

# State of the Archaeological Market 2020



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## FOREWORD

This survey presents the latest understanding we have of the health and economic performance of commercial archaeological practice in the UK and the Republic of Ireland. It demonstrates the value we make to the overall economy, and the improving sustainability of the sector when measured by permanent employment contracts, the level of turnover per staff member, and levels of profit. Compared to other SMEs within the UK economy for 2020, where only 70% have recorded profit<sup>1</sup>, commercial archaeology seems to be doing well. This situation allows confidence in a sustainable future for the sector and enables managers and employers to plan effective development of their organizations.

Previous surveys have highlighted the sector's dependence on housing as the principal source of funding, but the huge government investment in infrastructure for road and rail has had a direct effect on the type of archaeological project that now predominates. This change has affected working practices as well as funding streams, as the scale of such projects has necessitated greater collaboration between different practitioners so that consortia and joint ventures, as well as other kinds of partnership, have developed. The upskilling in project management and health and safety is also evident, with expectations from infrastructure and public sector funding placing new demands on archaeologists. Engagement with those responsible for setting standards in these fields is now being conducted by FAME, so that the requirements imposed on those delivering strategic schemes can be proportionate to the role that archaeologists perform.

The survey also provides evidence for extreme variation in development and the need for commercial archaeological practice, with nearly 30% of the total value in London and the south-east, rising to c.50% when the East of England and East Midlands are included. It demonstrates the unequal distribution of archaeologists, which must influence variations in pay and conditions within the sector, as market conditions dictate supply and demand. We remain dependent on a significant contribution from colleagues coming to us from abroad, but the survey also shows how many organizations are providing training opportunities and developing a future home-grown skills base. FAME members should be proud of what they have achieved, and this survey should give them confidence for the future.

Tim Malim, Chair: Federation of Archaeological Managers and Employers.

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<sup>1</sup> <https://www.statista.com/statistics/291401/profit-making-sme-small-and-medium-enterprises-united-kingdom-uk-by-sector/>

# EXECUTIVE SUMMARY & KEY RESULTS

This report is on the state of the market for archaeological services in the United Kingdom in 2019-20. The survey gathered data via a questionnaire sent to the employers of all archaeologists working in the UK in all sectors, through the *Profiling the Profession 2020* project, with data received from organisations working in the commercial sector extracted from that.

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 working in the commercial sector with comparative figures for other areas;
- 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 for 2019-20

4,375 people work in UK commercial archaeology.

87% of commercial archaeologists have permanent contracts of employment.

In March 2020, immediately after the UK's departure from the European Union, 13% of the people working in UK commercial archaeology were nationals of EU states.

Average turnover per member of staff was £51,187.

The sector reported an aggregate profit level of 6.3%.

The commercial archaeology sector is valued at £224 million pounds for 2019-20.

Transport was the largest market sector for commercial archaeology in 2019-20; in every previous year, the largest sector had been residential housing.

Overall future market sentiment was negative, with more employers expecting market deterioration in 2020-21 than improvement.

# INTRODUCTION

This project is a continuation of a series of projects that have been undertaken for 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 this 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, 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 was combined with the sector wide Archaeology Labour Market Intelligence: *Profiling the Profession 2012-13* 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 lead these surveys, though now in his role as CEO of FAME, and working with Doug Rocks-Macqueen, the Deputy CEO of FAME and Poppy German, a colleague at Landward Research.

This report presents the results of that work for 2019-20.

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

1. Data were gathered for this project through the wider *Profiling the Profession 2020<sup>2</sup>* project, and so contributions have been received from FAME members, CIfA Registered Organisations and other commercial organisations working in UK archaeology.
2. As identified in the 2019 report, over time the questionnaire had grown in size and scope of questions asked. We have now removed some questions and

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<sup>2</sup> <https://profilingtheprofession.org.uk/>

added some others, but overall this has reduced the number of questions and the time needed to respond.

3. This has led to questions being identified that do not need to be asked every year, and so selected questions are now being asked less frequently than on an annual basis.

## **METHODS**

The survey was conducted as part of the Profiling the Profession 2020 exercise, which meant more archaeological contractors and consultants were approached for information that in previous State of the Archaeological Market exercises, which only polled FAME members and CIfA Registered Organisations.

The survey was a digital survey created using Novisurvey software. Respondents were asked to provide data that applied on 1<sup>st</sup> March 2020, and so this report is on the situation at the end of financial year 2019-20, immediately following the UK having left the European Union and before the full impact of the COVID-19 pandemic began to be felt on the sector.

Links to the questionnaire were initially sent to potential respondents on 30<sup>th</sup> November 2020, with automated reminder and follow-up emails encouraging completion being sent periodically until the survey was closed on 20<sup>th</sup> January 2021.

# RESULTS OF 2019-20 SURVEY

## Response numbers

Responses were received from 70 organisations classified in *Profiling the Profession* as having principal roles of either contractors or consultants (the 2018-19 survey had 50 usable responses). Not every respondent answered every question.

## Geographic Distribution

Until 2019, State of the Archaeological Market publications reported on the locations of respondents' offices.

From this report onwards the numbers of members of staff working in defined areas – nine regions of England, Scotland, Wales, Northern Ireland, Republic of Ireland and the rest of the world – are reported, rather than the (less useful) measure of numbers of offices.

| <b>Contractor &amp; Consultant full-time equivalent</b> | <b>count</b> | <b>2020</b> |
|---|--------------|-------------|
| South East England                                      | 373          | 17%         |
| South West England                                      | 353          | 16%         |
| London  | 273          | 12%         |
| East of England   | 216          | 10%         |
| East Midlands   | 191          | 9%          |
| Scotland  | 158          | 7%          |
| Yorkshire and the Humber                                | 148          | 7%          |
| North East England                                      | 127          | 6%          |
| North West England                                      | 101          | 5%          |
| West Midlands   | 86           | 4%          |
| Wales   | 49           | 2%          |
| Northern Ireland  | 12           | 1%          |
| Republic of Ireland                                     | 118          | 5%          |
| Outside the UK and Republic of Ireland                  | 9            | 0%          |
| Total   | 2,214        |             |

**Table 1: Distribution of contractors and consultants by location.**



## Staff Numbers

| Contractor & Consultant full-time equivalent Employment location | Count | %     |
|--|-------|-------|
| Employed in UK   | 2,251 | 94.6% |
| In Republic of Ireland   | 118   | 5.0%  |
| Outside UK and Republic of Ireland                               | 11    | 0.4%  |
| Total staff  | 2,380 |       |

**Table 2: Staff numbers by country of employment.**

Over 2,300 staff were working for respondents, ranging from 1 to 326 members of staff per respondent (*n.b.* totals differ from Table 1 as not all respondents provided specific location data).

## Staff Nationalities

| Contractor & Consultant full-time equivalent  | Employed in UK |     | All   |     |
|---|----------------|-----|-------|-----|
|   | Count          | %   | Count | %   |
| British (UK subjects)                         | 1,730          | 86% | 1,746 | 82% |
| National of EU states                         | 259            | 13% | 360   | 17% |
| Nationals of other countries (non-UK, non-EU) | 29             | 1%  | 30    | 1%  |
| Total (n=)                                    | 2,018          |     | 2,037 |     |

**Table 3: Staff nationalities**

In 2020, 86% of staff members working for organisations headquartered in the UK were British nationals (Table 3). In 2019, the figure was 86%, and 2018 it was 85% (Table 4).

The data suggest a slow trend, decreasing the relative proportion of non-UK nationals working in UK commercial archaeology between the referendum on the UK's membership of the EU in June 2016 and the UK's departure from the EU in 2020.

| Contractor & Consultant full-time equivalent  | Dec-12 | Mar-17 | Mar-18 | Mar-19 | Mar-20 |
|---|--------|--------|--------|--------|--------|
| British (UK subjects)                         | 93%    | 83%    | 85%    | 86%    | 86%    |
| National of EU states                         | 3%     | 15%    | 13%    | 12%    | 13%    |
| Nationals of other countries (non-UK, non-EU) | 4%     | 2%     | 2%     | 3%     | 1%     |

**Table 4: Nationalities of staff (UK respondents) in 2012 and then 2017-20. 2012 was a *Profiling the Profession* exercise and represents the whole sector, not just those in commercial archaeology.**

## Staff Contracts

Three quarters of the people working in development-led archaeology are on full time, permanent contracts. This represents a significant increase from 2019 to 2020 (from 66% of all staff to 76%), with a concomitant reduction in the number of people who were working on fixed-term, full-time contracts. This reflects a competitive labour market, where employers are actively seeking to recruit and then retain staff.

Overall, 87% of workers were on permanent contracts and 13% were working on fixed-term contracts.

This project no longer gathers data for 'casual' or 'volunteer' staff.

| <b>Permanent</b>  | <b>Count</b> | <b>%</b>   |
|-------------------|--------------|------------|
| Full-time         | 1,802        | 76%        |
| Part-time         | 265          | 11%        |
| <b>Total</b>      | <b>2,067</b> | <b>87%</b> |
| <b>Fixed term</b> |              |            |
| Full-time         | 277          | 12%        |
| Part-time         | 36           | 2%         |
| <b>Total</b>      | <b>313</b>   | <b>13%</b> |
| Grand total (n=)  | 2,380        |            |

**Table 5: Staff by contract type for UK based organisations in 2019-20**

| <b>Contract type</b> | <b>Oct-11</b> | <b>Apr-12</b> | <b>Mar-14</b> | <b>Mar-15</b> | <b>Mar-16</b> | <b>Mar-17</b> | <b>Mar-18</b> | <b>Mar-19</b> | <b>Mar-20</b> |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| <b>Permanent</b>     |               |               |               |               |               |               |               |               |               |
| full-time            | 71%           | 74%           | 66%           | 68%           | 68%           | 71%           | 65%           | 66%           | 76%           |
| part-time            | 7%            | 11%           | 10%           | 9%            | 6%            | 6%            | 14%           | 13%           | 11%           |
| <b>Fixed term</b>    |               |               |               |               |               |               |               |               |               |
| full-time            | 17%           | 11%           | 21%           | 18%           | 21%           | 20%           | 16%           | 18%           | 12%           |
| part-time            | 0%            | 0%            | 1%            | 1%            | 2%            | 1%            | 2%            | 1%            | 2%            |
| <b>Casual</b>        |               |               |               |               |               |               |               |               |               |
| full-time            | 3%            | 3%            | 1%            | 2%            | 2%            | 1%            | 0%            | 0%            |               |
| part-time            | 0%            | 0%            | 0%            | 1%            | 0%            | 0%            | 0%            | 1%            |               |
| <b>Volunteer</b>     |               |               |               |               |               |               |               |               |               |
| full-time            | 0%            | 0%            | 0%            | 0%            | 0%            | 0%            | 0%            | 0%            |               |
| part-time            | 1%            | 0%            | 0%            | 2%            | 1%            | 2%            | 1%            | 3%            |               |

**Table 6: Staff by contract type for UK based organisations from 2011 to 2020.**

## Sector Growth

Since the beginning of this series of surveys in 2008, generating an estimate of the size of the workforce in commercial archaeology has been undertaken in each report.

This had been achieved by asking respondents the number of staff they employed one year previously, comparing that with the current year's figure and using aggregate difference to estimate the annual growth or reduction.

This has meant that in the years between *Profiling the Profession 2012-13* and *Profiling the Profession 2019-20*, State of the Archaeological Market data were gathered every year.

The annual growth of commercial archaeology was estimated on the basis of returned data for the survey year and the previous year; where a respondent had provided total staff numbers for year  $x$  and year  $x-1$ , the difference was taken to represent growth (or contraction).

Results were aggregated in each year – for example, in 2013-14, 30 organisations reported that they employed a total number of staff = 792.06, while at the time of the previous year's PTP 2012-13, the same organisations had employed 769.24 – so the total increased by 3.0% between the two surveys.

This level of increase, 3.0%, was assumed to have applied across the whole commercial subsector, and so the estimated size of commercial archaeology in 2013-14 was then taken to be the total reported population for PTP 2012-13, multiplied by this calculated increase.

This was then repeated for every State of the Archaeological Market exercise from 2013-14 to 2018-19.

But – this was extrapolating for the whole subsector from only the respondents that provided data for the number of staff they employed in both the survey year and the previous year.

If an organisation had ceased trading, their data were not collected. This meant that where staff complements were increasing, at companies that were growing or at new start-up companies, these were not being offset by figures from companies ceasing to trade. And so commercial archaeology was reported as employing more staff than it actually did as a sector.

This error was then compounded year on year.

Furthermore, there was an assumption that this was organic growth, and mergers and acquisitions were not considered separately. So, when one organisation acquired

another, then this would show as growth even if the total number of jobs in the sector did not grow. This has also contributed to some overcounting.

The calculated figure for the size of commercial archaeology in 2019-20 has now been generated from the *Profiling the Profession* figures, taken together with individual consideration of significant organisations that did not respond.

This figure, like the figure presented in *Profiling the Profession 2012-13*, has not been extrapolated from the previous year's figure simply on the basis of figures returned from organisations that provided data for the current survey year and the previous year.

If that methodology had been used (that which was applied in SAM between 2014 and 2019), then the figure for the size of commercial archaeology would have been 5,884. Rather than this, we are presenting a reconsidered figure of 4,375 that we feel is considerably more accurate.

This then means that the figures previously presented for the SAM reports – the figures between PTP checkpoints in 2012-13 and 2019-20 – must be reconsidered.

From discussions with sectoral business leaders, we are satisfied that between 2012-13 and 2019-20 commercial archaeology did grow in each year.

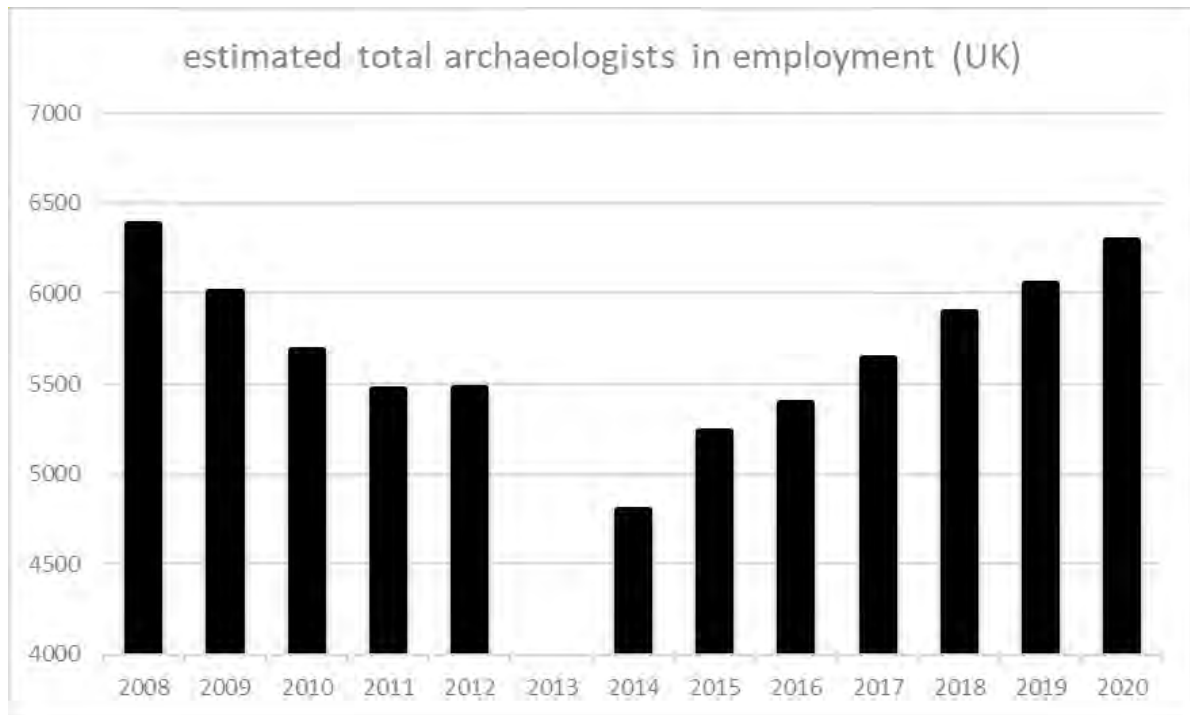
In total, we now consider that it grew from 2,812 individuals in 2012-13 to 4,375 in 2019-20 (an increase of 1,563).

The calculated expansion used each year is still indicative, and we have converted those calculated annual figures percentage points to proportional shares of the increase between 2012-13 and 2019-20.

| 2012-13                           | 2014                                      | 2015  | 2016  | 2017  | 2018  | 2019 | 2020  |                      |
|-----------------------------------|---|-------|-------|-------|-------|------|-------|----------------------|
| <i>SAM presented increase</i>     | 3.0                                       | 20.8  | 9.9   | 13.2  | 12.8  | 7.8  | 11.2  | =78.7                |
|                                   | as a share of growth over the full period |       |       |       |       |      |       |                      |
|                                   | 3.8%                                      | 26.4% | 12.6% | 16.8% | 16.3% | 9.9% | 14.2% | =100%                |
| <i>calculated annual increase</i> | 59  | 413   | 197   | 262   | 254   | 155  | 223   | =1,563               |
| 2812                              | 2871                                      | 3284  | 3481  | 3743  | 3997  | 4152 | 4375  | recalculated figures |
|                                   | 2.1%                                      | 14.4% | 6.0%  | 7.5%  | 6.8%  | 3.9% | 5.4%  | real annual growth   |

**Table 7: Recalculated Figures – Employment in Commercial Archaeology 2014-2020.**

The figures for people employed by local heritage management ('curatorial') and 'other' employers – universities, museums, national government - have been collected in the *Profiling the Profession 2020* survey.



**Figure 1: Estimated total numbers of archaeologists employed in the United Kingdom 2008-2020.**



|            | <b>Aug-07</b> | <b>Oct-08</b> | <b>Jan-09</b> | <b>Apr-09</b> | <b>Jul-09</b> | <b>Oct-09</b> | <b>Jan-10</b> | <b>Apr-10</b> | <b>Jul-10</b> | <b>Oct-10</b> | <b>Jan-11</b> |
|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| 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          |

|            | <b>Apr-11</b> | <b>Oct-11</b> | <b>Apr-12</b> | <b>Dec-12</b> | <b>Mar-14</b> | <b>Mar-15</b> | <b>Mar-16</b> | <b>Mar-17</b> | <b>Mar-18</b> | <b>Mar-19</b> | <b>Mar-20</b> |
|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| curatorial | 442           | 442           | 440           | 485           | 439           | 459           | 416           | 407           | 409           | 409           | 375           |
| other      | 1686          | 1628          | 1571          | 1495          | 1495          | 1495          | 1495          | 1495          | 1495          | 1495          | 1550          |
| commercial | 3225          | 3399          | 3467          | 2812          | 2871          | 3284          | 3481          | 3743          | 3997          | 4152          | 4375          |
| Total      | 5353          | 5469          | 5478          | 4792          | 4805          | 5238          | 5392          | 5645          | 5901          | 6056          | 6300          |

**Table 8: Reported and estimated size of the archaeological sector from 2007 to 2020.**

## Turnover

Fifty-eight respondents provided turnover figures for their latest financial years.

|                | UK - pounds turnover in year ending 31 March 2020 |
|----------------|---|
| respondents    | 58  |
| total turnover | £117,541,684                                      |
| average        | £2,026,581  |

**Table 9: Number of respondents to turnover question and combined total turnover in 2020.**

Turnover has been tracked by geographic source since 2017.

|         | England | Scotland | Wales | Northern Ireland | Republic of Ireland | Rest of the world |
|---------|---------|----------|-------|------------------|---------------------|-------------------|
| 2019-20 | 85%     | 7%       | 2%    | 0%               | 4%                  | 2%                |
| 2018-19 | 87%     | 6%       | 6%    | 0%               | 0%                  | 1%                |
| 2017-18 | 92%     | 3%       | 4%    | 1%               |                     |                   |
| 2016-17 | 88%     | 7%       | 4%    | 0%               |                     |                   |

**Table 10: Turnover originating from work undertaken by UK-headquartered organisations in each of these locations from 2017 to 2020.**

Total turnover has been tracked for six years. There have been fluctuations between each year, in large part attributable to differences between which organisations responded, but in every iteration the majority of respondents have had annual turnovers of below £1m.

|                      | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 |
|----------------------|---------|---------|---------|---------|---------|---------|
| >=£10m               | 5%      | 12%     | 9%      | 10%     | 6%      | 10%     |
| £5m -> £10m          | 8%      | 16%     | 6%      | 10%     | 3%      | 2%      |
| £2.5m -> £5m         | 5%      | 0%      | 3%      | 3%      | 6%      | 8%      |
| £1m -> £2.5m         | 21%     | 12%     | 19%     | 29%     | 18%     | 21%     |
| £500,000 -> £1m      | 33%     | 28%     | 25%     | 23%     | 3%      | 13%     |
| £250,000 -> £500,000 | 18%     | 12%     | 13%     | 19%     | 15%     | 13%     |
| <£250,000            | 10%     | 20%     | 25%     | 10%     | 52%     | 33%     |

**Table 11: Distribution of turnover from 2015 to 2020. UK only.**

The average turnover per member of staff was £51,187, an increase on the previous year, which, combined with an increase in the number of people working in commercial archaeology results in the entire sector being valued at £224 million pounds.

|         | <b>avg. per staff member</b> | <b>estimated commercial archaeologists</b> | <b>sector size</b> | <b>mean per organisation</b> | <b>median per organisation</b> |
|---------|------------------------------|--|--------------------|------------------------------|--------------------------------|
| 2019-20 | £51,187                      | 4,375                                      | £224m              | £2,142,424                   | £472,725                       |
| 2018-19 | £48,696                      | 4,152                                      | £202m              | £1,577,742                   | £250,000                       |
| 2017-18 | £48,747                      | 3,997                                      | £195m              | £2,553,346                   | £1,000,000                     |
| 2016-17 | £45,309                      | 3,743                                      | £170m              | £2,348,383                   | £643,500                       |
| 2015-16 | £45,615                      | 3,481                                      | £159m              | £2,928,146                   | £755,618                       |
| 2014-15 | £45,914                      | 3,284                                      | £151m              | £1,879,543                   | £864,000                       |
| 2013-14 | £56,237                      | 2,871                                      | £161m              | £1,641,720                   | £740,935                       |

**Table 12: 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 2014 to 2020. UK only.**

## Profits

58 respondents reported aggregate profits (or surplus, for not-for-profit organisations) of £7,397,727 on their combined turnover of £117,541,684 so this equates to 6.3%, an increase on 2018-19 (when aggregate profit levels were 5.5%).

45% of respondents reported profit levels that represented 5% or less of their turnovers.

| profit as % of turnover | Oct-11 | Apr-12 | Dec-12 | Dec-12 PP | Mar-14                 | Mar-15                     | Mar-16                 | Mar-17                    | Mar-18                    | Mar-19                  | Mar 20 PP                  |
|-------------------------|--------|--------|--------|-----------|------------------------|----------------------------|------------------------|---------------------------|---------------------------|-------------------------|----------------------------|
| <5%                     | 73%    | 75%    | 70%    | 60%       | 75%                    | 70%                        | 52%                    | 44%                       | 44%                       | 23%                     | 45%                        |
| 5-10%                   | 9%     | 15%    | 23%    | 18%       | 12%                    | 18%                        | 19%                    | 13%                       | 19%                       | 19%                     | 17%                        |
| 10-25%                  | 14%    | 10%    | 5%     | 11%       | 12%                    | 12%                        | 14%                    | 41%                       | 22%                       | 23%                     | 21%                        |
| >25%                    | 5%     | 0%     | 3%     | 12%       | 0%                     | 0%                         | 14%                    | 3%                        | 15%                       | 35%                     | 17%                        |
| mean                    |        |        |        |           | £31,582                | £46,637                    | £154,438               | £121.25                   | £211,531                  | £93,630                 | £127,547                   |
| median                  |        |        |        |           | £0                     | £5,500                     | £50,000                | £43,000                   | £60,000                   | £50,000                 | £400,000                   |
| range                   |        |        |        |           | -£3,000 to<br>£251,000 | -£1,000,000<br>to £935,000 | -75,000 to<br>£799,000 | -286,000 to<br>£1,000,000 | -£26,297 to<br>£1,800,000 | -£49,000 to<br>£828,383 | -£145,000 to<br>£2,329,494 |

**Table 13: Distribution of profits, mean, median and ranges of reported profits from 2011 to 2020. PP = *Profiling the profession*, data comes from *Profiling the Profession* projects.**

## Funding Sources

The question about funding sources was rephrased for 2019-20, to identify the form of funding received rather than the nature of clients, and the results make it overwhelmingly clear that commercial archaeology is funded via fees and charging for services.

| source   | respondent turnover |              |
|--|---------------------|--------------|
| Fees and charging for services   | £111,499,915        | 97%          |
| Funding agreements with local authorities  | £240,772            | 0%           |
| Funding from local or national government  | £847,212            | 1%           |
| Grants from National Heritage Lottery Fund, or other lottery funders, etc.       | £1,536,550          | 1%           |
| Grants from other sources <i>i.e.</i> , not Lottery or local/national government | £829,192            | 1%           |
| Fund-raising and donations   | £6,065              | 0%           |
| Membership fees  | 0                   | 0%           |
| Total (£)  | £114,959,696        | <i>n</i> =64 |

**Table 14: Sources of turnover funding 2019-20.**

## Market Sectors

In every previous year, Residential Development was the largest source of funding for commercial archaeology. In 2019-20, for the first time, Transport became the largest market sector. While other transport-led work was being undertaken, this figure is very heavily influenced by the quantity of work that was being undertaken on HS2. It is also very interesting to note how minimal the mineral sector has been over the 2019-20 FY. Traditionally this has been regarded as an important part of the archaeological market and an essential supplier for the construction industry, but these figures demonstrate the relative low value of the mineral and quarrying sector for archaeological practice.



| source of income   | Mar-20     |     |
|--|------------|-----|
|  | £          | %   |
| Transport  | 30,047,104 | 34% |
| Residential development                                    | 24,724,131 | 28% |
| Commercial and industrial                                  | 15,287,709 | 17% |
| Energy   | 6,215,006  | 7%  |
| Minerals   | 2,240,828  | 3%  |
| Community projects and HLF                                 | 1,869,911  | 2%  |
| National Agencies and University Grants                    | 1,562,091  | 2%  |
| Heritage conservation                                      | 1,190,495  | 1%  |
| Education  | 1,094,391  | 1%  |
| Water Supply   | 923,207    | 1%  |
| Local Authority Initiatives                                | 623,787    | 1%  |
| Assistance to LPAs delivering development control services | 147,089    | 0%  |
| Health   | 120,166    | 0%  |
| Other research and public archaeology                      | 83,010     | 0%  |
| Waste  | 45,866     | 0%  |
| Telecommunications   | 4,005      | 0%  |
| Any other services not categorised above                   | 2,328,377  | 3%  |
| Total  | 88,507,173 |     |

**Table 15: Sources of income by sector 2019-20.**

Over the previous six years, Residential Development has been the most significant source of market income, followed by Commercial & Industrial and then Transport.

| Source of Income                                    | Mar-14 | Mar-15 | Mar-16 | Mar-17 | Mar-18 | Mar-19 | Mar-20 |
|---|--------|--------|--------|--------|--------|--------|--------|
| Transport   | 4%     | 6%     | 10%    | 6%     | 14%    | 15%    | 34%    |
| Residential development                             | 41%    | 40%    | 53%    | 42%    | 36%    | 34%    | 28%    |
| Commercial and industrial                           | 6%     | 24%    | 14%    | 18%    | 13%    | 10%    | 17%    |
| Energy  | 12%    | 7%     | 3%     | 6%     | 14%    | 18%    | 7%     |
| Minerals  | 5%     | 5%     | 3%     | 2%     | 5%     | 9%     | 3%     |
| Community projects and HLF                          | 4%     | 3%     | 2%     | 3%     | 4%     | 1%     | 2%     |
| National Agencies and University Grants             | 2%     | 3%     | 2%     | 1%     | 1%     | 1%     | 2%     |
| Heritage conservation                               | 2%     | 1%     | 2%     | 1%     | 0%     | 2%     | 1%     |
| Education   | 3%     | 2%     | 1%     | 1%     | 1%     | 2%     | 1%     |
| Local Authority Initiatives                         | 1%     | 1%     | 1%     | 0%     | 1%     | 0%     | 1%     |
| Water Supply  | 5%     | 3%     | 2%     | 2%     | 1%     | 2%     | 1%     |
| Assistance to LPAs delivering dev. control services | 2%     | 1%     | 0%     | 0%     | 0%     | 0%     | 0%     |
| Health  | 1%     | 0%     | 1%     | 1%     | 0%     | 0%     | 0%     |
| Other research and public archaeology               | 1%     | 1%     | 1%     | 1%     | 5%     | 0%     | 0%     |
| Waste   | 1%     | 0%     | 1%     | 0%     | 0%     | 0%     | 0%     |
| Telecommunications                                  | 0%     | 0%     | 0%     | 0%     | 0%     | 0%     | 0%     |
| Any other services not categorised above            | 1%     | 2%     | 1%     | 9%     | 0%     | 5%     | 3%     |
| Leisure, sport, entertainment and tourism           | 6%     | 1%     | 0%     | 5%     | 2%     | N/A    | N/A    |
| Retail and town centres                             | 5%     | 3%     | 3%     | 2%     | 3%     | N/A    | N/A    |

**Table 16: Sources of income by sector from 2014 to 2020.**

## Forms of Contract

Questions about forms of contract were not asked in 2020. This will be a question that will continue to be asked in alternate years.

The 2019 report on Forms of Contract (the most current) is reproduced below.

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

**Table 17: Forms of Contract used in 2019.**

## Market Conditions

In March 2020, very nearly half of respondents considered that market conditions would deteriorate in the coming year – significantly more than expected the market to improve.

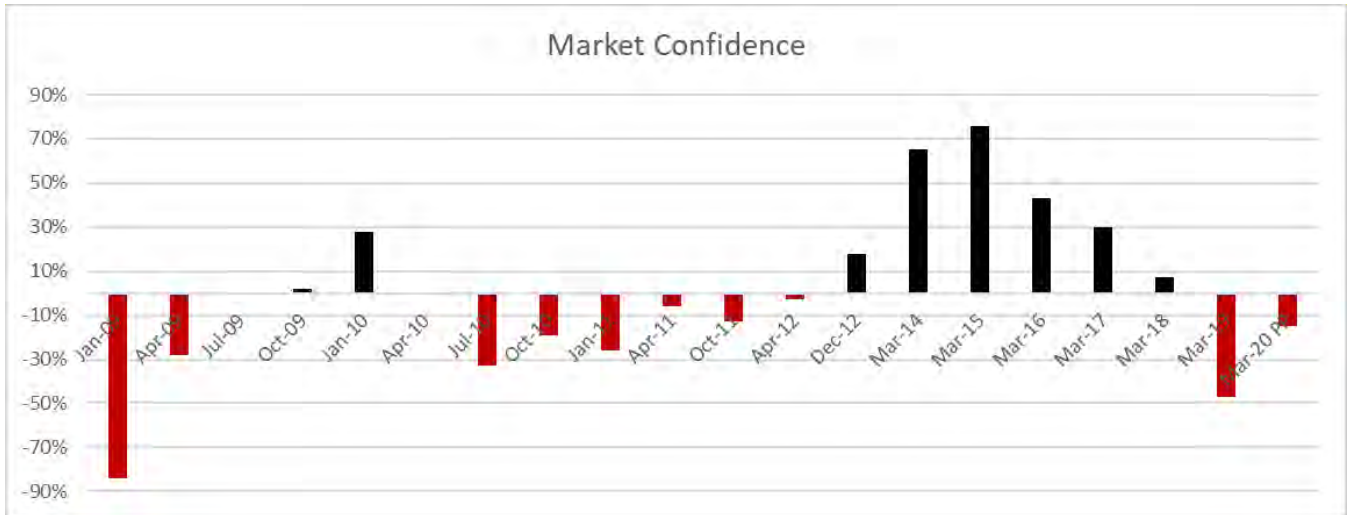
Overall, the sector felt less negative than it had a year before – but the anticipation was that the market in 2020-21 would be poorer than in 2019-20.

|   | Count | %   |
|---|-------|-----|
| yes - market conditions would deteriorate | 28    | 49% |
| no - market conditions would improve      | 19    | 33% |
| don't know                                | 10    | 18% |
| Total                                     | 57    |     |

**Table 18: Market condition expectations in 2020.**

|  | <b>Jan-09</b> | <b>Apr-09</b> | <b>Jul-09</b> | <b>Oct-09</b> | <b>Jan-10</b> | <b>Apr-10</b> | <b>Jul-10</b> | <b>Oct-10</b> | <b>Jan-11</b> | <b>Apr-11</b> |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| 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%          | -6%           |
|  | <b>Oct-11</b> | <b>Apr-12</b> | <b>Dec-12</b> | <b>Mar-14</b> | <b>Mar-15</b> | <b>Mar-16</b> | <b>Mar-17</b> | <b>Mar-18</b> | <b>Mar-19</b> | <b>Mar-20</b> |
| market conditions will deteriorate                             | 37%           | 32%           | 30%           | 13%           | 8%            | 21%           | 26%           | 37%           | 68%           | 49%           |
| market conditions will improve/the market will not deteriorate | 24%           | 29%           | 48%           | 78%           | 84%           | 64%           | 56%           | 44%           | 21%           | 33%           |
| don't know   | 39%           | 39%           | 23%           | 9%            | 8%            | 14%           | 19%           | 19%           | 12%           | 18%           |
| total confidence   | -13%          | -3%           | 18%           | 65%           | 76%           | 43%           | 30%           | 7%            | -47%          | -16%          |

**Table 19: Market confidence levels from January 2009 to March 2020. Total confidence is those that think the market won't deteriorate minus those that do.**



**Figure 2: Market Confidence from January 2009 to March 2020. Total confidence is those that think the market won't deteriorate minus those that do.**

Over time, archaeological employers' sense of confidence in the market can be linked to external political or economic events. At the start of 2009, the ongoing effects of the global economic downturn clearly influenced views; by the end of 2012, respondents were looking positively towards the future, but following the 2016 referendum on the UK's membership of the European Union, expectations deteriorated in the run-up to Brexit taking place.

Respondents were asked if they had specific comments to accompany their answers to the question, "

and 20 did – with Brexit and COVID-19 overwhelmingly influential (although two respondents identified that they were expecting a post-Brexit bounce or recovery).

Although I was insulated from market movements with HS2, I felt other sectors would suffer from COVID and Brexit.

Brexit

BREXIT

Brexit year was catastrophic and it could only get worse

By March 1st the COVID-19 pandemic had already affected Europe, and it was obvious that the UK would shortly follow suit.

by the beginning of March sites were shutting down in response to the developing Covid pandemic while enquiries were increasingly slowing down.

Covid-19 lockdown had begun and it was unclear how this would affect the 2020 performance and with the UK leaving the EU on 01/01/21, this could have a negative effect on the economy as a whole.

Due to uncertainty relating to the pandemic and Brexit

I thought they would deteriorate, but they actually improved.

Mainly due to COVID, with a bit of Brexit thrown in for good measure. My answers below are heavily skewed by the COVID uncertainty I would have had at the time

post brexit bounce

Post brexit recovery

The Brexit situation was a concern and yet the infrastructure situation and housing market was a reassurance. Covid was a more rapid problem and not foreseen

The entire economy will tank after Brexit

The uncertainty of Brexit was, and continues to be, a significant factor in forward planning as the condition of the economy post-Brexit is unknown.

Unfortunately I didn't realize that the govt was intent on deliberately trashing the economy over a minor health risk to the very elderly. Had I known I would have emigrated somewhere vaguely sensible like Sweden

We knew Brexit was coming

We predicted that COVID-19 would be a problem and had already started to make contingency plans. We were also anticipating the (bad) economic consequences of BREXIT

Worried how Brexit would affect the economy & house building especially as we are based in Northern Ireland.

yes, but for how long, we thought it would pick up later in year.

## Skills

Historically, the area where skills were most frequently reported as being lost was in Fieldwork. This was no longer the case in 2019-20, as relatively few respondents reported skills being lost – a remarkable transformation, with only 5% of respondents identifying that they had lost fieldwork skills, in comparison with 19% that had the year before - and as many reported skills losses in the areas of post-fieldwork analysis or desk-based / environmental assessment as were reported for fieldwork.

Although individual employers did not report that they were losing fieldwork skills, fieldwork was the area where most respondents identified that there was an overall sectoral skills shortage, and this was reflected in the high levels of hiring in and training being undertaken for this set of skills.

The most reported area where skills were hired in was in artefact or ecofact conservation, followed by fieldwork.

Significant numbers of respondents were training staff in desk-based assessment, data management, fieldwork, post-fieldwork and in providing advice.

83 respondents answered at least some of the questions relating to skills. In table 20 below, for each identified skill area – e.g., *Fieldwork (intrusive or non-intrusive)*, the numbers of respondents reporting having lost skills in that area, having hired in skills in that area, having trained staff in that area of skills, or identifying that they consider there is a sectoral skills shortage in that area – the number of respondents is given, together with that figure as a percentage of all 83 respondents. For example, 4



respondents reported that in the previous year they had lost skills in *Fieldwork (intrusive or non-intrusive)* – (5% of respondents), but 21 respondents (25%) considered that there was a wider sectoral skills shortage in this area.

|  | lost skills |    | hired skills |     | trained skills |     | sectoral skills shortage |     |
|--|-------------|----|--------------|-----|----------------|-----|--------------------------|-----|
| fieldwork (intrusive or non-intrusive)             | 4           | 5% | 34           | 41% | 23             | 28% | 21                       | 25% |
| post-fieldwork analysis                            | 4           | 5% | 25           | 30% | 23             | 28% | 13                       | 16% |
| artefact or ecofact conservation                   | 1           | 1% | 38           | 46% | 6              | 7%  | 11                       | 13% |
| providing advice to clients or other service users | 2           | 2% | 5            | 6%  | 20             | 24% | 6                        | 7%  |
| desk-based or environmental assessment             | 4           | 5% | 7            | 8%  | 32             | 39% | 7                        | 8%  |
| data management                                    | 0           | 0% | 3            | 4%  | 26             | 31% | 6                        | 7%  |
| other  | 1           | 1% | 5            | 6%  | 6              | 7%  | 5                        | 6%  |

**Table 20: Skills that were lost, hired in, trained and where respondents felt there was sectoral shortage in 2020. *n* = 83.**

| Skills Lost                            | Dec-12 | Mar-14 | Mar-15 | Mar-16 | Mar-17 | Mar-18 | Mar-19 | Mar-20 |
|--|--------|--------|--------|--------|--------|--------|--------|--------|
| fieldwork (intrusive or non-intrusive) | 19%    | 39%    | 35%    | 25%    | 27%    | 40%    | 19%    | 5%     |
| post-fieldwork analysis                | 14%    | 17%    | 16%    | 17%    | 23%    | 20%    | 6%     | 5%     |
| artefact or ecofact conservation       | 7%     | 4%     | 14%    | 17%    | 15%    | 16%    | 6%     | 2%     |
| providing advice to clients            | 10%    | 4%     | 11%    | 8%     | 12%    | 16%    | 6%     | 3%     |
| desk-based/environmental assessment    | 7%     | 4%     | 11%    | 8%     | 8%     | 12%    | 10%    | 4%     |
| data management                        | 5%     | 9%     | 5%     | 4%     | 8%     | 0%     | 0%     | 1%     |
| other                                  | 2%     | 13%    | 3%     | 4%     | 0%     | 0%     | 0%     | 1%     |

**Table 211: Skills lost from 2012 to 2020. 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.**

| Skills Bought-in                       | Dec-12 | Mar-14 | Mar-15 | Mar-16 | Mar-17 | Mar-18 | Mar-19 | Mar-20 |
|--|--------|--------|--------|--------|--------|--------|--------|--------|
| fieldwork (intrusive or non-intrusive) | 36%    | 39%    | 51%    | 67%    | 62%    | 68%    | 52%    | 39%    |
| post-fieldwork analysis                | 40%    | 35%    | 43%    | 58%    | 62%    | 60%    | 42%    | 38%    |
| artefact or ecofact conservation       | 55%    | 52%    | 27%    | 58%    | 46%    | 44%    | 39%    | 43%    |
| desk-based/environmental assessment    | 7%     | 17%    | 8%     | 21%    | 12%    | 12%    | 23%    | 5%     |
| providing advice to clients            | 0%     | 9%     | 14%    | 25%    | 15%    | 12%    | 13%    | 9%     |
| data management                        | 5%     | 0%     | 5%     | 13%    | 12%    | 4%     | 10%    | 3%     |
| other                                  | 7%     | 4%     | 0%     | 4%     | 8%     | 4%     | 16%    | 6%     |

**Table 22: Skills bought-in from 2012 to 2020. 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.**

| <b>Training Provided</b>               | <b>Dec-12</b> | <b>Mar-14</b> | <b>Mar-15</b> | <b>Mar-16</b> | <b>Mar-17</b> | <b>Mar-18</b> | <b>Mar-19</b> | <b>Mar-20</b> |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| fieldwork (intrusive or non-intrusive) | 36%           | 52%           | 54%           | 71%           | 62%           | 72%           | 55%           | 27%           |
| post-fieldwork analysis                | 29%           | 48%           | 46%           | 63%           | 62%           | 68%           | 42%           | 26%           |
| artefact or ecofact conservation       | 17%           | 39%           | 38%           | 58%           | 58%           | 68%           | 13%           | 6%            |
| providing advice to clients            | 29%           | 39%           | 38%           | 33%           | 38%           | 44%           | 45%           | 25%           |
| desk-based/environmental assessment    | 7%            | 30%           | 14%           | 33%           | 35%           | 36%           | 42%           | 34%           |
| data management                        | 17%           | 26%           | 24%           | 33%           | 31%           | 28%           | 23%           | 31%           |
| other                                  | 17%           | 30%           | 24%           | 21%           | 15%           | 8%            | 10%           | 10%           |

**Table 232: Skills training provided from 2012 to 2020. 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.**

| <b>Sector Shortages</b>                | <b>Dec-12</b> | <b>Mar-14</b> | <b>Mar-15</b> | <b>Mar-16</b> | <b>Mar-17</b> | <b>Mar-18</b> | <b>Mar-19</b> | <b>Mar-20</b> |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| post-fieldwork analysis                | 33%           | 35%           | 41%           | 46%           | 50%           | 64%           | 19%           | 25%           |
| fieldwork (intrusive or non-intrusive) | 24%           | 22%           | 49%           | 54%           | 65%           | 64%           | 29%           | 15%           |
| artefact or ecofact conservation       | 21%           | 13%           | 24%           | 29%           | 42%           | 48%           | 16%           | 12%           |
| providing advice to clients            | 24%           | 17%           | 22%           | 29%           | 38%           | 32%           | 16%           | 6%            |
| desk-based/environmental assessment    | 19%           | 17%           | 22%           | 29%           | 23%           | 32%           | 23%           | 10%           |
| data management                        | 24%           | 4%            | 8%            | 13%           | 15%           | 20%           | 13%           | 6%            |
| other                                  | 7%            | 17%           | 14%           | 29%           | 12%           | 20%           | 6%            | 5%            |

**Table 24: Skills shortages from 2012 to 2020. 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.**

## NVQ

Very few respondents answered the question on whether they were using, had used or planned to use the Level 3 NVQ Certification in Archaeological Practice.

### NVQ - (Level 3 NVQ Certificate in Archaeological Practice)

|                            |   |     |
|----------------------------|---|-----|
| have used but no longer do | 4 | 36% |
| currently use              | 4 | 36% |
| intend to use              | 3 | 27% |

**Table 25: NVQ responses to question "which of the following do you use, have used or intend to use for staff training and development?" n=11**

## Apprenticeships

Formal Apprenticeships continue to be under-used in commercial archaeology, but more respondents intend to use them in the future than reported having had experience of them to date. They appear to be more popular with employers than the NVQ.

### Apprenticeships

|                            |   |     |
|----------------------------|---|-----|
| have used but no longer do | 3 | 21% |
| currently use              | 2 | 14% |
| intend to use              | 9 | 64% |

**Table 26: Apprenticeships responses to question "which of the following do you use, have used or intend to use for staff training and development?" n=14**

## Perceptions

Overall, respondents felt that the economic climate for development was likely to deteriorate in the 12 months from March 2020. Views were balanced on whether heritage teams would grow or not. Late and / or non-payment of bills were becoming less significant concerns for the sector.

Overall, respondents tend to agree that current national planning policy frameworks make it easier to justify heritage work and revenue levels, and to disagree with the assertion that these frameworks weaken the case for heritage work.

A clear majority of respondents either agree, or strongly agree with the perception that **a shortage of heritage staff in LPAs is a major constraint on heritage projects**, and this has been the case in every iteration of this survey since 2014.

|   | Mar-14 | Mar-15 | Mar-16 | Mar-17 | Mar-18 | Mar-19 | Mar-20 |
|---|--------|--------|--------|--------|--------|--------|--------|
| <b>the economic climate for development will improve over the next 12 months</b>                                    |        |        |        |        |        |        |        |
| strongly agree  | 9%     | 23%    | 12%    | 4%     | 25%    | 9%     | 2%     |
| agree   | 55%    | 57%    | 35%    | 15%    | 19%    | 3%     | 20%    |
| unsure  | 36%    | 20%    | 42%    | 42%    | 31%    | 29%    | 39%    |
| disagree  | 0%     | 0%     | 12%    | 31%    | 17%    | 38%    | 27%    |
| strongly disagree   | 0%     | 0%     | 0%     | 8%     | 8%     | 18%    | 12%    |
| <b>my heritage team will grow within the next 12 months</b>   |        |        |        |        |        |        |        |
| strongly agree  | 24%    | 23%    | 22%    | 12%    | 15%    | 12%    | 12%    |
| agree   | 38%    | 40%    | 33%    | 36%    | 37%    | 15%    | 26%    |
| unsure  | 10%    | 26%    | 26%    | 24%    | 33%    | 29%    | 21%    |
| disagree  | 29%    | 9%     | 15%    | 16%    | 7%     | 26%    | 23%    |
| strongly disagree   | 0%     | 3%     | 4%     | 12%    | 7%     | 18%    | 18%    |
| <b>late payment of bills is an increasingly significant problem for my business</b>                                 |        |        |        |        |        |        |        |
| strongly agree  | 14%    | 14%    | 19%    | 15%    | 19%    | 9%     | 15%    |
| agree   | 45%    | 49%    | 31%    | 46%    | 30%    | 41%    | 26%    |
| unsure  | 5%     | 0%     | 12%    | 8%     | 15%    | 12%    | 8%     |
| disagree  | 36%    | 37%    | 38%    | 31%    | 37%    | 32%    | 42%    |
| strongly disagree   | 0%     | 0%     | 0%     | 0%     | 0%     | 3%     | 9%     |
| <b>non-payment of bills has been a significant problem for my business</b>  |        |        |        |        |        |        |        |
| strongly agree  | 18%    | 25%    | 12%    | 12%    | 0%     | 3%     | 9%     |
| agree   | 27%    | 26%    | 8%     | 20%    | 67%    | 26%    | 17%    |
| unsure  | 5%     | 3%     | 0%     | 8%     | 7%     | 9%     | 6%     |
| disagree  | 41%    | 41%    | 58%    | 52%    | 19%    | 44%    | 56%    |
| strongly disagree   | 9%     | 6%     | 23%    | 8%     | 7%     | 15%    | 12%    |
| <b>current national planning policy frameworks are making it easier to justify heritage work and revenue levels</b> |        |        |        |        |        |        |        |
| strongly agree  | 5%     | 12%    | 0%     | 4%     | 8%     | 3%     | 9%     |
| agree   | 55%    | 38%    | 31%    | 48%    | 42%    | 44%    | 34%    |
| unsure  | 18%    | 21%    | 19%    | 20%    | 27%    | 24%    | 32%    |
| disagree  | 18%    | 24%    | 46%    | 24%    | 19%    | 26%    | 25%    |
| strongly disagree   | 5%     | 6%     | 4%     | 4%     | 4%     | 0%     | 0%     |



|   | Mar-14 | Mar-15 | Mar-16 | Mar-17 | Mar-18 | Mar-19 | Mar-20 |
|---|--------|--------|--------|--------|--------|--------|--------|
| <b>current national planning policy frameworks weaken the case for heritage work and revenue levels</b> |        |        |        |        |        |        |        |
| strongly agree  | 9%     | 6%     | 4%     | 8%     | 26%    | 9%     | 6%     |
| agree   | 5%     | 21%    | 37%    | 13%    | 11%    | 9%     | 17%    |
| unsure  | 23%    | 24%    | 11%    | 25%    | 17%    | 24%    | 31%    |
| disagree  | 55%    | 38%    | 44%    | 46%    | 37%    | 53%    | 35%    |
| strongly disagree   | 9%     | 12%    | 4%     | 8%     | 9%     | 3%     | 11%    |
| <b>a shortage of heritage staff in LPAs is a major constraint on heritage projects</b>                  |        |        |        |        |        |        |        |
| strongly agree  | 35%    | 44%    | 38%    | 27%    | 30%    | 9%     | 19%    |
| agree   | 39%    | 35%    | 46%    | 58%    | 33%    | 56%    | 50%    |
| unsure  | 9%     | 15%    | 12%    | 8%     | 19%    | 18%    | 19%    |
| disagree  | 17%    | 6%     | 4%     | 8%     | 15%    | 12%    | 9%     |
| strongly disagree   | 0%     | 0%     | 0%     | 0%     | 4%     | 3%     | 3%     |

**Table 27: Respondents' perceptions from 2014 to 2020**