Archaeological Market Survey 2015

Prepared for

Kate Geary
Standards Development Manager

Chartered Institute for Archaeologists

and

Tim Malim
Chair

Federation of Archaeological Managers and Employers

Report reference: 2_01
Report status: FINAL

Prepared by
Landward Research Ltd

email enquiries@landward.eu
Registered in England and Wales, number 03749035

Archaeological Market Survey 2015

This report has been prepared by Landward Research Ltd in its professional capacity as research, training and project management specialists, with reasonable skill, care and diligence within the agreed scope and terms of contract and taking account of the manpower and resources devoted to it by agreement with its clients, and is provided by Landward Research Ltd solely for the internal use of its clients, the Chartered Institute for Archaeologists and the Federation of Archaeological Managers and Employers. It may be further distributed as the clients see fit if Landward Research Ltd is fully credited as the originator of this report.

Principal Author

Kenneth Aitchison

Prepared by
Landward Research Ltd

email enquiries@landward.eu
Registered in England and Wales, number 03749035

1 EXECUTIVE SUMMARY

This *Archaeological Market Survey* report is on the State of the Market for Archaeological Services in 2014-15 and has been prepared by Landward Research Ltd on behalf of the Chartered Institute for Archaeologists, FAME and Historic England.

The overall aims of this survey are to provide:

- a unique analysis of the archaeological sector as part of the overall UK economy;
- statistics that allow estimation of total value of sector to the economy;
- data on indicative numbers of employed professional archaeologists;
- data for analysis of long-term sustainability for the sector;
- an indication of social benefit through outreach;
- data that can enable informed lobbying to help protect the UK's heritage; and
- to support planning effectively for the future so that the profession is sustainable and results in a benefit for society

In financial year 2014-15, commercial archaeology was in a period of rapid recovery and expansion following years of decline or stagnation. The number of people working in the sector grew rapidly and businesses were very confident. Levels of turnover and profits increased.

Employment

It is estimated that the applied archaeology sectoral workforce grew by 20.8% in financial year 2014-15.

Over a comparable period, the number of archaeological staff providing expert advice to local planning authorities increased by 4.5%.

Together, these changes combine to result in the net number of people working in professional archaeology in the UK growing by 12.9% in financial year 2014-15 to an estimated total of 5,452 individuals.

Financial Performance

The average (mean) UK turnover for an applied archaeology company in 2014-15 was £1.9m, an increase of 15% over the year since March 2014, with an additional 3% above that being generated from non-UK work.

In total, it is estimated that UK commercial archaeology generated a total of £167m revenue in 2014-15.

Many of the largest employers are constituted as not-for-profit organisations.

Profit (or 'surplus') levels remained low – an average of 2.5% - but had improved slightly since 2014, when the figure was 1.9%.

Market Sectors

The overwhelming majority of income (75%, an increase from 67% in 2013-14) came from private sector clients.

The most important market sector was residential development, followed by commercial and industrial development.

email enquiries@landward.eu
Registered in England and Wales, number 03749035

Business Confidence

The sector in 2015 was more confident than it had been at any time since 2008 (the start of this data collection exercise). The high levels of confidence reported in 2014 had been maintained and positive sentiment increased.

The sector had its best ever recorded expectations of maintaining or increasing staffing levels, its best ever feelings about market conditions, there were high levels of planned expansion and for the first time more respondents expected no business failures in the next year than expected some to happen.

Skills, training and qualifications

Fieldwork skills continued to be those most commonly reported as being lost.

Artefact and ecofact conservation was no longer reported as a skill being lost by employers, nor was it identified as being a priority for in-house training, because it had become very much the norm for this to be provided by subcontractors.

The areas where training was focussed continued to match reasonably closely to the areas where skills were being reported as being lost (as they had been in 2014) - so these skills gaps (skills that existing staff needed but lacked) were being tackled by investment in training.

Perceptions

Respondents considered that the economic climate for development would improve in the next year (2015-16), and were even more confident of improvement than they had been a year previously.

Typically, they thought their heritage teams would grow, and they were even more confident that their teams would not contract in size.

Respondents considered that late payment of bills was an increasingly significant problem for their business, although the sector as a whole did not present a strong view on whether non-payment had been a significant problem.

Respondents tended to agree with, but were unsure about, the assertion that "current national planning policy frameworks are making it easier to justify heritage work and revenue levels"; equally, they were unsure, but tended to disagree with the statement that "current national planning policy frameworks weaken the case for heritage work and revenue levels".

They agreed that a shortage of heritage staff in local planning authorities was a major constraint on heritage projects (which could affect income generation), and this was felt even more strongly than it had been in 2014.

Response rate

Response levels were good – a marked improvement on 2014. A total of 89 organisations were asked to provide information and a total of 53 useable responses were received, a response rate of 59.6%.

The factors that had contributed to the low level of response to the 2014 survey had largely been addressed, through respondents becoming more familiar with the questionnaire, the survey being circulated at a better time of the year, and it asking for more recent data and opinions.

Future Work

This study will continue to be repeated annually, with the next survey taking place in early summer 2016. It will collect data from the end of the previous financial years on a cyclical basis until 2017-18 when it is intended that this will form part of the quinquennial *Profiling the Profession* project which gathers comparable data from the entire archaeological profession in the UK.

Contents

2 INTRODUCTION

Since the autumn of 2008, economic changes have impacted significantly upon archaeological practice in the UK.

The Chartered Institute for Archaeologists (CIfA) and the Federation of Archaeological Managers and Employers (FAME) have collected data on employment and skills issues in applied archaeological practice since October 2008. A series of nine quarterly surveys were initially conducted, gathering and presenting data from October 2008 to April 2011, and subsequently, CIfA and FAME commissioned Landward Research Ltd to gather data on a six-monthly basis and to present reports on the state of the archaeological market. The December 2012 report[1] was combined with the sector wide *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13*[2] report.

The effects of the economic situation began to directly impact upon commercial, applied archaeology from 2008 onwards. In 2010 and 2011, the changing economic effects began to be felt in the fields of archaeological services to local authorities, in national heritage agencies and in universities. The full effects of these changes on employment patterns within archaeology were not made clear until results of the pan-sectoral *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13* project revealed the depth of job losses across the whole sector.

The reports on those earlier surveys are available on the CIfA website via the Recession – managing and planning page and on the FAME website http://www.famearchaeology.co.uk/.

The Chartered Institute for Archaeologists continues to need up-to-date research to be best able to support their membership by informing the Institute and its members about the effects of the economic situation on archaeology. The Federation of Archaeological Managers and Employers also seeks to provide market intelligence to its members to help them compete effectively. The fact that both organisations have commissioned this survey demonstrates the value of the information for advocacy of archaeology at Westminster and national parliaments.

Together with Historic England, CIfA and FAME have commissioned Landward Research Ltd to continue to analyse and evaluate the state of the market for archaeological services, examining employment, turnover, market segmentation and other relevant topics.

This exercise is being carried out on an annual basis over five years, collecting data for the entire UK for every year from 2013-14 up to and including 2017-18, when it is intended that the *Profiling the Profession* series of projects will continue their quinquennial cycle. It will also ensure that the data gathered will be able to contribute directly to an intended future *Profiling the Profession 2017-18* project, thus ensuring that the funders will have a full role in guiding the design and then delivery of

[1] Aitchison, K. 2013. *State of the Archaeological Market December 2012*. Landward Research Ltd. http://www.landward.eu/State%20of%20the%20Archaeological%20Market%20-%20December%202012%20050913.pdf

[2] Aitchison, K. & Rocks-Macqueen, D. 2013. *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13*. Landward Research Ltd. http://www.landward.eu/Archaeology%20Labour%20Market%20Intelligence%20Profiling%20the%20Profession%202012-13.pdf

that project. The report presented here is based on data gathered from FAME member organisations and CIfA Registered Organisations, who are considered to represent the majority of employers working in commercial, client-funded applied archaeology.

The data gathered applied on the 31st March 2015, and so this report is on the situation at the end of financial year 2014-15. Throughout, comparisons are made with the results of the *Heritage Market Survey 2014*[3] results and with the *State of the Archaeological Market December 2012* data, both of which gathered data from the same survey population as the current report (FAME members and [C]IfA Registered Organisations).

Data have also been incorporated from the Historic England / ALGAO / IHBC *A seventh report on Local Authority Staff Resources*[4] which reported on archaeological staff advising local planning authorities in England.

2.1 Responses

In total, 89 organisations were asked to provide responses; 70 CIfA Registered Organisations and 59 FAME members. As most of these organisations are both CIfA ROs and FAME members, the total number of organisations approached is less than the total number of CIfA ROs plus FAME members.

The questionnaire was issued on 26th June 2015, seeking data that applied on 31st March 2015, the end of financial year 2014-15. The questionnaire was deployed via a *Novisystems* online survey package, with automated reminder emails encouraging completion being sent periodically until 14th July 2015.

A total of 55 responses were received, although two were duplicate entries, so the total number of useable responses was 53, a response rate of 59.6% - a notable increase from the 2014 survey response rate of 47.7%.

2.2 FAME Membership

is your organisation a member of FAME?

42 of the 53 respondents were FAME members (79% of the respondents, 71% of the FAME membership).

2.3 CIfA Registered Organisations

is your organisation a CIfA Registered Organisation?

[3] Aitchison, K. *Heritage Market Survey 2014*. Landward Research Ltd. http://www.landward.eu/Heritage%20Market%20Survey%202014%20final%20report%20v2.pdf

[4] Reilly, S. 2015. *A seventh report on Local Authority Staff Resources*. HE / ALGAO / IHBC. https://content.historicengland.org.uk/images-books/publications/seventh-report-la-staff-resources/7th-report-la-staff-resources.pdf/

Of the 53 responses, 44 were from CIfA Registered Organisations (83% of the respondents). This represented 63% of the CIfA Registered Organisations.

2.4 Constitution

The questionnaire asked about how respondent organisations were legally constituted. The majority of responses came from private limited companies (33 of the 53 respondents). The survey allowed respondents to check as many categories of constitution as applied, and ten indicated that they were both limited companies and registered charities, and one of these organisations was also 'other', so the number of responses for 2015 is greater than the number of respondents

How is your organisation legally constituted?
please check multiple categories if appropriate

Constitution	**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014		**State of the Archaeological Market** December 2012	
	33	62%	18	44%	18	38%
	13	25%	7	17%	13	27%
	7	13%	5	12%	6	13%
	6	11%	4	10%	5	10%
	5	9%	6	15%	5	10%
	2	4%	1	2%	1	2%
	53		41		48	

Using the numbers of staff reported as being employed on 31st March 2015 (managerial, professional, technical and administrative), the organisations that identify as being registered charities were, on average, the largest organisations in the sector (as was the case in the *Heritage Market Survey 2014* report).

staff numbers by organisational legal constitution

Constitution	orgs	total staff	avg staff

(orgs = number of organisations providing staffing data and information on constitution)

email enquiries@landward.eu
Registered in England and Wales, number 03749035

Note that this table includes deliberate double counting – all of the organisations that identified as being both a private limited company and a registered charity have been included under both headings, and the organisation that identified as being a private limited company, a registered charity and "other" has been included under all three (this organisation may have checked "other" to reinforce the point that it had dual status).

The data continued to show (as was the case in 2014) that while private limited companies were the most common form of enterprise represented, in this sector more people worked for not-for-distributable profit organisations (registered charities, constituent parts of local planning authorities, constituent parts of universities).

It is particularly significant that most of the large employers in this sector had not-for-profit constitutions. This has been identified as a barrier to effective competition as part of a market economy[5] and is a major constraint to ensuring the archaeological profession is sustainable as a commercial practice servicing development.

2.5 Location of Head and Subsidiary Offices

Respondents were asked about the locations of both their head office and of any subsidiary offices which were being included in their answers.

where is the head office of your organisation located?

Head Office Location	**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014		**State of the Archaeological Market** December 2012	
East Midlands	5	9%	2	5%	3	6%
East of England	5	9%	3	7%	3	6%
Greater London	6	11%	4	10%	4	8%
North East England	0	0%	0	0%	1	2%
North West England	3	6%	2	5%	1	2%
South East England	8	15%	6	15%	7	15%
South West England	9	17%	5	12%	7	15%
West Midlands	2	4%	5	12%	6	13%
Yorkshire and the Humber	3	6%	1	2%	4	8%
Scotland	5	9%	7	17%	6	13%
Wales	3	6%	4	10%	5	10%
Northern Ireland	1	2%	1	2%	0	0%
outside the UK	3	6%	1	2%	1	2%
total	53		41		48	

[5] Hinton, P. and Jennings, D. (2007) 'Quality management of archaeology in Great Britain: present practice and future challenges', in Willems, W.J.H. and Van den Dries, M. (eds) *Quality Management in Archaeology*, pp. 100-112, Oxford: Oxbow Books.

email enquiries@landward.eu
Registered in England and Wales, number 03749035

The reported distribution of head offices did not change substantially between the 2014 and 2015 surveys, with the exception of a marked reduction in the number of organisations reporting that they were headquartered in the West Midlands (this is likely to be an illustration of the different organisations responding to each survey, rather than an absolute reduction) and a substantial increase (from one to three) in the number of organisations that are headquartered outside the UK

45 of 53 respondents reported having subsidiary offices – a total of 71 subsidiary offices. Of those that reported having subsidiary offices, the numbers of these ranged between one and ten, an average of 1.6 for each organisation that reported that they had subsidiary offices. The existence of these subsidiary offices emphasises the fact that archaeological work is being undertaken in all parts of the United Kingdom.

are you also answering on behalf of any subsidiary offices? if so, please indicate where they are located?

Subsidiary Office Location	**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014		**State of the Archaeological Market** December 2012	
East Midlands	4	6%		10%		8%
East of England	7	10%		6%		8%
Greater London	7	10%		12%		6%
North East England	7	10%		6%		10%
North West England	5	7%		6%		10%
South East England	8	11%		10%		12%
South West England	7	10%		12%		16%
West Midlands	7	10%		8%		6%
Yorkshire and the Humber	8	11%		8%		8%
Scotland	7	10%		12%		10%
Wales	2	3%		10%		2%
Northern Ireland	1	1%		0%		2%
outside the UK	1	1%		2%		2%
total	71					

total numbers of offices reported by location

All Offices Location	head offices	subsidiary offices	total	
East Midlands	6	4	10	8%
East of England	5	7	12	10%
Greater London	6	7	13	10%
North East England	0	7	7	6%
North West England	3	5	8	6%
South East England	8	8	16	13%
South West England	9	7	16	13%
West Midlands	2	7	9	7%
Yorkshire and the Humber	3	8	11	9%
Scotland	5	7	12	10%
Wales	3	2	5	4%
Northern Ireland	1	1	2	2%
outside the UK	3	1	4	3%
	53	71	124	

The data cannot be disaggregated in terms of the numbers of individuals working at different offices, so this means that the geographical distribution of staff can only be presented on the basis of the head office locations.

The figures were skewed slightly by under-representation from Yorkshire and the Humber, but in general can be seen as an accurate distribution of working archaeologists in the UK, with the highest numbers of archaeologists occurring in the highest areas of general population (Greater London and South-East England). South-West England was also highly represented, with several large companies being headquartered there.

The figures for 2015 illustrate how relatively skewed the 2014 figures were, as very limited returns were received then from London and none at all from Yorkshire and the Humber.

staff numbers by head office location

Location	**Archaeological Market Survey 2015** March 2015			**Heritage Market Survey 2014** March 2014			**State of the Archaeological Market** December 2012		
		staff			staff			staff	
East Midlands	5	94.6	5%	1	2.5	<1%	3	78	5%
East of England	4	99.85	5%	1	3	<1%	3	49	3%
Greater London	5	485	26%	2	10	1%	4	427	29%
North East England	0	0	0%	0	0	0%	1	24	2%
North West England	2	18.5	1%	2	18	2%	1	12	1%
South East England	7	427.2	23%	4	132.5	17%	6	288.3	20%
South West England	8	352	19%	4	296.5	37%	7	215	15%
West Midlands	2	36.34	2%	5	91.1	12%	6	68	5%
Yorkshire and the Humber	1	19	1%	0	0	0%	3	27	2%
Scotland	4	216.3	12%	5	168	21%	6	185	13%
Wales	3	59	3%	4	60.5	8%	5	82	6%
Northern Ireland	1	9	<1%	1	8	1%	0	0	0%
outside the UK	3	48.5	3%	1	2	<1%	1	22	1%
total	45	1865.3		30	792.1		46	1477.3	

(orgs = numbers of organisations providing staffing data)

2.6 Years Trading

Respondents were asked when their organisations began trading.

In which year did your organisation begin trading (in applied archaeology)?

started operating	**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014		**State of the Archaeological Market** December 2012	
18th century						
19th century					1	2%
1900s	1	2%	1	2%	1	2%
1910s						
1920s						
1930s					1	2%
1940s	1	2%	1	2%	1	2%
1950s					1	2%
1960s	1	2%	1	2%		
1970s	10	19%	9	21%	15	32%
1980s	7	13%	3	7%	3	6%
1990s	16	30%	12	28%	8	17%
2000s	11	21%	11	26%	14	30%
2010s	6	11%	5	12%	2	4%
total	53		43		47	

As only three of the respondent organisations began trading before the 1970s, and the majority began trading since 1990, in general FAME members and CIfA Registered Organisations are typically mature enterprises – the median year for starting trading across the 53 respondents was 1993 (half had been trading for at least 22 years, and half less).

Examining the data for trading starts by organisational constitutions, the registered charities were typically founded in the "rescue" era of the 1970s, with no new charities entering the market since 2000, and that half of the local planning authority organisations were also established in the 1970s and all of them before 2000. Limited companies have become the preferred model over time, with the majority of organisations founded in each decade from the 1990s onwards using this model.

foundation dates by constitutional bases

	plc	ltd company	charity	part of lpa	part of university	other
1900s		1	1			1
1940s			1			1
1960s		1	1			
1970s		5	6	3	1	
1980s		3	2	2		1
1990s		9	1	1	1	3
2000s	2	7			2	
2010s		4		1	1	

3 STAFF NUMBERS

Respondents were asked about staffing levels on March 31st 2015, covering both UK and non-UK based staff. They were also asked about non-UK based staff, the types of contracts used, relative levels of staff turnover and whether they thought departing staff had left the sector or not. They were also asked for retrospective data to ensure consistency with the previous *Heritage Market Survey 2014* and the pan-sectoral *Profiling the Profession* study conducted in December 2012.

In total, it is estimated that the sectoral workforce (commercial, applied archaeology) grew by 20.8% in the year since the previous survey.

Separately, the number of archaeologists providing curatorial services to local planning authorities (technically, the number of full-time equivalent “archaeological specialists providing advice to local authorities”) in England rose by 4.5% in the year to the beginning of 2015[6].

No figures are available for the numbers of archaeologists working in “other” contexts (neither commercial nor curatorial), and so those figures have had to be assumed to have remained unchanged.

When these three figures are combined (commercial archaeology from this survey, curatorial from Reilly [2015] and “other” from Aitchison & Rocks-Macqueen [2013][7]), and in the case of the local authority figures, extrapolated from the English base, it is estimated that the entire archaeological profession working in the UK grew over the course of financial year 2014-15 from a total of 4830 to 5452 professional archaeologists, an increase of 12.9%.

3.1 Employment

The survey asked a series of questions about staffing levels, enquiring about the numbers of staff working on 31st March 2015 and asking how many of them were fee-earners. Respondents were also asked about non-UK based fee-earning staff.

[6] Reilly, S. 2015. *A seventh report on Local Authority Staff Resources*. HE / ALGAO / IHBC. https://content.historicengland.org.uk/images-books/publications/seventh-report-la-staff-resources/7th-report-la-staff-resources.pdf/

[7] Aitchison, K. & Rocks-Macqueen, D. 2013. *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13*. Landward Research Ltd. http://www.landward.eu/Archaeology%20Labour%20Market%20Intelligence%20Profiling%20the%20Profession%202012-13.pdf

3.1.1 Total Staff

How many full-time staff were based in your UK offices on 31 March 2015?

Please include all full-time or full-time equivalent staff, together with part-time staff, using estimates of full-time equivalency - for example, a member of staff working 2.5 days a week should be counted as 0.5.

How many UK members of staff (FTE) did your organisation have one year ago, on 31 March 2014 - the census date for the previous Heritage Market Survey?

Total UK staff (managerial, professional, technical and administrative)	Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014		State of the Archaeological Market December 2012	
	Mar 15	Mar 14	Mar 14	Dec 12	Dec 12	Aug 07
number providing data	45	42	30	30	46	40
total	1865.29	1468.56	792.06	769.24	1477.3	1858.05
average	41.45	34.97	26.40	25.64	32.12	46.45

Data are also presented for comparison purposes that were gathered in the predecessor *Heritage Market Survey 2014* and the *State of the Archaeological Market December 2012* (which both collected directly comparable data from FAME Member Organisations and [C]IfA Registered Organisations.

Directly comparing data from only the 42 organisations that provided data to this survey for both March 2015 and March 2014 shows that their total workforces increased in size by 20.8% in the course of the year between the survey dates (in absolute terms, nine had smaller workforces, three had not changed in size and 30 had grown).

This increase in workforce size – of 20.8% over one year - can be taken as a benchmark for the overall growth of the applied archaeological sector's workforce in 2014-15.

This remarkable rate of growth is supported by research into the number and scale of advertised posts within archaeology - Rocks-Macqueen[8] considers that more jobs were advertised in 2014-15 than in any of the previous 20 years for which data on advertisements has been collected.

3.1.2 Total Fee Earners

As well as being asked about the total numbers of all staff, respondents were also asked about the number of fee-earning staff, defined as *"Fee-earners: members of staff whose time can be billed to clients".*

UK-based fee earners working full-time

Total Staff	Total Fee-earners	
1555.79	1410.84	90.7%

n=36

Data only used from respondents providing positive numbers of staff and of fee-earners.

Fee earners therefore made up nearly 91% of the workforce at the respondent organisations in 2015; the calculated figure from *Heritage Market Survey 2014* was 85%.

[8] Rocks-Macqueen, D. 2015 (forthcoming). "Jobs in British Archaeology 2014-15". *The Archaeologist*.

3.1.3 Overseas Staff

Respondents were asked how many of their full-time staff were permanently based overseas on 31 March 2015.

Only three respondents reported having fee-earners based outside the UK, a total of 21 individuals, ranging from one to 16 at each of the organisations.

One of the three organisations that identified that they had fee-earners outside the UK reported having more non-UK fee-earners than were based in the UK.

Number of fee-earners permanently based outside the UK

	Fee-earners outside UK	**Fee earners in UK** (only organisations with non-UK fee earners)	***n=***
total 2015	21	72	3
total *Heritage Market Survey 2014*	13	156	3

3.1.4 Total Employment in UK Archaeology

The most recent comprehensive survey of employment in all areas of UK archaeology was *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13*, which incorporated data from *State of the Archaeological Market December 2012*.

Heritage Market Survey 2014 allowed those data to be updated for 2013-14, and now this report presents an updated estimate of the total number of people working in applied, commercial archaeology, which can be combined with the most recent estimates for curatorial archaeology to produce an overall estimate for the entire sector in 2015.

This report estimates that 3,498 individuals were working in commercial archaeology in March 2015, an increase of 602 individuals (20.8%) over the period since March 2014. This represents commercial archaeology returning to the staffing levels previously experienced in 2009 after a lengthy period of contraction or stagnation.

The most recently published survey of staffing in local planning authorities[9] considered that the number of archaeologists advising LPAs in England increased by 4.5% in the year to early 2015; if this same rate of change is extrapolated across the whole UK, then that represents an increase of 20 posts.

As no new data are available for archaeological employment in “other” sectors, the figures from *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13* (December 2012) are repeated unchanged here.

[9] Reilly, S. 2015. *A seventh report on Local Authority Staff Resources*. HE / ALGAO / IHBC. https://content.historicengland.org.uk/images-books/publications/seventh-report-la-staff-resources/7th-report-la-staff-resources.pdf/

For all sectors combined there was a net increase of 12.9% in the number of people working in UK archaeology between March 2014 and March 2015.

total numbers of archaeologists in employment in the UK, 2007-2015

Mar-15
459
1495
3498
5452

2014-15 represented a very significant period of growth for archaeological employment. It is important to note that while this was primarily the result of growth in the commercial sector, the number of archaeological advisers to local government also increased in 2014-15 – a very important detail, as that subsector shrank in 2013-14 and the overwhelming majority of respondents to both the *Heritage Market Survey 2014* and to the current survey considered that “a shortage of heritage staff in LPAs is a major constraint on heritage projects” (7, *Perceptions* below).

Staffing levels had begun to grow (very slightly) in 2013-14, and the rapid expansion of the commerical archaeological sector in 2014-15 coincides with very high levels of business confidence (5, *Business Confidence* below).

3.2 Contracts

how many of your members of staff were on each of the following types of contract on 31 March 2015?

	full-time		part-time		total	
permanent	1355	88.5%	176.3	11.5%	1531.3	76.4%
fixed term	365	94.2%	22.4	5.8%	387.4	19.3%
casual	36	70.6%	15	29.4%	51	2.5%
volunteer	3	8.8%	31	91.2%	34	1.7%
total	1759	87.8%	244.7	12.2%	2003.7	

n

Data were received on staff contracts from 44 respondents, relating to the contracts held by just over 2000 employees.

Over three-quarters of staff were on permanent contracts, nearly 20% on fixed term (temporary) contracts, very few were 'casual' staff and almost no volunteers were reported – a slight change from 2014, when no volunteers at all were reported.

88% of employees were on full-time contracts, and 88% of those people were permanently engaged. Part-time workers were more likely to have permanent contracts than to be working on fixed-term contracts.

Please note the apparent discrepancy between the total number of staff calculated on the basis of reported contracts being different from the total reported under 3.1.1, *Total Staff* above, which is mainly caused by the contracts table representing a head-count of individuals, rather than full-time equivalents (as reported in 3.1.1) and also by non-UK staff being included in the table above.

In comparison with the equivalent data from 2013-14 (below), the overall percentage of staff who were on permanent contracts remained almost unchanged. This could be taken as an indication that the increase in jobs seen in 2014-15 was not simply a fieldwork "spike", as that would likely be represented by a disproportionate increase in the percentage of fixed-term posts.

how many of your members of staff were on each of the following types of contract on 31 March 2014?

	full-time		part-time		total	
permanent	621	87.2%	91	12.8%	712	76.2%
fixed term	202	94.4%	12	5.6%	214	22.7%
casual	13	76.5%	4	23.5%	17	1.8%
volunteer	0	0%	0	0%	0	0%
total	836	89%	107	11%	943	

n=30

from Heritage Market Survey 2014, data reformatted to match 2015 table

3.3 Staff Turnover

Respondents were asked about the relative (not absolute) levels of staff turnover in the period since the previous survey.

what level of staff turnover did you experience between 31 March 2014 and 31 March 2015?

staff turnover	**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014		**State of the Archaeological Market** December 2012	
none (all current staff were working for us six months ago)	6	13%	4	14%	14	30%
some (up to 10% of current staff were not working for us six months ago)	21	47%	10	34%	23	49%
moderate (up to 25% of current staff were not working for us six months ago)	10	22%	10	34%	4	9%
considerable (over 25% of current staff were not working for us six months ago)	8	18%	5	17%	6	13%
total	45		29		47	

As has been noted previously, there are high levels of staff 'churn' in professional archaeology. The 2015 returns were from a larger sample of respondent organisations than were received in 2014, but if they are treated on a like-for-like basis, the degree of intensity of churn had reduced slightly. A smaller proportion of organisations reported that between 10-25% of their staff were not working for them six months previously, with a matching increase in the proportion of organisations reporting that up to 10% of their staff had not been working for them six months before.

The high churn rate can be considered to indicate that the labour market was both expanding (new entrants) and dynamic (people were moving between organisations).

3.4 Staff Lost From the Sector

Respondents were asked whether they believed that staff who had formerly worked for them were still working in archaeology or not.

If you lost staff in the period between 31 March 2014 and 31 March 2015, do you believe that these people left the profession or stayed within it with different employers?

staff destinations	**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014		**State of the Archaeological Market** December 2012	
all found alternative employment within archaeology	10	29%	8	36%	8	25%
most found alternative employment within archaeology	14	40%	9	41%	13	41%
even split between leaving the profession and finding alternative employment within archaeology	6	17%	4	18%	2	6%
most left the profession	2	6%	0	0%	5	16%
all left the profession	3	9%	1	5%	4	13%
total	35		22		32	

The majority of respondents thought that all, or most, of the people who had left their employ were still working in archaeology but for different employers. This continues the pattern identified in 2014, and 2012 before that, emphasising that a major component of staff turnover is made up of people moving within the sector.

Comments received reinforce this sentiment:

1 found alternative employment in archaeology 1 returned to education (archaeology PhD) 1 administrator (non-archaeological)
1 left to emigrate (not replaced) and is looking for work within archaeology - so neither left the profession or found alternative employment applies
as consultants
Following the bankruptcy of ASC Ltd on March 31st 2014, Icknield Archaeology Ltd and Bancroft Heritage Services (sole trader) were set up in order to complete the outstanding projects and to provide a service to existing clients
High rate reflects normal project cycle
Large engineering consultancy headhunted senior member of our staff.
Note that in March 2014 we only had 1 staff member in NI. this increase to 20 by March 2015 therefore we had no staff turnover
One left to join a museum - but position was filled.

One of the people 'leaving the profession' was not an archaeologist - technical finance skills
Staff loss 1 person (retirement) Staff gain 8 persons Change +7 staff = 20%
staff loss includes retirement
The loss amounts to a single member of staff who was looking for a new direction.
We had a large project coming to a close in Dec 14 so numbers naturally declined. However, both permanent and temp numbers have risen significantly since March 15.

3.5 Salaries

Respondents were asked whether salaries had typically risen or fallen during the 2014-15 financial year. This was specifically not a question about total salary bills, as those would be directly influenced by the number of personnel on the payroll.

did salaries at your organisation typically rise or fall between March 2014 and March 2015? (NB - not total salary bill)

salary changes	**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014		**State of the Archaeological Market** December 2012	
risen by above inflation	24	53%	9	29%	9	19%
risen by inflation	9	20%	9	29%	17	36%
unchanged	11	24%	13	42%	16	34%
fallen by up to 10%	0	0%	0	0%	5	11%
fallen by over 10%	1	2%	0	0%	0	0%
total	45		31		47	

The majority of respondents reported salaries as having risen by above inflation, with a further 20% reporting that salaries had risen by inflation. One respondent reported salaries as having fallen (which no respondents in 2014 had done).

Given that inflation in March 2015 was actually 0.0% (CPI rate)[10], many of the responses to this question may have been based on perceptions of what inflation had been at the time that salaries were changed, rather than specific reference to the inflation date on the survey date (31st March 2015).

The overall sense that salaries were rising, combined with the increase in the numbers of people employed, makes this a significant indicator of overall positive confidence within the sector.

[10] http://www.rateinflation.com/inflation-rate/uk-historical-inflation-rate accessed 27th July 2015

In terms of the average sizes of the workforce at the organisations where data on salary changes are available, the organisations where salaries were reported as having risen by more than inflation were typically larger than those that did not report this; the one organisation where salaries had fallen was very small.

salary changes March 2015	organisations	individuals	average size of workforce

3.6 Charge-out Rates

Respondents were asked about any changes to their charge-out rates in the year ending 31st March 2015, and then about how they anticipated they would change in the next year.

How did your charge out rates change in the year to the end of March 2015?

- *by what percentage did your charge-out rates increase (+) or decrease (-) over the year ending 31 March 2015?*
- *by what percentage did you or do you anticipate that your rates will increase (+) or decrease (-) over the year ending 31 March 2016?*

	Reported Change to March 2015	**Anticipated Change to March 2015** (reported in 2014)	**Anticipated Change to March 2016**
range	-10.0% to 10.0%	0.0% to 10.0%	-5.0% to 15.0%
Mean	2.8%	3.3%	3.6%
median	3.0%	2.2%	4.0%
mode	5.0% (11 responses)	0.0% (7 responses)	5.0% (12 responses)
n=	41	26	41

While the range of responses to the question of how much charge-out rates had changed in 2014-15 extended from 10% to minus 10%, on average (mean) charge out rates had risen by 2.8% (and the median figure - the middle point on the range of responses from high to low - was close to this figure). In comparison, the mean anticipated changes from the March 2014 survey were higher, but that was from a smaller sample.

Looking ahead, respondents typically expected their charge out rates to increase by higher levels (3.6%) in 2015-16 than they did in 2014-15, a further indicator of increasing confidence in the sector.

As the March 2015 annual UK inflation rate (CPI) was 0.0%, 71% of respondents had increased their charge-out rates in 2014-15 by more than this amount.

4 FINANCIAL PERFORMANCE

Respondents were asked a series of questions about their organisation's financial performance in financial year 2014-15. It was recognised that some respondents might be reluctant to release such information (even though the responses were anonymous).

Overall, the financial performance statistics indicate that the sector was growing and had positive future expectations.

Average financial turnovers were increased from 2013-14 to 2014-15.

Reported profit (or surplus) levels continued to be relatively low.

In terms of business activity, residential development continued to very clearly be the biggest market sector, and the largest source of funding by far was the private sector; this actually increased in importance when compared with 2013-14.

4.1 Turnover

What was your annual turnover (in £) in financial year 2014-15?

Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc
if your accounting period does not run from April to March, please indicate fee income for nearest 12-month period for which audited figures are available, making clear which period they cover.

your UK turnover in year ending 31 March 2015
your turnover from non-UK sources (including Republic of Ireland) in year ending 31 March 2015

	range	mean	median	*n=*
UK Turnover	£54,000 to £10,905,000	£1,879,543	£864,000	39
non-UK turnover	£0 to £700, 000	£60,011	£0	37; 28 reported zero return

2014 figures (from *Heritage Market Survey 2014*)

	range	mean	median	*n=*
UK Turnover	£68,000 to £6,578,420	£1,641,720	£740,935	20
non-UK turnover	£0 to £300,000	£32,977	£0	18; 15 reported zero return

Respondent organisations typically turned over £864,000 in 2014-15 (half generated more than this amount of revenue, half less). For most respondents, none of this income was generated outside the UK.

However, because some of the turnover figures at the high end of the range were particularly large, the average (mean) UK turnover for an applied archaeology company in 2014-15 was £1.88m, an increase of 14.5% on the figures reported for 2013-14.

In total, this survey approached the 89 organisations that are members of FAME or that are CIfA Registered Organisations. If the total turnover figures are extrapolated from the 39 responses to this question to that total of 89, then it could be estimated that UK commercial, applied archaeology generated a total of £167m revenue in 2014-15.

Most companies did not generate any non-UK income, but those that did generated an additional 3.2% of additional turnover from those sources.

	annual (UK) turnover			Source
	n=	average	change	
2014-15	37	£1.88m	+14.5%	Archaeological Market Survey 2015 March 2015
2013-14	20	£1.64m		Heritage Market Survey 2014 March 2014
2012-13	no data available			
2011-12	33	£1.71m	-6.6%	State of the Archaeological Market December 2012
2010-11	32	£1.83m	-4.2%	State of the Archaeological Market December 2012
2009-10	32	£1.91m		State of the Archaeological Market December 2012

33 organisations provided data for both financial turnover and numbers of staff; on average these organisations employed 41.3 members of staff each, with an average turnover per staff member of £45,914.

The data from 2013-14 were from organisations with fewer staff (29.2 on average), and although the average turnover per organisation increased in 2014-15, it can be calculated that the reported average turnover per member of staff fell by over £10,000 or by 18.4% in 2014-15.

average turnover per member of staff	
2014-15	£45,914
2013-14	£56,237
2012-13	no data available
2011-12	£53,271

While the numbers of staff had increased, the levels of turnover per worker – as a proxy measure of productivity – had actually fallen. This is likely to be the result of more junior staff being hired and so making up a larger share of the workforces as organisations expanded.

Respondents felt positive about future turnover prospects, with the average expectations for 2015-16 being an increase in turnover of 7.6% (the 2014-15 expectation was for an increase of 6%).

29 respondents provided data on their contributions to the community, public archaeology and education which had not been paid for directly by a client. On average these contributions were £35,820, an increase on the 2013-14 figure of £21,113.

These contributions equated to 2.2% of average annual turnover (an increase from 1.3% in 2013-14).

predicted % change in turnover between years ending 31 March 2015 and 31 March 2016

your contribution to the community, public archaeology and education which has not been paid for directly by a client

	range	mean	median	*n=*
anticipated change	-50.0% to +50.0%	+7.6%	+10.0%	39
non-client contributions	£0 - £500,000	£35,820	£3,442	29; 10 reported zero returns

4.2 Profit levels

Respondents were asked about the levels of profit (or surplus, for not-for-profit enterprises) realised in financial year 2014-5.

your surplus (plus or minus) in the year ending 31 March 2015

	range	mean	percentage of mean turnover	median	n=
surplus 2014-15	£935,000 to - £1,017,807	£46,637	2.5%	£5,500	33
surplus 2013-14[11]	£251,000 to - £3,000	£31,582	1.9%	£0	24

Six of the 33 organisations responding in 2015 reported negative figures, representing absolute losses (with one organisation reporting losses of over £1 million pounds in 2014-15), while a further six reported no surplus or loss. It is possible that these figures may be due to previous problems related to the recession and legacies having to be accounted for during 2014-15.

level of profit as % of turnover (surplus)	Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014		State of the Archaeological Market December 2012	
<5%	23	70%	18	75%	28	70%
5-10%	6	18%	3	12%	9	23%
10-25%	4	12%	3	12%	2	5%
>25%	0	0%	0	0%	1	3%
total	33		24		40	

[11] reported in *Heritage Market Survey 2014*

As reported previously, the majority of respondents continued to report having generated very low levels of profit, but the overall figures suggest a slight increase in profitability in 2014-15 (an increase from an average of 1.9% to 2.5%).

4.3 Areas of Activity (turnover)

Please estimate your UK turnover from the following sources in the year ending 31 March 2015

	n=	total	mean	%	2014 %
central government departments and agencies	11	£7,775,600	£706,873	13%	14%
other public bodies (including universities, public-private partnerships and local enterprise partnerships)	18	£1,109,588	£61,644	2%	5%
community groups (including HLF projects, town and parish councils and neighbourhood forums)	19	£1,051,102	£55,321	2%	3%
district, county or unitary councils (local planning authorities)	21	£2,094,137	£99,721	4%	5%
national agencies (EH, HS, Cadw etc)	18	£2,801,503	£155,639	5%	6%
private sector clients (including third parties)	27	£43,483,761	£1,610,510	75%	67%
aggregate total	**29**	**£58,315,691**	**£2,010,886**		

Of 29 respondents to this question, most had secured some income from each of the six defined areas of turnover activity. Funding from private sector clients represented the overwhelming majority (75%) of the total estimated income reported.

In comparison with 2013-14, the distribution of funding sources has remained broadly constant, although the percentage of funds received from private sector clients has increased, while the proportion received from local planning authorities and other public bodies has concomitantly decreased.

4.4 Market Sectors

The survey sought detailed information on which market sectors were generating income for the respondent organisations.

Please do not include non-UK turnover in this section
*In the column headed "**UK income**", please indicate your UK income in the year ending 31 March 2015 for the work in each of the sectors listed.*

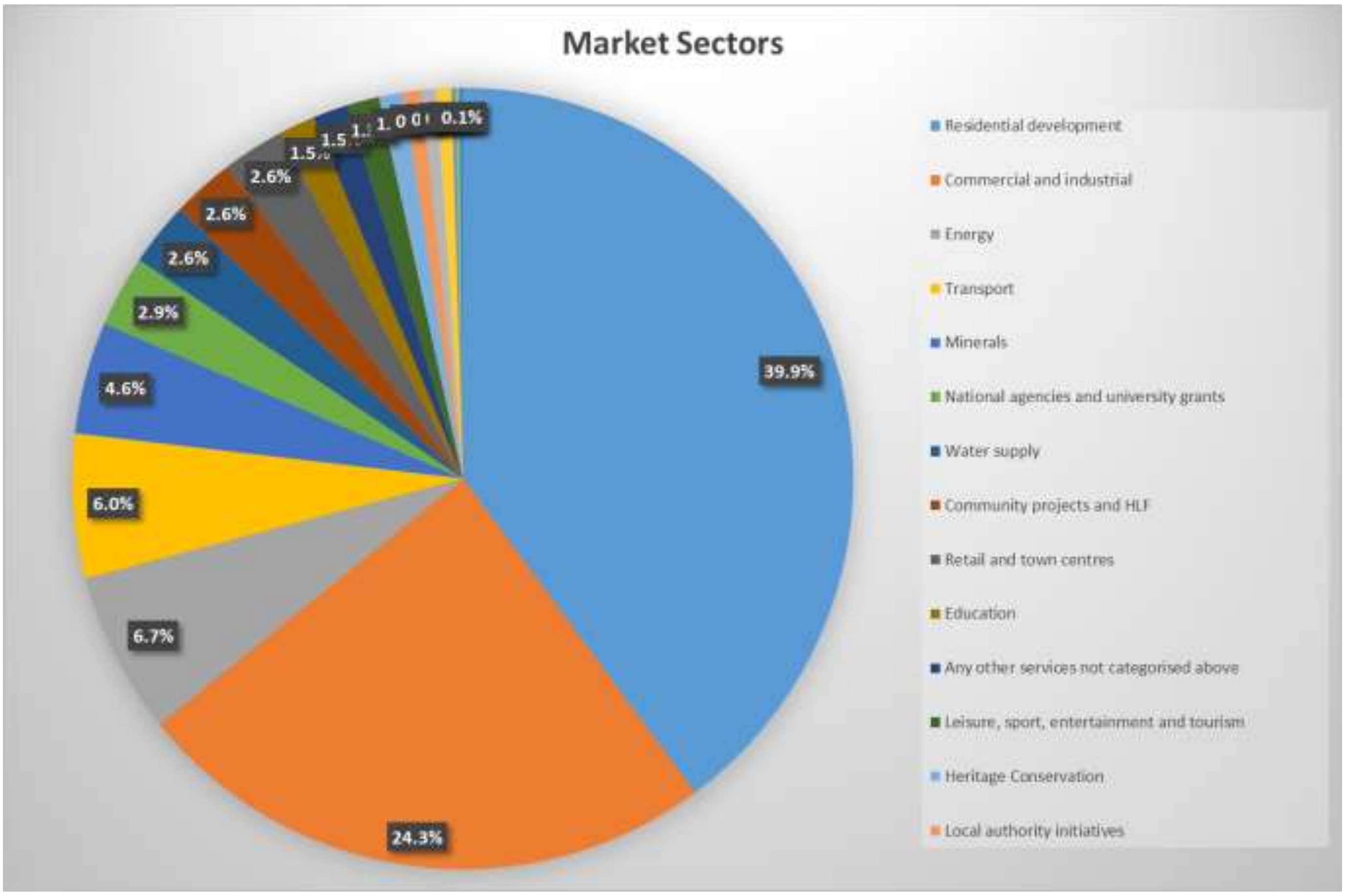
To avoid double counting, please do not include fee income from any commission in more than one box. The total for this column must not exceed total fee income reported under turnover in the question above. If you are unsure about which sector to attribute a particular commission to, please refer to the Note to Respondents below.

Category	total	%	% 2014	range	average	*n=*
residential development	£14,804,304	39.9%	40.5%	£10k - £5m	£870,841	17
commercial and industrial	£9,022,071	24.3%	5.6%	£17k - £5m	£751,848	12
energy	£2,494,566	6.7%	11.6%	£10k - £1.4m	£191,890	12
transport	£2,214,239	6.0%	3.9%	£4k - £1m	£184,520	12
minerals	£1,725,034	4.6%	4.7%	£8k - £500k	£143,753	12
national agencies and university grants	£1,095,113	2.9%	2.4%	£8k - £290k	£109,511	10
water supply	£981,859	2.6%	4.6%	£3k - £400k	£122,745	8
community projects and HLF	£960,768	2.6%	3.8%	£4k - £200k	£73,905	13
retail and town centres	£957,170	2.6%	5.2%	£5k - £500k	£108,352	9
education	£560,850	1.5%	2.8%	£2k - £200k	£62,317	9
any other services not categorised above	£547,177	1.5%	1.1%	£5k - £460k	£91,196	6
leisure, sport, entertainment and tourism	£489,129	1.3%	6.1%	£5k - £300k	£69,876	7
heritage conservation	£368,520	1.0%	2.2%	£2k - £200k	£73,704	5
local authority initiatives	£278,903	0.8%	0.7%	<£1k - £100k	£39,843	7
assistance to LPAs in delivering development control services	£231,500	0.6%	1.6%	£48k - £115k	£77,167	3
other research and public archaeology	£231,113	0.6%	0.9%	<£1k - £80k	£25,681	9
telecommunications	£61,085	0.2%	0.2%	£5k - £50k	£20,362	3
waste	£58,665	0.2%	0.8%	£4k - £50k	£19,555	3
health	£50,985	0.1%	1.4%	£1k - £50k	£25,492	2
aggregate total	**£37,133,051**					**20**

Residential development continued to represent the largest market sector, accounting for nearly 40% of income. The second largest market sector was commercial and industrial; these two sectors combined represented nearly two-thirds of the reported revenue of the respondent organisations.

Energy and transport were then the next most significant sectors with no other single market sector accounting for more than 5% of reported revenue.

The total amount reported income by market sector was more than double the total reported for 2013-14 (£15,317,456); this cannot be taken as an indication that the total amount being generated by the sector doubled, but rather this was a function of the limited number of returns provided to this question in 2014.



5 BUSINESS CONFIDENCE

The sector in 2015 was more confident than it had been at any time since 2008 (the start of this data collection exercise). The high levels of confidence reported in 2014 had been maintained, with positive sentiment increasing from the year before.

best ever expectations of maintaining or increasing staffing levels
best ever feelings about market conditions
for the first time more expected no business failures than expected some
high levels of planned expansion

5.1 Staffing Levels

At the end of March 2015, did you anticipate any changes to your staffing levels over the next year (to 31 March 2016)?

change in staffing	Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014		State of the Archaeological Market December 2012	
	23	62%	13	57%	18	42%
	11	30%	8	35%	21	49%
	3	8%	2	9%	4	9%
	37	+54%	23	+48%	43	+33%

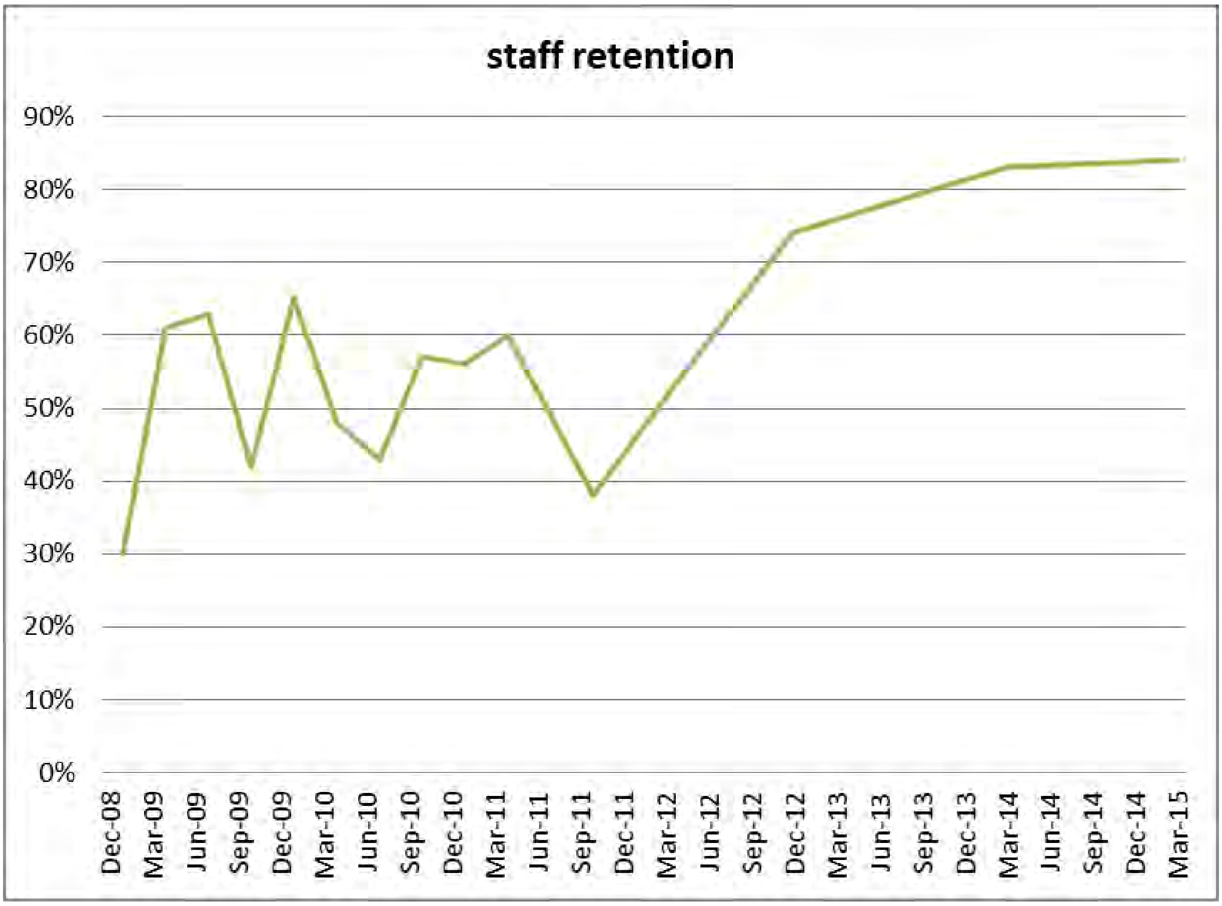
Don't know or no answer excluded

Comments received:

will take on at least 2 junior members of staff in next year
we have already seen a significant increase in permanent and fixed term staff since March 2015 and expect this to continue
we had just undergone a restructure and lost 1.5 posts
We are presently as large as we wish to be and will do our best to use flexible pricing in order to manage work flows that will sustain the current scale of operations.
We are laying off externally funded fixed-term contract staff once current projects are completed.
we anticipate an increase of 120 staff but then a fall before the end of the FY by 100
Small increase

Since April 2012, the proportion of respondents who expected to maintain or increase staff levels has increased with every iteration of this survey. In 2014-15 it was at its highest level since this series of surveys began in 2008, having increased slightly since 2014 (although it is notable that the overall sentiment in this area has always been positive, as at every survey point more businesses expected to maintain or increase their staff numbers in the forthcoming period than anticipated losing staff).

Note the graph below represents the proportions of respondents that expected to either increase or maintain staff numbers minus the numbers that expected to lose staff in the forthcoming period – a positive result is considered to either be maintenance or growth; it is not calculated as the number expecting to have more staff minus the numbers expecting to become smaller.



5.2 Market Conditions

On 31 March 2015, did you believe that market conditions would deteriorate over the next 12 months? (to 31 March 2016)

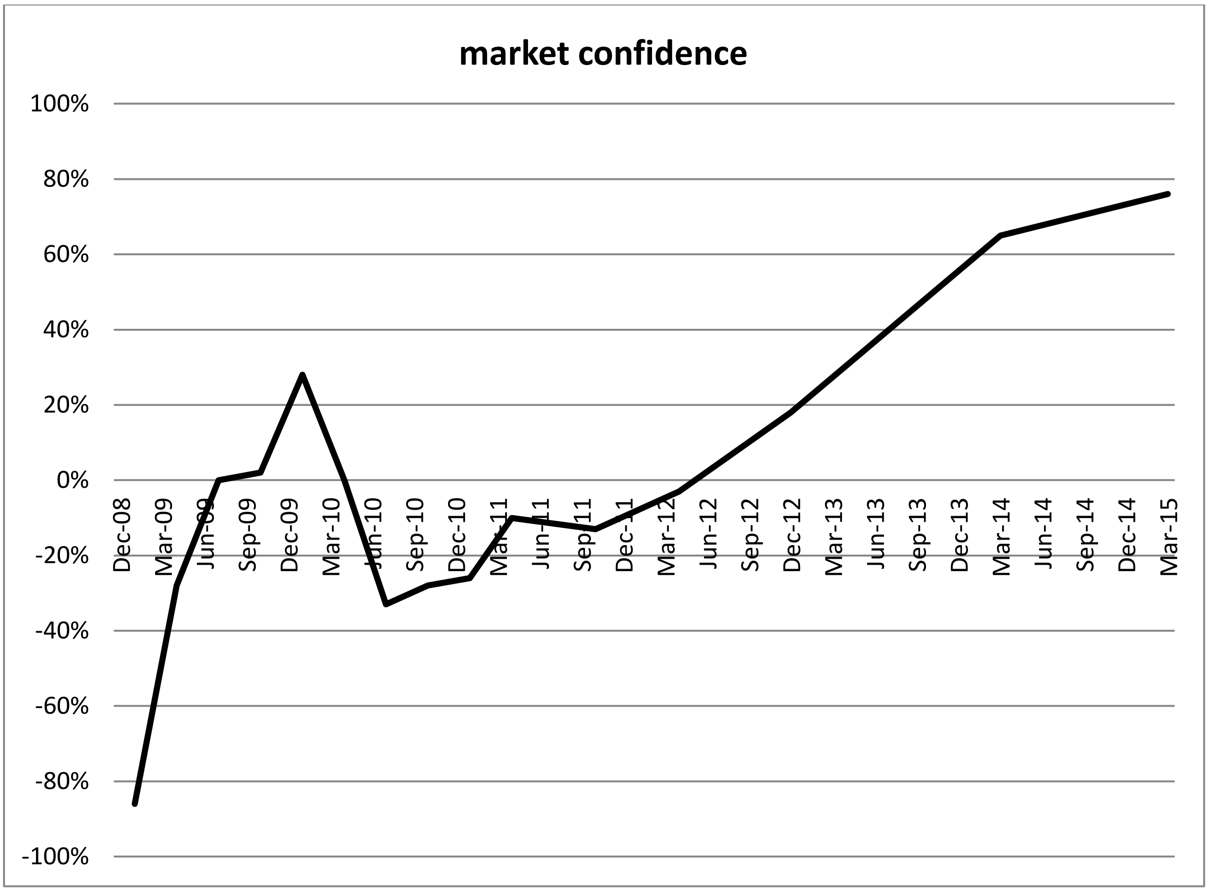
market conditions	Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014		State of the Archaeological Market December 2012	
the market will deteriorate	3	8%	3	13%	13	30%
the market will not deteriorate	31	84%	18	78%	21	48%
don't know	3	8%	2	9%	10	23%
total	37	+76%	23	+65%	44	+18%

The sector was very confident that market conditions would not deteriorate in 2015-16. This represented an overwhelmingly positive sentiment that was more positive than it had been in any of the previous surveys in this series.

Comments received:

A temporary cooling of the house building sector in the SE was evident in the lead up to the UK General Election - received wisdom at the time was that this would lead to renewed growth in the summer. Anticipated capacity bottle-necks in 2016+ (HS2 & TTT) were a major influence in forward planning, encouraging investment in staff development.
getting very busy
In terms of local authorities but not necessarily in terms of commercial archaeology
market was improving during 2014-15
unless there are changes to the planning system which lead to decreased opportunities for archaeology
We had a number of good projects in the pipeline that would require extra staff, however the developers on two of them decided not to proceed and the third project has been postponed until later in the year.
We have been very optimistic for over 18 months now.
With respect to NI there is a lot of uncertainty about the level of public spending, which is the mainstay of the economy. It is likely that pressure will be put on capital spending.

Since December 2012, more respondents have considered that market conditions would improve than would deteriorate, and overall confidence in the sector's market conditions has been increasing in every survey since September 2011.



5.3 Businesses Ceasing Trading

Since the start of this series of surveys, respondents have been asked if they expected any archaeological practices to cease trading in the next 12 months. In the earliest iterations of the survey, an overwhelming – near universal – majority of respondents expected that this would happen.

In March 2015, for the first time in this series of surveys, more respondents did not believe that any businesses would fail than did.

At the end of March 2015, did you expect any archaeological practices to cease trading over the next 12 months?

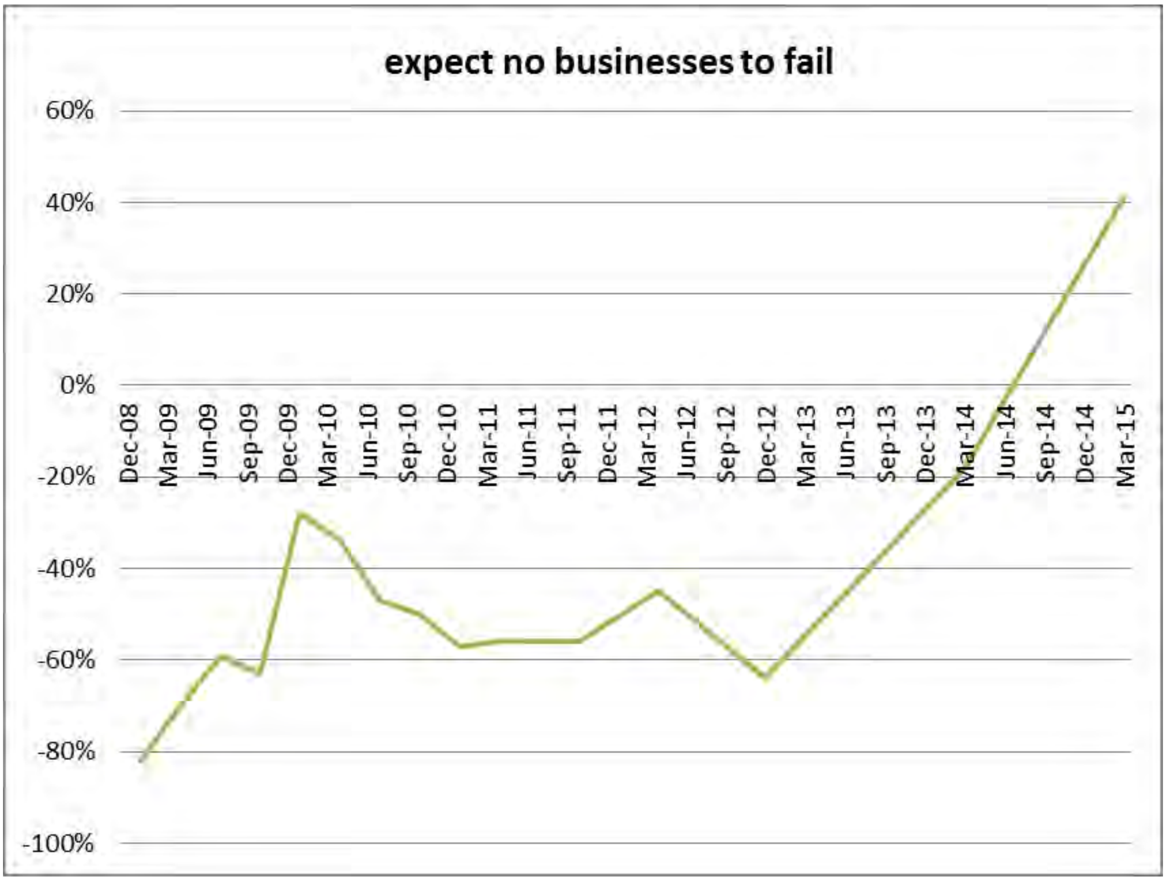
businesses ceasing trading	Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014		State of the Archaeological Market December 2012	
yes	6	16%	11	48%	32	73%
no	21	57%	7	30%	4	9%
don't know	10	27%	5	22%	8	18%
total	37	+41%	23	-18%	44	-64%

Comments received:

A return to the rates of growth witnessed last year is a potential cause of both cash-flow problems (project starts accelerating faster than project completions) and delivery problems (staff shortages contributing to fieldwork and reporting delays). Whilst most companies will thrive on new opportunities, these risks incline me to believe that one or two may be found wanting.
aware of serious late payment and cashflow concerns, and these are increasing and will threaten small organisations
looks like there is a lot of work on its way compared with years since 2008
Only a few work in NI and we are all managing at present, there is limited work, if more consultancies moved into this area I believe some of the businesses would close.
Quite possibly - even though the volume of work has increased significantly the environment has changed and some units have not adapted well.

The change from March 2014 to March 2015 has been the largest degree of change reported between any two surveys. As well as moving into an overall positive sentiment for the first time (more expect no businesses will fail than expect some will), a change from a net -18% in 2014 to +39% in 2015 reflects a remarkable change of attitudes.

The title of the graph below emphasises that positive figures reflect an expectation that no businesses in the sector will fail in the next year.



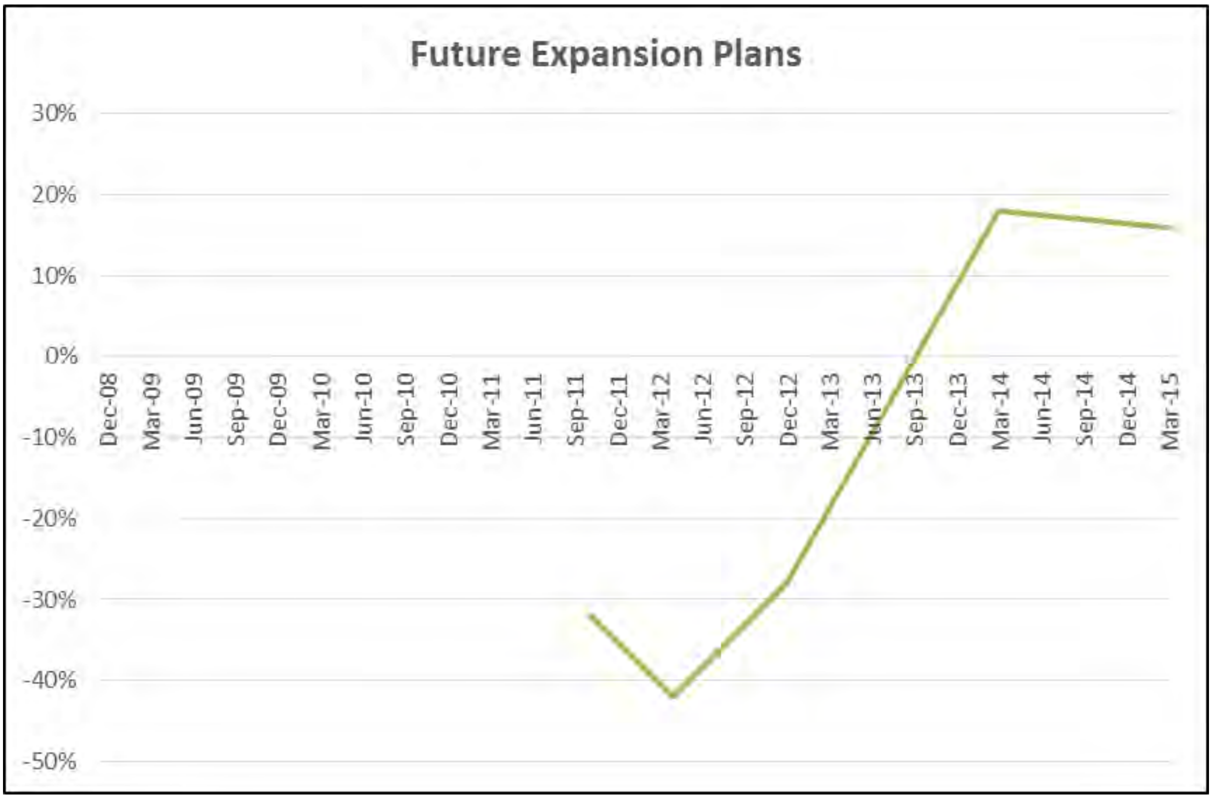
5.4 Expansion

Respondents were asked about planning for future business expansion.

Did you have any plans to expand your business significantly over twelve months from March 2015 (e.g. in premises, vehicles, capital equipment)?

expansion plans	Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014		State of the Archaeological Market December 2012	
yes	21	57%	11	48%	16	36%
no	15	41%	7	30%	28	64%
don't know	1	3%	5	22%	0	0%
total	37	+16%	23	+18%	44	-28%

The results of this survey show, for the first time, a clear majority of respondents planning to expand in 2015-16. Feelings about expansion have been becoming more positive since April 2012, and respondents were more definite about their plans – whether to expand or not – although the net score shows the sector was being slightly more cautious than they had been in 2014.



Comments received supported the overall positive outlook:

cautious expansion planned
in particular staff training (to aid retention) - also equipment purchases
Investment needed in all of the above areas
new office
New premises are under construction plus some modest capital expenditure
On the 1st October 2015 RCAHMS will merge with Historic Scotland to create a new merged body. The total staffing number for this new body is estimated to be 1200 FTE.
We are looking to increase staff numbers and invest in capital expenditure
We are mid-way through a major investment in new premises in Essex (relocation of offices brought about by a lease expiry) at a total cost of about £850k, as well as upgrading IT platform and vehicle fleet in Sussex (cost approaching £100k), continued investment in our UAV and survey capacity (also approx. £100k of investment) and the development and roll-out of our new inter-relational database. Allied to routine CAPEX we are likely to spend about £1.5M on improving our business platform across 14/15 and 15/16 financial years.
We have only just purchased new vans and a mini Mira High density array.
Yes we would like to get new survey equipment as our present equipment is now quite old.

6 SKILLS TRAINING AND QUALIFICATIONS

The survey sought to identify which areas of skills were being lost to the sector, where skills were being bought in (skills shortages) and where organisations were seeking to address the issue through training (skills gaps).

Throughout this part of the report, figures relate to the respondents who have experienced a particular, specific change in the previous year as a percentage of all who responded to each general question – eg, 18 respondents had lost skills in some way in the previous year. Of these, 13 had lost fieldwork skills, so the percentage presented is 72% (13/18). This does not 72% of fieldwork skills have been lost from the sector, nor does it mean that 72% of all organisations in commercial archaeology lost fieldwork skills.

Respondents were also asked in general terms whether they considered there were particular areas with skills problems across the sector.

6.1 Areas of Skills Losses

As has been the case in every single iteration of this survey since 2008, fieldwork skills were again the area where skills loss was most frequently identified, and post-fieldwork analysis continued to be the second-most commonly reported area where skills were being lost.

With a highly dynamic workforce, with high numbers of people joining and leaving organisations, it is always likely that it is in the areas of primary data generation (fieldwork) and secondary analysis (post-fieldwork) that people will change employers and so skills will (at least temporarily) be lost.

In the twelve months to the end of March 2015, did your organisation lose skills in any of these areas?

	Archaeological Market Survey 2015 March 2015		**Heritage Market Survey 2014** March 2014		**State of the Archaeological Market** December 2012	
fieldwork (invasive or non-invasive)	13	72%	9	69%	8	53%
post-fieldwork analysis	6	33%	4	31%	6	40%
desk-based or environmental assessment	5	28%	1	8%	3	20%
data management	4	22%	2	15%	2	13%
providing advice to clients	4	22%	1	8%	4	27%
other	2	11%	3	15%	1	7%
artefact or ecofact conservation	1	6%	1	8%	3	20%
total respondents	18		13		15	

“other” skills reported as being lost:

building recording
specialist archaeological knowledge and expertise

6.2 Areas of Skills Buy-in

As was repeatedly seen in previous iterations of this survey, artefact or ecofact conservation was the area where expertise was most often bought in from external providers (and was done so by the majority of respondents who identified that they bought skills in).

Conservation was not reported as a skill being lost by employers, nor was it identified as being a priority for in-house training, because this was now very much the norm to be provided by subcontractors.

Post-excavation analysis was bought in by the majority of respondents who identified that they bought-in skills, suggesting that the results of increased levels of fieldwork meant that these services were being both undertaken in-house and by consultant specialists, while the relative numbers of organisations temporarily buying-in fieldwork skills was lower than in 2014. When considered alongside the increase in staff numbers in 2015, this could suggest that as more fieldworkers were being taken on as employees, this was becoming less likely to be provided as an external service.

Looking at changes over the three years from 2012 to 2015, it is noticeable that fieldwork was being bought in much less often in 2015 while post-excavation (post-fieldwork) skills were being bought in much more often.

In the twelve months to the end of March 2015, did your organisation have to buy-in skills in any of these areas?

skills bought in	Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014		State of the Archaeological Market December 2012	
artefact or ecofact conservation	19	61%	12	67%	23	61%
post-fieldwork analysis	16	52%	8	44%	17	45%
fieldwork (invasive or non-invasive)	10	32%	9	50%	15	39%
data management	5	16%	0	0%	2	5%
other	3	10%	1	0%	3	8%
desk-based or environmental assessment	2	6%	4	22%	3	8%
providing advice to clients	0	0%	2	11%	0	0%
total respondents	31		18		38	

"other" skills reported as being bought in:

geophysical survey on larger projects, C14, some medieval ceramics analysis, copy-editing, financial auditing
Marketing
Palaeoenvironmental analyses, radiocarbon dating, artefact analyses

email enquiries@landward.eu
Registered in England and Wales, number 03749035

6.3 Areas of Training

In the twelve months to the end of March 2015 did your organisation invest in skills training in any of these areas?

training investment	Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014		State of the Archaeological Market December 2012	
fieldwork (invasive or non-invasive)	20	65%	12	57%	15	38%
desk-based or environmental assessment	17	55%	11	52%	12	31%
post-fieldwork analysis	14	45%	9	43%	12	31%
data management	14	45%	9	43%	7	18%
other	5	16%	7	33%	7	18%
artefact or ecofact conservation	9	29%	6	29%	7	18%
providing advice to clients	9	29%	7	33%	3	8%
total respondents	31		21		39	

The following 'other' skills were identified as having been areas where organisations invested in training:

aerial photo interpretation
Emergency First Aid at Work training, Manual Handling training, ISOH courses for senior staff in Managing Construction
Geophysical Software
Health & Safety
Health and Safety; Environmental Analysis, Survey
Insights and other management related training, other archaeological training, NVQ (two posts)
IT, fundraising, conservation
New skills needed across the board for both existing and new staff
Project management and general management
Quality Management

The majority of respondents invested in both fieldwork training and post-fieldwork analysis, the two areas where skills were most commonly being reported as being lost (so therefore these were skills gaps, skills that existing staff needed but lacked, that were being tackled by investment in training). Very substantial minorities were also investing in training in data management and desk-based or environmental assessment.

As first seen in 2014, and in contrast with earlier surveys, a much higher proportion of FAME members and CIfA Registered Organisations were investing in training while they were simultaneously increasing the number of people on their payrolls.

When areas of skills training are compared to the areas where outside expertise was being bought in (skills shortages – where employers cannot find staff with the relevant skills), fieldwork and post-fieldwork skills are being both bought in and internally trained up, but conservation continues to be much more likely to be bought in – this is now rarely a skillset that respondent organisations have in-house.

6.4 Skills Issues across the Sector

Respondents were asked about their perceptions of skills issues across the archaeological sector. The phrase "skills shortages" was used here in the questionnaire; this can have a technical definition relating to a problem skills area that is addressed through bringing in external expertise, but here was considered to refer to areas where there is a general underprovision of skilled labour.

On 31 March 2015, did you think there were skills shortages across archaeological practice in any of these areas?

skills issues	**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014		**State of the Archaeological Market** December 2012	
fieldwork (invasive or non-invasive)	18	67%	5	36%	10	31%
post-fieldwork analysis	15	56%	8	57%	14	44%
desk-based or environmental assessment	9	33%	4	29%	8	25%
artefact or ecofact conservation	8	30%	3	21%	9	28%
providing advice to clients	8	30%	4	29%	10	31%
data management	3	11%	1	7%	10	31%
other	5	19%	4	29%	3	9%
total respondents	27		14		32	

"Other" areas where skills issues were identified:

Archaeological Project Management
artefact specialists
communications, marketing, fundraising
Geophysics
Project and site management, admin, finance

As was first recognised in 2014, respondent organisations views on skills issues across the sector continue to closely match across to what they can identify within their own organisations – and so skills issues mirror training needs. This is very definitely a positive state of affairs, whereby employers are recognising and then taking on responsibility for addressing skills issues, rather than leaving them for outside bodies.

6.5 NVQ

The National Vocational Qualification in Archaeological Practice was first awarded in 2009 (the formal title for this qualification is now the *EDI Level 3 NVQ Certificate in Archaeological Practice)*. Respondents were asked about whether they had previously supported a member of staff gaining such a qualification, and whether they would consider doing so in the future.

On 31 March 2015, had you or were you considering supporting a member of staff to gain a vocational qualification in archaeological practice (NVQ)?

NVQ support	**Archaeological Market Survey 2015** March 2015				**Heritage Market Survey 2014** March 2014				**State of the Archaeological Market** December 2012			
	have supported		would consider in future		have supported		would consider in future		have supported		would consider in future	
yes	11	34%	15	60%	6	33%	11	65%	15	42%	30	71%
no	21	66%	3	12%	12	67%	1	6%	19	53%	6	14%
don't know	0	0%	7	28%	0	0%	5	29%	2	6%	6	14%
total	32		25		18		17		36		42	

FAME members and CIfA Registered Organisations continue to express positive sentiments about the NVQ in Archaeological Practice, with around a third of respondents having previously supported a candidate and more than half being prepared to consider such support in the future. Over time, the proportion that have supported someone to gain this qualification has remained relatively constant, and the percentage that would consider future support has slowly declined.

7 PERCEPTIONS

	strongly disagree	disagree	unsure	agree	strongly agree
score	1	2	3	4	5
the economic climate for development will improve over the next 12 months	0%	0%	20%	57%	23%
2015 average	4.03 (agree) 🡅				
2014 average	3.73 (agree)				
your heritage team will grow within the next 12 months	3%	9%	26%	40%	23%
2015 average	3.74 (agree) 🡅				
2014 average	3.60 (agree)				
your heritage team will contract within the next 12 months	23%	54%	20%	0%	3%
2015 average	2.06 (disagree) 🡇				
2014 average	2.16 (disagree)				
late payment of bills is an increasingly significant problem for your business	0%	37%	0%	49%	14%
2015 average	3.40 (unsure) 🡅				
2014 average	3.37 (unsure)				
non-payment of invoices has been a significant problem for your business	6%	41%	3%	26%	24%
2015 average	3.21 (unsure) 🡅				
2014 average	3.04 (unsure)				
current national planning policy frameworks are making it easier to justify heritage work and revenue levels	6%	24%	21%	38%	12%
2015 average	3.29 (unsure) 🡇				
2014 average	3.40 (unsure)				
current national planning policy frameworks weaken the case for heritage work and revenue levels	12%	38%	24%	21%	6%
2015 average	2.74 (disagree) 🡅				
2014 average	2.53 (disagree)				
a shortage of heritage staff in LPAs is a major constraint on heritage projects	0%	6%	15%	35%	44%
2015 average	4.17 (agree) 🡅				
2014 average	3.92 (agree)				

Further comments on Perceptions:

The system would not let me answer 'No' for the NVQ question on the previous page
The system in NI is a bit different to the rest of the UK, DOE: HED (formally NIEA) are not consistent in their requirements from site to site or company to company, they have no proper written standards to issue licences, make people site directors or even excavate sites. And most importantly they have no teeth to go after developers who damage or destroy sites, developers know that they will get a measly fine which is cheaper than undertaking archaeological work and there are no restrictions placed on them for further developments.
'Pay when we get paid' contracts are common and although they usually work reasonable well we occasionally find ourselves owed for much longer than anticipated
Archaeology is such a small part of the business of UCL that late payment of invoices is an inconvenience to us rather than a significant problem. Were we not this insulated from cash-flow problems it would be a considerable concern.
Archaeology being in NPPF alongside other material issues in the planning process gives us equal status in the eyes of some clients as their other constraints. Archaeology is increasingly a routine consideration for developers rather than an exceptional unpleasantness

Respondents considered that the economic climate for development would improve in the next 12 months, and their views had become more positive than they were in 2014.

Typically, they thought their heritage teams would grow, and they were even more confident that their teams would not contract in size. They were more confident of growth than they had been in 2014, and were also more confident that they would not shrink than they were in 2014.

The majority of respondents considered that late payment of bills was an increasingly significant problem for their business, with this being felt slightly more strongly than in 2014, and while non-payment was not yet a significant problem for most businesses, there was more concern about this than there had been in 2014.

Respondents tended to agree with the statement that “current national planning policy frameworks are making it easier to justify heritage work and revenue levels“, and to disagree with the assertion that “current national planning policy frameworks weaken the case for heritage work and revenue levels”, but in both cases they were less certain of these views than they had been in 2014.

They agreed that a shortage of heritage staff in LPAs was a major constraint on heritage projects, and this was felt even more strongly than it had been in 2014.

8 FURTHER COMMENTS

17 it is not possible, at present, to provide figures about community and education contribution, but it is not zero. 19 where there are blanks these figures are included in the figure above. Data is not collected at these levels. Growth estimates is not broken down in this way.
Economic activity is on the increase in the Rep of Ireland albeit starting from a low base. There is still significant pressure on rates. There is a lot of uncertainty about the NI economy given pressure from Westminster for large cuts to the annual budget. Rates in NI are very low (much over then the need to be) given the small number of suppliers in the market.
11) You will probably have a record of what we submitted last year - I didn't keep a record 16) null response as the question does not reflect our approach to costing and pricing 19) don't have the time to work that all out - sorry
Last year I wrote how this questionnaire didn't really fit our focus on research/public/community - but this one works much better. It's clear that the market is becoming much more aware of the potential of community work, and we've started to see the same kind of cut-throat tender strategies that have wreaked havoc with construction based work now being applied. It is therefore likely that this market segment will also succumb to the same constraints that have hindered the growth of the rest of the commercial profession.
Margins are minimal: many archaeological companies put in low fee quotations in order to win work, dragging down the construction & development industry's perception of costs for archaeological work. House builders in particular seek to drive down the costs of archaeological work, also looking for fixed cost quotations to put all the risk on the archaeological company. It is going to be difficult to break this cycle until the majority of archaeological companies are prepared to quote reasonable fees/rates for their professional staff.
NB. Our financial year runs from June to June and are not audited. I have taken the financial data from our monthly management accounts for the period required - these will be reasonably accurate. We have had quite a good year with margins back to the sort of levels we were used to seeing before the recession. Our staff are better remunerated, the company better resourced and our reserves stronger. There are some problems with skills shortages but on the whole things are looking good. Re. the data you collect in this survey: It is very difficult to determine industry norms and what companies should be aspiring to when there are so many different types of organisations involved in the commercial side of archaeology (the numbers often quoted seem low to us). Question 17d of this survey (Your contribution to the community) is clearly very important. These contributions can only be made if a surplus is generated so unless we know the value of this contribution we cannot know whether a company is making a low margin a) because it is inefficient b) effectively buying work with cheap prices c) using a large part of the surplus to support otherwise unfunded outreach events and publications as per their constitution. If you could perhaps separate out the data a little more by type of company (Local Authority Units, Charitable Trusts, Consultancy, Private Company etc.) that would help.

Our position is anomalous as we are a local authority that used to have an externally funded projects team that is being wound down as current project commitments are completed. Re Q17-19 most of our private sector income came from EH as our NHPP projects are taking the longest to complete. We do also have some large backlog post-excavation projects but in nearly all cases they did not result in income during 14/15, being either unfunded or previously paid for. Private sector income is mostly from HER searches and FEP responses (the £18820). The Q regarding NVQs wouldn't allow me to put no for both questions - which is the case.
Q 28 stated 'error' when trying to note that we would also consider supporting a member of staff in the future. The market is crying out for more consolidation. 2015-17 appear to offer an unprecedented opportunity for the commercial archaeology sector to adopt more mature procurement practices. The English planning framework could do much more to require public benefit from archives.
Staffing and overall turnover figures are based on real data, but all other figures given here are exceptionally crude estimates that might best be ignored. We do not routinely record the types of market information required by this survey, and do not presently have the time to conduct a more detailed sectorial analysis.
This questionnaire is too long and time consuming. We don't collect the data on sectors so have to guess. If you want higher return rate make the questionnaire shorter.
We are failing collectively to address the problem of low charge-out rates. Archaeological work is undertaken with such low margins that it is not possible to develop it in a manner consistent with other commercial activities. We really need to discuss this freely- not with a view to fixing rates, but to achieving an understanding of where they need to be in order to develop staff and allow investment in technology and facilities. Mike Heaton's presentation at the FAME conference was spot on. Our inadequate understanding of commerce (myself included) means were operate in a failed market of our own making. I am lucky (?) enough to work for a multi-national company and can see how much more commercially astute our professional peers are. Archaeology does not have to be a permanent race to the bottom. If we are to attract investment and develop, we need to start operating with business margins rather than with the commercial approach of breadline charities.

APPENDIX – QUESTIONNAIRE

Heritage Market Survey 2015

CIfA Chartered Institute for Archaeologists

FAME ■ Federation of Archaeological Managers & Employers

Heritage Market Survey 2015

Dear Colleague,

FAME and CIfA, supported by Historic England, have appointed Landward Research Ltd to undertake annual surveys of suppliers to the **Heritage Market**.

I would like to ask you if you could please give up some of your time to answer the questions below. We seek information as it applied to your organisation on 31 March 2015 - so at the very end of financial year 2014-15.

This survey will extend the information gathered by the previous **Heritage Market Survey 2014** and the earlier **State of the Archaeological Market** and **Profiling the Profession: Archaeology Labour Market Intelligence** surveys.

You are able to save the questionnaire at any stage and to return to it later (by following the link in your invitation email). You are also able to print the entire questionnaire from any screen using the buttons at top right of each page.

The deadline for responses is Sunday 19 July 2015.

Your responses are fully confidential and will not be seen by any individual other than myself.

If you require further advice or information, please email hms@landward.eu.

Please complete the form by 19 July 2015.

Kenneth Aitchison Executive Director Landward Research Ltd

1. Please enter your organisation's name (to avoid duplicate entries being made)

2. Please provide an email address where you can be contacted in the event of any queries

3. Is your organisation a member of FAME?

- ○ yes ○ no

4. Is your organisation a CIfA Registered Organisation?

- ○ yes ○ no

5. How is your organisation legally constituted?

please check multiple categories if appropriate

- ☐ private limited company (ltd)
- ☐ public limited company (plc)
- ☐ registered charity
- ☐ constituent part of a local planning authority
- ☐ constituent part of a university

Page 1 of 11

☐ other

6. Where is the head office of your organisation located?

7. Are you also answering on behalf of any subsidiary offices? If so, please indicate where they are located?

☐ East of England ☐ East Midlands ☐ Greater London ☐ North East England
☐ North West England ☐ South East England ☐ South West England ☐ West Midlands
☐ Yorkshire and the Humber ☐ Scotland ☐ Wales ☐ Northern Ireland
☐ outside the UK

8. In which year did your organisation begin trading (in applied archaeology)?

Page 2 of 11

Heritage Market Survey 2015

CIfA Chartered Institute for Archaeologists

FAME Federation of Archaeological Managers & Employers

Heritage Market Survey 2015

Staff Numbers

9. How many full-time staff were based in your UK offices on 31 March 2015?

Please include all full-time or full-time equivalent staff, together with part-time staff, using estimates of full-time equivalency - for example, a member of staff working 2.5 days a week should be counted as 0.5.
Fee-earners: members of staff whose time can be billed to clients.

	FTE
total UK staff (managerial, professional, technical and administrative) employed	
total UK-based fee earners working full-time	

10. How many full-time staff were permanently based overseas on 31 March 2015?

Number of fee-earners permanently based outside the UK

11. How many UK members of staff (FTE) did your organisation have one year ago, on 31 March 2014 - the census date for the previous Heritage Market Survey?

12. How many of your members of staff were working on each of the following types of contract or agreement on 31 March 2015?

	full-time	part-time
permanent		
fixed term		
casual		
volunteer		

13. What level of staff turnover did you experience between 31 March 2014 and 31 March 2015?

14. If you lost staff in the period between 31 March 2014 and 31 March 2015, do you believe that these people left the profession or stayed within it with different employers?

- all left the profession
- most left the profession
- even split between leaving the profession and finding alternative employment within archaeology
- most found alternative employment within archaeology
- all found alternative employment within archaeology

comments?

15. Did salaries at your organisation typically rise or fall between March 2014 and March 2015? (NB - not total salary bill)

16. How did your charge out rates change in the year to the end of March 2015, and by how much do you expect them to change in 2015-16?

by what percentage did your charge-out rates increase (+) or decrease (-) over the year ending 31 March 2015?

by what percentage do you anticipate that your rates will increase (+) or decrease (-) over the year ending 31 March 2016?

Page 4 of 11

Heritage Market Survey 2015

CIfA Chartered Institute for Archaeologists

FAME Federation of Archaeological Managers & Employers

Heritage Market Survey 2015

17.
What was your annual turnover (in £) in financial year 2014-15?

Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc

If your accounting period does not run from April to March, please indicate fee income for nearest 12-month period for which audited figures are available, making clear which period they cover. Guidance on types of work to be included is in the Note to Respondents appended to this form. If your fee income for the year exceeded £5 million, we will require ask you to provide a breakdown of at least part of this fee income in the next page.

	£
your UK turnover in year ending 31 March 2015	
your turnover from non-UK sources (including Republic of Ireland) in year ending 31 March 2015	
predicted % change in turnover between years ending 31 March 2015 and 31 March 2016	
your contribution to the community, public archaeology and education which has not been paid for directly by a client	
your surplus (plus or minus) in the year ending 31 March 2015	

18.
Please estimate your UK turnover from the following sources in the year ending 31 March 2015

Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc

	£
private sector clients (including third parties)	
other public bodies (including universities, public-private partnerships and local enterprise partnerships)	
district, county or unitary councils (local planning authorities)	
national agencies (EH [now HE], HS, Cadw etc)	
central government departments and agencies	
community groups (including HLF projects, town and parish councils and neighbourhood forums)	

Heritage Market Survey 2015

CIfA Chartered Institute for Archaeologists

FAME Federation of Archaeological Managers & Employers

Heritage Market Survey 2015

19. Market Sectors

Please do not include non-UK turnover in this section

*In the column headed "**UK income**", please indicate your UK income in the year ending 31 March 2015 for the work in each of the sectors listed.*

Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc.

To avoid double counting, please do not include fee income from any commission in more than one box. The total for this column must not exceed total fee income reported under turnover in the question above. If you are unsure about which sector to attribute a particular commission to, please refer to the Note to Respondents below.

*In the two columns headed "**growth estimates**", please estimate what percentages of growth (+) or decline (-) were in the UK market in 2014-15 and what you think they will be in 2015-16 for services in each of the sectors listed.*

	UK income 2014-15	growth estimates	
	£	2014-15	2015-16
Construction			
Residential development			
Commercial and industrial			
Retail and town centres			
Leisure, sport, entertainment and tourism			
Infrastructure			
Minerals			
Waste			
Transport			
Energy			
Telecommunications			
Water supply			
Education			
Health			
Research and public archaeology			
Community projects and HLF			
National agencies and university grants			
Local authority initiatives			
Other research and public archaeology			
Other services			
Heritage conservation			
Assistance to LPAs in delivering development control services			
Any other services not categorised above			

Notes to Respondents

Please do not include non-UK planning fee income in this section.

Inevitably there is some overlap between the categories identified in this section. To avoid double-counting, IT IS ESSENTIAL that

income from any particular commission is entered in only one of the categories offered. The aggregate income shown in this table must should not exceed your figure for total UK planning fee income in *Value of work undertaken and funding sources.*

Work connected with specific development projects (including site-specific representations on LDFs) should be included in the relevant category under the headers "Development Management" or "Infrastructure Planning". Sector-specific planning work such as transport plans, housing land availability studies etc should also be included under these headings.

Work unconnected with specific development projects or types should be included at the relevant rows elsewhere.

We cannot anticipate every situation, so we leave it to your discretion as to how to allocate commissions falling within several possible categories. If in doubt, we are happy to advise. However, these guidelines may assist:

1: Large-scale mixed developments: Where these contain a broad mix of uses they may be entered under Mixed-use development (greenfield or brownfield). Projects comprising a predominant development type should be entered in the relevant Development Management sector category eg large housing developments with just one or two local shops or facilities should be entered under Residential.

2: Regeneration projects: Projects focusing on local regeneration or redevelopment of properties in single use should be entered in the relevant Development Management category. Where a wider mix of uses is involved, they should be entered under Mixed-use development (brownfield). More general studies of regeneration potential etc should be entered under Plans, Strategies and Studies: Individual sites.

3. Plan representations: Commission for private or public clients on an LDF allocation for a specific development type should be entered under the relevant Development Management category. Representations for developers or landowners seeking an unspecified use or involving a portfolio of sites should be entered under the relevant spatial category in Plans, Strategies and Studies.

4: Infrastructure projects: If infrastructure planning work is ancillary to a development project, please include it under the relevant Development Management category. Stand-alone transport, energy, telecoms, water supply and drainage projects should be entered in the appropriate Infrastructure Planning category.

Page 7 of 11

Heritage Market Survey 2015

CIfA Chartered Institute for Archaeologists

FAME Federation of Archaeological Managers & Employers

Heritage Market Survey 2015

20. At the end of March 2015, did you anticipate any changes to your staffing levels over the next year (to 31 March 2016)?

Other comments?

21. On 31 March 2015, did you believe that market conditions would deteriorate over the next 12 months? (to 31 March 2016)

Other comments?

22. At the end of March 2015, did you expect any archaeological practices to cease trading over the next 12 months?

Other comments?

23. Did you you have any plans to expand your business significantly over twelve months from March 2015 (e.g. in premises, vehicles, capital equipment)?

Other comments?

Page 8 of 11

email enquiries@landward.eu
Registered in England and Wales, number 03749035

Heritage Market Survey 2015

CIfA Chartered Institute for Archaeologists

FAME Federation of Archaeological Managers & Employers

Heritage Market Survey 2015

24. In the twelve months to the end of March 2015, did your organisation lose skills in any of these areas?

post-fieldwork analysis	artefact or ecofact conservation	desk-based or environmental assessment
providing advice to clients	fieldwork (intrusive or non-intrusive)	data management
other		

25. In the twelve months to the end of March 2015, did your organisation have to buy-in skills in any of these areas?

fieldwork (intrusive or non-intrusive)	providing advice to clients	artefact or ecofact conservation
data management	post-fieldwork analysis	desk-based or environmental assessment
other		

26. In the the twelve months to the end of March 2015, did your organisation invest in skills training in any of these areas?

fieldwork (intrusive or non-intrusive)	providing advice to clients	artefact or ecofact conservation
data management	post-fieldwork analysis	desk-based or environmental assessment
other		

27. On 31 March 2015, did you think there were skills shortages across archaeological practice in any of these areas?

post-fieldwork analysis	providing advice to clients	artefact or ecofact conservation
fieldwork (intrusive or non-intrusive)	desk-based or environmental assessment	data management
other		

28. On 31 March 2015, had you or were you considering supporting a member of staff to gain a vocational qualification in archaeological practice (NVQ)?

	yes	no	don't know
have supported a member of staff in the past			
would consider supporting a member of staff in the future			

Page 9 of 11

Heritage Market Survey 2015

Chartered Institute for Archaeologists

Federation of Archaeological Managers & Employers

Heritage Market Survey 2015

29. On 31 March 2015, would you have agreed or disagreed with the following statements?

Individual responses will be aggregated in any published survey report and your views will not be attributed to you without your permission

	strongly agree	agree	unsure	disagree	strongly disagree
current national planning policy frameworks are making it easier to justify heritage work and revenue levels					
non-payment of invoices has been a significant problem for your business					
your heritage team will contract within the next 12 months					
the economic climate for development will improve over the next 12 months					
your heritage team will grow within the next 12 months					
late payment of bills is an increasingly significant problem for your business					
current national planning policy frameworks weaken the case for heritage work and revenue levels					
a shortage of heritage staff in LPAs is a major constraint on heritage projects					

Any other comments?

Page 10 of 11

email enquiries@landward.eu
Registered in England and Wales, number 03749035

CIfA Chartered Institute for Archaeologists

FAME Federation of Archaeological Managers & Employers

Heritage Market Survey 2015

30. If you have any further comments on your responses, or on the state of commercial archaeology in general, please let us know. FAME and CIfA would also particularly value respondents' views on the type of market information you would most value in future surveys

Please complete your response by Sunday 19th July 2015

email enquiries@landward.eu
Registered in England and Wales, number 03749035