Job Losses in Archaeology – April 2011

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CONTENTS

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1 EXECUTIVE SUMMARY

In April 2011, the rate of job losses in archaeology appears to have slowed, and business confidence is showing very slight signs of improvement.

In the first three months of 2011, the number of archaeologists in work increased very slightly (by 0.6% since January - there are estimated to be 5863 working archaeologists in the UK on 1 April 2011, 800 less than at the summer 2007 peak), but further job losses in curatorial local government services are expected and imminent.

Looking back, after a serious decline in the number of people employed in commercial archaeology in the autumn of 2008, there have been rises and falls in the total numbers of archaeologists in work over the last two and a half years, but with a general downward trend. Several businesses have ceased trading, with commercial companies attached to universities being particularly vulnerable.

Over time, business confidence (tracked through the measures of whether companies expect to maintain their staffing levels, whether the market is expected to improve in the next year and whether businesses are expected to close) has been poor. Overall signs of recovery in late 2009 were reversed in the first half of 2010; there has been a slight improvement in early 2011.

For the eighth 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.

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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 eighth repetition of the January 2009 exercise, which has been conducted 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 and on the FAME website http://www.famearchaeology.co.uk/news/.

The organisations that were approached represented the majority of employers working in commercial, client-funded applied archaeology. While data have not been sought for this exercise from all organisations exclusively providing curatorial advice to local or national government, information has been received from ALGAO which allows an estimate to be produced for the number of individuals working in local government advisory roles.

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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 link to a short questionnaire which closely replicated those used previously by email on 1 April 2011, asking for responses by 8 April 2011.

This asked for data that applied to their organisations on 1 April 2011, relating to 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 the list of 65 IfA Registered Organisation Responsible Postholders provided by IfA and to the list of 69 FAME members provided by FAME. There is a significant degree of overlap (with some organisations being both IfA Registered Organisations and FAME members).

Results are extrapolated from the data returned to generate total numbers of individuals estimated to be employed within commercial, applied archaeology.

Data provided by ALGAO have given total numbers for those archaeologists employed to provide advisory services to local authorities. That dataset was collected in May 2010.

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 these numbers 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

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4 RESULTS

4.1 Individuals in Archaeological Employment

All figures presented here take into account the results of an ALGAO survey of May 2010; the details of those data were presented in the previous (January 2011) report on job losses in archaeology. As no more recent data are available, that survey continues to be treated as the best and most reliable source of information on the number of individuals working in services advising local planning authorities.

The respondent organisations to this current survey employed 1544.5 (FTE) individuals on 1 April 2011. The same organisations employed 1901.09 (FTE) individuals in August 2007 at the time of the *Archaeology Labour Market Intelligence Profiling the Profession 2007-08* survey, a reduction of 18.8% over the period from August 2007 to April 2011.

Since the previous survey in January 2011, the total number of people that the respondents employed increased by 1.6% over the three months to April 2011.

Extrapolating from this sample and in comparison with previous results (including ALGAO figures), this represents a net gain of 36 jobs across the entire archaeological profession in the first quarter of 2011,equating to an increase of 1.1% of commercial archaeological posts or 0.6% of all archaeological posts.

It is estimated that on 1 April 2011 there were 5863 people in archaeological employment in the United Kingdom, 3225 of whom worked in applied, commercial archaeology.

4.2 Change over Time

Using data from the nine 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 modest rise in the number of people working in the first quarter of 2010 was followed by a more substantial increase in the second quarter, which represented the largest quarterly increase since this series of reports began. The numbers in employment fell significantly in the third quarter of 2010, and continued to fall in the final quarter.

At the start of January 2011, there were fewer people in archaeological employment than at any time since the series of surveys began, approximately 863 fewer people in archaeological work than at the August 2007 peak. The numbers of archaeologists in employment then stabilised and recovered slightly over the three months to April 2011.

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	Aug 07	Oct 08	Jan 09	Apr 09	Jul 09	Oct 09	Jan 10	Apr 10	Jul 10	Oct 10	Jan 11	Apr 11
Commercial Archaeology	4036	3906	3561	3323	3472	3526	3270	3404	3669	3333	3189	3225
Entire Profession	6690	6560	6215	5977	6126	6180	5924	6058	6307	5971	5827	5863

Employment in UK archaeology, August 2007 – April 2011

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 improved slightly under all three measures in April 2011, after two measures (staff retention and business failures) had fallen in the final quarter of 2010.

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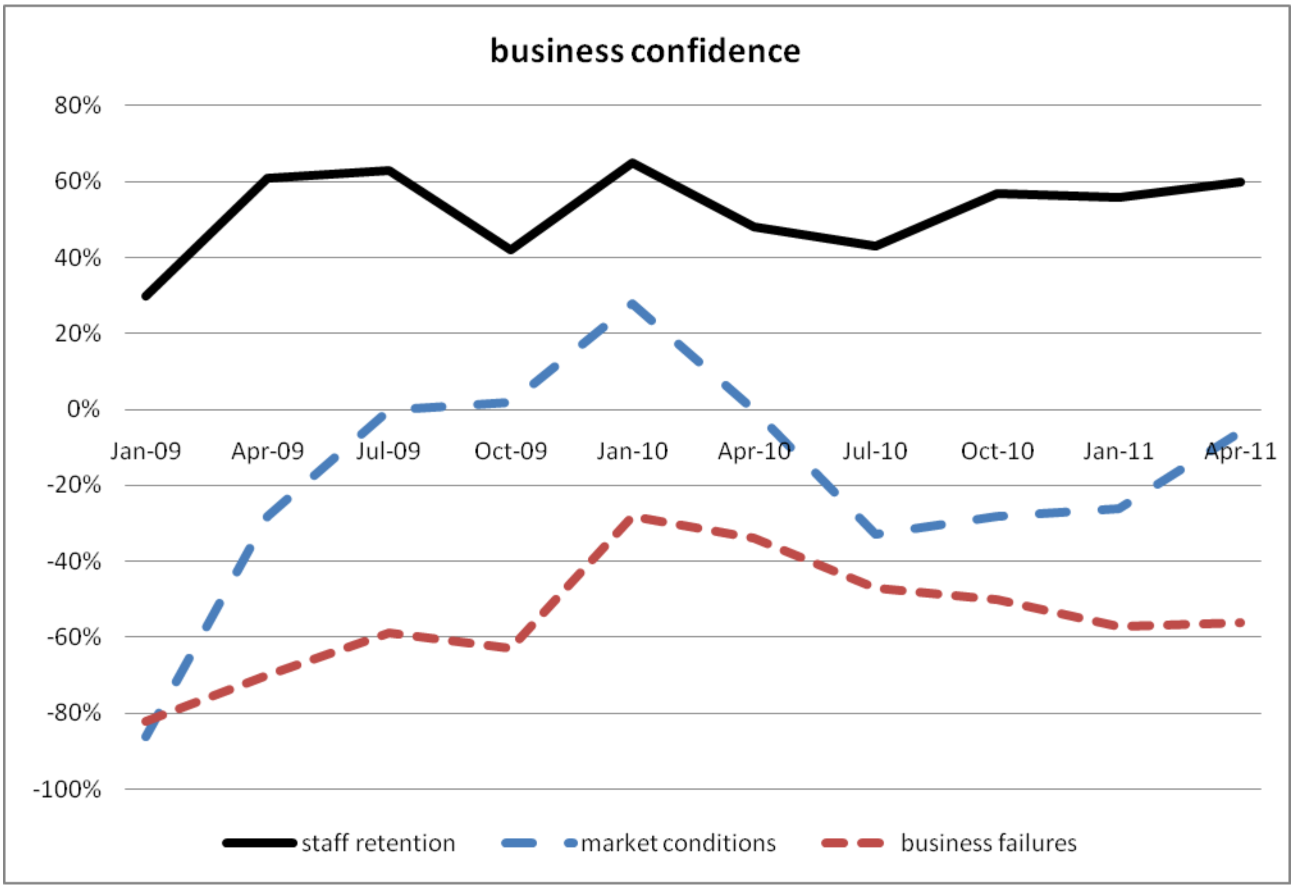

Business Confidence, all measures, January 09 – April 11

4.3.1 Maintenance of Staffing Levels

The questionnaire asked respondents firstly whether, on 1 April 2011, they felt that they would be able to maintain their staff numbers over the three months to the end of June 2011.

In April 2011, the overwhelming majority of respondents that expressed a definite view (29 of 39) 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 2011)?

	Responses	Number employed on 01/04/2011	Lost staff in previous quarter	No change in previous quarter	Expanded in previous quarter
Yes (will maintain present levels)	29	755.9	5	16	8
No (will not maintain present levels)	5	43.1	3	0	2
Don't know	5	84	1	2	2
Total	39	883	9	18	12

Over time, companies have generally been confident in their abilities to retain staff, even in periods when the profession as a whole has been losing staff numbers.

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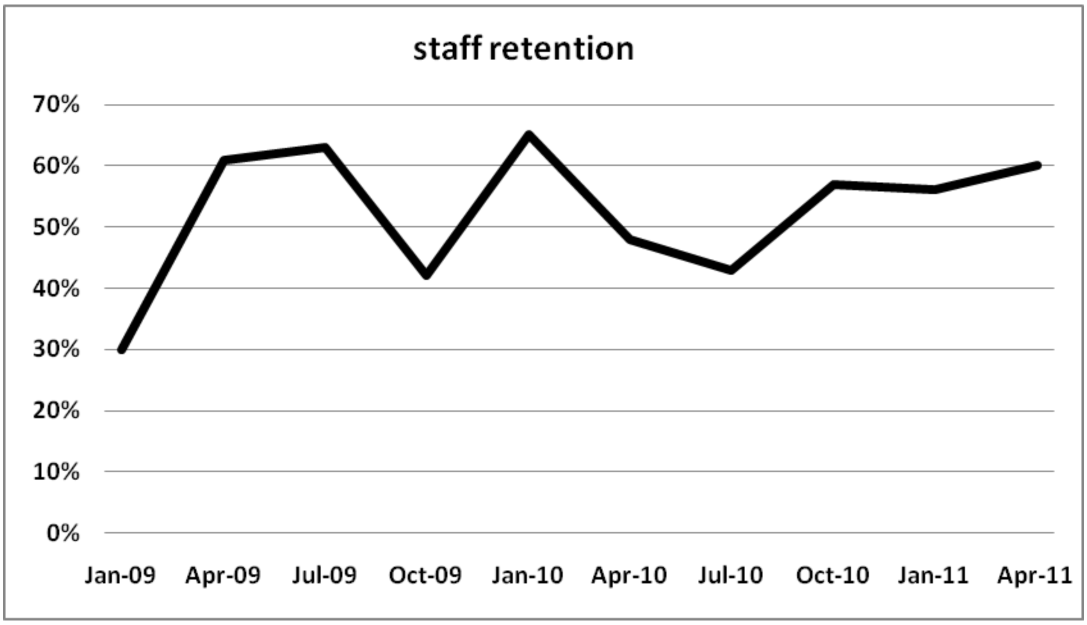
	Will maintain present levels over next quarter	Will not maintain present levels over next quarter
April 2011	74%	14%
January 2011	67%	11%
October 2010	72%	15%
July 2010	67%	24%
April 2010	62%	14%
January 2010	74%	9%
October 2009	63%	21%
July 2009	77%	14%
April 2009	77%	16%
January 2009	61%	31%

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.



Expectation of staff retention, January 2009 – April 2011

Over time, respondents have generally been confident of being able to maintain staffing levels, with significant fluctuations but an overall improving trend.

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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 April 2011)?

	Responses	Numbers of staff employed on 01/01/2011
Yes (market conditions will deteriorate in the next 12 months)	12	375
No (market conditions will not deteriorate)	10	171.6
Don’t know or no answer	16	228.4
Total	38	775

A slight majority of businesses expected the market to deteriorate over the year ahead from 1 April 2011.

Over time, responses to this question had suggested that feelings were becoming more positive until the April 2010 survey, which reported a reduction in confidence, which was reinforced in July 2010. Subsequently, attitudes have softened, but more employers still expect conditions to worsen than to get better.

	Expect conditions to worsen	Do not expect conditions to worsen	Don’t know or no answer
April 2011	36%	26%	38%
January 2011	46%	20%	35%
October 2010	50%	22%	28%
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.

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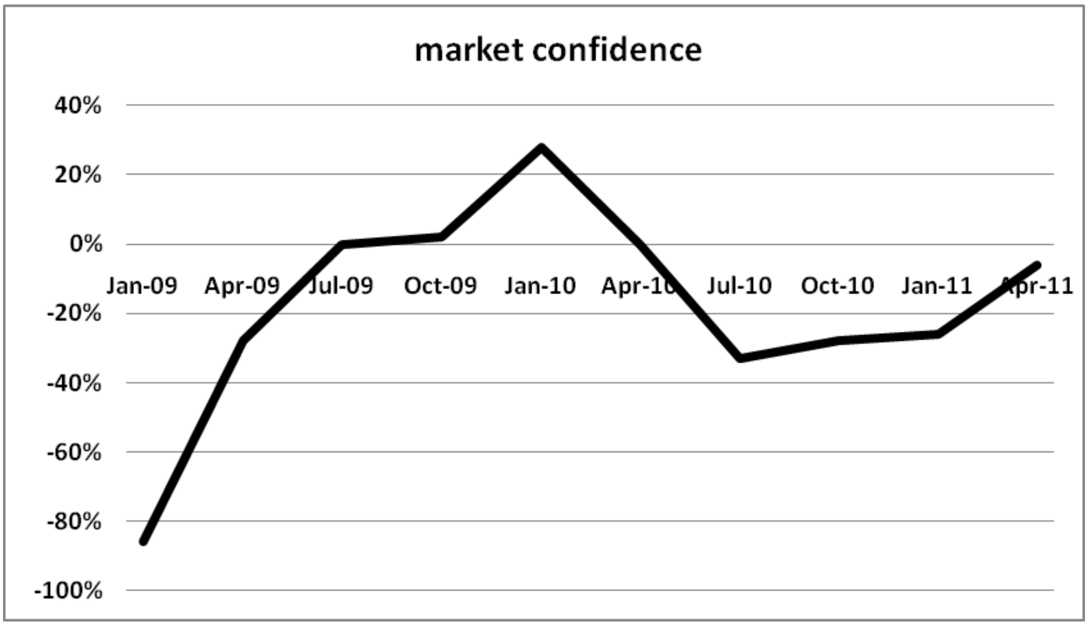

Market confidence, January 2009 – April 2011

This graph demonstrates very clearly that business confidence in future market conditions steadily improved until the beginning of 2010, but shifted significantly towards the negative from the April 2010 survey onwards, with a slow improvement (but still an overall negative level of confidence) in the second half of 2010 and the first quarter of 2011.

4.3.3 Business Failures

The respondents were also asked if they anticipated any archaeological businesses to fail and cease trading in the twelve months from 1 April 2011.

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

	Responses	Numbers of staff employed on 01/04/2011
Yes (expect practices to cease trading in 12 months from April 2011)	23	547.4
No (do not expect any practices to cease trading in 12 months from April 2011)	2	44
Don't know or no answer	13	183.6
Total	38	775

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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 considerably 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
April 2011	61%	5%	34%
January 2011	61%	4%	35%
October 2010	57%	7%	37%
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 remained steadily high in the first quarter of 2011.

As with the two datasets above, graphing the number of responses with a positive sentiment (practices <u>will not</u> cease trading) less the number of negative responses (practices <u>will</u> 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.

Expectation of Business Failures, January 2009 – April 2011

At no point have more respondents expected positive outcomes than negative, although overall opinion had been generally improving until the April 2010 survey. Since then,

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attitudes became more and more pessimistic with each successive survey until the most recent, April 2011 iteration, has shown a very slight improvement.

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. This iteration of the survey did not ask the respondents to grade the relative severity of the skills losses (as had been done in previous iterations).

The table below grades the responses by the total number of times a skill area was identified as being lost.

	Total
Contributing to intrusive investigations (evaluation, excavation) as team members or diggers	11
Conducting (leading or directing) intrusive investigations (evaluation, excavation)	8
Contributing to non-intrusive investigations (geophysical survey) as team members	4
Creating, managing and maintaining Historic Environment Records	4
Artefact research	3
Contributing to survey and interpretation of historic buildings as team members	2
Desk-based historic environment research including desk-based assessment	2
Providing information and advice on the conservation and management of the historic environment	2
Conducting (leading or directing) non-intrusive investigations (geophysical survey)	1
Conducting (leading or directing) other non-intrusive investigations	1
Conducting (leading or directing) survey and interpretation of historic buildings	1
Conservation of artefacts or ecofacts	1
Contributing to other non-intrusive investigations as team members	1
Ecofact research	0
Historic environment characterisation	0
No significant skills losses (or improved skills base)	14

Skills Lost, April 2011

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 seven previous surveys (since April 2009).

The results for April 2011 identify an increased recognition of HER management and information provision skills being lost.

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5 FUTURE SURVEYS

IfA have committed to continuing "to monitor and publish employment figures and provide members with pertinent information"[2], and are discussing with FAME and Landward Research Ltd how this can best be achieved in the future.

[2] Hinton, P. 2011. Letter to IfA Members re: Membership support plan (17 March 2011).

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6 RESPONDENTS' COMMENTS

Below, comments from respondents are reproduced verbatim (except where organisational names have been suppressed). They have been grouped under recurrent themes.

6.1 Recruitment and Staffing

Unfortunately following the government's Comprehensive Spending Review we have undergone a restructure and we are no longer providing a commercial archaeology service. Another member of staff will be leaving this week and the remaining three staff will in future provide a local authority statutory service only.

The company position at the end of the 2010/11 financial year is better than in the previous two, though not as financially secure of 2007/8. We have a higher staff level due to specific contracts at the start of this financial; but as those projects fall away we will return to more modest staff numbers but comparable to pre-recession levels.

Slight change in numbers between Jan and April is not due to market conditions (one staff member wanted to make a lifestyle change but we continue to use her as a specialist from time to time on a sub-contract basis, another member of staff went to work for another archaeological organisation). We are already recruiting to fill our vacant project manager post and would expect to maintain current levels by recruitment if necessary; we may even required one or two additional site staff though numbers recruited will remain small (i.e., 1 or 2, rather than the usual 6-10). We are often ironing out peaks and troughs by sub contracting staff out to other organisations and vice versa.

Probably a temporary spike in employment levels at present, but who knows.

Recent reductions in staffing have been caused by certain factors that are specific to *[the organisation]* and not related to general market conditions. These have been managed through mutually agreed retirement and reduced working hours both of which impact on what had been relatively stable FTEs. *[The organisation]* anticipates a little more 'natural wastage' early in 2011-2012, and thereafter expects stability. One new employee in 2011-2012 will be on 1 year workplace learning scheme. *[The organisation]* currently envisages that any other new employees are likely to be recruited only on short term fixed contracts.

I have heard (albeit anecdotally) of archaeologists being made redundant and then being re-employed on substantially different (usually worse) terms and conditions, such as being required to accept unpaid travel etc.

6.2 The State and Future of the Market

Our company's level of tendering and order book have remained buoyant since Easter 2010, to the extent that our core staff numbers have more or less recovered their 2008 'pre-crash' levels, and we are in a position to offer modest salary increases in April. There is a lot of generalisation about the present financial situation: it is evident that some companies, like us, are doing well, while others are not. We must be careful not to talk ourselves into recession.

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We're busy, but prices are still very competitive so there is no let-up there. The main concern at the moment is the uncertain impact of public sector cuts - will these provide threats or opportunities? It is interesting for the commercial sector, having been weathering the economic storm for some years now, to see the public sector start to feel the pain - welcome to the party, guys...

There has been a dramatic falling-off of planning applications in the past three months and, although there is a reasonable amount of work about at the moment, the second half of the years is looking very difficult indeed. We in the regions note that larger national organizations are trying to re-invent themselves with the development of smaller quasi-independent regionally-based satellites, no doubt reporting back to the base organization. From our perspective, with a diminishing size of market and increased competition for all kinds of work, this has all the hallmarks of 'the perfect storm' for job losses in archaeology.

The market appears to have settled in many ways; we are back to clients bringing projects forward including some housing schemes. It is not as buoyant as it was. Looking forward we expect the market to remain stable in 2011/12, but imagine that there is still over capacity in the archaeology industry for this level of market and that low margins will continue with the strong possibility of losing competitors in the year ahead (or see them suffer drastic restructuring).

The main concern is of course the many local councils views on cutting heritage at all levels, from planning departments to tourist information services (for example the only tourism group in *[this county]* has been closed down). This will seriously hit the sector across the board, and has already been seen with the closure or mothballing of museums and significant losses of curatorial posts for instance.

Slightly more hopeful signs at present although it's all still a bit fragile with depress housing demand and some business failures are a real possibility. Loss of Planning Archaeologists is still a real concern

Probably, there are too many contractors chasing a limited amount of work but unfortunately the work is unevenly spread both in terms of who gets it and when it happens.

Our biggest concern is the wave of early retirals of council archaeologists in the public sector. Four senior archaeologists in the Scottish curatorial body are known to be retiring in this year already; two are in single post archaeology services. Should there be a failure to sustain universal provision of archaeological advice to the planning service in Scotland I would have worries that in time the market size will contract further as consents are granted without appropriate conditions.

Loss of curatorial positions and 'watering down' of planning decisions will prove a domino effect, with many more sites slipping through the net without any or only superficial archaeological input.

One final concern, in these days of 'localism' and the proposed simplification of aspects of government and the planning process, is the imposition of increased charges and more complex bureaucracy on curatorial services. If local authority archaeologists are going to charge for services, perhaps they should consider radically improving their efficiency. Waiting over ten days for the emailed results of an HER enquiry and then being charged over £100 is simply not acceptable!

I expect that more Local authority organisations will retract or disappear, but that the existing commercial organisations have managed to reach a more stable plateau. The effects of LA

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redundancies upon existing commercial entities - that is, what do the individuals do? - poses a further round of uncertainly towards the end of calendar year 2011 and throughout 2012.

6.3 Competition

We have two particular concerns regarding the present state of the profession. One is the tendency of certain organisations to provide ridiculously low tenders for work. This just cheapens contract archaeology, and does the profession no good at all. The second is the increasing tendency of certain of the larger contractors to set up regional offices, particularly in areas that are already well served by established local contractors. It makes no economic sense, and just adds to the fragmentation of the profession.

The provision of both a curatorial and commercial archaeological role in a number of areas does not sit well with an open and fair playing field.

6.4 Comments on the Questionnaire and Future Research

As well as addressing job losses in archaeology during and as a result of the recession, I think that important consideration should be given to research on the erosion of terms and conditions for archaeologists.

6.5 Comments on Policy

Whilst most archaeologists are probably just grateful to have a job and an income, it does raise questions about the likelihood of the IfA achieving its objective of raising employment standards, or at least the likely timescale for when it will get there!

PPS 5 is a step in the right direction, however its implementation across the country is haphazard to say the least.

As with all levels of planning archaeology there is a serious lack of consistency from district to district, never mind county to county. For example, some authorities will charge up to £100 per standard archive box (if they will accept them at all) and others do not charge.

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7 QUESTIONNAIRE

Job Losses in Archaeology, IfA and FAME consultation - April 2011

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.

This work is carried out by Landward Research Ltd on behalf of IfA and FAME.

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. Over the course of 2010, there was an increase in the number of working archaeologists in the first half of the year, but business confidence was deteriorating and the number of archaeologists in employment fell again over the six months to the end of December 2010.

All of the quarterly reports have been published by the IfA at http://www.archaeologists.net/profession/recession and in the members' area of the FAME website http://www.famearchaeology.co.uk/ The most recent report (for October 2010 and January 2011) is available at: http://www.archaeologists.net/sites/default/files/node-files/JoblossesJan2011.pdf, with a news story at: http://www.famearchaeology.co.uk/news/

I would like to ask you 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 April 2011. 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. If you require further advice or information on completing the form, please email enquiries@landward.eu.

Please complete the form by 8 April 2011. A very short deadline has been set in order to give us the opportunity to have results available at the IfA Conference, which will be in Reading from April 12-14.

Kenneth Aitchison

Executive Director
Landward Research Ltd

*Required

Company Name *please add your company's name to avoid duplicate entries being made

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

Staff Numbers

How many members of staff (FTE) did your organisation have on 1 April 2011?

How many members of staff (FTE) did your organisation have on 1 January 2011?

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

Business Confidence

Do you anticipate being able to maintain your current staffing levels over the next three month period (to 1 July 2011)?

- (x) don't know
- ( ) yes
- ( ) no

Do you believe that the market conditions will deteriorate further over the next 12 months (to 31 March 2012)?

- (x) don't know
- ( ) yes
- ( ) no

Do you expect any archaeological practices to cease trading over the next 12 months (to 31 March 2012)?

- (x) don't know
- ( ) yes
- ( ) no

Skills Losses

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 the areas where you feel your organisation has lost skills during the present crisis.

Please mark up to three areas which 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
- [ ] No significant skills losses (or improved skills base)

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Further Comments

Comments or suggestions for future research

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

Please complete your response by Friday 8 April 2011.

Thank you for providing this information. Your answers will be treated in the strictest confidence.
kenneth.aitchison@landward.eu

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