to help informally. Some local authorities encourage conservation officers to advise clients to go down the pre-app advice route, as this may be a paid-for service. In some cases historic environment advisors to local authorities are being discouraged from recommending individual professionals or companies, for example archaeologists or archaeological contractors. This is one example of a de-risking culture where “recommendations” may lead to possible liability issues. In some cases the local authority will encourage the use of “accredited” professionals or companies, but only where the conservation officer or other historic environment advisors is aware of such schemes.

Illustration of how clients find and choose suppliers of specialist heritage skills and services



GRAPHIC 8

Clients use “Google” if they do not have a recommendation, which may or may not direct them to representative body websites or other useful resources. Some relevant bodies use Search Engine Optimisation (SEO) and Pay-per-click (PPC) search advertising to assist with this. Other routes to finding suppliers include: visiting events, calling a technical helpline, asking a representative body and asking their architect or other professional advisor if they have one. Where clients have a professional advisor they will often de-risk the choice of supplier by delegating it to the advisor. Main contractors and others in the supply chain are also asked to manage suppliers, de-risking the ultimate client, for example the homeowner, developer, etc. In these cases a supplier may pivot

to become a client for those further down the supply chain and therefore have a dual role in that project.

The Ecclesiastical Architects & Surveyors Association has an “approved lists” of suppliers and in this case many parishes will use suppliers on this list. Other organisations have lists of “appropriate suppliers”, for example the Chartered Institute for Archaeologists. Where there are list, they are not always well known.

Identifying appropriate suppliers

In Stage 1 previous work, price, proximity and availability were the most important criteria for choosing a supplier of specialist heritage skills and services. Secondary items including qualifications, memberships and accreditations may also influence the decision.

In Stage 2 client commented that previous work, personal connection, price and availability were the most important factors. In addition some clients would follow compliance procedures and check items such as references, recommendations, qualifications, memberships and accreditations. The level of due diligence depended on the type of client and the type and size of project. The higher the project value and complexity, the more detailed the due diligence may be.

Availability and capacity may sometimes be as important (but not more important) as the quality of previous work, because the work may need to be done to a particular / tight schedule. And, there may only be a limited number of available specialist suppliers. This last point highlights the issues of capacity constraints on the supply side for some specialist heritage skills and services. Cost is always a factor when choosing a supplier, but a mentioned above, it is not the necessarily the most important factor. However, sometimes clients feel that they are “forced” or “obliged” to carry out works. In this context the project is something that has to be done, but not something anyone wants to do or pay for it. This can affect the choice of supplier.

The role of statutory heritage bodies

Some relevant bodies believe that statutory heritage bodies, including Historic England, should engage more closely with them to ensure that heritage bodies use their members on grant-funded projects. Heritage bodies should take the lead regarding the use of appropriate suppliers, meaning accredited or in some other way specialised. There is also a perception that statutory heritage bodies have an inconsistent approach to

working with different professions, trades and crafts and their relevant bodies. For example, the perception is that some heritage bodies insist on using accredited suppliers and other do not.

Compulsion

Some relevant bodies advocate compulsion as a way of ensuring the most appropriate suppliers of specialist heritage skills and services are used. Others are strongly against any kind of compulsion or other form of regulation with regard to supplier choice. Compulsion in this context means that clients would have to choose a supplier from a particular list or register for a certain professional service, trade or craft.

The subject of compulsion was raised by a number of respondents and their feelings on the matter are strong. There appears to be some confusion over whether compulsion currently operates in the heritage landscape, the desire for compulsion from different representative and statutory bodies and what compulsion might mean in practice.

Compulsion would drive the use of accredited suppliers. But it would be difficult to apply even an element of compulsion without affecting “competitive tension” in the marketplace. Clients feel that would restrict trade, create cartels and push up prices.

Accreditation

Accreditation in some form is seen as a good thing, but it is not one of the main criteria for choosing a supplier of specialist heritage skills and services.

Clients feel that not all accreditation schemes are the same, for example they don’t use easily comparable entry criteria. They feel that too much jargon is used

and the word “accreditation” itself is not always used or always helpful. Where there are two accreditation schemes for one profession, such as in architecture with the RIBA Conservation Register and the Register of Architects Accredited in Building Conservation, clients see the schemes as competing and not complementary.

None of this is helpful to clients when they are attempting to choose the most appropriate supplier.

The advantage to a professional, trades or craftsperson of becoming “accredited” is only apparent if clients are aware of the scheme, understand it and apply value to it, or if the use of accredited specialists is required under a condition or obligation of planning permission.

Many clients remain unclear regarding what accreditation is, its value and necessity. They are confused because of the plethora of schemes and the inconsistency within them, e.g. entry requirements, etc.

Recommendations

There are significant knowledge gaps amongst clients in the specialist heritage skills and services demand landscape.

While there is an appreciation for the assets in question – buildings, landscapes, interiors and moveable heritage – the level of understanding of the help available could be improved.

There is a need for education. There is an appetite for advice.

The priority is to signpost clients to places where they can find a selection of appropriate suppliers. In addition, perceived and apparent knowledge gaps should be addressed by offering impartial and unbiased information and advice.

To do this the CDTG / HEF / HE will need to:

1. Identify any knowledge gaps that would mean the three recommendations would be difficult to implement
2. Identify any further research or supplementary research
3. Decide if the scope expands to include the other home countries heritage bodies
4. Agree the way(s) forward
5. Agree who is to take this forward, for example HEF / CDTG / Edinburgh Group / other new body or group
6. Commit to intensive collaboration
7. Commit resources

Alongside the above list we suggest three broad recommendations, each of which has a set of actions and outcomes. It is worth noting that further work will need to be commissioned in order to fully work these recommendations up into deliverable projects.

We are more than happy to work with the HEF / CDTG and Historic England in order to work up such project plans.

Recommendation 1 – Collaboration

1.1 Pan-sector advocacy via deeper collaboration

There are many professionals and businesses offering a range of skills and services to clients with older or listed assets. There isn't a "heritage profession" – there are architects, contractors, conservation officers, heritage consultants, surveyors, planners, agents, property managers, engineers and others.

Clients do not readily identify with "heritage" or "historic" (or similar words and phrases) in relation to their day-to-day personal and business lives. But they do understand heritage conceptually. With deeper collaboration, including the breaking down of professional and trade rivalries and misunderstandings for the benefit of the client, there is an opportunity to shape the "heritage sector" so that it makes sense to the client.

This will drive awareness, understanding and action in the areas that are important to members of the CDTG and HEF, but only if it is done in a client-centric way. If that is possible then pan-sector advocacy is also possible. That will result in:

- The relevant bodies taking part becoming the go-to sources for information
- Influencing behaviour
- Effecting change
- Sharing best practice
- Thought leadership

1.2 Encourage relevant bodies to collaborate with local authority officers

Local authority officers (including but not limited to conservation, planning and archaeological officers) are willing to receive help from relevant bodies that improves their knowledge and understanding of the supply landscape for specialist heritage skills and services. Improving the knowledge of local authority officers would have a positive effect on demand. While conservation officers' time is very limited and they often cannot "recommend" individual suppliers, they can "suggest" lists, registers, accreditation schemes, etc. if they know they exist.

1.3 Encourage relevant bodies to collaborate with clients

We suggest using best practice case studies to encourage relevant bodies to employ "pull" strategies to link clients with appropriate members. Relevant bodies have a role to play in helping their members' clients make the most informed and appropriate choices. This does not conflict with any other objective they may have. Clients could simply be directed to a register or other list, or a number of members could be "suggested" based on criteria such as proximity, or size of project.

1.4 Encourage consistent collaboration between heritage bodies and relevant bodies

Historic England should consider additional research with relevant bodies into their perception that statutory bodies have an inconsistent way of working with different professions, trades and crafts. The results of this research will improve

Historic England's relationships with these bodies.

Historic England should communicate with relevant bodies to bring some clarity to the subject of compulsion.

Recommendation 2 – Education

As previously mentioned there are significant knowledge gaps in the specialist heritage skills and services demand landscape. Getting people to understand what they are buying (private clients and smaller developers) is important. It is also important that owners and managers of heritage assets understand opportunities and benefits as well as obligations and responsibilities. There is also a need to improve knowledge in the marketplace about the availability of and distinction of suppliers of specialist heritage skills and services.

Different client groups / audiences have different needs and so we suggest the starting point is to agree a set of personas - generalised characters that encompass the various needs, goals, and observed behaviour patterns among different target audiences.

A campaign (by which we simply mean an organised marketing activity with a defined goal) could be devised for each persona. We suggest each campaign should be measured and tested, refined and improved. Our view is that this is not a "one-off" set of campaigns. Rather it would be the start of sustained, targeted communication to clients.

Example personas include:

- Private clients living in non-listed properties of merit (e.g. in conservation areas)

- Private clients living in listed properties
- Estate agents, solicitors and mortgage companies involved in the conveyancing process and who are advising purchasers
- Companies offering buildings insurance who lack unawareness
- Quantity surveyors, cost consultants and others involved in budgeting for construction, development and infrastructure
- Senior managers in contractors who value reputational benefit
- Local authority officers who need to be kept up to date

Calls to action and measurement of success criteria will need to be agreed. The campaigns would be activated through digital media (web, email, social) and in print.

We also suggest disseminating messaging developed for the above campaigns through organisations representing relevant client groups.

Recommendation 3 – Advice

There is an appetite for advice. Conservation officers have traditionally been a source of advice but are under pressure due to resource constraints and liability concerns.

Some private clients with older properties are also concerned about getting in touch with conservation officers to ask for advice. There appears to be a perception that conservation officers will pick out issues and problems rather than be helpful and supportive. They will notice works, possibly carried out many years ago, and if they weren't done properly could demand that they are re-done. All

clients, but particularly private owners, want unbiased, confidential advice.

Some clients have worked in different parts of the country and have dealt with different local authorities, planning authorities, heritage bodies and a whole range of consultants. There is a belief that advice can be inconsistent. This could be for a number of reasons including knowledge gaps and particular approaches by different advisors. Clients want consistent advice.

An independent place or places where clients of all kinds, including developers and contractors, can get consistent, unbiased and confidential advice about their older properties or other heritage assets, would benefit clients and could work with conservation officers and not against them.

To make it worthwhile the scope for advice given would probably have to expand beyond simply procurement. There will be a cost associated with the provision of this advice and we suggest that further investigation takes place into funding models, including paid-for advice models.

We have suggested below a number of ways that such advice could be disseminated.

- Advice on finding and choosing suppliers via telephone possibly paid via premium rate number
- Online advice on finding and choosing suppliers possibly with a pay wall
- Advice via third parties, e.g. Citizens Advice Bureau

Annex 1 – Summary report to Stage 1

Project name	HEF CDTG market conditions for expert and specialist heritage skills and services 2015-16
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Title	Stage 1 Summary Report
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About this project

This is a qualitative research project designed to establish robust and reliable insight on present market conditions for specialist heritage skills and services.

The hypothesis, developed by the Historic Environment Forum (HEF) Client Demand Task Group (CDTG), is that there is a lack of informed demand for specialist heritage skills and services. For example, clients may not realise the breadth of skills and services available, or where and how to find them. They may not appreciate the importance of using appropriately skilled suppliers or know how to identify such suppliers.

This research is intended to provide a clear perspective in place of the present anecdotal information gathered from the sector. It is divided into three stages. Stage 1 involved a series of interviews with professional, craft and trade bodies representing the supply side of the heritage skills landscape. Stage 2 involved focus groups and depth interviews with clients. Stage 3 maps the first two stages, draws them together, and suggests ways forward in the final report. The overall objective is to help us suggest ways of communicating more effectively with clients to stimulate demand for specialist heritage skills.

About this summary report

This Stage 1 Summary Report is designed to give the project board an overview of the results from the fieldwork carried out with a range of bodies that represent those supplying a variety of specialist heritage skills and services.

In total there were 38 respondents from 27 organisations. If there is time we will add AABC to this list (please see Highlight Report dated 31 August for details).

We looked at their “pull” strategies - to draw clients toward their members - and their “push” strategies - to ensure clients hear the message that members of these organisations are the right people and businesses to use. We also looked at how these organisations view client behaviour in choosing suppliers of specialist heritage skills and services - how clients go about finding suppliers, whether or not this is easy, how clients identify appropriate suppliers and what they value most when choosing a supplier and procuring their services.

Accreditation is a key theme and we discussed with the respondents the schemes relevant to their members, their view of client perceptions of these schemes, and whether accreditation delivers competitive advantage and increased market access.

About the respondents and their organisations

The 38 respondents included people working in policy, public affairs, CPD, training, client services, project management, sales, marketing and in secretariat and head office functions. These included: two advisors, eleven managers, eight directors, six committee members or Chairs, nine Chief Executives and two past Presidents.

The 27 organisations have over 350,000 members. An individual or company may be a member of two or more respondent organisations, so there is some duplication between them. Not all work on older properties or in the heritage sector; this depends, to some extent, on how you define “heritage”. However, most professionals, trades and craftspeople work on traditionally built buildings and on older properties at least some of the time. In the case of builders, around half do so

on a regular basis, but this is perhaps because of the large stock of pre-1919 buildings in the country, rather than their preference or specialist skill set. In the case of craftspeople, most work on older properties because that is the nature of their work.

The 27 organisations that took part in Stage 1 are:

- Association of Professional Landscapers
- British Association of Landscape Industries
- British Woodworking Federation
- Chartered Institute for Archaeologists
- Chartered Institute of Architectural Technologists
- Chartered Institute of Building
- Chartered Institution of Building Services Engineers
- Conservation Accreditation Register of Engineers
- Ecclesiastical Architects & Surveyors Association
- Federation of Archaeological Managers & Employers
- Federation of Master Builders
- Glass & Glazing Federation
- Guild of Master Craftsmen
- Heritage Crafts Association
- Institute of Carpenters
- Institution of Civil Engineering
- Institute of Conservation
- Institute of Historic Building Conservation
- Landscape Institute
- Lead Contractors' Association
- National Federation of Roofing Contractors
- National Heritage Training Group
- National Society of Master Thatchers
- Royal Institute of British Architects
- Royal Institute of Chartered Surveyors
- Royal Town Planning Institute
- The Stone Federation

Specialist heritage skills and services offered

Not all members of respondent organisations work on heritage projects or older properties. Those that do offer a range of services primarily concerned with the repair, maintenance and improvement of these buildings and sites: in other words, not new-build projects. The list below is not exhaustive but gives an idea of the breadth of specialist heritage skills and services offered.

- Archaeology
- Building contracting / construction
- Building design (by architects, architectural technologists and technicians)
- Cabinetmaking
- Carpentry
- Civil engineering
- Client advisor
- Conservation architect services
- Conservators
- Consultancy
- Dry stone walling services
- Glazing
- Joinery
- Landscape architecture
- Landscaping
- Leadwork
- Lecturers
- Planning consultancy
- Planning services
- Project management
- Roofing services
- Services engineering
- Stonemasonry
- Structural engineering
- Surveying
- Trainers

In addition, a whole range of traditional craftspeople such as furniture restorers, blacksmiths, and specialists in archives, stained glass and sculpture are represented.

Language – terms and phrases

Throughout this research project, in Stage 1 when we spoke to relevant bodies of those supplying specialist heritage skills and services and in Stage 2 when we spoke to clients, the language used in describing heritage skills was repeatedly raised as an issue. All the words and phrases in this list appear to have ambiguous, confusing or in some other way misunderstood meanings.

Accreditation
Appropriate
Architectural conservator
Architectural designer
Competent
Conservation architect
Garden designer
Heritage
Heritage consultant
Heritage professional
Heritage project
Heritage sector
Historic environment
Historic property
Older property
Traditionally built property

At this stage we have not attempted to define these terms and phrases for the benefit of the respondents or readers of this report. The list is here simply to highlight that inconsistent and ambiguous terminology and an apparent lack of clarity in the use of language do not help clients make the right decisions. This list is by no means complete and is illustrative only.

Defining the client

Another term that perhaps needs defining at this early stage is “client”. Throughout this summary report, when we refer to the “client” we mean the person who is making the decisions that affect who works on the project.

That person or business may or may not pay the bill. For example, an architect may be the client of a stonemason but the homeowner pays the bill. In this example the homeowner could also be the client of the stonemason. One respondent commented that *“It gets a bit murky sometimes”*, regarding who is the client.

Some respondents had a narrower definition of “client” than others. Some don’t know who their members’ clients are and some don’t appear to see this as important.

We use the term in the widest sense. It’s about who makes the decisions. Below is a short list of the types of individuals and organisations we mean when we use the term “client”:

Architects
Charities and Trusts
Churches – including lay members
Contractors
Custodians
Domestic / private homeowners
Government departments / agencies
Heritage consultants
House builders
Housing associations
Landowners
Local authorities
National heritage bodies
Property developers / investors

The informed / uninformed client

From our discussions with the respondents in Stage 1 of the research – the relevant bodies – the general consensus is that there is a lack of informed demand amongst clients.

However, it is more complex than a binary choice between informed and uninformed levels.

Some clients start out with little information but build their knowledge and become informed and educated. But some respondents asked, “*Are they informed in the right way?*” Clients may feel they are well informed, but when challenged they cannot always demonstrate this.

We suggest breaking informed / uninformed into a more targeted list of four client knowledge levels based on their appreciation for the heritage assets in their care (including private homes), their awareness and understanding of responsibilities, obligations, availability of assistance, knowledge of specialist and so forth. The knowledge level would also be applied based on the client’s actions.

1. Educated client – acts appropriately.
2. Informed client – may act appropriately.
3. Knowledgeable client – they are aware but may not always act.
4. Novice client – little or no appreciation, understanding, awareness or action.

The level of demand for specialist heritage skills and services

When asked if demand for these services was increasing, decreasing or staying the same, most respondents said there are positive signs.

There is some evidence of increasing demand and in some professions, trades and crafts demand is mixed or steady. No one said demand is falling. One respondent commented, “*Demand is good but the projects are not always profitable.*” Profitability is often linked to the size of the project. Many heritage projects are relatively small for the construction industry, but the work needed to start, manage and complete these projects can be disproportionate to their size.

Demand is closely linked to construction industry growth, house prices and economic growth generally, and so is cyclical. Demand for some specialist heritage skills and services also appears to spike when there is a major national project, for example the Olympics in 2012, Crossrail over the last few years and now HS2 and the Thames Tideway Tunnel. Demand in London and the South East is stronger than elsewhere in the UK. One respondent commented, “*Competition is increasing, esp. from Eastern Europe, but there is no shortage of work.*”

Some major heritage refurbishment projects that were on hold after the credit crunch are now coming back on stream and even local authorities are finding small amounts of money for the maintenance and repair of heritage properties in their care (listed and non-listed).

Linking members with clients

While it is not always a prime objective for respondent organisations to promote their members, many do have a member list, register or other directory available to the public online. Some present this as a “find a...” service with some, generally limited, functionality such as distance, specialism filters, etc.

A number of respondents were very keen to point out that their online register was not the same as a “check-a-trade” style service. Their view was that these services are “paid-for” and inclusion is not dependent on demonstrable skills or competences, and that these commercial supplier registers (managed by a private business rather than a representative body) are not helpful in directing clients to appropriate suppliers.

Generally, a respondent's website is the main platform used to link members with clients.

A number of respondents were critical of their own organisation's website, with one commenting *"It is notoriously difficult to find anything on our website"*. Another said *"It's not a friendly site if you're looking for a supplier"*.

One respondent said, *"To actively market to the client would cost of lot of money"*, but they do try. They also reply on their members to do their own promotional work, supported by the organisation with logos, stationery, etc.

A number of respondents attend events to raise their own profile and that of their members. Others use PR including their own and other publications and other printed material, including direct mail. Examples of direct mail include factsheets about heritage projects, procurement guides and a client guide explaining the benefits of choosing accredited people.

Social media is becoming increasingly important. Most respondents are using Twitter and/or Facebook to reach out to clients and other audiences beyond their membership.

Awards are an important platform. Most respondents have an annual awards ceremony and many of these have a heritage category. Two respondents commented that new members have joined their organisations simply to be able to submit their heritage project into the relevant category of their annual awards. *"It's about teaching people about the register and giving advice about how to choose the right supplier,"* commented one respondent.

Another way of "promoting" members is through chartered status. This *"adds*

kudos and differentiates members to clients", commented another respondent.

Partnering with other organisations, either co- or pan-professionally or across a sector, is another way that a number of respondents promote their members. This is about *"increasing our voice"* said one respondent.

Some respondents want the statutory bodies to engage with their organisation more fully to ensure they use "competent" people, i.e. their members. Some statutory bodies do work with some respondent organisations but not others, and this apparent inconsistency frustrates respondents.

One respondent commented that they follow *"an holistic approach to promoting their profession"* rather than promoting particular members. A number of respondents also noted that it is better to promote positive messages about choosing appropriate / accredited suppliers (better quality work, quicker, commercial and public benefit) rather than talking about compulsion or negative messages (what happens if things go wrong).

Linking clients with members

When asked how they link clients with members – a "pull" strategy rather than "push" – some respondents were not sure how to do this or whether it is part of their role. This is in part dependent of whether the respondents' organisation is a professional body or a trade association – all but two respondents were one or the other. *"(We) are bit inward looking"*, said one respondent.

However, one respondent organisation has a client advisory service which aims to link clients with members. Another has

online advice for clients with the objective of drawing them to their website and on to their directory. One respondent organisation prints and sends out a copy of its member list to over 20,000 architects and surveyors. Another respondent noted *"We don't promote our members with historic conservation knowledge to the local authority database, but we could"*. Their reason for not having done this yet was *"resources and priorities"*.

A number of respondents have heritage groups or some other way of bringing together members that work in heritage, or have expressed an interest in the field. Some make this information publically available and potential clients can get in touch directly with the group or other body.

How do clients find suppliers?

One respondent commented, *"They (the client) may not be aware that they need professionals with specialist conservation experience"*. Another said, *"Clients often don't know what they've got, so they don't know what type of help they need."*

Most respondents had the view that many clients do not fully understand their own needs until there is a trigger. This could be an event, such as a leak or other property damage, or it could be a planning application condition. In these cases the search for a supplier of a specialist heritage skill or service is reactive.

"Assuming the client has common sense they would look for a person or association to point them in the right direction. If they don't have the common sense they are at the mercy of cowboys and there isn't much more we can do." commented one respondent.

In other cases, a client may approach the

search for a supplier of a specialist heritage skill or service in a more proactive way, but they may not fully understand the breadth and depth of help available. For example, they wouldn't be able to say what a heritage professional does.

Most clients search online. *"If they are under 35 they will almost certainly use Google as their first and possibly only method of finding suppliers"*, commented one respondent. Some respondents are active in SEO (search engine optimisation), using website content strategies to make sure they appear high up on a Google search page. Some use paid search advertising via Google to maximise visibility on a search page.

The most powerful way clients find suppliers is thought to be word of mouth – asking colleagues, friends, etc. for recommendations or ideas. This appears to be true of professional clients as well as domestic. A number of respondents felt that older clients are most likely to use this route and more likely to choose it first.

The consensus amongst respondents is that clients (especially domestic homeowners) will *"do some online research, call some people, look at previous work and testimonials or references, and then make a decision"*. This appears to be true for all client knowledge levels, from educated to novice.

Some respondents felt that some clients find potential suppliers at shows and exhibitions, but these are more likely to be informed or educated clients.

Some respondents have a technical helpline, through which they can suggest using a member to help with their project. However this does not appear to be a proactive strategy, more a reaction to

specific requests.

A number of respondents believed that a client would go to their architect, or other professional advisor, for advice on supplier choice, assuming (a) the client is engaging with professional advisors and (b) they have not delegated supplier choice to that professional. Some clients look at their contractor / builder as a professional advisor and will ask them for advice regarding supplier choice.

Only two respondents felt that clients would go to a “*federation*”.

The average owner is “naive to all these speciality trades he needs to use on his building”, commented one respondent.

Some local authorities have lists of suppliers and are willing to pass on contact details and a number of respondents know that their members have been “recommended” in this way. But most local authorities appear to be less interested or unable to provide lists. Respondents believe this is due to a combination of factors, including reductions in staff and other resources, potential liability risk and restraint of trade accusations.

In the Church of England, some Diocesan Advisory Councils have a list of approved suppliers and will share this information with parishes.

The ease of this search for suppliers

Respondents had mixed opinions when asked how easy it is for clients to find appropriate suppliers. Some thought it is very easy, while one said it is “*completely baffling*”. This could be because of the broad nature of “specialist heritage skills and services”. For example, is it easier to find an archaeologist or a thatcher?

Despite these possible differences, most

respondents believe it to be confusing for clients to find suppliers, or as one *respondent put it, “It’s easy to find a person, but not necessarily the right person”*. Another respondent commented that clients have to “*wade through*” the information available, as there is “*no definitive guidance*”.

Most respondents felt that how easy it is to search for suppliers depends on clients’ understanding of their own needs and the help available from professions, trades and crafts. “*It’s a wider problem, it’s about what people understand an architect or a builder does.*” noted one respondent.

Identifying appropriate suppliers – what do clients value most?

A number of respondents asked, “*What is ‘appropriate’?*” We raised the issue of terminology and consistent use of language under *Language – terms and phrases* on page 29. Again, the words and phrases commonly used when discussing the themes in this research project are not always fully understood or accepted.

For the purposes of this question, we use “appropriate” to describe a supplier with the necessary experience and skills to carry out a specialist heritage project in a competent manner.

Assuming a need has been defined, most respondents agreed that before clients meet a prospective supplier, they are most interested in:

1. Previous work
2. Price
3. Proximity
4. Availability

Evidence of previous work on similar projects and for similar clients is probably

the most important factor. This is about quality as well as reassurance. Some clients will want to visit a project or site, while others will be content with looking at images and words, on a website for example.

Price is always a factor. *“Some clients are very financially driven and developers and main contractors are completely financially driven.”* noted one respondent. Another said, *“There are clients who think ‘Why should I pay extra for someone on that register?’”* because others say they can do the work more cheaply.

Many clients will try and get as much free advice as possible, usually from the Internet or from colleagues and friends. Other clients appreciate the extra experience, knowledge and skill and therefore expect better advice. Overall, respondents believe that with heritage projects, price is not necessarily the most important factor when choosing a supplier.

Proximity / localism to the client repeatedly came up in respondent discussions for two reasons. Clients may find it reassuring to use a local supplier because of their “visibility” and because they will be more readily available. Other clients value proximity as they link it to cost, i.e. suppliers travelling considerable distances will be more expensive. In both cases, decision-making may be affected if there is a lack of supplier choice in a client’s local area.

Availability is critical to certain clients, according to a number of respondents, especially commercial clients such as developers and contractors. Generally, clients want someone who can do the work to their timetable, often quickly.

Meeting suppliers is about reassurance.

Clients want to meet suppliers and get on with them and *“see the whites of their eyes”*, to see if their approach meets the client’s expectations. Another respondent described it as *“buying into people, not just buying a product or service”*.

Clients will often have a checklist of additional items including qualifications, memberships, accreditation, etc. For certain clients this is more important and in fact essential, for example to get on a tender list. For other clients, these items are “nice to haves”, as one respondent put it. In order to encourage clients to want to choose suppliers who are accredited (or registered / qualified / competent by some other measure) one respondent suggested promoting the concept of using *“Suitably Qualified & Experienced Personnel”*, as is common practice in highly regulated industries.

Accreditation in respondent sectors

There are a number of different accreditation schemes in the specialist heritage skills and services landscape, and a number of other approval and registration, membership and other schemes that seek to differentiate individuals and businesses.

Some are professional accreditation schemes, such as those run by the RIBA, AABC, CARE and RICS and soon to be joined by CIOB. These, alongside IHBC, CIAT and ICON follow COTAC (Council on Training in Architectural Conservation) principles and work together on the Edinburgh Group.

Others are vetting and rating schemes such as the Association of Landscape Professionals and the Lead Contractors Association (LCA). The former uses the Government’s Trustmark endorsement scheme. The LCA vets its members using

its own criteria and that of relevant British Standards. It visits all members annually to reassess their work and grades them accordingly. Other “accreditation” schemes do not visually or physically assess members’ work.

One respondent organisation used to have a “hallmark” scheme, but the associated costs were deemed too expensive in the recession and the scheme was dropped. Another explained that their members don’t feel they need to be accredited as *“they are already providing that service”*. Some specialist registers may have few members because the specialists already get enough work.

In architecture there are two competing accreditation schemes plus an additional one for architectural technicians / technologists. Surveyors can be accredited through the RICS Building Conservation Accreditation scheme. They can also be a CIOB member and accredited by their new conservation accreditation scheme. Surveyors can also become IHBC members and be accredited by that organisation too.

Some respondent organisations, such as the Federation of Master Builders, the Guild of Master Thatchers and the Stone Federation, have membership criteria (evidence of H&S, financial, skills, training, complaint investigation, visiting sites to view their work, etc.) that are similar to other organisations’ accreditation criteria – but they do not call it an accreditation scheme.

There is also some concern over the use of the word “accreditation” as this has specific meaning in the academic sphere, i.e. the accreditation of courses. A number of respondents suggested this

might lead to some confusion.

Client perceptions of accreditation schemes

Almost all respondents agree that accreditation in some form is a good thing. It is about demonstrating experience, competence, knowledge and skill. One respondent commented, *“Clients appear to be far more educated than before”*.

However, the majority of respondents also feel that *“Clients are generally and genuinely confused”*. Domestic clients don’t really understand the accreditation and some commercial clients *“make contractors ‘tick the boxes’, but that doesn’t mean they think much of the accreditation schemes.”* The accreditation schemes are not all the same and some respondents feel this is part of the problem.

There appears to be a danger of using jargon, as if everyone knows what “we” are talking about. Another respondent felt that *“There is cynicism about these schemes. Is an organisation with an accreditation scheme promoting best practice or just their members?”*

A number of respondents raised the prospect of compulsion, whereby clients have to use accredited suppliers. Other fear this could lead to high prices.

Competitive advantage and increased market access via accreditation

This is not the primary reason many respondent members become accredited. Some are simply enthusiastic and passionate about conservation. Others want to be seen as a specialist and for other it is about personal professional development. In this sense a professional (or business) becomes accredited out of self-interest. They like to *“test themselves*

and feel confident they are at the top of their game” as one respondent put it. For others, however, it is about differentiation and business generation.

Some respondents see no link between accreditation and an increase in business for their members. One commented, *“They seem to be getting enough work without accreditation”.*

But most respondents do see an advantage, but only if the client is aware of the accreditation and thinks it important. On the one hand, from a member viewpoint, accreditation schemes are a good idea because they differentiate and provide a competitive advantage. However, at the client end there is a feeling that there may be too many schemes and there is confusion and perhaps some cynicism.

Appendix

Stage 1 discussion guide

Introduction

This discussion guide contains a list of topics that will be covered by the moderator and discussed with the participants during the face-to-face and telephone in-depth interviews.

All interviews will use the same guide, covering the same topics. They will be presented in a general format, using open / probing questions for each. This allows us to make comparisons between the responses.

The guide also introduces the research and reassures respondents about confidentiality and anonymity. However, we will avoid spending too much time on background information and concentrate on the issues that you wish to cover.

Section 1 – Opening the discussion

[Duration: 5 minutes]

Moderator notes:

Open the interview with a personal introduction.

Explain the purpose of the discussion in very general terms:

Good afternoon, my name is X and I am moderating this research on behalf of Historic England. The research looks into the market conditions for specialist heritage skills and services.

Additional moderator notes:

Indicate the length of the discussion – one and a half hours maximum.

Reassure respondents about confidentiality, privacy and anonymity.

Mention that the discussion will be recorded.

Explain in more depth the research project:

This is a qualitative research project designed to establish robust and reliable insight on present market conditions for specialist heritage skills and services. The hypothesis is that there is a lack of informed demand for specialist heritage skills and services. For example, clients may not realise the breadth of skills and services available, or where and how to find them. They may not appreciate the importance of using appropriately skilled suppliers or how to identify such suppliers. It is intended to provide a clear perspective in place of the present anecdotal information gathered from the sector and from owners. It will be divided into two stages. The first stage will take the form of a series of interviews with professional, craft and trade bodies representing the supply side of the heritage skills landscape. In the second stage we will speak with clients.

Section 2 – About the respondents

[Duration: 10 minutes]

Q1. Ask the respondent(s) to introduce themselves and mention their role.

Q2. Ask for a very brief “about your organisation”.

Q3. What specialist heritage skills and services do your members provide?

Q4. Who are their clients?

Q5. Do you feel demand is increasing, reducing or staying the same, for these skills and services?

Section 3 – Current actions to meet demand for skilled heritage practitioners

[Duration: 15 minutes]

Q6. How does your organisation promote members with specialist heritage skills and services?

Q7. How do you help clients find suitable members?

Moderator notes:

Neutrally probe for push [Q6] and pull [Q7] activities and programmes alongside more general insight into the organisational priority attached to heritage.

Section 4 – The current nature of market demand for specialist heritage skills and services

[Duration: 20 minutes]

Introduction to this section:

We want to know what you think about the nature of market demand for specialist heritage skills and services in general.

Q8. How do you think clients go about finding a supplier of specialist heritage skills and services?

Moderator notes:

Neutrally probe for knowledge of sources of information, etc.

Q9. How easy do you think it is for clients to find this kind of suppliers?

Q10. How do you think clients identify appropriate suppliers?

Q11. What do your members' clients value most when procuring services?

Moderator notes:

Neutrally probe for respondents' understanding of "appropriate" in Q10 and their reasoning behind the answers to Q11.

Section 5 – Accreditation

[Duration: 20 minutes]

Introduction to this section:

We now want to move on to talk about accreditation, gathering insight from your own point of view and that of your organisation.

Q12. What accreditation schemes apply to your members providing specialist heritage skills and services?

Moderator notes:

Neutrally probe for knowledge of third party accreditation schemes, if they exist.

Q13. What do you think are clients' perceptions of such systems and frameworks?

Moderator notes:

Assuming the organisation has an accreditation scheme or their members join a third party scheme move on to Q14 and Q15.

Q14. Do accredited members have a commercial advantage over those who are not accredited?

Q15. Do you think accreditation increase member's access to the market?

Moderator notes:

Neutrally probe for reasoning for answers to Q14 and Q15

Summing up and close

[Duration: 5 minutes]

Moderator notes:

Ask the respondents for their impression of the discussion.

Ask if there are any further comments they wish to make.

Offer contact details.

Thank the respondents for their time.

Annex 2 – Summary report to Stage 2

Project name	HEF CDTG market conditions for expert and specialist heritage skills and services 2015-16
EH ref	7163
ClfA ref	P126
Title	Stage 2 Summary Report
Product No.	Product 2
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About this project

This is a qualitative research project designed to establish robust and reliable insight on present market conditions for specialist heritage skills and services.

The hypothesis, developed by the Historic Environment Forum Client Demand Task Group, is that there is a lack of informed demand for specialist heritage skills and services. For example, clients may not realise the breadth of skills and services available, or where and how to find them. They may not appreciate the importance of using appropriately skilled suppliers or know how to identify such suppliers.

This research is intended to provide a clear perspective in place of the present anecdotal information gathered from the sector. It is divided into three stages. Stage 1 involved a series of interviews with professional, craft and trade bodies representing the supply side of the heritage skills landscape. Stage 2 involved focus groups and depth interviews with clients. Stage 3 maps the first two stages, draws them together, and suggests ways forward in the final report. The overall objective is to help us suggest ways of communicating more effectively with clients to stimulate demand for specialist heritage skills.

About this summary report

This report is not a Highlight Report, because it gives much more detail than a brief informative statement of progress. A Highlight Report is being issued at the same time as this report. This is also not the end-of-project report. That will be issued at the end of October. This Stage 2 Summary Report is designed to give the project board an overview of the results from the fieldwork carried out with a range of clients for specialist heritage skills and services.

In total there were 39 respondents from 30 organisations plus six private individuals.

We discussed the specialist heritage skills and services they use, if they understand the need for specialists, and their responsibilities and obligations regarding heritage projects.

We looked at how respondents go about finding suppliers of specialist heritage skills and services, how they identify appropriate suppliers and what they value most when choosing a supplier and procuring their services.

Accreditation is a key theme and we asked respondents which schemes they were aware of, if accreditation is an important deciding factor when choosing suppliers and if it's easy to find accredited suppliers.

Recruiting the respondents

The recruitment strategy for Stage 2 was to secure a mix of people in each group and to ensure that the "less well-informed" were recruited where applicable. For example, when researching which contractors, developers or consultants to add to the potential respondent lists, we made sure not to include too many "specialists" who worked solely on heritage projects.

We also made sure the respondents were involved in a range of projects from very large-scale projects involving master plans, through to new builds and RMI (refurbishment, maintenance and improvement). Landscapes and interiors were also included to balance the project typologies. Where building projects are concerned, we specifically made clear the properties did not have to be listed. They simply had to have some historic, architectural or cultural value.

With the local government group we concentrated on Dorset, as this is a rural county where there are multiple layers of local government including county, district, borough and town councils. We recruited conservation officers as they could give a dual view – client and supplier. We were not able to recruit local government property or estates representatives, as no one was available or willing to participate within the timeframe.

The group representing large property owners in the public or third sectors comprised senior respondents from a range of well-known organisations.

Recruitment for the final group, large property owners in the private sector, was a challenge simply because of the target respondents' availability and willingness to participate. We decided to break this group up and carry out three face-to-face, one-to-one in-depth interviews in order to capture what insights we could within the timetable.

Sources of contact data for recruitment

We used a number of sources of contact data. As well as our own research, resources and personal network, we received valuable assistance from:

- Desk research by Loud Marketing
- Personal networks of the Loud Marketing team
- The Client Demand Task Group members
- The Federation of Master Builders e-newsletter promoting the research
- The British Property Federation e-newsletter promoting the research
- MSMR Architects
- Dorset County Council
- Historic England

About the respondents

The 41 respondents included employees and business owners from 30 organisations working in heritage, planning, conservation, construction, property development, property investment, surveying, legal services, property management and various advisory roles. The respondent set also included six private individuals.

Respondents included: one architect, one solicitor, three advisors, three officers, six managers, two surveyors, two partners, one principal, eight directors, four MDs, one chairman and one senior volunteer.

The respondents were involved in a wide range of project typologies from very large-scale projects that involved master plans and new build developments that involved a heritage element such as archaeology, through to listed building refurbishments and smaller-scale RMI and conservation work.

The private individuals had five properties between them:

1. Georgian town house in a north London conservation area
2. Grade II listed Georgian town house in Henley-on-Thames
3. 400-year-old farm on the outskirts of Canterbury
4. Grade II listed house on the outskirts of Bath
5. Grade II listed house on the outskirts of Bath with Grade I elements

The 30 organisations that took part in Stage 2 are:

Alan Baxter Associates
Arque Construction
Bovey Construction
Cadogan Estate
Canal & River Trust
Chester Row

Christchurch & East Dorset District
Council
City Designer
Crown Estate
DAC Beachcroft
David Lock Associates
Donald Insall Associates
Dorset County Council
Gerald Eve
Grosvenor Britain & Ireland
Historic Houses Association
Historic Royal Palaces
JLL
Johnson & Mather
LendLease
MSMR Architects
National Trust
NLP Planning Senior
North Dorset District Council
Northbeach
RM Construction
The Church of England
U+I

Specialist heritage skills and services commissioned by respondents

Architectural services, including building design and client advisory / consultancy services, are the most common services used by respondents, alongside contractors (referred to as main contractor or builder depending on the client). Contractors may or may not be specialists.

The complete list of specialist heritage skills and services mentioned by clients:

Archaeology
Architecture
Asbestos removal specialists
Bronzeworkers
Building surveying
Clock restorer
Cobb building specialists
Conservation architect services
Conservators
Contractors

Environmental impact assessors
Expert witnesses
Garden designers
Garden restoration
Glazing restoration
Heritage consultants
Landscape architects
Landscape contractors
Landscape designers
Leaded glazing
Leadwork
Lime mortar analysis
Lime plasterers
Metal conservators
Metal window repairers
Paint analysts
Planning consultants
Project managers
Quantity surveying
Specialist surveyors
Stonemasons
Structural engineers
Technicians
Timber decay / preservation contractors

Language – terms and phrases

Throughout this research project, in Stage 1 when we spoke to relevant bodies of those supplying specialist heritage skills and services and in Stage 2 where we spoke to clients, the language used in describing heritage skills was repeatedly raised as an issue. All the words and phrases in this list appear to have ambiguous, confusing or in some other way misunderstood meanings.

Accreditation
Appropriate
Architectural conservator
Architectural designer
Competent
Conservation architect
Garden designer
Heritage
Heritage consultant

Heritage professional
Heritage project
Heritage sector
Historic environment
Historic property
Older property
Traditionally built property

At this stage we have not attempted to define these terms and phrases for the benefit of the respondents or readers of this report. The list is here simply to highlight that inconsistent and ambiguous terminology and an apparent lack of clarity in the use of language do not help clients make the right decisions. This list is by no means complete and is illustrative only.

Defining the client

We included this section in the summary report to Stage 1, but it is just as relevant here. Throughout this summary report, when we refer to the “client” we mean the person who is making the decisions that affect who works on the project.

Sometimes this is a straightforward relationship. A homeowner engages the services of a thatcher and pays them for their work. In other examples, there may be a chain of suppliers from architect to main contractor to sub-contractors to specialists. In other, usually more complex larger projects, a client may engage directly with a team and be more active in project management. This team could include architect, planning consultant, heritage consultant and in some cases main contractor.

So, the client/supplier landscape is not fixed, may be complex and may differ depending on who the ultimate client is, who is paying for the work to be done, the size of the project and if there are any other external factors at play, for example planning applications, grant funding, etc.

We use the term client in this wide sense. It's about who makes the decisions. Below is a short list of the types of individuals and organisations we mean when we use the term “client”:

Architects
Charities and Trusts
Churches – including lay members
Contractors
Custodians
Domestic / private homeowners
Government departments / agencies
Heritage consultants
House builders
Housing associations
Landowners
Local authorities
National heritage bodies
Property developers / investors

The informed / uninformed client

From our discussions with respondents from bodies representing suppliers of specialist heritage skills and services in Stage 1 of this research and with client respondents in this stage, the general consensus is that there is a lack of informed demand amongst clients.

As noted in the summary report to Stage 1, whether a client is informed or uninformed is more complex than a binary choice between those two terms.

We suggest breaking informed / uninformed into a more targeted list of four client knowledge levels based on their appreciation for the heritage assets in their care (including private homes), their awareness and understanding of responsibilities, obligations, availability of assistance, knowledge of specialist and so forth. The knowledge level would also be applied based on the client's actions.

1. Educated client – acts appropriately.
2. Informed client – may act appropriately.

3. Knowledgeable client – they are aware but may not always act.
4. Novice client – little or no appreciation, understanding, awareness or action.

Respondent understanding of their responsibilities to heritage

All respondents felt a responsibility toward older properties, including listed buildings and other heritage assets. They also understood their obligations toward these buildings. This does vary and some respondents have personal experience of private clients who *“have no idea what they have bought”*. Other respondents have personal experience of developers and investors who *“simply don’t care”* about their responsibilities and for whom cost and profit are always more important.

Some respondents, including those representing owners of large properties in the commercial, public and third sectors, see themselves as custodians of such buildings. The theme of passing on to the next generation – of the public at large or of shareholders – is strong.

Similarly, private owners feel that sense of history and of responsibility. Some private owners realise they have responsibilities and obligations but they are reticent to ask for help. This may be because of the perceived cost of using professional advisors. Or it may be because there is a view that asking for help from the local conservation officer – still offered free of charge – will *“Open Pandora’s box”*. In some cases private owners fear they will be forced to carry out work to rectify mistakes made perhaps decades ago, by previous generations.

Contractors and developers are also aware of their responsibilities and obligations. They are concerned primarily

with reputation. They can gain a good reputation by treating older properties appropriately and sympathetically. Conversely there is a risk of reputational damage if they do not do so.

As main contractors and developers put work out to sub-contractors and specialists on a regular basis, they are aware that the work of these suppliers could reflect on their own businesses. Because of this they are conscious that their sub-contractors and suppliers also understand the responsibilities and obligations that come with heritage projects.

Respondent awareness of the need for help from specialist suppliers

All respondents indicated that they are aware of the need to use suppliers of specialist heritage skills and services, *“where necessary”*. That last phrase indicates that a value judgement is made over the use, or not, of a specialist. Also, not all respondents are completely clear on what their needs are regarding specialist heritage skills and services. This may be because the project is particularly challenging or it may be because they have not worked with a particular material or trade before. This is particularly true of private homeowners, but also true of smaller developers and contractors and others who come up against something unusual. In these circumstances, larger clients are likely to engage the services of a professional such as an architect, surveyor or heritage consultant. Smaller clients may take the advice of their contractor.

How do you go about finding a specialist supplier?

Asking trusted contacts for a recommendation is the main way most

respondents find suppliers. This could include asking friends, family, colleagues, peers and in some cases competitors. Recommendations are seen as an unbiased tool. It is worth noting, however, that two respondents said that if they were asked for a recommendation they would not necessarily give the contact details of their *“best supplier”* in that field. They fear that if they did they might lose that supplier. Most respondents believe that suppliers of specialist heritage skills and services, certainly the good ones, are busy all the time and this adds to the sense of competitiveness.

If there are no recommendations then most respondents would search for suppliers online, or many said they would *“Google”*. But, some respondents are *reluctant to do this as they feel, “There is a load of rubbish out there”* and it might be waste of time.

Contractor respondents noted that they are often given a named or nominated sub-contractor by an architect or other professional. They are expected to use this supplier and would almost always do so unless they had very strong negative feelings toward that particular supplier.

How easy do you think it is to find a supplier?

As one respondent put it, *“It’s easy if you know what you’re doing”*. As mentioned above, it is also seen as time consuming by a number of respondents and this is one reason why they tend to be loyal to their chosen suppliers.

Identifying appropriate suppliers – what do clients value most?

Cost is a major factor across all respondent groups when choosing suppliers. However, it is generally seen as important but not the most important

factor. Cost cannot be dismissed, but it can be overcome if the other criteria are met.

Seeing examples of previous work is possibly the most important factor. It was mentioned by all respondents and would ideally be done in person, so the client could visually inspect the work to see that it was done to a satisfactory standard. If this is not possible, then looking at examples of previous work online or on paper is sufficient. The client would want to know details of project location, cost, the client and any other useful information.

One advantage of visiting previous projects is that the client would meet the specialist face-to-face. This is very important to many clients, especially private owners. They want to find out, *“If the supplier has the same approach and mind set”*.

Measuring competence is important and most respondents believe the best way to do this is to ask for a recommendation from a trusted contact. So, recommendations are as important when choosing a supplier as they are when finding a supplier.

Other ways of measuring competence are to see a reference from previous clients (not known to the respondent) and to find out if the supplier is a member of a relevant professional or trade body.

A small number of commercial respondents carry out due diligence on new suppliers, including those who offer specialist heritage skills and services. Membership of a relevant body, accreditations, qualifications, proof of solvency, insurances, health and safety competence, and the training of staff would be included in this process. But, it

is worth noting that other respondents, smaller businesses, consultants and private homeowners said that they do not have time to carry out this type of due diligence, although they see its value. Contractor respondents agreed that it is important but that the lengths you would go to check competence are often correlated with the value of the project or the contract. It is seen as time consuming and, *“Not always cost-effective”*.

This is where recommendation plays an important role, as if you have one you, *“Do not need to double-check everything”*.

Another important factor when choosing a specialist supplier is whether they can fit in with the client's timeframe. This can be a deciding factor for some clients, including contractors and developers. Others that are able to take a long-term view will plan in major projects perhaps years in advance and make sure their supply chain is aware. They are then able to plan and ensure they are available to do the work. For many smaller projects, that long-term planning is simply impossible and so supplier availability becomes critical.

Defining “specialist” and “heritage”

Throughout this research project, phraseology and use of language has repeatedly been raised as an issue. As well as including a list of often-misunderstood words and terms (see page 45), we also asked client respondents what they thought two words meant: “specialist” and “heritage”.

Specialist

- “Best”
- “Complex”
- “Expensive”

Heritage

- “Old”

- “Architectural value”
- “Importance”
- “History”
- “Expensive”
- “Slower”

How easy do you think it is to choose a supplier?

Most respondents emphasised the importance of recommendations when finding and choosing suppliers of specialist heritage skills and services. It appears that if you can obtain a recommendation, then the process is easy. But without a recommendation, the process can be time consuming and complex.

Which specialist heritage accreditation schemes are you aware of?

Respondents were well aware of a number of accreditation (or similar) schemes including:

- “RIBA”
- “Master builder”
- “Master thatcher”
- “CIOB”
- “Master joiner”

Do you consider accreditation when choosing specialist suppliers?

As noted previously, the main criteria for choosing a specialist supplier are cost, seeing examples of previous work, availability and measuring competence.

Being accredited in some way is something that a client looks at and looks for, but it is not the most important or a deciding factor.

How easy do you think it is to find accredited suppliers?

For the respondents who look for accreditation, it appears to be relatively easy to find suitably accredited suppliers.

Appendix

Stage 2 discussion guide

Section 1 – Opening the discussion

[Duration: 5 minutes]

Moderator notes:

Open the interview with a personal introduction.

Explain the purpose of the discussion in very general terms:

Good afternoon, my name is X and I am moderating this research on behalf of Historic England. The research looks into the market conditions for specialist heritage skills and services.

Additional moderator notes:

Indicate the length of the discussion – one and a half hours maximum.

Reassure respondents about confidentiality, privacy and anonymity.

Mention that the discussion will be recorded.

Explain in more depth the research project:

This is a qualitative research project designed to establish robust and reliable insight on present market conditions for specialist heritage skills and services.

The hypothesis is that clients could be better informed about the availability of different types of specialist heritage skills and services and that there is an opportunity to explain clearly the options available and how to find them. This research is intended to provide a clear perspective in place of the present anecdotal information gathered from the sector and from owners. It will be divided into two stages. The first stage took the form of a series of interviews with professional, craft and trade bodies representing the supply side of the heritage skills landscape. In the second stage we are speaking with clients

This research will help us suggest ways of stimulating demand for specialist heritage skills.

Section 2 – About the respondents

[Duration: 10 minutes]

Q1. Ask the respondent(s) to introduce themselves and mention their role.

Q2. Ask for a very brief “about your organisation” [if applicable].

Q3. What specialist heritage skills and services do you / could you commission?

Moderator notes:

In Q3 respondents may not have commissioned any work at this point but may need to do so in the future and therefore their insight is still valuable. Compare with Q3 in Stage 1.

Q4. What do you feel are your [organisation’s] obligations or responsibilities to heritage [as the owner of / manager of X]?

Moderator notes:

In Q4 we are looking for a top line answer, not a major discussion. This question is designed to seed the idea of obligation and responsibility in the minds of the respondents.

Section 3 – Finding a supplier of specialist heritage skills and services

[Duration: 20 minutes]

Introduction to this section:

We want to know how you would go about finding a supplier.

Q5. Are you aware that you need the help of suppliers with specialist heritage skills?

Moderator notes:

In Q5 neutrally probe to see if respondents understand their own needs.

Q6. How do you / would you go about finding a supplier?

Moderator notes:

In Q6 neutrally probe for sources of information, etc.

Q7. How easy do you think it would be to find a supplier?

Section 4 – Choosing a supplier of specialist heritage skills and services

[Duration: 20 minutes]

Introduction to this section:

We want to know how you go about or would go about choosing between suppliers.

Q8. How would you go about choosing a supplier?

Moderator notes:

Neutrally probe for criteria, etc.

Q9. What are your principal objectives / concerns when choosing a supplier?

Q10. What do you value most in a supplier?

Q11. How would you define: “expert”; “specialist”; heritage skills”.

Q12. How easy do you think it would be to choose a supplier of specialist heritage skills and services?

Section 5 – Accreditation

[Duration: 20 minutes]

Introduction to this section:

We now want to move on to talk about accreditation of suppliers of specialist heritage skills and services.

Q13. Which specialist heritage skills and services accreditation schemes are you aware of?

Moderator notes:

Prompt with names / stimulus if necessary

Q14. To what extent do you consider accreditation when choosing a supplier of specialist heritage skills and services?

Moderator notes:

Neutrally probe for knowledge, attitudes, behaviours, barriers, etc.

Q15. Do you consider using self-regulated (or non-accredited) suppliers?

Moderator notes:

Neutrally probe for reasoning for answers to Q14

Q16. How easy is it / would it be to find accredited suppliers?

Summing up and close

[Duration: 5 minutes]

Moderator notes:

Ask the respondents for their impression of the discussion.

Ask if there are any further comments they wish to make.

Offer contact details.

Thank the respondents for their time.