



Job Losses in Archaeology – July 2010

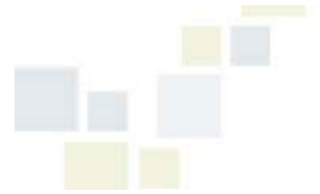
Prepared for

Kate Geary
Standards Development Manager

Institute for Archaeologists

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Prepared by
Landward Research Ltd

161 Industry Street, Sheffield S6 2WX
tel +44(0)114 281 0904
email enquiries@landward.eu
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Principal Author(s)

Kenneth Aitchison

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1 EXECUTIVE SUMMARY

The number of people in archaeological employment increased markedly over the three months from April to June 2010, with at least one employer finding it difficult to recruit fieldworkers, but simultaneously business confidence in maintaining this growth declined considerably.

It is estimated that 6498 people were working in professional archaeology on 1st July 2010, an increase of 265 (4.3%) on the figure for 1st April 2010.

3669 of these individuals were working in commercial, applied archaeology, an increase of 7.8% on the figure for 1 April 2010. This figure is 9.1% below the August 2007 peak.

The proportion of businesses that expected to be able to maintain their current staff numbers fell in comparison with three months previously, with the proportion of businesses that expected market conditions to deteriorate rising significantly. Unlike at the start of 2010, most businesses now expect conditions to be worse in the next year than better. The overwhelming majority of respondents expect some archaeological practices to cease trading in the next twelve months.

Even though some employers found it difficult to recruit fieldworkers, for the fifth quarter in succession the skills needed to conduct and contribute to invasive field investigation were reported as being those that were most frequently being lost.

2 INTRODUCTION

In January 2009, the Institute for Archaeologists (IfA), together with FAME (the Federation of Archaeological Managers and Employers) responded to learning that the economic downturn was having serious effects on commercial archaeological practice by conducting a rapid survey of archaeological employers in order to gather statistical data on job losses and business confidence which could be used to support businesses and individual archaeologists.

This report is on the results of the sixth repetition of the January 2009 exercise, which has been repeated on a quarterly basis since that date. The reports on those earlier surveys are available on the IfA website at through the [Recession – managing and planning](#) page.

The organisations that were approached represented the majority of employers working in commercial, client-funded applied archaeology. Data have not been sought for this exercise from organisations exclusively providing curatorial advice to local or national government.

3 METHODOLOGY

Archaeological employers that are either Registered Organisations with the Institute for Archaeologists (IfA) or members of the Federation of Archaeological Managers and Employers (FAME) were sent a short questionnaire which replicated those used previously by email on 20 August 2010, asking for responses by 27 August 2010.

This asked about past and present staffing levels, business confidence in the future and which skills were being most heavily lost. The full questionnaire is presented at the end of this report.

Questionnaires were sent to 64 IfA Registered Organisations and to the 59 members of FAME. As there is a degree of overlap (with some organisations being both IfA Registered Organisations and FAME members), 98 questionnaires were sent in total. As two of these organisations do not employ archaeologists in the UK (and did not reply to the consultation), and two questionnaires went to subsidiary offices of larger organisations, in total 94 organisations were contacted.

Results are extrapolated from the data returned to generate total numbers of individuals estimated to be employed within commercial, applied archaeology. The total number of individuals who were working in all other areas of archaeological practice in August 2007, as reported in *Archaeology Labour Market Intelligence Profiling the Profession 2007-08*¹ is added to this to produce overall figures for the entire archaeological profession.

3.1 Responses

45 completed questionnaires were returned.

¹ Aitchison, K. & Edwards, R. 2008. *Archaeology Labour Market Intelligence: Profiling the Profession 2007.08*. Reading: Institute for Archaeologists.
http://www.archaeologists.net/modules/icontent/inPages/docs/lmi%200708/Archaeology_LMI_report_colour.pdf

4 RESULTS

4.1 Individuals in Archaeological Employment

The respondent organisations employed 1685.23 (FTE) individuals on 1 July 2010. The same organisations employed 1813.86 (FTE) individuals in August 2007 at the time of the *Archaeology Labour Market Intelligence Profiling the Profession 2007-08* survey, a reduction of 7.1% over that period.

However, they reported an increase in the total number of individuals working for them of 5.4% over the three months since the date of the previous survey, 1 April 2010.

Extrapolating from this sample, this represents a net gain of 265 jobs across the entire archaeological profession, equating to an increase over the quarter of 7.8% of commercial archaeological posts or 4.3% of all archaeological posts.

One respondent to the survey expressly noted difficulties in recruiting staff, writing that there “seems to [be a] shortage of diggers at present”.

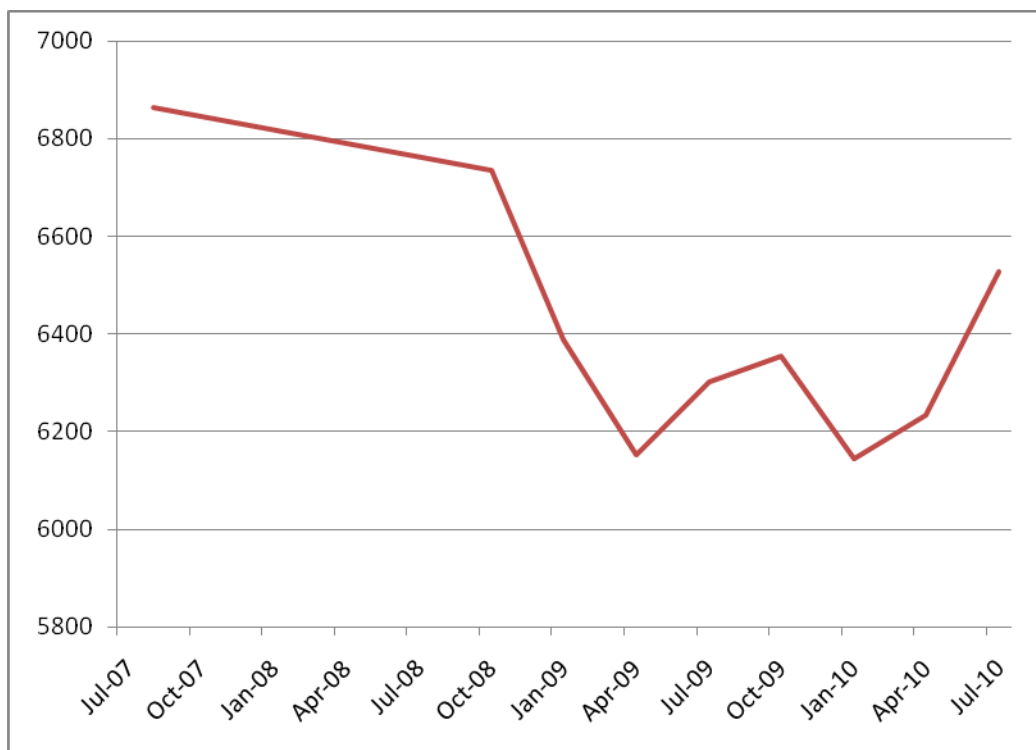
4.2 Change Over Time

Using data from the seven quarterly surveys undertaken to date, further details become apparent.

There was a modest decline in the number of people employed between August 2007 and October 2008, but then very significant numbers of jobs were lost in the final quarter of 2008 and the first quarter of 2009. Over the two quarters following April 2009, the number of people in archaeological employment stabilised, but the numbers fell again in the final quarter of 2009. A very modest rise in the number of people working in the first quarter of 2010 has been followed by a more substantial increase in the second quarter, which has represented the largest quarterly increase since this series of reports began.

At the start of July 2010, there were still approximately 365 less people in archaeological work than at the August 2007 peak.

	13 Aug 07	01 Oct 08	01 Jan 09	01 Apr 09	01 Jul 09	01 Oct 09	01 Jan 10	01 Apr 10	01 Jul 10
Commercial Archaeology	4036	3906	3559	3323	3472	3526	3316	3404	3669
Entire Profession	6865	6735	6388	6152	6301	6355	6145	6233	6498



Employment in UK archaeology, August 2007 – July 2010

4.3 Business Confidence

The questionnaire asked three questions relating to business confidence, regarding staff retention, opinion on the future condition of the archaeological market, and whether the respondents expected any businesses failures in the sector.

Overall confidence is declining under all three measures, after it had slowly been showing signs of improvement until the start of 2010.

Two respondents specifically identified political causes for this decline in confidence:

“Following the new Coalition govt’s budget the housing market in particular has slowed down after some progress before May 2010”, and

“On the wider picture I think it is likely that cuts in Government/Local Government expenditure will have an impact through potential reductions in LA staffing (potentially leading to less briefs) and the reduction in infrastructure projects and other government driven initiatives. RICS views on the construction industry picking up in the next two years are ‘gloomy’, although we have seen a slight rise in planning applications this year”.

4.3.1 Maintenance of Staffing Levels

The questionnaire asked respondents whether they felt that they would be able to maintain their present staff numbers over the three months to the end of September 2010.

The majority of respondents that expressed a definite view (30 of 41) felt that they would be able to maintain their present staffing levels.

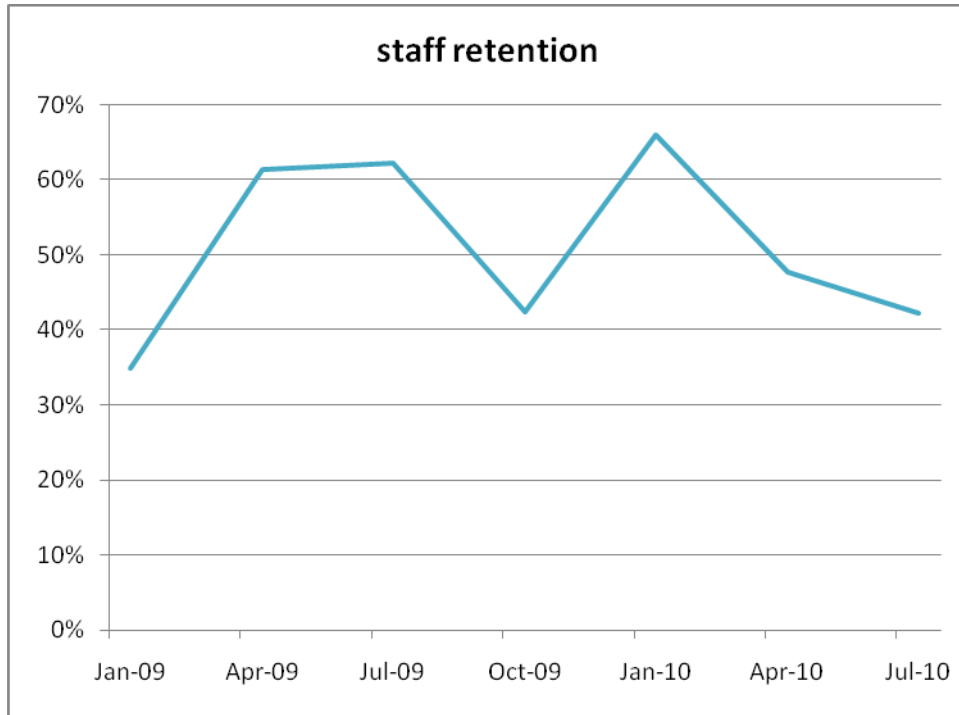
Do you anticipate being able to maintain your present staffing levels over the next three month period (to 30 June 2010)?

	Responses	Number employed on 01/07/2010	Lost staff in previous quarter	No change in previous quarter	Expanded in previous quarter
Yes (will maintain present levels)	30	969.43	8	13	9
No (will not maintain present levels)	11	341.8	1	4	6
Don't know	4	374	1	3	0
Total	45	1685.23	10	20	15

Over time, companies have generally been confident in their abilities to retain staff, but are now less confident than they were in the first half of 2009. A higher percentage of businesses are more confident of maintaining staff levels for the quarter to the end of June 2010 than they were three months before, but this is more than counterbalanced by the figure for the percentage who do not expect to maintain these levels.

	Will maintain present levels over next quarter	Not maintain present levels over next quarter
July 2010	67%	24%
April 2010	62%	14%
January 2010	74%	9%
October 2009	63%	21%
July 2009	77%	14%
April 2009	77%	16%
January 2009	61%	31%

Graphing the total number of positive responses less the number of negative responses as a percentage of the total number of responses received (where if every response was positive the result would be 100%, and if every response was negative the result would be -100%) presents more legible results.



Over time, respondents have generally been confident of being able to maintain staffing levels, but the level of confidence has fallen in this and the previous survey.

4.3.2 Future Situation

Respondents were also asked for their views on whether the market would deteriorate or not over the next year.

Do you believe that the market conditions will deteriorate further in the next twelve months (from July 2010)?

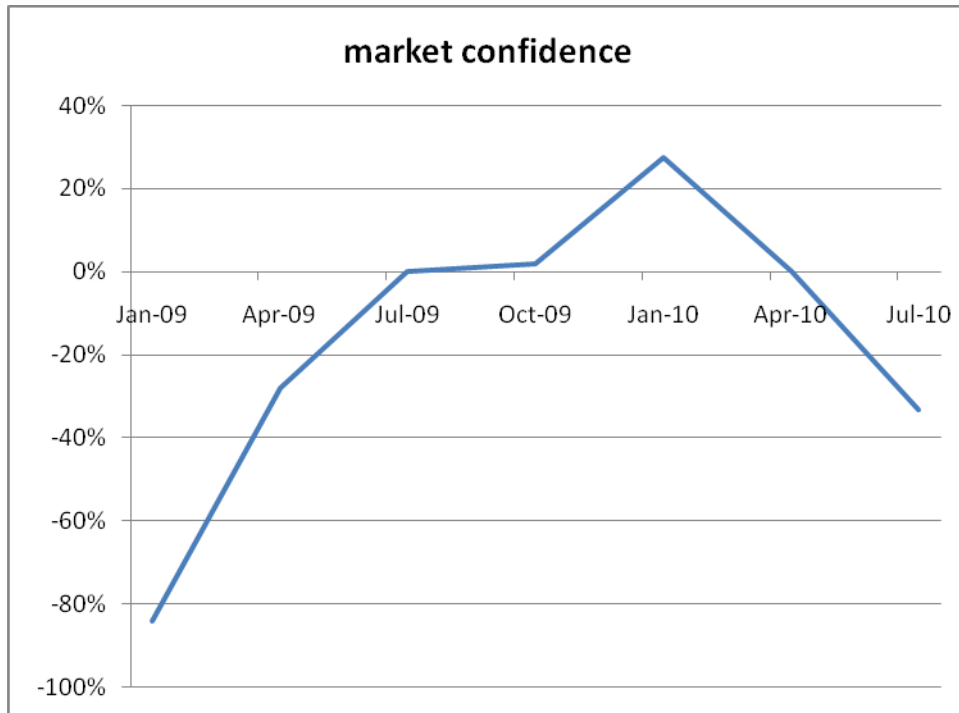
	Responses	Number of staff employed on 01/07/2010
Yes (market conditions will deteriorate in the next 12 months)	23	549.23
No (market conditions will not deteriorate)	8	482
Don't know or no answer	14	654
Total	45	1685.23

The majority of businesses expected the market to deteriorate over the year from 1st July 2010.

Over time, responses to this question had suggested that feelings were becoming more positive until the previous survey (April 2010), which reported a reduction in confidence, a sentiment which has sharpened considerably in this survey.

	Expect conditions to worsen	Do not expect conditions to worsen	Don't know or no answer
July 2010	51%	18%	31%
April 2010	29%	29%	43%
January 2010	19%	47%	34%
October 2009	31%	33%	36%
July 2009	42%	42%	16%
April 2009	54%	26%	20%
January 2009	89%	3%	8%

As above, graphing the number of responses with a positive sentiment (the market will not deteriorate) less the number of negative responses (the market will deteriorate) as a percentage of the total number of responses received (where if every response was positive the result would be 100%, and if every response was negative the result would be -100%) presents more legible results.



This graph demonstrates very clearly that business confidence in future market conditions had been steadily improving until the beginning of 2010, but has shifted significantly towards the negative since that point.

One respondent wrote “I expect that demand in some areas will improve, eg housing developments, and work related to agri-environment schemes, but that projects based on infrastructure development, English Heritage grant funding and local authority funding are likely to be reduced. Local authority funding for the service will certainly be cut, but the impact is not yet known.”

Another noted that “The market is still unpredictable, but current trends are positive. Against this the archaeological market, rather than the construction market, is very aggressive with what I would consider sharp practices being employed to secure contracts”.

4.3.3 Business Failures

The respondents were also asked if they anticipated any archaeological businesses to fail and cease trading in the next 12 months.

Do you expect any archaeological practices to cease trading in the next 12 months?

	Responses	Number of staff employed on 01/07/2010
Yes (expect practices to cease trading in 12 months from July 2010)	25	251.1
No (do not expect any practices to cease trading in 12 months from July 2010)	4	747.85
Don't know or no answer	16	686.28
Total	45	1685.23

Over time, respondents have had a steadily high expectation that businesses will fail in the forthcoming 12 months. Every survey has produced results that suggest more respondents expected businesses to fail than did not.

	Expect practices to cease trading	Do not expect practices to cease trading	Don't know or no answer
July 2010	56%	9%	36%
April 2010	53%	19%	18%
January 2010	47%	19%	34%
October 2009	71%	8%	21%
July 2009	70%	11%	19%
April 2009	75%	5%	20%
January 2009	84%	2%	14%

The percentage of respondents that expect businesses to fail has risen, and the percentage that does not expect this to happen has fallen in comparison with three months before.

As with the two datasets above, graphing the number of responses with a positive sentiment (businesses will not fail) less the number of negative responses (practices will cease trading) as a percentage of the total number of responses received (where if every response was positive the result would be 100%, and if every response was negative the result would be -100%) presents more legible results.



At no point have more respondents expected positive outcomes than negative, although overall opinion had been generally ameliorating until the January 2010 survey. Since then, attitudes have become increasingly negative.

One respondent wrote: "We still think it is likely that organisations will cease trading either from cash flow or bad debt problems or for political reasons – eg budgetary cuts in public sector organisations, universities and local authorities".

4.4 Skills Lost

Respondents were also asked to identify which specific skills areas were being particularly affected. The questionnaire asked them to indicate up to three areas from the shortlist of skill areas used in Aitchison & Edwards 2008 where they felt that their organisation had lost skills during the present crisis. They were asked to mark these 1, 2 and 3 in order of severity (1 being the area where skills have been most severely affected).

The table below grades the responses according firstly to the total number of times a skill area was identified as being lost, and secondarily by the significance that respondents attached to that loss.

	Total	1 (most severely affected)	2 (severely affected)	3 (affected)
Contributing to intrusive investigations (evaluation, excavation) as team members or diggers	16	9	5	2
Conducting (leading or directing) intrusive investigations (evaluation, excavation)	15	4	8	3
Conducting (leading or directing) survey and interpretation of historic buildings	5	3	0	2
Desk-based historic environment research including desk-based assessment	5	1	1	3
Artefact research	4	2	1	1
Contributing to non-intrusive investigations (geophysical survey) as team members	4	0	1	3
Historic environment characterisation	2	1	1	0
Conducting (leading or directing) non-intrusive investigations (geophysical survey)	1	0	1	0
Contributing to survey and interpretation of historic buildings as team members	1	0	1	0
Providing information and advice on the conservation and management of the historic environment	1	0	1	0
Conducting (leading or directing) other non-intrusive investigations	1	0	0	1
Contributing to other non-intrusive investigations as team members	1	0	0	1
Creating, managing and maintaining Historic Environment Records	1	0	0	1
Other archaeological skills (<i>please specify</i>) – post-ex	1	0	0	1
Conservation of artefacts or ecofacts	0	0	0	0
Ecofact research	0	0	0	0

Skills continue to be lost across almost all professional activities, but as in previous quarters it is the skills that are needed to conduct and contribute to intrusive, excavation projects which are being most notably lost – which repeats the pattern reported in the five previous surveys (since April 2009).

5 FUTURE SURVEYS

IfA will continue to commission this survey on a quarterly basis, reporting the results on its website and tracking changes in the situation, until further notice.

6 QUESTIONNAIRE

From: Kenneth Aitchison <kenneth.aitchison@archaeologists.net>

Sent: Fri, 20 August, 2010 16:40:46

Subject: Job Losses in Archaeology - IfA and FAME consultation, July 2010

Job Losses in Archaeology - July 2010

Dear Colleague,

IfA and FAME wish to continue to gather data on the state of the labour market in commercial archaeology, and so I would once again like to invite you to please complete the questionnaire below.

Over the last two years, the situation has been volatile; the worst quarter for job losses was the final three months of 2008, and since then there have been quarterly fluctuations in the total numbers of people in archaeological employment. In the first quarter of 2010, there was a small increase in the number of working archaeologists, but business confidence was deteriorating when the survey was conducted (which was shortly after the general election).

I would like to ask you once again if you would please give up some of your time to answer the standardised set of questions below.

We now seek information as it applied to your organisation on **1 July 2010**. Please help us to produce as full a picture as possible; as before, your responses are fully confidential and will not be seen by any individual other than myself.

All of the previous reports are available through the IfA website's [recession page](#) (with specific reports at [January 09](#), [April 09](#), [July 09](#), [October 09](#), [January 10](#) and now [April 10](#)).

This email has been sent to all IfA Registered Organisations and FAME member organisations.

How many members of staff (FTE) did your organisation have on 1 July 2010?

How many members of staff (FTE) did your organisation have on 1 April 2010?

How many members of archaeological staff (FTE) did your organisation have on 13 August 2007 (the census date for *Profiling the Profession: Archaeology Labour Market Intelligence 2007-08*)?

Do you anticipate being able to maintain your present staffing levels over the next three month period (to 30 September 2010)?

Do you believe that the market conditions will deteriorate further over the next 12 months?

Do you expect any archaeological practices to cease trading over the next 12 months?

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email enquiries@landward.eu
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As well as tracking the key data regarding job losses, in order to help us track which specific skills areas are being particularly affected, and so to help plan for the recovery, please now also indicate up to three areas from the following list where you feel your organisation has lost skills during the present crisis. Please mark these 1, 2 and 3 in order of severity (1 being the area where skills have been most severely affected). Please try to limit your responses to the **three** areas that you feel have been most seriously affected).

Conducting (leading or directing) intrusive investigations (evaluation, excavation)
 Contributing to intrusive investigations (evaluation, excavation) as team members or diggers
 Conducting (leading or directing) survey and interpretation of historic buildings
 Contributing to survey and interpretation of historic buildings as team members
 Conducting (leading or directing) non-intrusive investigations (geophysical survey)
 Contributing to non-intrusive investigations (geophysical survey) as team members
 Conducting (leading or directing) other non-intrusive investigations
 Contributing to other non-intrusive investigations as team members
 Desk-based historic environment research including desk-based assessment
 Creating, managing and maintaining Historic Environment Records
 Historic environment characterisation
 Providing information and advice on the conservation and management of the historic environment
 Conservation of artefacts or ecofacts
 Artefact research
 Ecofact research
 Other archaeological skills (please specify)

Please send your responses to me, [Kenneth Aitchison](#), by Friday 27 August 2010.

Your answers will be treated in the strictest confidentiality; while aggregated and extrapolated figures will be provided to FAME and published on the [recession - managing and planning](#) page of the IfA website and elsewhere, I personally will be the only individual who ever sees your separate responses.

The information gathered will continue to be used to see how IfA members, Registered Organisations and the profession as a whole can be supported through this period. We expect to continue to repeat this questionnaire on a quarterly basis until further notice.

Kenneth Aitchison: IfA Head of Projects and Professional Development

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Kenneth Aitchison MA FSA FSA Scot MIfA

Head of Projects and Professional Development, Institute for Archaeologists

t +44 (0)114 281 0904 m +44 (0)780 389 5033 skype kenneth_aitchison www.archaeologists.net

Registered office: SHES, University of Reading, PO Box 227, Reading RG6 6AB Tel: 0118 3786336

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Landward Research Ltd

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