State of the Archaeological Market – October 2011

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1 EXECUTIVE SUMMARY

The number of people employed in commercial, applied archaeology has increased slightly (by 0.4%) over the six months to October 2011.

Levels of staff turnover are relatively low, and employers believe that the majority of people who have lost jobs in archaeology in the last six months have remained within the sector.

Salaries have not risen in line with inflation in the six months to October 2011, and therefore have typically fallen in real terms.

Significant numbers of archaeological businesses have subsidiary offices located elsewhere in the United Kingdom.

Financially, companies are turning over slightly more revenue in 2010-11 than in 2009-10. Profitability is low. Where available, information suggests that the majority of revenue is derived from carrying out field investigation and post-fieldwork analysis.

Business confidence, as measured through reported future expectations, remains low. A minority of organisations expect to substantially expand their business in the next twelve months.

Skills losses are commonly reported in the areas of fieldwork and post-fieldwork analysis, but these are both areas where skills shortages are being addressed through organisations bringing in outside expertise and through investment in staff training. One area where there is a skills issue that is only being addressed through buying-in expertise is in conservation, where organisations are investing relatively little in training. Overall, respondents considered that post-fieldwork analysis and conservation were the two areas with the most significant sector-wide skills shortages.

A minority of respondents had previously supported an employee getting an NVQ, although the majority say that they would consider supporting someone in the future.

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2 INTRODUCTION

The Institute for Archaeologists (IfA) and FAME have collected data on employment and skills issues in applied archaeological practice since October 2008 in response to the ongoing economic downturn.

A series of nine quarterly surveys were conducted, gathering and presenting data from October 2008 to April 2011. 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/.

IfA and FAME have now commissioned Landward Research Ltd to gather data and to present six-monthly reports on the state of the archaeological market. The report presented here is based on data gathered from FAME member organisations and IfA Registered Organisations, who represent the majority of employers working in commercial, client-funded applied archaeology. Data have also been incorporated from the most recent (August 2011) English Heritage / ALGAO / IHBC report on Local Authority Staff Resources.

2.1 Responses

114 email addresses were provided in total by FAME and IfA (66 organisations from IfA Registered Organisations, 48 from FAME Membership); nine addresses were duplicated in both lists, so a total of 105 invitations to complete the survey were issued.

These addresses were registered to 89 unique Internet Service Providers, 6 of which were alternative ISPs for organisations on the list, so in total 83 organisations were approached.

The questionnaire was issued on 24 October 2011, seeking data that applied on 1 October 2011. The questionnaire was deployed via a Novisystems online survey package, with a requested response date of 4 November 2011.

After some respondents had issues with the survey, it was amended to allow respondents to return to part-completed responses. In order to allow this added functionality, the questionnaire could only be answered by following links in the invitation emails. It was also amended to allow respondents to print off their responses (whether completed or not) and was reissued on 4 November 2011 with a revised deadline of 11 November 2011.

A total of 55 responses were received, of which 11 were (part completed) duplicate responses from organisations that did fully respond, so there was a final total of 44 usable responses, a response rate of 49.4%.

2.2 IfA Registered Organisations

is your organisation an IfA Registered Organisation?

Of 44 responses, 39 indicated that they were from IfA Registered Organisations (88.6% of responses). This represented 66.7% of the organisations whose addresses were provided by IfA.

2.3 Constitution

The questionnaire asked about how respondent organisations were legally constituted. The largest set of responses came from private limited companies, and while this did not represent a majority of respondents, it must be noted that some respondent organisations are both private limited companies and registered charities and so could have ticked either box.

In general, the majority of respondents were either private-sector or third-sector organisations (36% limited companies, 18% charities = 54%), although nearly half can also be seen as being constituted as not-for-distributable profit organisations (18% charities, 16% within local government, 14% within universities = 48%).

how is your organisation legally constituted?

private limited company (ltd)	16	36%
public limited company (plc)	0	0%
registered charity	8	18%
constituent part of a local planning authority	7	16%
constituent part of a university	6	14%
other	7	16%
	44	

Using the numbers of staff reported as being in employment on 1 October 2011 (not all respondents gave figures for this) the registered charities are, on average, the largest organisations in the sector.

This shows that the majority of individual members of staff (65%) work for limited companies or charities, and also that the majority of individuals work for not-for-distributable profit organisations (64%).

staff numbers by organisational legal constitution

	orgs	total staff		avg staff
private limited company (ltd)	16	408.4	31%	27.23
public limited company (plc)	0	0	0%	0
registered charity	8	441.5	34%	73.58
constituent part of a local planning authority	7	171.57	13%	24.51
constituent part of a university	6	217.4	17%	36.23
other	7	66.8	5%	9.54
	44	1305.67		31.85

Future iterations of this questionnaire might benefit from presenting the question about charitable status separately from the question about legal status. No option was given to allow respondents to clarify what they meant by an “other” legal constitutional basis; this might help future iterations of the questionnaire.

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2.4 Location of Head and Subsidiary Offices

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

where is the head office of your organisation located?

East Midlands	4	9%
East of England	8	18%
Greater London	4	9%
North East England	1	2%
North West England	1	2%
South East England	7	16%
South West England	5	11%
West Midlands	5	11%
Yorkshire and the Humber	1	2%
Scotland	4	9%
Wales	3	7%
Northern Ireland	0	0%
outside the UK	1	2%
	44	

Very few respondent organisations had head offices in Yorkshire and the Humber, the North West or the North East of England. No responses were received from organisations based in Northern Ireland.

19 of 44 respondents reported having subsidiary offices. Of those that reported having subsidiary offices, they had between one and six, an average of 2.53 each. The existence of subsidiary offices is clearly a major factor in the landscape of archaeological work, and must reflect the existence of working opportunities for companies in these areas

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

East Midlands	4	9%
East of England	3	6%
Greater London	2	4%
North East England	3	6%
North West England	9	19%
South East England	8	17%
South West England	5	11%
West Midlands	4	9%
Yorkshire and the Humber	4	9%
Scotland	4	9%
Wales	0	0%
Northern Ireland	0	0%
outside the UK	1	2%
	47	

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Comparing the locations of head offices with subsidiary offices, it is clear that while some parts of the UK have few organisations based there, these areas are attractive enough for organisations to establish subsidiary offices there. It is particularly noticeable that while in total, only three organisations had head offices in “the north of England” - Yorkshire and the Humber, North West England and North East England, a total of 16 organisations have subsidiary offices in these regions.

total numbers of offices reported by location

	head	subsidiary	total	
East Midlands	4	4	8	9%
East of England	8	3	11	12%
Greater London	4	2	6	7%
North East England	1	3	4	4%
North West England	1	9	10	11%
South East England	7	8	15	16%
South West England	5	5	10	11%
West Midlands	5	4	9	10%
Yorkshire and the Humber	1	4	5	5%
Scotland	4	4	8	9%
Wales	3	0	3	3%
Northern Ireland	0	0	0	0%
outside the UK	1	1	2	2%
	44	47	91	

The data acquired cannot be disaggregated in terms of the numbers of individuals working at different offices, so this means that the geographical distribution of staff can only be presented on the basis of the head office locations. While a large number of staff is reported for the one respondent organisation based in Yorkshire and the Humber, there is a general reflection of the overall UK population pattern in the distribution of archaeologists’ place of work.

staff numbers by head office location

	orgs	total staff		avg staff
East Midlands	4	117	9%	29.25
East of England	8	193.47	15%	24.18
Greater London	2	142	11%	71
North East England	1	30	2%	30
North West England	1	8	1%	8
South East England	6	110.9	8%	18.48
South West England	5	262	20%	52.4
West Midlands	5	105.8	8%	21.16
Yorkshire and the Humber	1	143	11%	143
Scotland	4	122.5	9%	30.62
Wales	3	52	4%	17.33
Northern Ireland	0	0	0%	0
outside the UK	1	19	1%	19
	41	1305.67		31.85

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2.5 Years trading

Respondents were asked when their organisation began trading.

in which year did your organisation begin trading?

19th century	1	2%
1950s	1	2%
1960s	0	0%
1970s	8	19%
1980s	8	19%
1990s	16	38%
2000s	6	14%
2010 -	2	5%
	42	

The majority of organisations had been founded since 1990, reflecting the changed nature of applied archaeology in the 1990s following the introduction of PPG16 in England in 1990 and comparable guidance elsewhere in the UK in the years immediately following.

This interpretation is reinforced when the data are presented by the constitutional basis of the respondent organisations; only one of the respondents that was a private limited company was established before 1990, while the majority of charities responding were established in the 1970s. This largely represents the set of organisations that were established as the early "units" which received core funding from the state to carry out archaeological activity on a regional basis in the 1970s, and which have continued on a different funding basis to the present day.

foundation dates by constitutional basis

	ltd company	charity	part of lpa	part of university	other
19th century				1	
1950s	1				
1960s					
1970s		5	2	1	
1980s	2	2	2		2
1990s	9	1	1	3	2
2000s	3			1	2
2010 -	1				1

The answers received were skewed by respondents answering the question that was asked, and so the one nineteenth century foundation appears to represent the founding date of a parent university; the 1950s response represents the founding of a parent engineering company. In future iterations of this survey, a question asking when the organisation started carrying out archaeological work may be more informative.

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3 STAFF NUMBERS

3.1 Employment

Respondents were asked how many staff were working for their organisation on 1 October 2011. For comparative purposes, they were also asked for the same data as it applied six months earlier (1 April 2011) and as it applied on 13 August 2007, the census date of Profiling the Profession 2007-08.

how many members of staff (FTE) did your organisation have on 1 October 2011 / 1 April 2011 / 13 August 2007?

	01/10/2011	01/04/2011	13/08/2007
number providing data	41	40	30
total	1305.67	1228.14	1085.6
average	31.85	30.7	36.19

Using recent data from ALGAO[1] to track the numbers employed providing curatorial advice in England (and extrapolating that data to the rest of the UK), and following on from the previous surveys in this series, estimated totals for the numbers of individuals in work in both local government curatorial and commercial applied archaeology can be presented.

The total numbers of archaeologists working in local government curatorial roles is estimated to have been 512.2 at the time of the Profiling the Profession 2007-08 survey (August 2007). This number is a reduction from the number presented in that publication, and it has been recalculated using the figures presented by ALGAO for the numbers of archaeologists working in such positions in England in 2006 as a base (407.2[2]).

That calculated total of 512 for 2006 fell to 505 by April 2008, 485 in April 2010 and 442 in April 2011.

As no data have been collected on the numbers of archaeologists working in other areas since the 2007 Profiling the Profession survey[3], the results presented in that report continue to have to be used for the numbers employed in “all other” areas of archaeological practice. It is recognised that this is likely to now represent an overestimation, as it is known that jobs have been lost in national heritage agencies, museums, universities and elsewhere, but this has not been quantified.

total numbers of archaeologists in employment in the UK, 2007-2011

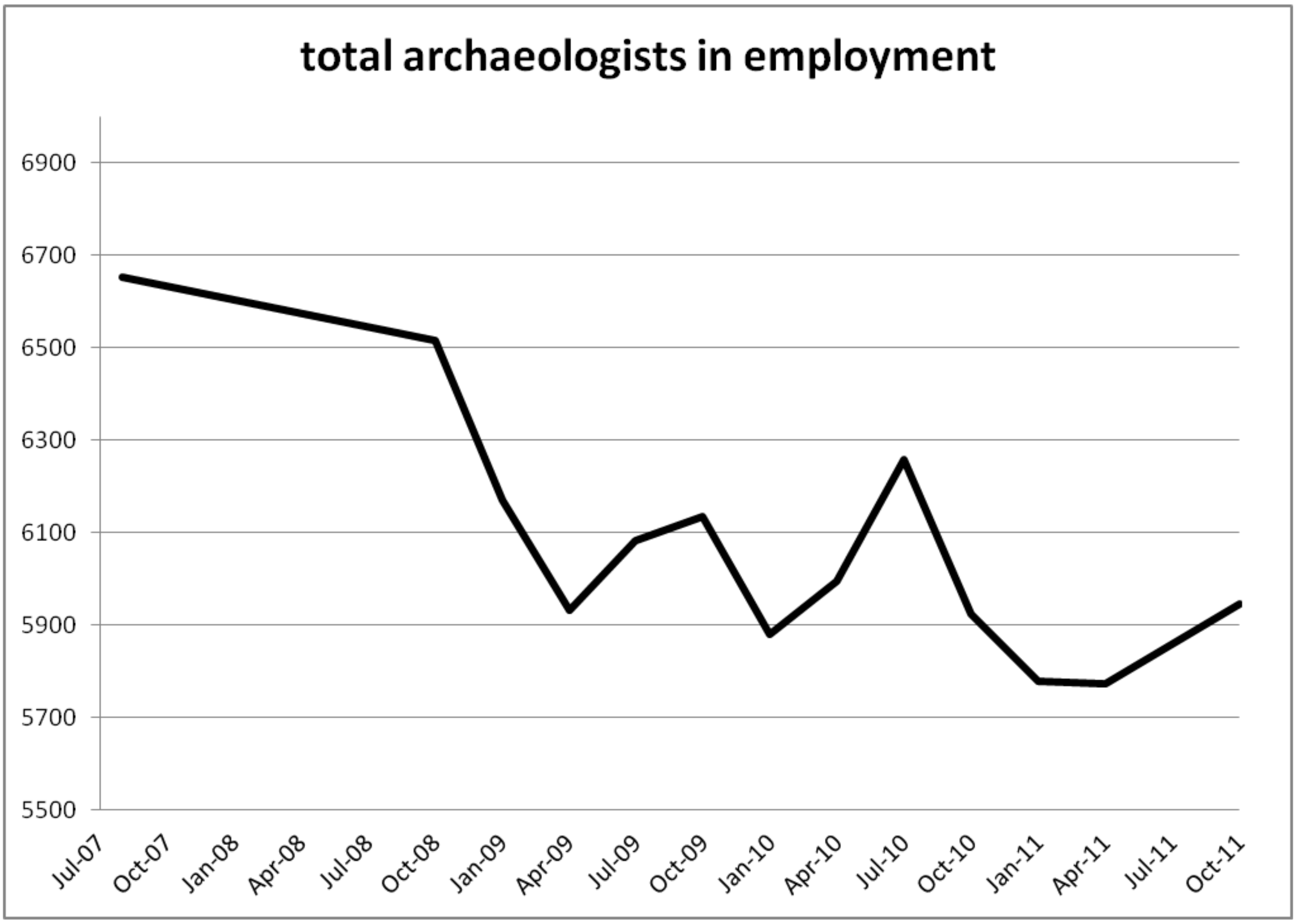
	Aug-07	Oct-08	Jan-09	Apr-09	Jul-09	Oct-09	Jan-10	Apr-10	Jul-10	Oct-10	Jan-11	Apr-11	Oct-11
curatorial	512	505	505	505	505	505	505	485	485	485	485	442	442
other	2105	2105	2105	2105	2105	2105	2105	2105	2105	2105	2105	2105	2105
commercial	4036	3906	3561	3323	3472	3526	3270	3404	3669	3333	3189	3225	3399
total	6653	6516	6171	5933	6082	6136	5880	5994	6259	5923	5779	5772	5946

[1] Batchelor, D. 2011. *A third report on Local Authority Staff Resources*. http://www.helm.org.uk/upload/pdf/Impl-HPRRef2011.pdf

[2] English Heritage, ALGAO & IHBC. 2010. Implementing the Heritage Protection Reforms. A Second Report on Local Authority Staff Resources. Table A.3, p.12. http://www.helm.org.uk/upload/pdf/LPA-resources2.pdf?1311765498

[3] Aitchison, K. & Edwards, R. 2008. *Discovering the Archaeologists of Europe: United Kingdom. Archaeology Labour Market Intelligence: Profiling the Profession 2007-08*. http://www.discovering-archaeologists.eu/national_reports/DISCO_national_UK_final.pdf

The numbers employed in commercial archaeology have increased slightly since the April 2011 survey to 3399 FTE (+0.4%), but they remain at levels much lower than estimated in August 2007, and remain comparable with the figures reported since April 2009 (since when the figures have fluctuated between 3323 and 3669).



3.2 Staff turnover

Respondents were asked about the relative (not absolute) levels of staff turnover in the previous six months.

what level of staff turnover have you experienced in the last six months?

none (all current staff were working for us six months ago)	18	47%
some (up to 10% of current staff were not working for us six months ago)	16	42%
moderate (up to 25% of current staff were not working for us six months ago)	4	11%
considerable (over 25% of current staff were not working for us six months ago)	0	0%
	38	

The responses suggest that, while there has been modest growth in the sector, turnover (which includes movement between employers as well as completely new appointments) was relatively modest in the six months to October 2011.

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3.3 Staff lost from the sector

Previous surveys had identified merely whether organisations had net gains or losses of numbers of staff. In an attempt to identify whether staff were being lost from the sector, respondents were asked whether they felt that staff who had formerly worked for them were still working in archaeology or not.

if you have lost staff in the six months to 1 October 2011, do you believe that these people left the profession or stayed within it with different employers?

all found alternative employment within archaeology	3	12%
most found alternative employment within archaeology	9	36%
even split between leaving the profession and finding alternative employment within archaeology	8	32%
most left the profession	2	8%
all left the profession	3	12%
	25	

Overall, respondents generally felt that more people who left their employ in the previous six months were likely to have remained within professional archaeology than to have left it completely.

3.4 Contracts

In order to build up data on the nature of employment contracts within the sector (and so to identify trends in the future), respondents were asked about what types of contract their staff members were on.

how many of your members of staff are on each of the following types of contract?

	permanent		fixed term		casual		volunteer		total	
full time	828	71%	201	17%	36	3%	0	0%	1065	91%
part time	86.5	7%	3.5	0%	3.5	0%	12	1%	105.5	9%
	914.5	78%	204.5	17%	39.5	3%	12	1%	1170.5	

The only available comparable data is from Profiling the Profession 2007-08, when in August 2007, 73% of archaeologists worked on permanent or open-ended contracts, 23% were on fixed term contracts and 3% were on contracts with ‘other’ durations[4], and so relatively little has changed over the four years since that survey. At that time 11% of archaeological staff were on part-time contracts and 89% were full-time[5]; again, relatively little has changed.

[4] Aitchison & Edwards 2008, table 85, p. 84

[5] Aitchison & Edwards 2008, table 90, p. 87

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3.5 Salaries

Respondents were asked whether salaries had typically risen or fallen in the six months since April 2011. This was specifically not a question about the total salary bill, as that would be directly influenced by the total number of personnel on the payroll.

Have salaries at your organisation typically risen or fallen since April 2011? (NB - not total salary bill)

risen by above inflation	1	3%
risen by inflation	8	21%
unchanged	28	72%
fallen by up to 10%	2	5%
fallen by over 10%	0	0%
	39	

Overall, salaries had normally remained unchanged, and therefore had fallen in real terms. Only at one organisation had salaries risen by above inflation.

When these data are combined with the information available on the numbers of individuals working for the respondent organisations, the picture is very slightly more positive for the numbers of individuals concerned, but salaries still fell in real terms for 62% of archaeologists.

	orgs	individuals	
risen by above inflation	1	56.4	4%
risen by inflation	8	424	33%
unchanged	27	722.17	56%
fallen by up to 10%	2	76.3	6%
fallen by over 10%	0	0	0%
	39	1278.87	

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4 FINANCIAL PERFORMANCE

Respondents were asked a series of questions about their organisation's financial performance over the previous three and a half financial years. It was recognised that some respondents might be reluctant to release such information (even though the responses were anonymous) and so the questionnaire stated "*please note - answering the questions on this page is optional, but if you can give indicative figures these will be extremely valuable*".

4.1 Turnover

what was your annual turnover (in £m) for each of the last three years, and for the six months to the end of September 2011?

	responses		average		
2008-09	22		£1.276m		
2009-10	23		£1.108m	-13%	
2010-11	23		£1.189m	+7%	
Apr - Sep 11	18	£0.618m	*£1.236m*	*+3%*	*extrapolated from first six months of f/y*

This limited dataset suggests that turnovers declined from 2008-09 to 2009-10, but then rose in 2010-11 and will continue to rise modestly if the results for the first six months of 2011-12 are repeated in the second half of the year. However, given the links between applied archaeology and the construction industry and that sector's tendency to have less productive winter months (Q4 and Q1)[6], then this may be an optimistic estimate.

4.2 Profit levels

Respondents were asked about the levels of profit (or surplus, for not-for-profit enterprises) realised in the six months since April 2011.

what level of profit / surplus margin have you realised in the six months since April 2011?

<5%	16	73%
5-10%	2	9%
10-25%	3	14%
>25%	1	5%
	22	

Generally, respondents reported low levels of profitability. The lowest band (less than 5% profit or surplus reported) will also include organisations that made a loss in this period.

[6] Office for National Statistics, 2011, *New Orders in the Construction Industry Q3 2011* http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-244195

4.3 Areas of activity (turnover)

In order to identify which areas of activity were generating income, respondents were asked to estimate how their income broke down in terms of a set of areas of activity which has also been used to track skills, training and qualification issues.

broadly, what percentages of your turnover (in the last six months) have been generated through each of the following areas of activity?

fieldwork (invasive and non-invasive)	49%
post-fieldwork analysis	23%
provision of advice to clients	5%
data management	1%
desk-based or environmental assessment	15%
conservation of artefacts or ecofacts	0%
other	7%

These figures are based on the aggregated individual percentages provided by the 22 respondents to this question, not the reported absolute value of each area, but they show that fieldwork and post-fieldwork analysis dominate as sources of income.

Only a very limited number of respondents provided both these data and figures for turnover in the first six months of financial year 2010-11 (twelve respondents), and so while quantified, aggregated figures can be presented, these should be treated with caution and should not be extrapolated to produce totals for the entire sector.

	value	
fieldwork (invasive and non-invasive)	£3.22m	60%
post-fieldwork analysis	£1.10m	21%
provision of advice to clients	£0.30m	6%
data management	£0.05m	1%
desk-based or environmental assessment	£0.46m	9%
conservation of artefacts or ecofacts	£0.00m	0%
other	£0.14m	3%
total	£5.35m	

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5 BUSINESS CONFIDENCE

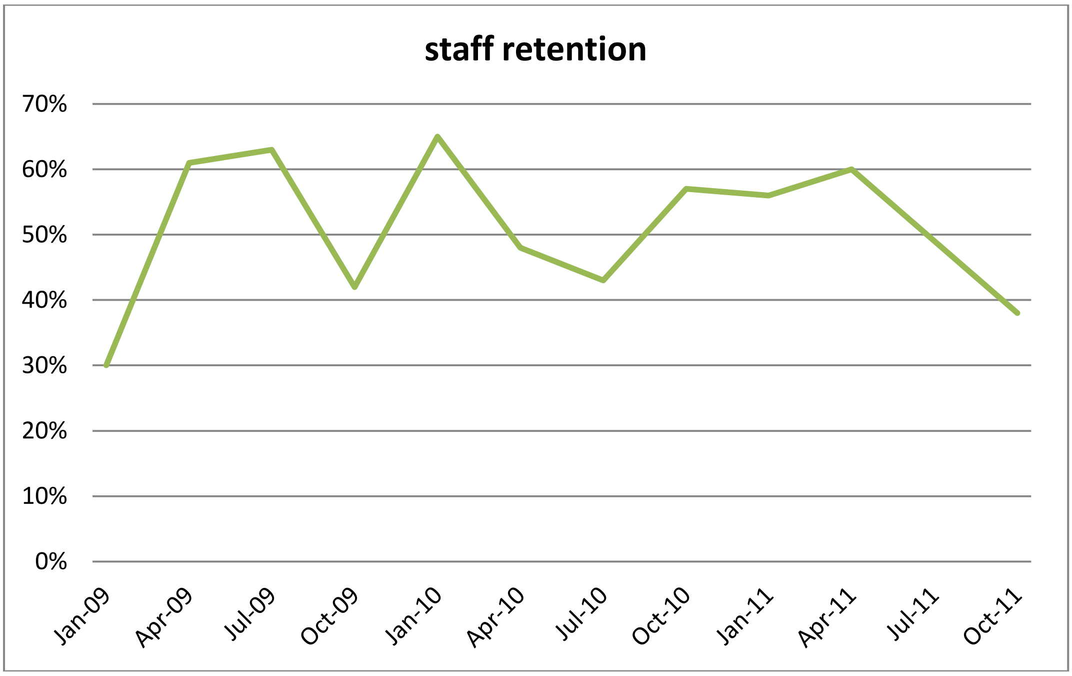
A series of questions relating to business confidence that were asked in the previous series of quarterly surveys continued to be asked in this survey, allowing to clearly identify changes over time. A series of graphs are presented which specify levels of business confidence, calculated as the percentage of respondents expressing a positive view at the survey date minus the percentage of respondents who expressed a negative view (therefore a score of 100% means that all respondents were positive, and a score of -100% means that all respondents were negative).

5.1 Staff retention

do you anticipate any changes to your staffing levels over the next six month period (to 1 April 2012)?

increase staff numbers	8	18%
maintain staff numbers	19	43%
lower staff numbers	10	23%
don't know or no answer	7	16%
	44	

This represents a significant drop in businesses' confidence in maintaining their current staffing levels. While the overall sentiment remains positive (as it has done since this series of surveys began in January 2009), with more businesses expecting to increase their staff numbers than expect to decrease, there has been an overall drop in confidence since April 2011.



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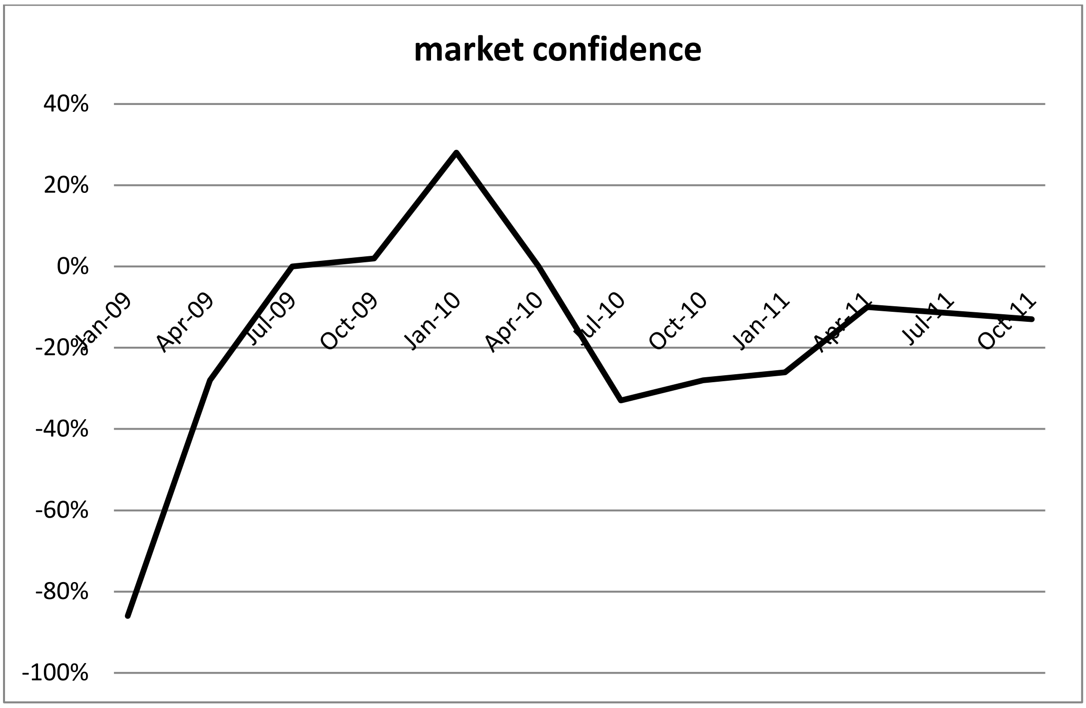
5.2 Market conditions

do you believe that the market conditions will deteriorate over the next 12 months? (to 30 September 2012)

yes	14	37%
no	9	24%
don't know	15	39%
	38	

The overall sense is that businesses continue to expect market conditions to deteriorate, as they have done since April 2010. There has been little overall change in attitudes since April 2011.



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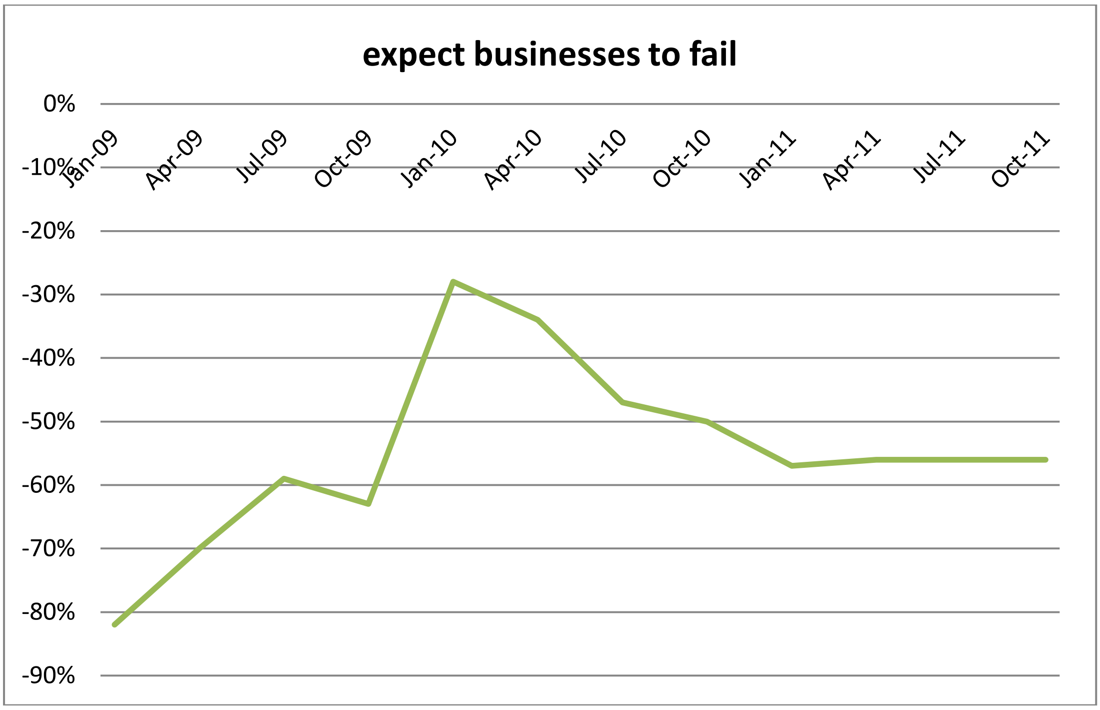
5.3 Businesses ceasing trading

do you expect any archaeological practices to cease trading over the next 12 months (to 30 September 2012)?

yes	22	59%
no	1	3%
don't know	14	38%
	37	

The overwhelming majority of respondents continue to believe that some archaeological practices will fail in the next year, with the level expecting this remaining constant since April 2011.



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5.4 Expansion

A new question was introduced to the survey regarding business plans for future expansion.

do you have any plans to expand your business significantly over the next twelve months (to September 2012) (e.g. in premises, vehicles, capital equipment)?

yes	10	27%
no	22	59%
don't know	5	14%
	37	

Overall, respondents were less than half as likely to have plans to expand their business significantly in the next twelve months than to not have such an expansion planned.

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6 SKILLS TRAINING AND QUALIFICATIONS

The survey sought to identify which areas of skills were being lost to the sector, where skills were being bought in (skills shortages) and where organisations were seeking to address the issue through training (skills gaps). They were then asked in general terms whether they considered there were particular areas with skills problems across the sector.

6.1 Areas of skills losses

in the last six months (since April 2011) has your organisation lost skills in any of these areas?

fieldwork (invasive or non-invasive)	6
post-fieldwork analysis	6
artefact or ecofact conservation	3
providing advice to clients	2
data management	1
desk-based or environmental assessment	1
other - archaeological site management and conservation	1
other - palaeoenvironmental processing/analysis	1

In the earlier series of surveys, the skills involved in leading and contributing to fieldwork were constantly reported as being those that organisations most often reported as being lost.

6.2 Areas of skills buy-in

in the last six months (since April 2011) has your organisation had to buy-in skills in any of these areas?

artefact or ecofact conservation	12
fieldwork (invasive or non-invasive)	10
post-fieldwork analysis	9
data management	2
desk-based or environmental assessment	2
providing advice to clients	1
other	1

Conservation is the area with the most significant skills shortages, but this is being addressed through the buying-in of expertise, rather than through training (see below). Despite fieldwork and post-fieldwork skills being those reported as being most frequently lost by organisations, there is clearly a level of demand for these which is being addressed (perhaps on a short-term basis) by skilled staff being brought in from other organisations.

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6.3 Areas of training

in the last six months (since April 2011) has your organisation invested in skills training in any of these areas?

fieldwork (invasive or non-invasive)	19
post-fieldwork analysis	16
data management	9
desk-based or environmental assessment	6
providing advice to clients	6
artefact or ecofact conservation	3
other - health and safety	3
other - business skills, management	1
other - interpretation skills, particularly digital	1
other - IT management	1
other - public inquiries	1
other - seminars, lectures, reading	1
other - social networking	1

Although significant numbers of respondents reported that they had lost fieldwork and post-fieldwork skills capacity in the previous six months, far more organisations were seeking to address this issue through training to meet the skills gaps in these areas. Generally, organisations were more likely to address their skills issues through training than through buying-in the skills of external personnel, with the major exception of artefact or ecofact conservation.

6.4 Skills shortages across the sector

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

do you think there are skills shortages across archaeological practice in any of these areas?

post-fieldwork analysis	9
artefact or ecofact conservation	5
providing advice to clients	4
data management	3
fieldwork (invasive or non-invasive)	1
other - outreach and public engagement	1
other - palaeoenvironmental processing/analysis	1
other	1
desk-based or environmental assessment	0

Post-fieldwork analytical skills were the area of expertise most frequently reported as being in short supply; organisations appear to be trying to tackle this through training their existing staff. Conservation was the second most frequently reported ‘problem’ area, and this is typically addressed by organisations subcontracting or buying in expertise, rather than through the sector as a whole investing in training.

No respondents considered that there was a shortfall in desk-based or environmental (impact) assessment skills.

6.5 NVQ

The National Vocational Qualification in Archaeological Practice was first awarded in 2009. Respondents were asked about whether they had previously supported a member of staff gaining such a qualification, and whether they would consider doing so in the future.

have you or would you consider supporting a member of staff to gain a vocational qualification in archaeological practice (NVQ)?

	have supported	would consider
yes	4	19
no	16	8
don't know	0	7

Only a minority of respondents had previously supported an employee getting an NVQ, although the majority say that they would consider supporting someone in the future. It is notable that all of the respondents who had previously supported someone to get the NVQ say that they would continue to consider doing so again in the future. Overall, this suggests that while take-up remains low, the qualification is valued by employers, and particularly by those who have already seen members of staff get the qualification.

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7 FURTHER COMMENTS

Much better survey than before - will wait with interest for the results

No comments

Significant concerns regarding the future of Local Authority based curatorial archaeologists and the financial support to conduct their roles from LA. Some withdrawing support altogether. Seems a backward step in the protection of the local heritage environment.

I think it should focus on tenders and contracts - form is really hard to use - you should be able to view what info is needed; go away and get it and then fill it in. There is no capacity to save what you have done and return to it later

The market in Scotland is entirely unpredictable at the moment, however I'm hopeful that the next year will see a more settled pattern of economic activity.

I feel that as an industry (inc. the IFA) we are very inward looking. As a commercial unit manager what can I actually do with the data collected here apart from maybe feel a bit better/worse because others are better/worse off than us. I am far more interested to know how the outside world perceives us. There is, of course, a direct connection between this, how much we can charge and then how much we are able to pay ourselves. As an industry we should all be far more aware of how we come across to the people who commission us

This looks a useful improvement on the data previously collected. Well done

[organisation] is an RO and partnership of two. We are not employees, and we have no staff. We have no contract other than our partnership contract outlining our responsibilities to each other. We do not have a salary, we take drawings, aiming for a set rate each month but with bonuses when we can. Whether we are ill, or have family commitments we try to take the same drawings every month, limited only by whether cashflow will let us. We try to plan ahead to ensure a good cashflow but you can never predict when clients will pay. We last increased the monthly drawings at the end of March. We approached 2011 with some trepidation with the outlook for archaeological work being poor and other changes to sources of work being affected by changes in funding streams. In the event we have had more work across the board this year than any other. We have been asked for several watching briefs in the past few months and are having to turn people away at present. We are also now on two Framework Agreements which may give us more work in the future.

Undertaking an NVQ within the context of a Russel Group University is well nigh impossible. This survey catches the organisation at a time of great change when many of the answers to the questions posed here are not easily arrived at.

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8 APPENDIX - QUESTIONNAIRE

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State of the Archaeological Market October 2011 reissue

Dear Colleague,
This is a reissued version of a questionnaire circulated at the end of October. If you answered that earlier questionnaire, thank you very much and you do not need to complete this version.

In response to comments made by respondents, the questionnaire has been enhanced to make it easier to complete - you are now able to save the questionnaire at any stage and to return to it later (by following the link in your invitation email). You are also able to print the entire questionnaire from any screen using the buttons at top right of each page. The deadline for responses has been extended to Friday November 11 2011.

This builds upon earlier surveys (October 2008 - April 2011) and moves on from focussing on job losses to establish a broader survey, reflecting the wish expressed by FAME members to get a fuller picture of the archaeological market by capturing and updating some of the data gathered in the 2009 FAME survey (FAME members' area) and to build on the economic analysis presented in the Southport Group's report.

I would like to ask you if you would now please give up some of your time to answer the questions below. We seek information as it applied to your organisation on 1 October 2011.

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

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

Please complete the form by 11 November 2011.

Kenneth Aitchison Executive Director Landward Research Ltd

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

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

3. is your organisation an IfA Registered Organisation?

yes **no**

4. how is your organisation legally constituted?

5. where is the head office of your organisation located?

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

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

7. in which year did your organisation begin trading?

Continue later

State of the Archaeological Market October 2011 reissue

Staff Numbers

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

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

3. If you have lost staff in the six months to 1 October 2011, do you believe that these people left the profession or stayed within it with different employers?

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

comments?

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

5. what level of staff turnover have you experienced in the last six months?

6. how many of your members of staff are on each of the following types of contract?

	full-time	part-time
permanent		
fixed term		
casual		
volunteer		

7. have salaries at your organisation typically risen or fallen since April 2011? (NB - not total salary bill)

Continue later

State of the Archaeological Market October 2011 reissue

Page 3 of 6

1. what was your annual turnover (in £m) for each of the last three years, and for the six months to the end of September 2011?

please note - answering the questions on this page is optional, but if you can give indicative figures these will be extremely valuable

	turnover (£m)
2008-09	
2009-10	
2010-11	
April - September 2011	

2. what level of profit / surplus margin have you realised in the six months since April 2011?

3. broadly, what percentages of your turnover (in the last six months) have been generated through each of the following areas of activity?

fieldwork (invasive and non-invasive)

post-fieldwork analysis

provision of advice to clients

data management

desk-based or environmental assessment

conservation of artefacts or ecofacts

other

comments?

Continue later

State of the Archaeological Market October 2011 reissue

1. Do you anticipate any changes to your staffing levels over the next six month period (to 1 April 2012)?

   Other comments?

2. Do you believe that the market conditions will deteriorate over the next 12 months? (to 30 September 2012)

   Other comments?

3. Do you expect any archaeological practices to cease trading over the next 12 months (to 30 September 2012)?

   Other comments?

4. Do you you have any plans to expand your business significantly over the next twelve months (to September 2012) (e.g. in premises, vehicles, capital equipment)?

   Other comments?

Continue later

State of the Archaeological Market October 2011 reissue

1. in the last six months (since April 2011) has your organisation lost skills in any of these areas?

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

2. in the last six months (since April 2011) has your organisation had to buy-in skills in any of these areas?

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

3. in the last six months (since April 2011) has your organisation invested in skills training in any of these areas?

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

4. do you think there are skills shortages across archaeological practice in any of these areas?

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

5. have you or would you consider supporting a member of staff to gain a vocational qualification in archaeological practice (NVQ)?

	have supported a member of staff in the last six months	would consider supporting a member of staff in the future
yes	€	€

no	◌	◌
don't know	◌	◌

Continue later

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State of the Archaeological Market October 2011 reissue

1. 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 11 November 2011

Continue later