State of the Archaeological Market 2019

Kenneth Aitchison &

Doug Rocks-Macqueen

ACKNOWLEDGEMENTS

This project was undertaken by the Federation of Archaeological Managers and Employers, with support from the Chartered Institute for Archaeologists and Historic Environment Scotland.

Published by Federation of Archaeological Managers and Employers 2020

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FOREWORD

As Chair of FAME I am very pleased to present the results of the 2018-19 State of the Archaeological Market Survey, very ably compiled by our executive, Kenneth Aitchison and Doug Rocks-Macqueen. Since 2008 the data from this annual survey have provided the foundation for analysis of the marketplace and the health of archaeological commercial practice, and has been used to extrapolate the contribution that commercial archaeology makes to the economy.

Over the years it has demonstrated that archaeological organisations are flexible to cycles of boom and bust in the economy, and have developed a sustainable model for delivering archaeological services in support of the planning process, which in turn results in public benefit through the safeguarding, investigation and dissemination of knowledge for threatened parts of our heritage. The results from this survey corroborate previous ones in showing that professional archaeologists are now charging rates, and returning profits, on a par with other allied professions, and that we are re-investing in our businesses through staff training and development. It exposes shortfalls in certain skill sets, and in the distribution of those skills geographically, but it also helps in understanding who are the major funders of archaeology in the UK, and what market sectors most need our services. Over time the annual variability of the results due to a small sample size and different organisations responding each year, will be evened out, so that valid long-term trend analysis can be undertaken. Nevertheless, the 2018-19 survey allows a spotlight to be directed on the sector, which illuminates the place of commercial archaeology in the marketplace, for which very few other data sets exist. For this reason alone, it is an essential source of information for a profession which frequently needs to make its case to government, and reinforce the value we bring for the good of society, to justify the developer-funding for archaeology required through the planning process.

Tim Malim, Chair: Federation of Archaeological Managers and Employers

EXECUTIVE SUMMARY

This report is on the state of the market for archaeological services in the United Kingdom in 2018-19, and for this year, also includes responses from the Republic of Ireland – although there were insufficient responses to gather any sophisticated insights into archaeological practice in the Republic of Ireland. The survey has gathered data via a questionnaire sent to archaeologists working primarily in the commercial archaeological sector.

The overall aims of this survey are to provide:

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

KEY RESULTS OF THE SURVEY

Archaeologists employed in commercial practice in the UK:

86% are British Nationals.

11% are from other EU countries.

80% on permanent contracts.
84% work full-time.
Archaeological employment grew by 7.8% in the year to March 2019 to an estimated 5,300 working in commercial archaeology and 7,200 overall in all sectors of archaeology.

The commercial archaeology sector:

Average turnover per member of staff **£48,696.**

Size of the sector, **£258m.**

Median profit of just **£50,000** per organisation.

87% of turnover is generated in England.

73% of funding comes from private sector.

Residential development is the largest market, generating **34%** of turnover.

68% of respondents see the economy deteriorating in the future.

Only **27%** think their team will grow in the next year.

23% of respondents have supported a member of staff to get an NVQ, while none have supported an Apprentice.

Fieldwork is still the most in demand skill with **19%** reporting a loss in this area, **52%** buying in and **55%** training staff in this skill. **29%** of employers believe there is a sector-wide shortage in this area.

INTRODUCTION

This project is continuation of several projects stretching over a decade. With the onset of the 2008 financial crisis the Chartered Institute for Archaeologists (CIfA) and the Federation of Archaeological Managers and Employers (FAME) began a series of projects to measure the changes it would bring to the sector. Nine quarterly surveys were initially conducted, gathering and presenting data from October 2008 to April 2011. Kenneth Aitchison, first with CIfA and then with Landward Research Ltd, undertook this work. Subsequently, CIfA and FAME commissioned a project to gather data on a six-monthly basis and to present reports on the state of the archaeological market, again by Landward Research. The December 2012 report[1] was combined with the sector wide Archaeology Labour Market Intelligence: *Profiling the profession* 2012-13[2] report. These reports highlighted the effect the economic situation had on the archaeological sector.

Because this information was valuable to CIfA, FAME and the sector, they, together with Historic England, 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. That exercise was carried out on an annual basis over five years, collecting data for the entire UK for every year from 2013-14 up to 2017-18.

Following on from this five-year project and, again, because of its value, CIfA and FAME have decided to continue this work and received support from Historic Environment Scotland to do so. Kenneth Aitchison continues to undertake these surveys, though now in his role as CEO of FAME, and working with Doug Rocks-Macqueen, the Deputy CEO of FAME. This report presents the results of that work for 2018-19.

There have been several significant changes to this project compared to past ones:

1. In past projects, the survey was only sent to only CIfA Registered Organisations and FAME members but this year the survey was sent out to as many organisations operating in commercial archaeology as the research team could identify.

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[1] Aitchison, K. 2013. State of the Archaeological Market December 2012. Landward Research Ltd. https://landward.eu/wp-content/uploads/2013/10/State-of-the-Archaeological-Market-December-2012.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

2. Given the cross-over between companies working in the UK and the Republic of Ireland, some questions were specifically adapted for an Irish context *e.g.* amounts changed to euro. However, only four organisations responded from the Republic of Ireland, not enough to draw conclusions about the sector there. In most cases these answers are separated out and the results are essentially for the UK only.
3. Over the years the questionnaire has grown in size and scope of questions asked. This year it has been reduced significantly to improve response rates.
4. Part of this reduction in questions was a result of examining the questions and finding that some questions do not need to be asked every year. These questions will be asked in rotation in the future.
5. Where applicable, comparisons are made with all the years that the data have been gathered for, instead of just the most recent year.

METHODS

The survey was a digital survey created using Novisurvey software. Respondents were asked to provide data that applied on 31st March 2019, and so this report is on the situation at the end of financial year 2018-19. A total of 356 organisations and individuals were invited to respond. Links to the questionnaire were initially sent to potential respondents on October 14th, 2019, with automated reminder and follow-up emails encouraging completion being sent periodically until the survey was closed at the end of the year. However, it was briefly re-opened in 2020 to ensure responses had been obtained from key, larger organisations.

RESULTS OF 2018-19 SURVEY

Response numbers and confidence level

52 responses were received, although two were from the same organisation and one did not respond to any of the questions, so the total number of useable responses was 50 (the 2017-18 survey also had 50 usable responses). Not every respondent answered every question.

Note: in most cases the results are rounded to the nearest whole number which means totals can sometimes exceed 100%.

Geographic Distribution

44 put the United Kingdom as their primary country of work, four put the Republic of Ireland and one was an international organisation with its headquarters outside of the UK and the Republic of Ireland (Table 1).

UK respondents were asked about the locations of their headquarters and subsidiary offices. 13 of the respondents had subsidiary offices, 29 in total. The number of subsidiary offices ranged from 1-5. 20 of 48 respondents in the 2018 survey reported having subsidiary offices, comparable with 2017 when 22 of 54 did.

The most popular areas for offices were the South West & South East of England, East Midlands, Yorkshire & Humber and Scotland, with North West England slightly behind those.

Location of Offices was first recorded in the October 2011 survey and since then have remained remarkably stable (Table 2), with year to year fluctuations due to sampling (Table 3). The only region that saw any sort of change greater than 1% between the first and second half of the decade has been the West Midlands. However, that change is small and could be the result of normal sampling distributions. Given both the year to year variations, which makes it hard to spot short term trends, and overall stability of office locations, which indicates no long-term change, the collection of these data may be changed in the future. We know that organisations move staff between offices and so it might be more illuminating to query staff per region instead of offices to get a better understanding of increases and decreases in work per region.

Location	Headquarters	Subsidiary Offices	All	
South West England	6	4	10	**14%**
South East England	4	5	9	**13%**
East Midlands	6	3	9	**13%**
Yorkshire and the Humber	5	3	8	**11%**
Scotland	5	3	8	**11%**
North West England	4	3	7	**10%**
East of England	3	1	4	**6%**
Greater London	3	1	4	**6%**
North East England	1	3	4	**6%**
West Midlands	4	0	4	**6%**
Wales	1	1	2	**3%**
Northern Ireland	0	0	0	**0%**
Republic of Ireland		0	0	**0%**
Outside UK & Republic of Ireland		2	2	**3%**
Total	42	29	71	

Table 1: Location of respondents' offices for organisations headquartered in the UK.

Office Location	Highest	Lowest	Average 2011-19	Average 2011-14*	Average 2015-19*
South East England	16%	10%	13%	14%	13%
South West England	15%	11%	13%	13%	12%
Scotland	15%	9%	12%	12%	11%
East of England	12%	5%	9%	9%	9%
East Midlands	12%	6%	8%	7%	9%
West Midlands	12%	4%	8%	10%	7%
Yorkshire and the Humber	11%	5%	8%	7%	9%
Greater London	11%	4%	7%	7%	7%
North West England	11%	5%	7%	7%	8%
North East England	6%	3%	5%	5%	5%
Wales	10%	3%	5%	6%	5%
Outside the UK	4%	0%	2%	2%	3%
Northern Ireland	2%	0%	1%	1%	1%
Republic of Ireland	5%	0%	N/A	N/A	N/A
Outside the UK and Republic of Ireland	3%	0%	N/A	N/A	N/A

Table 2: Highest and lowest shares of distribution of offices as well as the averages of all surveys (10), 2011-14 (* covers five surveys) and 2015-19 (* five surveys).

Office Location	Oct-11	Apr-12	Dec-12	Dec-12 PP	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
South East England	16%	14%	13%	13%	12%	13%	10%	14%	15%	12%
South West England	11%	13%	15%	13%	12%	13%	11%	13%	12%	13%
Scotland	9%	12%	11%	15%	14%	10%	12%	14%	9%	11%
East of England	12%	9%	7%	10%	7%	10%	12%	11%	8%	5%
West Midlands	10%	12%	9%	8%	10%	7%	9%	4%	9%	5%
Yorkshire and the Humber	5%	7%	8%	11%	5%	9%	8%	11%	8%	11%
East Midlands	9%	7%	7%	6%	8%	7%	8%	8%	9%	12%
North West England	11%	6%	6%	5%	5%	6%	8%	8%	10%	9%
Greater London	7%	6%	7%	5%	11%	10%	9%	6%	4%	5%
Wales	3%	7%	6%	6%	10%	4%	5%	6%	5%	3%
North East England	4%	5%	6%	6%	3%	6%	5%	3%	5%	5%
Outside the UK	2%	2%	2%	2%	2%	3%	3%	4%	4%	
Northern Ireland	0%	1%	1%	1%	1%	2%	1%	1%	2%	0%
Republic of Ireland										5%
Outside the UK and Republic of Ireland										3%

Table 3: Distribution of offices of respondents from October 2011 to March 2019. PP = Profiling the profession, data comes from the Profiling the profession project.

Staff Numbers

The respondents had over 1,100 staff working for them (Table 4). This ranged from 1 to 309 members of staff per respondent. 92% of these staff were fee-earners. Fee-earning staff are defined as "members of staff whose time can be billed to clients". This profile did not change between the UK and Republic of Ireland headquartered organisations.

Staff Full-time equivalent	All		UK Only	
total staff (managerial, professional, technical and administrative) employed	1,115.3		1,089.8	
total fee earners	1,022.1	92%	1,003.1	92%

Table 4: Number of Full-time equivalent staff for respondents and percentage of them that are fee earners in 2019.

The percentage of staff that are fee-earners has fluctuated between 85% and 94% since these data were first gathered in the 2014 survey (Table 5).

Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
85%	91%	94%	85%	94%	92%

Table 5: Percentage of total staff that are fee-earners from 2014 to 2019.

This fluctuation appears to be the result of the size of the organisations that responded, and not because of any changes in the sector. As one would imagine, all sole traders are 100% fee earners (Table 6). Once an organisation has more than 50 employees then they tend to have more than 90 percent of their employees as fee-earners. For smaller organisations, however, there are breakpoints that cause their averages to go down. For example, a small organisation with 7 staff but one who is an admin/finance person would have only 87% of their staff as fee-earners and this pushes the average down. There appears to be economies of scale in this regard.[3]

[3] This question is might be considered for removal in the future or for collecting data less often as it has been fairly stable and results from the composition of responses rather than any sectoral changes.

Number of staff	2017	2018	2019
1	100%	100%	100%
2 to 24	81%	88%	86%
25 to 49	93%	76%	79%
over 50	89%	95%	94%

Table 6: Average percentage of staff that are fee earners by organisation size from 2017 to 2019.

Staff Nationalities

In 2019, 86% of staff members working for organisations headquartered in the UK were British nationals (Table 7). In 2018, the figure was 85%, and 2017 it was 83% (Table 8). Although there is a slight reduction in the numbers of non-British nationals, the 3% difference is within the range of statistical variation that one would expect from surveys, and as such does not yet support evidence for a trend..

Staff Full-time equivalent	All		UK Only	
British nationals (UK subjects)	941.5	**84%**	937.5	**86%**
Irish nationals (Irish citizens)	25	**2%**	7	**1%**
Nationals of other EU states	122.5	**11%**	118	**11%**
Nationals of other countries (non-UK, non-EU)	32.5	**3%**	31.5	**3%**
total	1,121.5		1,094	

Table 7: Nationalities of staff for all respondents and for those headquartered in the UK in 2019.

Nationality	Dec-12	Mar-17	Mar-18	Mar-19
British (UK subjects)	93%	83%	85%	86%
Nationals of other EU states	3%	15%	13%	12%
Nationals of other countries (non-UK, non-EU)	4%	2%	2%	3%

Table 8: Nationalities of staff (UK respondents) in 2012 and then 2017-19. 2012 was the *Profiling the profession* exercise and represents the whole sector, not just those in commercial archaeology.

Staff Contracts

The majority of staff are on full time-time and permanent contacts; part-time, fixed term and casual contracts are a minority in the sector (Table 9). As a percentage of staff employed, the proportion of different types of contract have remained steady over the past decade (Table 10).

Contract type	All		UK only	
Permanent				
full-time	806	**66%**	795	**66%**
part-time	157.5	**13%**	155.5	**13%**
total	963.5	**79%**	950.5	**80%**
Fixed term				
full-time	211	**17%**	211	**18%**
part-time	16	**1%**	16	**1%**
total	227	**18%**	227	**19%**
Casual				
full-time	6.5	**1%**	5	**0%**
part-time	23	**2%**	13	**1%**
total	29.5	**3%**	18	**1%**
Volunteer				
full-time	0		0	
part-time	40	**3%**	40	**3%**
total	40	**3%**	40	**3%**
all totals	1,220		1,195.5	

Table 9: Staff by contract type for all respondents and those headquartered in the UK in 2019.

Contract type	Oct-11	Apr-12	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
Permanent								
full-time	71%	74%	66%	68%	68%	71%	65%	66%
part-time	7%	11%	10%	9%	6%	6%	14%	13%
Fixed term								
full-time	17%	11%	21%	18%	21%	20%	16%	18%
part-time	0%	0%	1%	1%	2%	1%	2%	1%
Casual								
full-time	3%	3%	1%	2%	2%	1%	0%	0%
part-time	0%	0%	0%	1%	0%	0%	0%	1%
Volunteer								
full-time	0%	0%	0%	0%	0%	0%	0%	0%
part-time	1%	0%	0%	2%	1%	2%	1%	3%

Table 10: Staff by contract type for UK based organisations from 2011 to 2019.

Sector Growth

Since the beginning of these surveys in 2008, estimating the size of the workforce in commercial archaeology has been undertaken in each report. This is achieved by asking respondents the number of staff they employed one year previously comparing this with this year's figure and using aggregate difference to estimate the annual growth or reduction.

	All	Increase	UK only	Increase
total staff now	1,116.3	7.4%	1,090.8	7.8%
total staff one year ago	1,039.7		1,012.2	

Table 11: Change in respondents staffing levels in 2019 (organisations providing data for 2019 and 2018 only).

This year the growth was 7.8% for the UK (Table 11). If this level of growth is applied to the previous year's estimated total population then we have almost 5,300 archaeologists working in commercial archaeology, (Table 12). These numbers are estimates and may not necessarily reflect the exact composition of the sector.

Annual curatorial figures have been produced through another survey conducted by Historic England, ALGAO and IHBC. However, that survey was not run in 2019 and so the 2019 number is assumed to be the same as the year before. The figures for people employed by 'other' employers – universities, museums, national government and third sector bodies are collected in the *Profiling the profession* exercises; the reported numbers between 2007 and 2012 were extrapolated from the data collected then, and the numbers presented since 2012 have been kept constant at the level reported by the last *Profiling the profession* as we do not know how they have changed. A new *Profiling the profession* project will be taking place in 2020 which will allow for future revision of the numbers between 2012 and 2020. This means that this estimate of over 7,000 archaeologists in paid employment could change significantly in the future.

	Aug-07	Oct-08	Jan-09	Apr-09	Jul-09	Oct-09	Jan-10	Apr-10	Jul-10	Oct-10	Jan-11
curatorial	512	505	505	505	505	505	505	485	485	485	485
other	2105	1972	1943	1914	1886	1857	1829	1800	1771	1743	1714
commercial	4036	3906	3561	3323	3472	3526	3270	3404	3669	3333	3189
total	6653	6383	6009	5742	5863	5888	5604	5689	5925	5561	5388

	Apr-11	Oct-11	Apr-12	Dec-12	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
curatorial	442	442	440	485	439	459	416	407	409	409
other	1686	1628	1571	1495	1495	1495	1495	1495	1495	1495
commercial	3225	3399	3467	2812	2896	3498	3844	4351	4908	5291
total	5353	5469	5478	4792	4830	5452	5755	6253	6812	7195

Table 12: Reported and estimated size of the archaeological sector from 2007 to 2019.

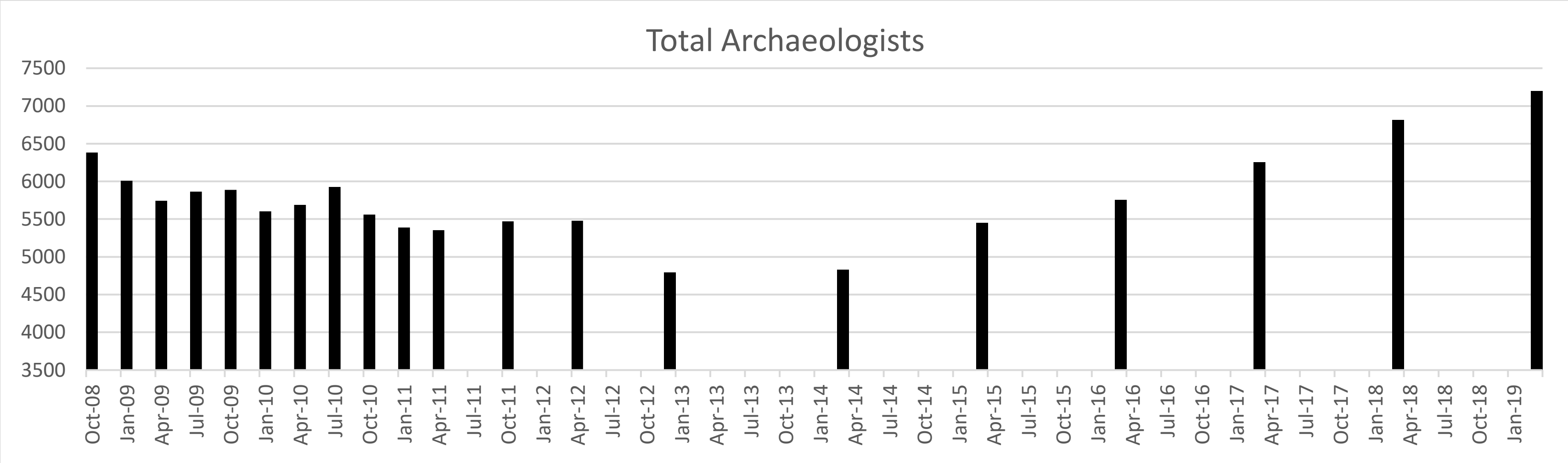

Figure 1: Estimated total numbers of archaeologists working in the United Kingdom.

Turnover

Thirty-six responded with turnover figures for their latest financial years (Table 13).

	UK - pounds turnover in year ending 31 March 2019	IE - euro turnover in year ending 31 December 2018 €
Respondents	33	3
total turnover	52,065,477	1,010,000

Table 13: Number of respondents to the turnover question and their combined total turnover in 2019.

Turnover has been tracked by geographic source since 2017 (Table 14).

	England	Scotland	Wales	Northern Ireland	Republic of Ireland	Rest of the world
2018-19	87%	6%	6%	0%	0%	1%
2017-18	92%	3%	4%	1%		
2016-17	88%	7%	4%	0%		

Table 14: Turnover originating from work undertaken by UK-headquartered organisations in each of these locations in 2019.

Turnover has been tracked for five years. There are fluctuations between each year, but the majority of respondents have consistently had annual turnovers of below £1m. In 2018-19, an absolute majority of respondents turned over less than £250,000. This is probably explained by an increased number of smaller organisations (non-FAME members and non-CIfA Registered Organisations) being invited to contribute, and responding, to the survey this year.

	2014-15	2015-16	2016-17	2017-18	2018-19
>=£10m	5%	12%	9%	10%	6%
£5m -> £10m	8%	16%	6%	10%	3%
£2.5m -> £5m	5%	0%	3%	3%	6%
£1m -> £2.5m	21%	12%	19%	29%	18%
£500,000 -> £1m	33%	28%	25%	23%	3%
£250,000 -> £500,000	18%	12%	13%	19%	15%
<£250,000	10%	20%	25%	10%	52%

Table 15: Distribution of turnover from 2015 to 2019. UK only.

The average turnover per member of staff was £48,696, while the median was less at £45,042. That is similar to previous years, though with the increased size of the workforce this means that the total value of the sector has steadily been increasing. This year it is estimated at more than a quarter of a billion pounds.

	Avg. per staff member	Estimated commercial archaeologists	Sector size	Mean per organisation	Median per organisation
2018-19	£48,696	5,291	£258m	£1,577,742	£250,000
2017-18	£48,747	4,908	£239m	£2,553,346	£1,000,000
2016-17	£45,309	4,351	£197m	£2,348,383	£643,500
2015-16	£45,615	3,844	£175m	£2,928,146	£755,618
2014-15	£45,914	3,498	£161m	£1,879,543	£864,000
2013-14	£56,237	2,896	£163m	£1,641,720	£740,935
2012-13	no data available				
2011-12	£53,271	2,812	£150m		

Table 16: The average turnover per employee, estimated number of archaeologists, total value of the commercial archaeology sector, mean turnover per respondent and median turnover per respondent from 2011 to 2019. UK only.

Profits

Respondents reported aggregate profits (or surplus, for not-for-profit organisations) of £2,902,545 on their combined turnover of £52,625,477 so this equates to 5.5% which is comparable to net profit margins elsewhere within the construction sector[4].

[4] https://mooreandsmalley.co.uk/wp-content/uploads/2019/02/MHA_Construction_Sector_Report.pdf

	Oct-11	Apr-12	Dec-12	Dec-12 PP	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
<5%	73%	75%	70%	60%	75%	70%	52%	44%	44%	**23%**
5-10%	9%	15%	23%	18%	12%	18%	19%	13%	19%	**19%**
10-25%	14%	10%	5%	11%	12%	12%	14%	41%	22%	**23%**
>25%	5%	0%	3%	12%	0%	0%	14%	3%	15%	**35%**
mean					£31,582	£46,637	£154,438	£121.25	£211,531	**£93,630**
median					£0	£5,500	£50,000	£43,000	£60,000	**£50,000**
range					-£3,000 to £251,000	-£1,000,000 to £935,000	-75,000 to £799,000	-286,000 to £1,000,000	-£26,297 to £1,800,000	**-£49,000 to £828,383**

Table 17: Distribution of profits, mean, median and ranges of reported profits from 2011 to 2019. PP = *Profiling the profession*, data comes from the *Profiling the profession* project.

Funding Sources

The majority of respondents' funding came from the private sector (Table 18). This is in line with previous years, but the level has dropped slightly (Table 19).

Source	Respondent turnover	
private sector clients	£ 28,683,244	73%
national heritage agencies (Historic England, Historic Environment Scotland, Cadw, Heritage Council *etc*)	£ 1,654,829	4%
central government departments and agencies	£ 3,603,295	9%
local, district, city, county or unitary councils (local planning authorities)	£ 2,023,358	5%
community groups (including lottery-funded projects, town and parish councils and neighbourhood forums)	£ 1,817,803	5%
other public bodies (including universities, public-private partnerships and local enterprise partnerships)	£ 1,270,194	3%

Table 18: Source of turnover funding for respondents in 2019.

Source	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
private sector clients (including third parties)	67%	75%	79%	81%	83%	73%
central government departments and agencies	14%	13%	3%	7%	9%	9%
national heritage agencies (Historic England, Historic Environment Scotland, Cadw, Heritage Council etc)	6%	5%	6%	3%	3%	4%
other public bodies (including universities, public-private partnerships and local enterprise partnerships)	5%	2%	4%	2%	2%	3%
local, district, city, county or unitary councils (local planning authorities)	5%	4%	3%	5%	2%	5%
community groups (including HLF projects, town and parish councils and neighbourhood forums)	3%	2%	5%	2%	1%	5%

Table 19: Source of turnover funding for respondents from 2014 to 2019.

Market Sectors

As in past years, residential development continues to be the primary source of funding, though it is beginning to decline as other sources increase, especially Energy and Transportation (Table 20).

Source of Income	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
Residential development	41%	40%	53%	42%	36%	34%
Commercial and industrial	6%	24%	14%	18%	13%	10%
Energy	12%	7%	3%	6%	14%	18%
Transport	4%	6%	10%	6%	14%	15%
Minerals	5%	5%	3%	2%	5%	9%
Any other services not categorised above	1%	2%	1%	9%	0%	5%
Community projects and HLF	4%	3%	2%	3%	4%	1%
Retail and town centres	5%	3%	3%	2%	3%	N/A
Water supply	5%	3%	2%	2%	1%	2%
Leisure, sport, entertainment and tourism	6%	1%	0%	5%	2%	N/A
Education	3%	2%	1%	1%	1%	2%
National agencies and university grants	2%	3%	2%	1%	1%	1%
Other research and public archaeology	1%	1%	1%	1%	5%	0%
Heritage Conservation	2%	1%	2%	1%	0%	2%
Local authority initiatives	1%	1%	1%	0%	1%	0%
Assistance to LPAs in delivering development control services	2%	1%	0%	0%	0%	0%
Health	1%	0%	1%	1%	0%	0%
Waste	1%	0%	1%	0%	0%	0%
Telecommunications	0%	0%	0%	0%	0%	0%

Table 20: Sources of income by sector from 2014 to 2019.

Forms of Contract

Externally standardised approaches (the Institution of Civil Engineers' NEC3 or ICE short form) were less frequently used than exchanges of letters, client's or own standard terms and conditions, or bespoke forms of client contract.

	Mar-16	Mar-17	Mar-18	Mar-19	
				Count	Percentage
exchange of letters / emails	74%	70%	74%	27	**77%**
your own organisation's standard T&Cs	63%	70%	70%	21	**60%**
client's standard T&Cs	63%	59%	70%	19	**54%**
bespoke	42%	48%	33%	10	**29%**
NEC3 (various - family of contracts)	32%	26%	37%	7	**20%**
ICE (short form or alternatives)	26%	22%	15%	5	**14%**
none	5%	7%	0%	4	**11%**
don't know				1	**3%**
other	0%	0%	4%	1	**3%**

Table 21: Forms of Contract used.

Market Conditions

Market conditions are considered to be significantly deteriorating for the sector (Table 22). This is the first time since 2012 that more respondents thought the market would deteriorate than thought it would improve (Table 23, Figure 2). From the comments received, this appears to be related to Brexit.

	Count	%
yes - market conditions would deteriorate	23	68%
no - market conditions would improve	7	21%
don't know	4	12%
Total	34	

Table 22: Market condition expectations in 2019.

- Mainly down to Brexit
- BREXIT IMPACT & HS2 JITTERS
- Aberdeen is a very variable market at the moment but generally positive that it will not be worse than last year
- BREXIT
- up turn in consultancy work
- Volatility due to level of confidence and Brexit. Over past 12 months clients have decided to move forward rather than wait, but as we move into 2019-20 the uncertainty around a deal or no deal will continue to affect the market, and if we leave the EU without a deal, this will have a detrimental effect on some clients. Investment is therefore being held back until a more certain future can be predicted
- Uncertainty of Brexit
- Concerned that there would be a slowdown leading up to 31st October. This does not appear to have been the case
- conditions improving but larger projects bring more risk in terms of payments and more complex contracting.

	Jan-09	Apr-09	Jul-09	Oct-09	Jan-10	Apr-10	Jul-10	Oct-10	Jan-11	Apr-11
market conditions will deteriorate	87%	54%	42%	31%	19%	29%	51%	41%	46%	32%
market conditions will improve/the market will not deteriorate	3%	26%	42%	33%	47%	29%	18%	22%	20%	26%
don't know	10%	19%	17%	26%	34%	43%	31%	28%	35%	42%
total confidence	-84%	-28%	0%	2%	28%	0%	-33%	-19%	-26%	-5%

	Oct-11	Apr-12	Dec-12	Dec-12 PP	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
market conditions will deteriorate	37%	32%	30%	45%	13%	8%	21%	26%	37%	68%
market conditions will improve/the market will not deteriorate	24%	29%	48%	32%	78%	84%	64%	56%	44%	21%
don't know	39%	39%	23%	23%	9%	8%	14%	19%	19%	12%
total confidence	-13%	-3%	18%	-13%	65%	76%	43%	30%	7%	-47%

Table 23: Market confidence levels from January 2009 to March 2019. Total confidence is those that think the market won't deteriorate minus those that do. PP = *Profiling the profession*.

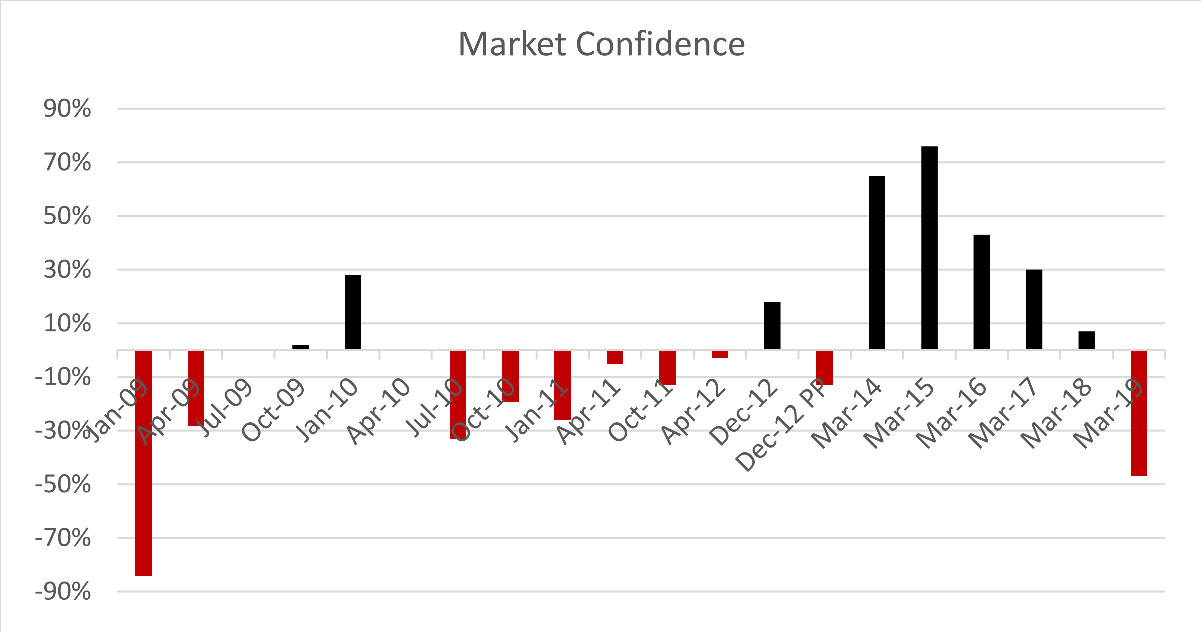

Figure 2: Total market confidence *e.g.* percentage of respondents who think the market will not deteriorate minus those that do.

Client Failure

Respondents reported a total of 18 projects that ended because of client collapse. Those that provided information on where in the process this occurred reported these were either during post-fieldwork analysis or pre-fieldwork. While this is a very rare occurrence, as thousands of projects take place each year, it is concerning that the majority occur during post-fieldwork analysis, potentially leaving orphan archaeological archives without a funder to pay for their analysis and completion.[5]

total	pre-fieldwork	during evaluation	during mitigation	during post-fieldwork analysis
18	5	0	1	7

Table 24: Projects stopped because of client failure and where in the process this occurred in 2019

[5] This is the first time these data have been gathered in this way. Previously a question had been asked about projects that fell through because the client ceased trading. This year the question was modified to get more detail about where in the process this occurred.

Skills

The area where skills were most frequently reported as being lost was in Fieldwork. This was also the area where skills were most frequently hired in, that staff were trained in, and where respondents believe there is a sectoral shortage (Table 25).

Post-fieldwork analysis and desk-based or environmental assessment are the other skill areas where some respondents reported losing skills. However, there are significant drops in the numbers of organisations reporting these when compared with previous years (Table 26, Table 27, Table 28, Table 29)

	lost skills		hired skills		trained skills		sectoral skills shortage	
fieldwork (intrusive or non-intrusive)	6	**19%**	16	**52%**	17	**55%**	9	**29%**
post-fieldwork analysis	2	**6%**	13	**42%**	13	**42%**	6	**19%**
artefact or ecofact conservation	2	**6%**	12	**39%**	4	**13%**	5	**16%**
providing advice to clients	2	**6%**	4	**13%**	14	**45%**	5	**16%**
desk-based or environmental assessment	3	**10%**	7	**23%**	13	**42%**	7	**23%**
data management	0	**0%**	3	**10%**	7	**23%**	4	**13%**
other	0	**0%**	5	**16%**	3	**10%**	2	**6%**

Table 25: Skills that were lost, hired in, trained and where respondents felt there was sectoral shortage in 2019. n = 31.

Skills lost	Oct-11	Apr-12	Dec-12	Dec-12 PP	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
fieldwork (intrusive or non-intrusive)	16%	19%	19%	10%	39%	35%	25%	27%	40%	19%
post-fieldwork analysis	16%	6%	14%	8%	17%	16%	17%	23%	20%	6%
artefact or ecofact conservation	8%	3%	7%	6%	4%	14%	17%	15%	16%	6%
providing advice to clients	5%	3%	10%	9%	4%	11%	8%	12%	16%	6%
desk-based/environmental assessment	3%	6%	7%	5%	4%	11%	8%	8%	12%	10%
data management	3%	0%	5%	8%	9%	5%	4%	8%	0%	0%
Other	5%	3%	2%	2%	13%	3%	4%	0%	0%	0%

Table 26: Skills lost from 2011 to 2019. Percentages calculated on total responses to all skills questions and not just those to this specific question. The assumption is made that those who did not respond did so because they had no losses. PP – *Profiling the profession*.

Skills Bought-in	Oct-11	Apr-12	Dec-12	Dec-12 PP	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
fieldwork (intrusive or non-intrusive)	27%	35%	36%	35%	39%	51%	67%	62%	68%	52%
post-fieldwork analysis	24%	29%	40%	44%	35%	43%	58%	62%	60%	42%
artefact or ecofact conservation	32%	35%	55%	37%	52%	27%	58%	46%	44%	39%
desk-based/environmental assessment	5%	3%	7%	9%	17%	8%	21%	12%	12%	23%
providing advice to clients	3%	3%	0%	2%	9%	14%	25%	15%	12%	13%
data management	5%	6%	5%	8%	0%	5%	13%	12%	4%	10%
Other	3%	3%	7%	9%	4%	0%	4%	8%	4%	16%

Table 27: Skills bought-in from 2011 to 2019. Percentages calculated on total responses to all skills questions and not just those to this specific question. The assumption is made that those who did not respond did so because they had no need to buy in the skills. PP – *Profiling the profession*.

Training provided	Oct-11	Apr-12	Dec-12	Dec-12 PP	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
fieldwork (intrusive or non-intrusive)	51%	45%	36%	23%	52%	54%	71%	62%	72%	55%
post-fieldwork analysis	43%	35%	29%	15%	48%	46%	63%	62%	68%	42%
artefact or ecofact conservation	8%	6%	17%	20%	39%	38%	58%	58%	68%	13%
providing advice to clients	16%	13%	29%	22%	39%	38%	33%	38%	44%	45%
desk-based/environmental assessment	16%	26%	7%	13%	30%	14%	33%	35%	36%	42%
data management	24%	13%	17%	11%	26%	24%	33%	31%	28%	23%
other	24%	23%	17%	11%	30%	24%	21%	15%	8%	10%

Table 28: Skills training provided from 2011 to 2019. Percentages calculated on total responses to all skills questions and not just those to this specific question. The assumption is made that those who did not respond did so because they had no need to train in those skills. PP – *Profiling the profession*.

Sector Shortages	Oct-11	Apr-12	Dec-12	Dec-12 PP	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
post-fieldwork analysis	24%	26%	33%	47%	35%	41%	46%	50%	64%	19%
fieldwork (intrusive or non-intrusive)	3%	16%	24%	28%	22%	49%	54%	65%	64%	29%
artefact or ecofact conservation	14%	23%	21%	31%	13%	24%	29%	42%	48%	16%
providing advice to clients	11%	23%	24%	25%	17%	22%	29%	38%	32%	16%
desk-based/environmental assessment	0%	26%	19%	20%	17%	22%	29%	23%	32%	23%
data management	8%	6%	24%	28%	4%	8%	13%	15%	20%	13%
Other	5%	13%	7%	6%	17%	14%	29%	12%	20%	6%

Table 29: Skills lost from 2011 to 2019. Percentages calculated on total responses to all skills questions and not just those to this specific question. The assumption is made that those who did not respond did so because they did not believe there are sector shortages. PP – *Profiling the profession*.

NVQ

Most respondents have not supported a member of staff to acquire an NVQ in Archaeological Practice (Table 30). While a plurality of respondents would consider supporting staff, these numbers have not changed greatly over the last few years. Changes appear to be in the composition of the respondents and so vary year to year but with no trends (Table 31, Table 32).

have supported a member of staff in the past		
yes	6	23%
no	20	77%
maybe	0	0%
would consider supporting a member of staff in the future		
yes	8	47%
no	3	18%
maybe	6	35%

Table 30: Supporting a member of staff to obtain an NVQ in 2019.

have supported a member of staff in the past	Oct-11	Apr-12	Dec-12	Dec-12 PP	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
yes	14%	13%	42%	21%	33%	34%	31%	33%	14%	23%
no	55%	87%	53%	68%	67%	66%	69%	67%	86%	77%
don't know	31%	0%	6%	11%	0%	0%	0%	0%	0%	0%

Table 31: Percentage of respondents who have supported a member of staff to get an NVQ from 2011 to 2019. PP – *Profiling the profession*.

would consider supporting a member of staff in the future	Oct-11	Apr-12	Dec-12	Dec-12 PP	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
yes	56%	68%	71%	49%	65%	60%	54%	75%	48%	47%
no	24%	14%	14%	26%	6%	12%	29%	19%	10%	18%
don't know	21%	18%	14%	24%	29%	28%	17%	6%	43%	35%

Table 32: Percentage of respondents who would consider supporting a member of staff to get an NVQ from 2011 to 2019. PP – *Profiling the profession*.

Apprenticeships

Apprenticeships continue to not be used in this part of the sector (Table 33), though most respondents are open to supporting them. This question has only been tracked for a few years, but the trend has been for only one or two respondents to say they have actually supported them; these are very new qualifications, formally launched in 2019[6].

	Mar-16	Mar-17	Mar-18	Mar-19	
have supported a member of staff in the past					
yes	4%	11%	5%	0	0%
no	96%	89%	95%	26	100%
don't know	0%	0%	0%	0	0%
would consider supporting a member of staff in the future					
yes	46%	71%	40%	12	63%
no	33%	12%	3%	2	11%
don't know	5%	18%	9%	5	26%

Table 33: Responses to apprenticeships from 2016 to 2019. 2019 includes count and percentages.

Perceptions

The respondents' perceptions typically indicate that they are expecting deterioration in their future business outlook, with less confidence in the economic climate and of hiring staff (Table 34). However, in other areas the perceptions have been stable for several years. Responses to questions about current national planning policy frameworks have not changed, other than minor fluctuations from year-to-year.

[6] https://historicengland.org.uk/whats-new/news/heritage-apprenticeships-launched/#:~:text=Historic%20Environment%20Trailblazer%2C%20a%20group,professional%20bodies%20and%20training%20providers.&text=Historic%20England%20will%20also%20prepare%20to%20recruit%20and%20train%20apprentices.

	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	
the economic climate for development will improve over the next 12 months							
strongly agree	9%	23%	12%	4%	25%	9%	3
agree	55%	57%	35%	15%	19%	3%	1
unsure	36%	20%	42%	42%	31%	29%	10
disagree	0%	0%	12%	31%	17%	38%	13
strongly disagree	0%	0%	0%	8%	8%	18%	6
my heritage team will grow within the next 12 months							
strongly agree	24%	23%	22%	12%	15%	12%	4
agree	38%	40%	33%	36%	37%	15%	5
unsure	10%	26%	26%	24%	33%	29%	10
disagree	29%	9%	15%	16%	7%	26%	9
strongly disagree	0%	3%	4%	12%	7%	18%	6
late payment of bills is an increasingly significant problem for my business							
strongly agree	14%	14%	19%	15%	19%	9%	3
agree	45%	49%	31%	46%	30%	41%	14
unsure	5%	0%	12%	8%	15%	12%	4
disagree	36%	37%	38%	31%	37%	32%	11
strongly disagree	0	0	0	0	0	3%	1
non-payment of bills has been a significant problem for my business							
strongly agree	18%	25%	12%	12%	0%	3%	1
agree	27%	26%	8%	20%	67%	26%	9
unsure	5%	3%	0%	8%	7%	9%	3
disagree	41%	41%	58%	52%	19%	44%	15
strongly disagree	9%	6%	23%	8%	7%	15%	5
current national planning policy frameworks are making it easier to justify heritage work and revenue levels							
strongly agree	5%	12%	0%	4%	8%	3%	1
agree	55%	38%	31%	48%	42%	44%	15
unsure	18%	21%	19%	20%	27%	24%	8
disagree	18%	24%	46%	24%	19%	26%	9
strongly disagree	5%	6%	4%	4%	4%	0%	0
current national planning policy frameworks weaken the case for heritage work and revenue levels							
strongly agree	9%	6%	4%	8%	26%	9%	3
agree	5%	21%	37%	13%	11%	9%	3
unsure	23%	24%	11%	25%	17%	24%	8
disagree	55%	38%	44%	46%	37%	53%	18
strongly disagree	9%	12%	4%	8%	9%	3%	1

	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	
a shortage of heritage staff in LPAs is a major constraint on heritage projects							
strongly agree	35%	44%	38%	27%	30%	9%	3
agree	39%	35%	46%	58%	33%	56%	19
unsure	9%	15%	12%	8%	19%	18%	6
disagree	17%	6%	4%	8%	15%	12%	4
strongly disagree	0%	0%	0%	0%	4%	3%	1

Table 34: Respondents perceptions from 2014 to 2019.

POSTSCRIPT

The State of the Archaeological Market surveys capture information about the rapidly changing commercial archaeology sector. The data they have produced have been annual complements to the underpinning *Profiling the profession* surveys, which were undertaken every five years from 1997-98 to 2012-13. It is *Profiling the profession* that has gathered data on the characteristics of the sector - the ages, genders, ethnicities and disability statuses of archaeologists – together with information about their skills, qualifications and the salaries they receive.

After a lengthy delay, *Profiling the profession* returns in 2020.

Historic England, through a grant from their Covid-19 Emergency Response Fund, will be enabling Landward Research Ltd to gather, analyse and present up-to-date information about the archaeologists that work in all sectors – commercial, curatorial, academic, museum and more. FAME will work with Landward to ensure that the *Profiling the profession 2020* project also captures data that can be presented as State of the Archaeological Market 2020, and we are inviting our partners in this project – the Chartered Institute for Archaeologists and Historic Environment Scotland – to continue their support in order to enable this to be a UK-wide exercise.

APPENDIX – SURVEY INSTRUMENT

FAME CIfA Chartered Institute for Archaeologists SCOTLAND'S ARCHAEOLOGY STRATEGY

State of the Archaeological Market 2018-19

Dear Colleague,

FAME is the only organisation solely devoted to representing the interests of archaeological managers and employers to the profession and business world. CIfA is the leading professional body representing archaeologists working in the UK and overseas.

To do this, we need to be informed by up-to-date information, and so - supported by Historic Environment Scotland - FAME and CIfA are continuing a series of annual surveys of suppliers to the Archaeological Market.

Please answer the questions that follow. We seek information as it applied at the end of last financial year (31 March 2019 in the UK, 31 December 2018 in the Republic of Ireland)

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

Please reply by Wednesday 30 October 2018. Your responses are fully confidential and will not be seen any anyone other than the two members of the research team, who are myself and our Deputy CEO (I am a Certified Member of the Market Research Society and we work to MRS professional standards)

Kenneth Aitchison CEO FAME

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

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

FAME CIfA Chartered Institute for Archaeologists SCOTLAND'S ARCHAEOLOGY STRATEGY

State of the Archaeological Market 2018-19

Which country is your organisation headquartered in?

- United Kingdom
- Republic of Ireland
- Another country - please enter below

Where in the UK is the head office of your organisation located?

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

- East of England
- East Midlands (England)
- Greater London
- North East England
- North West England
- South East England
- South West England
- West Midlands (England)
- Yorkshire and the Humber
- Scotland
- Wales
- Northern Ireland
- Republic of Ireland
- outside the UK and Republic of Ireland

State of the Archaeological Market 2018-19

How many full-time staff were working for your organisation on 31 March 2019?

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

Of your staff, how many were:

	FTE
British nationals (UK subjects)	
Irish nationals (Irish citizens)	
nationals of other EU states	
nationals of other countries (non-UK, non-EU)	

State of the Archaeological Market 2018-19

How many of your members of staff were working on each of the following types of contract or agreement on 31 March 2019?

	full-time	part-time
permanent		
fixed term		
casual		
volunteer		

State of the Archaeological Market 2018-19

How many members of staff (FTE) did your organisation have one year before, on 31 March 2018 - the census date for the previous Archaeological Market Survey 2018?

State of the Archaeological Market 2018-19

What was your annual financial turnover for work in financial year 2018-19?

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 the nearest 12-month period for which figures are available.

	£
turnover in year ending 31 March 2019	

What was your annual financial turnover for work in financial year 2018?

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

If your accounting period does not run from January to December, please indicate fee income for the nearest 12-month period for which figures are available.

	€
turnover in year ending 31 December 2018	

How much of your turnover originated from work undertaken in each of these locations?

please enter percentages, ensuring that the total = 100%

England	
Scotland	
Wales	
Northern Ireland	
Republic of Ireland	
rest of the world	

What was your annual profit (or surplus) (in £) in financial year 2018-19?

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

If you made a loss in 2018-19, please enter a negative figure.

	£
your profit or surplus (plus or minus) in the year ending 31 March 2019	

What was your annual profit (or surplus) (in €) in financial year 2018?

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

If you made a loss in 2018, please enter a negative figure.

	€
your profit or surplus (plus or minus) in the year ending 31 December 2018	

State of the Archaeological Market 2018-19

How much of your turnover originated from your direct client from each of these sources?

please enter percentages, ensuring that the total = 100%

private sector clients	
national heritage agencies (Historic England, Historic Environment Scotland, Cadw, Heritage Council etc)	
central government departments and agencies	
local, district, city, county or unitary councils (local planning authorities)	
other public bodies (including universities, public-private partnerships and local enterprise partnerships)	
community groups (including lottery-funded projects, town and parish councils and neighbourhood forums)	

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State of the Archaeological Market 2018-19

Market Sectors

please indicate your income in the year ending 31 March 2019 for work in each of the sectors listed. Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc.

	Income 2018-19
	£
Construction	
Residential development	
Commercial and industrial	
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	

Market Sectors

please indicate your income in the year ending 31 December 2018 for work in each of the sectors listed. Please enter full numbers of euro, eg 1250000, not decimal fractions of millions etc.

	Income 2018
	€
Construction	
Residential development	
Commercial and industrial	
Infrastructure	
Minerals	
Waste	
Transport	

	Income 2018
	£
Energy	
Telecommunications	
Water supply	
Education	
Health	
Research and public archaeology	
Community projects and lottery-funded	
National agencies and university grants	
Local authority initiatives	
Other research and public archaeology	
Other services	
Heritage conservation	
Assistance to local government in delivering development control services	
Any other services not categorised above	

FAME — Federation of Archaeological Managers & Employers

CIfA Chartered Institute for Archaeologists

SCOTLAND'S ARCHAEOLOGY STRATEGY

State of the Archaeological Market 2018-19

Which forms of client contract do you routinely use?

check as many as apply

- ☐ ICE (short form or alternatives)
- ☐ NEC3 (various - family of contracts)
- ☐ Bespoke
- ☐ Client's standard T&Cs
- ☐ Your own organisation's standard T&Cs
- ☐ Exchange of letters / emails
- ☐ Don't know
- ☐ None
- ☐ Other

FAME CIfA Chartered Institute for Archaeologists SCOTLAND'S ARCHAEOLOGY STRATEGY

State of the Archaeological Market 2018-19

At the end of last financial year (4th April 2019 in UK, 31st December 2018 in Republic of Ireland), did you believe that market conditions would deteriorate over the next 12 months?

Other comments?

In the last financial year, how many of your projects were not completed because of a client suffering business failure?

Other comments?

Where in the project process did this occur?

please enter numbers for each stage

	number of projects
pre-fieldwork	
during evaluation	
during mitigation	
during post-fieldwork analysis	

FAME CIfA Chartered Institute for Archaeologists SCOTLAND'S ARCHAEOLOGY STRATEGY

State of the Archaeological Market 2018-19

Considering these areas of archaeological skills, please check any boxes where (in the last financial year) your organisation:

lost skills

had to buy in skills (hired subcontractors)

invested in skills training

considered there was a skills shortage across the whole sector

	lost skills	hired skills	trained skills	sectoral skills shortage
fieldwork (intrusive or non-intrusive)				
post-fieldwork analysis				
artefact or ecofact conservation				
providing advice to clients				
desk-based or environmental assessment				
data management				
other				

FAME CIfA Chartered Institute for Archaeologists SCOTLAND'S ARCHAEOLOGY STRATEGY

State of the Archaeological Market 2018-19

On 31 March 2019, had you or were you considering supporting a member of staff to gain a vocational qualification in archaeological practice (*Level 3 NVQ Certificate in Archaeological Practice*)?

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

On 31 March 2019, had you or were you considering supporting a member of staff to undertake an Apprenticeship in Historic Environment Practice?

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

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State of the Archaeological Market 2018-19

At the end of last financial year (31 March 2019 in UK, 31 December 2018 in Ireland), 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
my heritage team will grow within the next 12 months					
a shortage of heritage staff in LPAs is a major constraint on heritage projects					
current national planning policy frameworks weaken the case for heritage work and revenue levels					
current national planning policy frameworks are making it easier to justify heritage work and revenue levels					
the economic climate for development will improve over the next 12 months					
non-payment of bills has been a significant problem for my business					
late payment of bills is an increasingly significant problem for my business					

Any other comments?

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State of the Archaeological Market 2018-19

If you have any further comments on your responses, or on the state of commercial archaeology in general, please let us know.

Please complete your response by Wednesday 30 October 2019