Archaeological Market Survey 2016

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1 EXECUTIVE SUMMARY

This *Archaeological Market Survey* report is on the State of the Market for Archaeological Services in the United Kingdom in 2015-16. It has been prepared by Landward Research Ltd on behalf of the Chartered Institute for Archaeologists, FAME (Federation of Archaeological Managers and Employers) and Historic England.

The overall aims of this survey are to provide:

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

In financial year 2015-16 commercial archaeology grew in terms of the number of employees working in the sector, with increased levels of financial turnover and profit. However, the sector was not as confident as it had been a year earlier, with concerns over the result of the referendum on Britain's membership of the European Union a contributory factor.

The sector generally does not have confidence in planning policy frameworks, or that local planning authorities are being provided with sufficient professional advice.

One respondent commented "We must seize the opportunity that HS2 and the government infrastructure programme offers us as a catalyst for change within the market place, so professional salaries/fees can be raised, and profits generated to create a sustainable future for applied archaeological practice in the UK. This will require working together and not devaluing our own profession by under-cutting or inappropriately costing up tenders."

Employment

- It is estimated that the applied archaeology sectoral workforce grew by 9.9% in financial year 2015-16. The workforce in this sector has now returned to levels last experienced in 2009.
- In comparison with the previous year, growth has slowed; the sectoral workforce expanded by 20.8% in 2014-15.
- Over a comparable period, the number of archaeological staff providing expert advice to local planning authorities decreased by 13.5%.
- Together, these changes combine to result in the net number of people working in professional archaeology in the UK growing by 5.2% in financial year 2015-16 to an estimated total of 5,736 individuals.

Financial Performance

- The average (mean) reported UK turnover for an applied archaeology company in 2015-16 was £2.7m, an increase of 44% over the year since March 2015, with an additional 2% above that being generated from non-UK work. However, the financial turnover dataset was skewed by unevenly distributed responses.
- It is estimated that, in total, UK commercial archaeology generated total revenue of between £60m - £167m in 2014-15.
- Profit (or 'surplus') levels remained low – an average of 5.2% - but had increased since 2015, when the figure was 2.5.9%.
- Salaries at most respondent organisations rose by above inflation in 2015-16.
- Charge-out rates rose by 3.2% on average.
- Many of the largest employers are constituted as not-for-profit organisations.

Market Sectors

- The overwhelming majority of income (79%, an increase from 75% in 2014-15) came from private sector clients.
- The most important market sector continued to be residential development, which provided over 50% of income, followed by commercial and industrial development.

Business Confidence

- While the sector in 2016 was confident, the March 2016 results were the first time that the level of confidence in future market conditions had declined since September 2011.
- Many respondents completed the survey after the June 2016 referendum on Britain's membership of the European Union, and commented on the result as having a negative effect on their future plans and expectations.
- Respondents in 2016 reported the best ever expectations of maintaining or increasing staffing levels, exceeding even the 2015 results.
- While there was overall confidence that market conditions would not deteriorate in 2016-17, the sector was not as confident about the future as it had been one year before.
- More respondents expect there to be no business failures in the sector than expected some, but sentiment was not as positive as it had been in 2015.
- Respondents generally expected to expand their business in 2016-17, but the level of expectation has been declining year-on-year from a 2014 peak.

Skills, Training and Qualifications

- Fieldwork skills continued to be those most commonly reported as being lost.
- As was the case in 2015, artefact and ecofact conservation was rarely reported as a skill being lost by employers, nor was it often identified as being a priority for in-house training, because it had become very much the norm for this to be provided by subcontractors.
- The areas where training was focussed continued to match reasonably closely to the areas where skills were being reported as being lost (as they had been in 2015 and 2014) - so these

skills gaps (skills that existing staff needed but lacked) were being tackled by investment in training.

- Employers' interest in the NVQ in Archaeological Practice appears to be declining, which may be related to the end of HLF funding to support candidates, but many respondents would consider taking on an Apprentice in Historic Environment Practice.
- One respondent commented that "We are predicting that post-ex specialists (particularly finds and pottery) might quickly prove a bottleneck on delivery. These people do not just drop out of a university course so we have to find innovative ways to train and retain."

Forms of Contract

- Respondents typically use a range of Forms of Contract; ICE standard Forms are not used as often as contractors' or clients' own standard terms and conditions.

Perceptions

- Respondents considered that the economic climate for development would improve in the next year (2016-17), but they were less confident of improvement than they had been a year previously.
- Typically, they thought their heritage teams would grow, but were less confident of this than they had been in 2015.
- Respondents did not present a strong view on whether late payment of bills was a significant problem for their business; in 2014-15, this had been seen as more of a problem. The sector as a whole considered non-payment to not be a significant problem.
- Respondents were unsure about, the assertion that "current national planning policy frameworks are making it easier to justify heritage work and revenue levels"; equally, they were unsure about the statement that "current national planning policy frameworks weaken the case for heritage work and revenue levels". Sentiment in both cases had become more negative since 2015.
- They agreed that a shortage of heritage staff in local planning authorities was a major constraint on heritage projects (which could affect income generation), and this feeling has increased since 2015 (when it had also increased on the year before).

Response Rate

- Response levels were good. In terms of absolute responses, there was an increase on 2015, although the survey population of organisations had increased, and so there was actually a decline in the percentage of organisations providing data (56% declining from 60% in 2015).

Future Work

- This study will continue to be repeated annually, with the next survey taking place in early summer 2017. It will collect data from the end of the previous financial years on a cyclical basis until 2017-18 when it is intended that this will form part of the quinquennial Profiling the Profession project which gathers comparable data from the entire archaeological profession in the UK..

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2 INTRODUCTION

Economic changes that began in the autumn of 2008 have impacted significantly upon archaeological practice in the UK.

The Chartered Institute for Archaeologists (CIfA) and the Federation of Archaeological Managers and Employers (FAME) have collected data on employment and skills issues in applied archaeological practice since October 2008. A series of nine quarterly surveys were initially conducted, gathering and presenting data from October 2008 to April 2011, and subsequently, CIfA and FAME commissioned Landward Research Ltd to gather data on a six-monthly basis and to present reports on the state of the archaeological market. The December 2012 report[1] was combined with the sector wide *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13*[2] report.

The effects of the economic situation began to directly impact upon commercial, applied archaeology from 2008 onwards. In 2010 and 2011, the changing economic effects began to be felt in the fields of archaeological services to local authorities, in national heritage agencies and in universities. The full effects of these changes on employment patterns within archaeology were not made clear until results of the pan-sectoral *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13* project revealed the profundity of change with a considerable depth of job losses across the whole sector.

The reports on those earlier surveys are available on the CIfA website via the Recession – managing and planning page and on the FAME website http://www.famearchaeology.co.uk/.

The Chartered Institute for Archaeologists continues to need up-to-date research to be best able to support their membership by informing the Institute and its members about the effects of the economic situation on archaeology. The Federation of Archaeological Managers and Employers also seeks to provide market intelligence to its members to help them compete effectively. The fact that both organisations have commissioned this survey demonstrates the value of the information for advocacy of archaeology at Westminster and national parliaments.

Together with Historic England, CIfA and FAME have commissioned Landward Research Ltd to continue to analyse and evaluate the state of the market for archaeological services, examining employment, turnover, market segmentation and other relevant topics.

This exercise is being carried out on an annual basis over five years, collecting data for the entire UK for every year from 2013-14 up to and including 2017-18, when it is intended that the *Profiling the Profession* series of projects will continue their quinquennial cycle. It will also ensure that the data gathered will be able to contribute directly to an intended future *Profiling the Profession 2017-18* project, thus ensuring that the funders will have a full role in guiding the design and then delivery of

[1] Aitchison, K. 2013. *State of the Archaeological Market December 2012*. Landward Research Ltd. http://www.landward.eu/State%20of%20the%20Archaeological%20Market%20-%20December%202012%20050913.pdf

[2] Aitchison, K. & Rocks-Macqueen, D. 2013. *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13*. Landward Research Ltd. http://www.landward.eu/Archaeology%20Labour%20Market%20Intelligence%20Profiling%20the%20Profession%202012-13.pdf

that project. The report presented here is based on data gathered from FAME member organisations and CIfA Registered Organisations, who are considered to represent the majority of employers working in commercial, client-funded applied archaeology.

The data gathered applied on the 31st March 2016, and so this report is on the situation at the end of financial year 2015-16. Many respondents did not complete their responses until after the referendum on Britain's membership of the European Union on 23rd June 2016, and several commented that this had influenced their answers (negatively) to the Business Confidence [6 below] questions.

Throughout, comparisons are made with the results of the *Archaeological Market Survey 2015*[3] and *Heritage Market Survey 2014*[4] results, both of which gathered data from the same survey population as the current report (FAME members and CIfA Registered Organisations).

Data have also been incorporated from the Historic England / ALGAO / IHBC *An eighth report on Local Authority Staff Resources*[5] which reported on archaeological staff advising local planning authorities in England.

Some changes were made to the survey in 2016, with new questions introduced about Apprenticeships and Forms of Contract; some questions have been reworded for clarity, and the presentation of the results on financial turnover has been altered.

The way that graphic information has been changed for the time-series datasets, to emphasise that data were collected at specific points in time, rather than continuously (as could have been suggested by the graph formats used previously).

2.1 Responses

In total, 101 organisations were asked to provide responses; 76 CIfA Registered Organisations and 62 FAME members. As most of these organisations are both CIfA ROs and members of FAME, the total number of organisations approached is less than the total number of CIfA ROs plus FAME members.

The questionnaire sought data that applied on 31st March 2016, the end of financial year 2015-16

A draft version of the questionnaire was accidentally issued via a *Novisystems* online survey package on 4th April 2016. Some respondents answered this early version before the accidental release was recognised; they were thanked for their efforts and told they would not be sent the finalised version of the survey. The data that the early respondents provided were saved and incorporated into the results; the full questionnaire was then deployed on 17th June 2016, with automated reminder

[3] Aitchison, K. *Archaeological Market Survey 2015*. Landward Research Ltd. http://www.landward.eu/Archaeological_Market_Survey_2015.pdf

[4] Aitchison, K. *Heritage Market Survey 2014*. Landward Research Ltd. http://www.landward.eu/Heritage%20Market%20Survey%202014%20final%20report%20v2.pdf

[5] Reilly, S. 2016. *An eighth report on Local Authority Staff Resources*. HE / ALGAO / IHBC. https://content.historicengland.org.uk/images-books/publications/eighth-report-la-staff-resources/eighth-report-la-staff-resources.pdf/

emails encouraging completion being sent periodically until the survey closed on 22nd July 2016. Follow-up enquiries were sent to a small number of respondents after that date.

A total of 63 responses were received, although six were duplicate entries, so the total number of useable responses was 57, a response rate of 56.4% - a decline from the 2015 response rate of 59.6% (the 2014 response rate was 47.7%), although as the survey population was larger (101 organisations rather than 89 in 2015), the actual number of responses increased.

2.2 FAME Membership

is your organisation a member of FAME?

39 of the 57 respondents were FAME members (68% of the respondents, 63% of the FAME membership).

2.3 CIfA Registered Organisations

is your organisation a CIfA Registered Organisation?

Of the 57 responses, 47 were from CIfA Registered Organisations (82% of the respondents). This represented 62% of CIfA Registered Organisations.

2.4 Constitution

The questionnaire asked about how respondent organisations were legally constituted. The majority of responses came from private limited companies (30 of the 57 respondents). The survey allowed respondents to check as many categories of constitution as applied; four indicated that they were both limited companies and registered charities, and one public limited company also reported being a charity. One organisation was both a constituent part of a local authority and of a university. This means that the total number of responses for 2016 (57 respondents providing 63 responses) is greater than the number of respondents.

How is your organisation legally constituted?
please check multiple categories if appropriate

constitution	**Archaeological Market Survey 2016** March 2016		**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014	
private limited company (ltd)	30	53%	33	62%	18	44%
registered charity	12	21%	13	25%	7	17%
constituent part of a local planning authority	5	9%	7	13%	5	12%
constituent part of a university	8	14%	6	11%	4	10%
other	6	11%	5	9%	6	15%
public limited company (plc)	2	4%	2	4%	1	2%
total respondents	57		53		41	

Using the numbers of staff reported as being employed on 31st March 2016 (managerial, professional, technical and administrative), the organisations that identify as being registered charities were, on average, the largest organisations in the sector (as was the case in the *Heritage Market Surveys 2015* and *2014*).

staff numbers by organisational legal constitution

constitution	orgs	total staff	avg staff
registered charity	10	1114.7	111.47
public limited company (plc)	1	65	65
private limited company (ltd)	21	948.2	45.15
constituent part of a university	8	246.82	30.85
constituent part of a local planning authority	3	48.3	16.1
other	4	27	6.75

(orgs = number of organisations providing both staffing data and information on constitution)

Note that this table includes deliberate double counting – each of the organisations that identified as falling under two categories has been included under both headings; also note that not all organisations provided both information on staffing and their legal constitution.

The data continued to show (as was the case in 2015 and 2014) that while private limited companies were the most common form of enterprise represented, in this sector more people worked for not-for-distributable profit organisations (registered charities, constituent parts of local planning authorities, constituent parts of universities).

Most of the large employers in this sector had not-for-profit constitutions. This has been identified as a potential barrier to effective competition within a market economy[6].

[6] Hinton, P. and Jennings, D. (2007) 'Quality management of archaeology in Great Britain: present practice and future challenges', in Willems, W.J.H. and Van den Dries, M. (eds) *Quality Management in Archaeology*, pp. 100-112, Oxford: Oxbow Books.

2.5 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?

head office location	Archaeological Market Survey 2016 March 2016		Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014	
East Midlands	3	5%	5	9%	2	5%
East of England	9	16%	5	9%	3	7%
Greater London	4	7%	6	11%	4	10%
North East England	2	4%	0	0%	0	0%
North West England	4	7%	3	6%	2	5%
South East England	8	14%	8	15%	6	15%
South West England	7	12%	9	17%	5	12%
West Midlands	3	5%	2	4%	5	12%
Yorkshire and the Humber	2	4%	3	6%	1	2%
Scotland	9	16%	5	9%	7	17%
Wales	3	5%	3	6%	4	10%
Northern Ireland	0	0%	1	2%	1	2%
outside the UK	3	5%	3	6%	1	2%
total	57		53		41	

The reported distribution of head offices has not changed substantially over the period from 2014 to 2016; variation over that time is likely to represent reporting or non-reporting by respondents. There are organisations headquartered in all parts of the UK (and outside the UK) working in the sector.

27 of 57 respondents in 2016 reported having subsidiary offices, a remarkable drop in comparison with the figure for 2015 when 45 of 53 respondents reported having subsidiary offices. The 27 respondents had a total of 75 subsidiary offices – an increase when compared with the number of subsidiary offices reported in 2015.

Of those that reported having subsidiary offices, the numbers of these ranged between one and ten, an average of 2.8 for each organisation that reported that they had such offices. While there was a drop in the number of organisations that had subsidiary offices in 2016, the total number of such offices increased; the existence of these subsidiary offices confirms that applied archaeological work is being undertaken in all parts of the United Kingdom.

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

subsidiary office location	Archaeological Market Survey 2016 March 2016		Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014	
East Midlands	7	9%	4	6%	5	10%
East of England	7	9%	7	10%	3	6%
Greater London	8	11%	7	10%	6	12%
North East England	4	5%	7	10%	3	6%
North West England	6	8%	5	7%	3	6%
South East England	5	7%	8	11%	5	10%
South West England	8	11%	7	10%	6	12%
West Midlands	9	12%	7	10%	4	8%
Yorkshire and the Humber	8	11%	8	11%	4	8%
Scotland	7	9%	7	10%	6	12%
Wales	4	5%	2	3%	5	10%
Northern Ireland	1	1%	1	1%	0	0%
outside the UK	1	1%	1	1%	1	2%
total	75		71		51	

total numbers of offices reported by location

all offices location	head offices	subsidiary offices	total	
East Midlands	3	7	10	8%
East of England	9	7	16	12%
Greater London	4	8	12	9%
North East England	2	4	6	5%
North West England	4	6	10	8%
South East England	8	5	13	10%
South West England	7	8	15	11%
West Midlands	3	9	12	9%
Yorkshire and the Humber	2	8	10	8%
Scotland	9	7	16	12%
Wales	3	4	7	5%
Northern Ireland	0	1	1	1%
outside the UK	3	1	4	3%
	57	75	132	

The data 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.

In general, these figures can be seen as an accurate distribution of working archaeologists in the UK, with the highest numbers of archaeologists occurring in the highest areas of general population (Greater London and South-East England). South-West England was also highly represented, with several large companies being headquartered there.

staff numbers by head office location

location	Archaeological Market Survey 2016 March 2016			Archaeological Market Survey 2015 March 2015			Heritage Market Survey 2014 March 2014		
	orgs	staff		orgs	staff		orgs	staff	
East Midlands	3	91.2	5%	5	94.6	5%	1	2.5	<1%
East of England	4	138.6	7%	4	99.85	5%	1	3	<1%
Greater London	4	476	25%	5	485	26%	2	10	1%
North East England	2	108	6%	0	0	0%	0	0	0%
North West England	3	25	1%	2	18.5	1%	2	18	2%
South East England	5	385.35	20%	7	427.2	23%	4	132.5	17%
South West England	7	429.7	22%	8	352	19%	4	296.5	37%
West Midlands	3	37.83	2%	2	36.34	2%	5	91.1	12%
Yorkshire and the Humber	1	14	1%	1	19	1%	0	0	0%
Scotland	8	190.87	10%	4	216.3	12%	5	168	21%
Wales	2	16	1%	3	59	3%	4	60.5	8%
Northern Ireland	0	0	0%	1	9	<1%	1	8	1%
outside the UK	0	0	0%	3	48.5	3%	1	2	<1%
total	42	1912.55		45	1865.3		30	792.1	

(orgs = numbers of organisations providing staffing data)

2.6 Years Trading

Respondents were asked when their organisations began trading.

In which year did your organisation begin trading (in applied archaeology)?

started operating	**Archaeological Market Survey 2015-16** March 2016		**Archaeological Market Survey 2014-15** March 2015		**Heritage Market Survey 2013-14** March 2014	
18th century						
19th century						
1900s			1	2%	1	2%
1910s						
1920s						
1930s						
1940s			1	2%	1	2%
1950s						
1960s	1	2%	1	2%	1	2%
1970s	8	15%	10	19%	9	21%
1980s	4	7%	7	13%	3	7%
1990s	15	27%	16	30%	12	28%
2000s	15	27%	11	21%	11	26%
2010s	12	22%	6	11%	5	12%
total	55		53		43	

No respondent organisations were formed before 1960, and the overwhelming majority began trading since 1990. The median year for starting trading across the 55 respondents was 1999 (half had been trading for at least 17 years, and half less).

Examining the data for trading starts by organisational constitutions, the registered charities were typically founded in the "rescue" era of the 1970s. Limited companies have become the preferred model over time, with the majority of organisations founded since 2000 using this model.

foundation dates by constitutional bases

	plc	ltd company	charity	part of lpa	part of university	other
1960s			1			
1970s	1	4	6		1	
1980s		2	1	1		1
1990s		6	3	2	3	1
2000s	1	10		1	4	4
2010s		7	1			

3 STAFF NUMBERS

Respondents were asked about staffing levels on March 31st 2016, covering both UK and non-UK based staff. They were also asked about non-UK based staff, the types of contracts used, relative levels of staff turnover and whether they thought departing staff had left the sector or not. They were also asked for retrospective data to ensure consistency with the previous *Archaeological market survey 2015*.

In total, it is estimated that the sectoral workforce (commercial, applied archaeology) grew by 9.9% in the year since the previous survey (by comparison, the sectoral workforce grew by 20.8% in the previous year).

Separately, the number of archaeologists providing curatorial services to local planning authorities (technically, the number of full-time equivalent "archaeological specialists providing advice to local authorities") in England fell by 13.5% in the year to the beginning of 2015[7].

No figures are available for the numbers of archaeologists working in "other" contexts (neither commercial nor curatorial), and so those figures have had to be assumed to have remained unchanged.

When these three figures are combined (commercial archaeology from this survey, curatorial from Reilly [2016] and "other" from Aitchison & Rocks-Macqueen [2013][8]), and in the case of the local authority figures, extrapolated from the English base, it is estimated that the entire archaeological profession working in the UK grew over the course of financial year 2015-16 from a total of 5452 to 5736 professional archaeologists on 31st March 2016, an increase of 5.2%.

3.1 Employment

The survey asked a series of questions about staffing levels, enquiring about the numbers of staff working on 31st March 2016 and asking how many of them were fee-earners. Respondents were also asked about non-UK based fee-earning staff.

[7] Reilly, S. 2016. *An eighth report on Local Authority Staff Resources*. HE / ALGAO / IHBC. https://content.historicengland.org.uk/images-books/publications/eighth-report-la-staff-resources/eighth-report-la-staff-resources.pdf/

[8] Aitchison, K. & Rocks-Macqueen, D. 2013. *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13*. Landward Research Ltd. http://www.landward.eu/Archaeology%20Labour%20Market%20Intelligence%20Profiling%20the%20Profession%202012-13.pdf

3.1.1 Total Staff

How many full-time staff were based in your UK offices on 31 March 2016?
Please include all full-time or full-time equivalent staff, together with part-time staff, using estimates of full-time equivalency - for example, a member of staff working 2.5 days a week should be counted as 0.5.

How many UK members of staff (FTE) did your organisation have one year ago, on 31 March 2015 - the census date for the previous Heritage Market Survey?

total UK staff (managerial, professional, technical and administrative)	Archaeological Market Survey 2016 March 2016		Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014	
	Mar 16	Mar 15	Mar 15	Mar 14	Mar 14	Dec 12
number providing data	42	42	45	42	30	30
total	1912.55	1740.41	1865.29	1468.56	792.06	769.24
average	46.65	42.45	41.45	34.97	26.40	25.64

Data are also presented for comparison purposes that were gathered in the predecessor *Archaeological market survey 2015* and the *Heritage Market Survey 2014* (which both collected directly comparable data from FAME Member Organisations and CIfA Registered Organisations.

Directly comparing data from the 42 organisations that provided data to this survey for both March 2016 and March 2015 shows that their total workforces increased in size by 9.9% in the year between the survey dates (in absolute terms, eight had smaller workforces, ten had not changed in size and 24 had grown).

This increase in workforce size – of 9.9% over one year - can be taken as a benchmark for the overall growth of the applied archaeological sector's workforce in 2015-16. This is a significant amount of growth, although the rate of growth has slowed from the level recorded in 2014-15 (20.8%).

3.1.2 Total Fee Earners

As well as being asked about the total numbers of all staff, respondents were also asked about the number of fee-earning staff, defined as *"Fee-earners: members of staff whose time can be billed to clients".*

UK-based fee earners working full-time

total staff	total fee-earners	
1848.35	1728.32	93.5%

n=36

Data only used from respondents providing positive numbers of staff and of fee-earners.

Fee earners therefore made up nearly 94% of the workforce at the respondent organisations in 2016; the calculated figure from *Archaeological market survey 2015* was 91%.

3.1.3 Overseas Staff

Respondents were asked how many of their full-time staff were permanently based overseas on 31st March 2016.

Only four respondents reported having fee-earners based outside the UK, with a total of 10.5 individuals, ranging from 0.5 to 8 at each of the organisations. The numbers of fee-earners permanently based outside the UK have varied considerably over the years that these data have been collected, owing to different respondent organisations answering this question each year.

One of the four organisations that identified that they had fee-earners outside the UK reported having more non-UK fee-earners than were based in the UK.

Number of fee-earners permanently based outside the UK

	fee-earners outside UK	**fee earners in UK** (only organisations with non-UK fee earners)	***n=***
total 2016	10.5	253.7	4
total *Archaeological Market Survey 2015*	21	72	3
total *Heritage Market Survey 2014*	13	156	3

3.1.4 Total Employment in UK Archaeology

The most recent comprehensive survey of employment in all areas of UK archaeology was *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13*, which incorporated data from *State of the Archaeological Market December 2012*.

Subsequent iterations of the Heritage Market Survey in 2013-14 and 2014-15 allowed these data to be updated, and now this report presents an updated estimate of the total number of people working in applied, commercial archaeology, which can be combined with the most recent estimates for curatorial archaeology to produce an overall estimate for the entire sector in 2016.

Using the methodology applied in all predecessor surveys of extrapolating from results received, this report estimates that 3,844 individuals were working in commercial archaeology in March 2016, an increase of 386 individuals (9.9%) over the period since March 2015. This represents continuing growth in commercial archaeology, following rapid expansion from 2014 onwards, and the commercial sector has returned to staffing levels previously experienced in 2009; this is still below the peak recorded in 2008 immediately before the economic deterioration that began to affect the sector in that year.

The most recently published survey of staffing in local planning authorities[9] considered that the number of archaeologists advising LPAs in England decreased by 13.5% in the year to early 2016;

[9] Reilly, S. 2016. *An eighth report on Local Authority Staff Resources*. HE / ALGAO / IHBC. https://content.historicengland.org.uk/images-books/publications/eighth-report-la-staff-resources/eighth-report-la-staff-resources.pdf/

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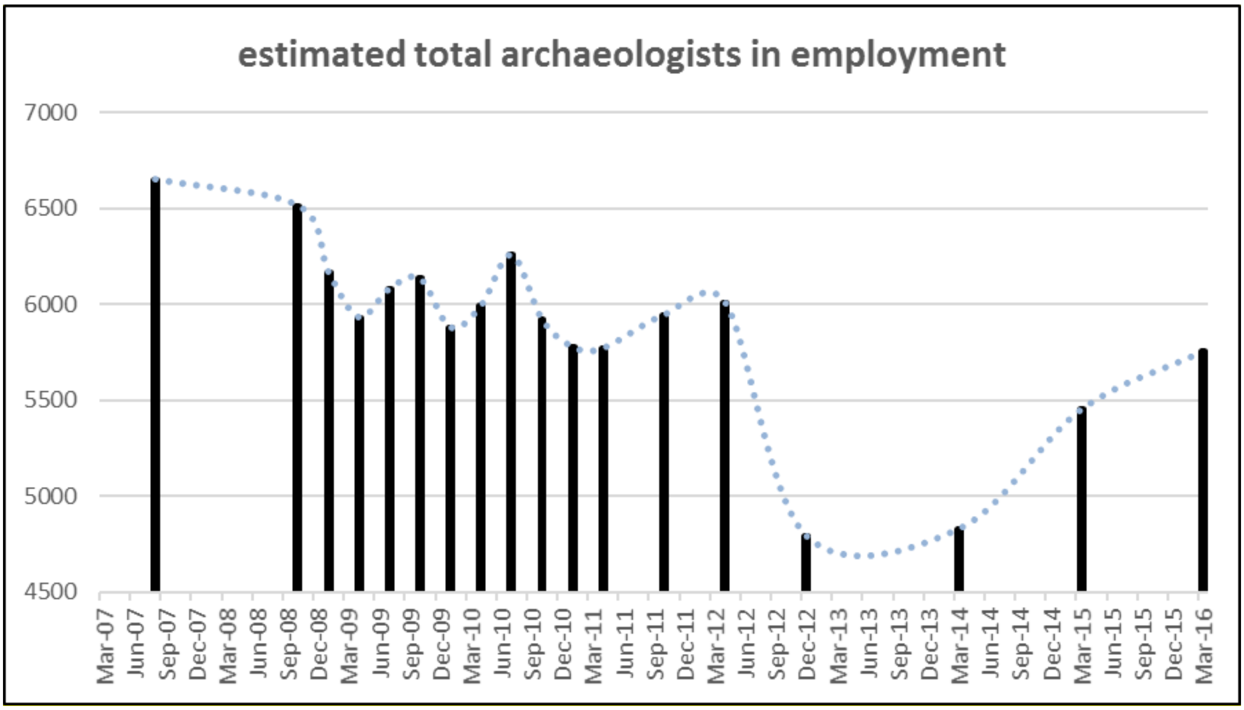
there is not believed to have been an equivalent rate of change outside England[10]. This represents a loss of 42.5 FTE posts.

As no new data are available for archaeological employment in "other" sectors, the figures from *Archaeology Labour Market Intelligence: Profiling the Profession 2012-13* (December 2012) are repeated unchanged here.

For all sectors combined there was a net increase of 5.3% in the number of people working in UK archaeology between March 2015 and March 2016.

total numbers of archaeologists in employment in the UK, 2007-2016

	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	Apr-12	Dec-12	Mar-14	Mar-15	**Mar - 16**
curatorial	512	505	505	505	505	505	505	485	485	485	485	442	442	440	485	439	459	**416**
other	2105	2105	2105	2105	2105	2105	2105	2105	2105	2105	2105	2105	2105	2105	1495	1495	1495	**1495**
commercial	4036	3906	3561	3323	3472	3526	3270	3404	3669	3333	3189	3225	3399	3467	2812	2896	3498	**3844**
total	6653	6516	6171	5933	6082	6136	5880	5994	6259	5923	5779	5772	5946	6012	4792	4830	5452	**5755**



Following the global economic downturn of 2008 and an associated loss of jobs in UK archaeology, post-collapse growth in UK archaeological employment began, very slowly, in 2013-14, and rapidly accelerated in 2014-15. Although there have been job losses in the curatorial sector in 2015-16, growth has continued, driven by the commercial sector, which has added more jobs than were lost by curatorial.

[10] Doug Rocks-Macqueen, pers. comm. 14th September 2016.

These curatorial losses are significant, as an overwhelming – and increasing - majority of respondents to this survey, together with the *Archaeological market survey 2015* and *2014* considered that “a shortage of heritage staff in LPAs is a major constraint on heritage projects” (7, *Perceptions* below). Since 2011, the number of curatorial posts has decreased by 17%.

3.2 Contracts

how many of your members of staff were working on each of the following types of contract or agreement on 31 March 2016?

	full-time		part-time		total	
Permanent	1107	91.6%	102	8.4%	1209	73.9%
fixed term	340	92.6%	27	7.4%	367	22.4%
Casual	35	81.4%	8	18.6%	43	2.6%
Volunteer	3	18.8%	13	81.3%	16	1.0%
Total	1485	90.8%	150	9.2%	1635	

n=38 (nb – percentages read horizontally across rows, not vertically down columns)

Data were received on staff contracts from 38 respondents, relating to the contracts or working agreements held by over 1600 employees or volunteers.

Nearly three-quarters of staff were on permanent contracts, over 20% on fixed term (temporary) contracts, very few were ‘casual’ staff and almost no volunteers were reported. These figures are very similar to the results in 2015.

90% of employees were on full-time contracts, and 75% of those people were permanently engaged. Part-time workers were more likely to have permanent contracts than to be working on fixed-term contracts.

Please note the discrepancy between the total number of staff calculated on the basis of reported contracts and the figure reported under 3.1.1, *Total Staff* above is because fewer respondents provided data on whether staff were on full-or part-time contracts.

In comparison with the equivalent data from 2014-15 (below), the overall percentage of staff who were on permanent contracts remained almost unchanged, as was the case when comparing 2015 with 2014. This supports the view that the increase in jobs seen in 2014-15 and continued in 2015-16 is not simply a fieldwork “spike”, as that would likely be represented by a disproportionate increase in the percentage of fixed-term posts.

how many of your members of staff were on each of the following types of contract on 31 March 2015?

	full-time		part-time		total	
permanent	1355	88.5%	176.3	11.5%	1531.3	76.4%
fixed term	365	94.2%	22.4	5.8%	387.4	19.3%
casual	36	70.6%	15	29.4%	51	2.5%
volunteer	3	8.8%	31	91.2%	34	1.7%
total	1759	87.8%	244.7	12.2%	2003.7	

n=44

from Archaeological Market Survey 2015

3.3 Staff Turnover

Respondents were asked about the relative (not absolute) levels of staff turnover in the period since the previous survey.

what level of staff turnover did you experience between 31 March 2015 and 31 March 2016?

staff turnover	**Archaeological Market Survey 2016** March 2016		**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014	
none (all current staff were working for us one year ago)	13	33%	6	13%	4	14%
some (up to 10% of current staff were not working for us one year ago)	11	28%	21	47%	10	34%
moderate (up to 25% of current staff were not working for us one year ago)	11	28%	10	22%	10	34%
considerable (over 25% of current staff were not working for us one year ago)	5	13%	8	18%	5	17%
total	40		45		29	

A high level of staff 'churn' has been recognised within the sector (confirmed by the responses to Staff Lost from the Sector, 3.4 below). The rate of turnover is slowing, with more respondents reporting that they had not had any change in staff in the previous year. While organisations are typically growing by adding staff, the level of churn is much more stable than it was when the sector was shrinking and jobs were being lost.

3.4 Staff Lost From the Sector

Respondents were asked whether they believed that staff who had formerly worked for them were still working in archaeology or not.

If you lost staff in the period between 31 March 2015 and 31 March 2016, do you believe that these people left the profession or stayed within it with different employers?

staff destinations	**Archaeological Market Survey 2016** March 2016		**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014	
all found alternative employment within archaeology	1	4%	10	29%	8	36%
most found alternative employment within archaeology	16	67%	14	40%	9	41%
even split between leaving the profession and finding alternative employment within archaeology	4	17%	6	17%	4	18%
most left the profession	0	0%	2	6%	0	0%
all left the profession	3	13%	3	9%	1	5%
total	24		35		22	

As was the case in 2015, most respondents thought that all, or most, of the people who had left their employ were still working in archaeology but for different employers, which continues to repeat a pattern identified in 2014, and 2012 before that, emphasising that a major component of staff turnover is made up of people moving within the sector.

Comments received:

A degree of volatility in the market place relative to previous years as competitors and consultants come looking for more experienced staff.
Do not have an answer to this question
Of those who left, some returned to us during the period and a proportion went on into Higher Education (PhDs), a reflection of the demographic of our staff base
Transferred to different area within overall organisation
We had a number of large projects running in March 2016 and were able to employ increased numbers. We enjoy a great deal of volunteer support in the community.
We lost one member of staff to family relocation abroad and gained one new employee, one additional employee started but soon left

3.5 Salaries

Respondents were asked whether salaries had typically risen or fallen during the 2015-16 financial year. This was specifically not a question about total salary bills, as those would be directly influenced by the number of personnel on the payroll.

did salaries at your organisation typically rise or fall between March 2015 and March 2016? (NB - not total salary bill)

when comparing changes to inflation, please consider the rate of inflation at the date of the salary settlement

salary changes	Archaeological Market Survey 2016 March 2016		Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014	
risen by above inflation	22	54%	24	53%	9	29%
risen by inflation	12	29%	9	20%	9	29%
unchanged	7	17%	11	24%	13	42%
fallen by up to 10%	0	0%	0	0%	0	0%
fallen by over 10%	0	0%	1	2%	0	0%
total	41		45		31	

For the second year in succession, the majority of respondents reported salaries as having risen by above inflation, with a further 29% reporting that salaries had risen by inflation. No respondents reported salaries as having fallen. The CPI rate of inflation in March 2016 was 0.5%[11]; respondents were asked to compare changes with inflation at the date of the salary settlement.

In terms of the average sizes of the workforce at the organisations where data on salary changes are available, the organisations where salaries were reported as having risen by more than inflation were typically larger than those that reported salaries had risen by inflation, and those that had risen by inflation were typically larger than those where salaries were unchanged in 2015-16.

salary changes March 2016	organisations	individuals	average size of workforce
rose by above inflation	22	1546.55	70.30
rose by inflation	12	293.27	24.44
unchanged	6	44.9	7.48
fell by up to 10%	0	0	0
fell by over 10%	0	0	0

[11] http://www.rateinflation.com/inflation-rate/uk-historical-inflation-rate accessed 13th September 2015

3.6 Charge-out Rates

Respondents were asked about any changes to their charge-out rates in the year ending 31st March 2016, and then about how they anticipated they would change in the next year.

How did your charge out rates change in the year to the end of March 2016?

- *by what percentage did your charge-out rates increase (+) or decrease (-) over the year ending 31 March 2016?*
- *by what percentage did you or do you anticipate that your rates will increase (+) or decrease (-) over the year ending 31 March 2017?*

	reported change to March 2016	**anticipated change to March 2016** (reported in 2015)	**anticipated change to March 2017**
range	-10% to 15%	-5.0% to 15.0%	-10% to 20%
mean	3.2%	3.6%	4.3%
median	2.5%	4.0%	5.0%
mode	0.0% (11 responses)	5.0% (12 responses)	5.0% (10 responses)
n=	34	41	35

Charge-out rates rose by an average of 3.2% in the year to March 2016; a year previously, they had been expected to rise by 3.6%. Looking forward, respondents expect their charge-out rates to rise by even more in the year to March 2017 (although, historically, the average increases in charge-out rates have always been less than were anticipated a year before – this was the case in 2016 and 2015).

As the March 2016 annual UK inflation rate (CPI) was 0.5%, 65% of respondents increased their charge-out rates in 2015-16 by more than this amount.

4 FINANCIAL PERFORMANCE

Respondents were asked a series of questions about their organisation's financial performance in financial year 2015-16. It was recognised that some respondents might be reluctant to release such information (even though the responses were anonymous).

- Overall, the financial performance statistics indicate that the sector had grown and had positive future financial expectations.
- Average financial turnovers increased from 2014-15 to 2015-16.
- Reported profit (or surplus) levels also increased, but continued to be relatively low.
- In terms of business activity, residential development continued to very clearly be the biggest market sector and now provides more than 50% of income. The largest source of funding by far was the private sector; this continued to increase in importance year-on-year.

4.1 Turnover

What was your annual turnover (in £) in financial year 2015-16?

Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc
if your accounting period does not run from April to March, please indicate fee income for nearest 12-month period for which audited figures are available, making clear which period they cover.

your UK turnover in year ending 31 March 2016
your turnover from non-UK sources (including Republic of Ireland) in year ending 31 March 2016

	range	mean	median	*n=*
UK turnover	£15,100 to £12,484,000	£2,928,146	£755,618	24
non-UK turnover	£0 to £150,000	£48,219	£0	25; 20 reported zero return

2015 figures (from *Archaeological Market Survey 2015*)

	range	mean	median	*n=*
UK turnover	£54,000 to £10,905,000	£1,879,543	£864,000	39
non-UK turnover	£0 to £700, 000	£60,011	£0	37; 28 reported zero return

Respondent organisations typically turned over £600,528 in 2015-16 (half generated more than this amount of revenue, half less). For most respondents, none of this income was generated outside the UK.

The average (mean) UK turnover for an applied archaeology company in 2015-16 was £2.93m, an increase of 55.7% on the figure reported for 2014-15. It should be noted that the median figure simultaneously fell by 14.4%, as more respondents reported figures lower than the mean than above.

Presenting turnover by income bands shows that a relatively high proportion of respondents fell into the lowest income bracket (below £250k), and a relatively high proportion also fell into the two highest income brackets (£5m to £10m and over £10m). The number of high returns is likely to be due to the data collection methodology; after the survey closed, specific non-respondent organisation which were believed to employ the most archaeologists (and so likely to have higher turnovers) were specifically pursued to get responses. By contrast, the 2014-15 figures show a normal distribution around the median turnover of between £0.5m and £1m.

UK turnover	***2015-16***		***2014-15***	
<£250,000	5	20%	4	10%
£250,000 -> £500,000	3	12%	7	18%
£500,000 -> £1m	7	28%	13	33%
£1m -> £2.5m	3	12%	8	21%
£2.5m -> £5m	0	0%	2	5%
£5m -> £10m	4	16%	3	8%
>=£10m	3	12%	2	5%
total	25		39	

Multiplying the median and mean figures by the total survey population (of 101 organisations) would suggest that in 2015-16 the sector generated between £75m-£296m of revenue; the comparable figures for 2014-15 were £77m-£167m.

	annual (UK) turnover			**Source**
	n=	mean	change	
2015-16	24	£2.93m	+55.7%	Archaeological Market Survey 2016 March 2016
2014-15	37	£1.88m	+14.5%	Archaeological market survey 2015 March 2015
2013-14	20	£1.64m		Heritage Market Survey 2014 March 2014
2012-13	no data available			
2011-12	33	£1.71m	-6.6%	State of the Archaeological Market December 2012
2010-11	32	£1.83m	-4.2%	State of the Archaeological Market December 2012
2009-10	32	£1.91m		State of the Archaeological Market December 2012

Most companies did not generate any non-UK income, but those that did generated an additional 2.0% of additional turnover from those sources.

predicted % change in turnover between years ending 31 March 2016 and 31 March 2017

	Range	**mean**	**median**	***n=***
anticipated change	-20% to +100%	+10.8%	+10.0%	24

On average, respondents typically expected their turnover to increase by 10.8% in 2016-17; the average expectations for 2015-16 were for increase in turnover of 7.6%, and the 2014-15 expectation was for an increase of 6%.

25 organisations provided data for both financial turnover and numbers of staff; on average these organisations employed 61.6 members of staff each, with an average turnover per staff member of £45,615, a decrease from 2014-15 of 0.7%.

average turnover per member of staff	
2015-16	£45,615
2014-15	£45,914
2013-14	£56,237
2012-13	no data available
2011-12	£53,271

While the numbers of staff had increased, the levels of turnover per worker – as a proxy measure of productivity – had actually fallen very slightly. As in 2014-15, this may be the result of more junior staff being hired to work on fieldwork projects and so making up a larger share of the workforces as organisations expanded.

16 respondents provided data on their contributions to the community, public archaeology and education which had not been paid for directly by a client. On average these contributions were £25,728, a decrease from the 2014-15 figure of £35,820.

These contributions equated to 0.9% of those organisations' average annual turnovers (a decrease from 1.1% in 2014-15).

your contribution to the community, public archaeology and education which has not been paid for directly by a client

	range	mean	median	*n=*
non-client contributions	£2,000 - £200,000	£25,728	£9,500	16; 4 reported zero returns

4.2 Profit Levels

Respondents were asked about the levels of profit (or surplus, for not-for-profit enterprises) realised in financial year 2015-6.

your surplus (plus or minus) in the year ending 31 March 2016

	range	mean	percentage of mean turnover	median	*n=*
surplus 2015-16	-£75,000 to £799,000	£154,438	5.2%	£50,000	23
surplus 2014-15[12]	-£1,017,807 to £935,000	£46,637	2.5%	£5,500	33

Profit levels increased in 2015-16 when compared with the year before, both in terms of the average absolute levels of profit and in terms of that as an average percentage of turnover.

[12] reported in *Archaeological market survey 2015*

While typical profit levels remained, the average had steadily increased, to 5.2% in 2015-16 from 2.5% in 2014-15 and 1.9% in 2013-14. Approximately 30% indicated that profit levels were over 10% which is a surprisingly high rate of profitability, especially compared to previous years which suggested a rate of 2.5% or less. This increase seems to reflect the slight increase in pay (above inflation) and the investment in training that many organizations have been taking, and is therefore a very positive signal that the sector has the resources to start investing and developing.

While most respondents reported being in profit, four of the 23 organisations responding in 2016 reported negative figures, representing absolute losses, with another one reporting neither surplus nor loss.

level of profit as % of turnover (surplus)	Archaeological Market Survey 2016 March 2016		Archaeological market survey 2015 March 2015		Heritage Market Survey 2014 March 2014	
<5%	11	52%	23	70%	18	75%
5-10%	4	19%	6	18%	3	12%
10-25%	3	14%	4	12%	3	12%
>25%	3	14%	0	0%	0	0%
total	21		33		24	

Data only used from respondents providing turnover and profit/surplus figures

4.3 Funding Sources (areas of activity as turnover)

Please estimate your UK turnover from the following sources in the year ending 31 March 2016

	n=	total	mean	%	2015 %
central government departments and agencies	13	£1,963,361	£151,028	3%	13%
other public bodies (including universities, public-private partnerships and local enterprise partnerships)	14	£2,712,162	£193,726	4%	2%
community groups (including HLF projects, town and parish councils and neighbourhood forums)	17	£3,650,054	£214,709	5%	2%
district, county or unitary councils (local planning authorities)	19	£2,410,926	£126,891	3%	4%
national agencies (HE/EH, HES, Cadw etc)	12	£3,790,766	£315,897	6%	5%
private sector clients (including third parties)	16	£54,363,911	£3,397,744	79%	75%
aggregate total		**£68,891,180**			

Of 22 respondents to this question, most had secured some income from each of the six defined areas of funding. Funding from private sector clients represented the overwhelming majority (79%) of the total estimated income reported; this was an increase on the 2015 figure of 75%.

In comparison with 2014-15, the distribution of funding sources has remained broadly constant, although the percentage of funds received from central government departments and (non-heritage) agencies fell significantly.

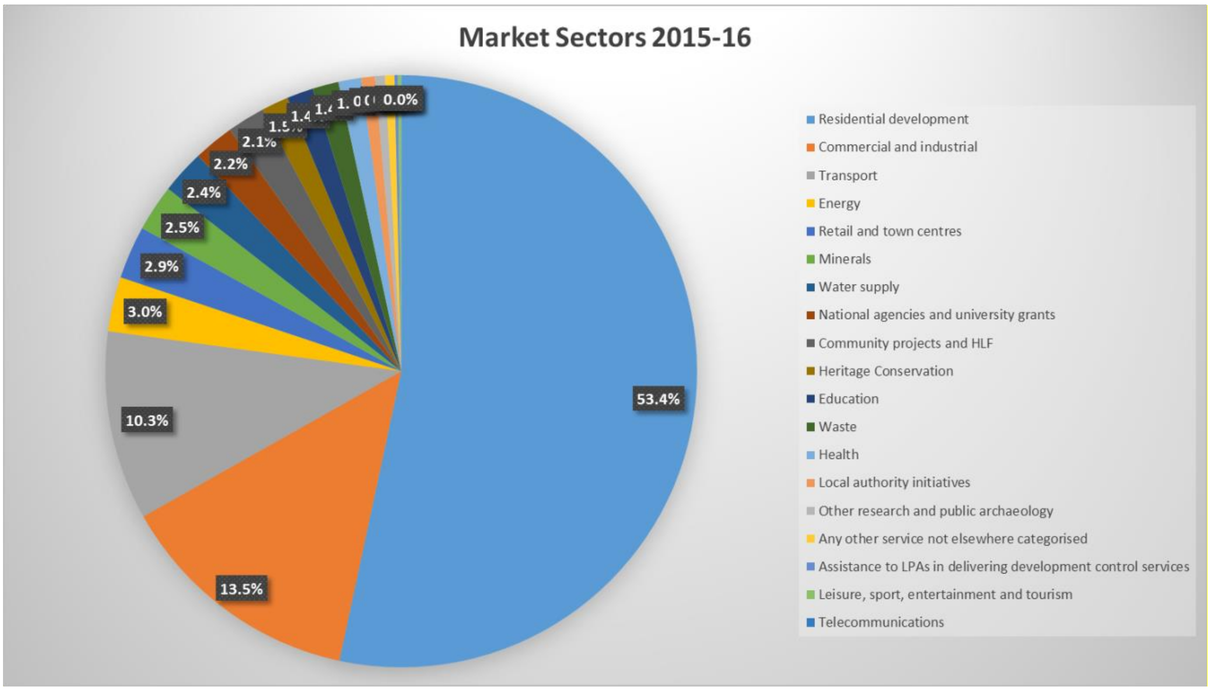
4.4 Market Sectors

The survey sought detailed information on which market sectors were generating income for the respondent organisations.

Please do not include non-UK turnover in this section
*In the column headed "**UK income**", please indicate your UK income in the year ending 31 March 2016 for the work in each of the sectors listed.*

To avoid double counting, please do not include fee income from any commission in more than one box. The total for this column must not exceed total fee income reported under turnover in the question above. If you are unsure about which sector to attribute a particular commission to, please refer to the Note to Respondents below.

category	total	% 2016	% 2015	range	average	*n=*
residential development	£19,179,082	53.4%	39.9%	£1,882 - £7,300,800	£1,598,257	12
commercial and industrial	£4,844,953	13.5%	24.3%	£1,000 - £2,500.000	£440,450	11
transport	£3,710,732	10.3%	6.0%	£732 - £3,120,000	£371,073	10
energy	£1,068,510	3.0%	6.7%	£5,300 - £456,000	£97,137	11
retail and town centres	£1,038,000	2.9%	2.6%	£8,000 - £625,000	£259,500	4
minerals	£913,985	2.5%	4.6%	£6,485 - £250,000	£114,248	8
water supply	£860,072	2.4%	2.6%	£1,000 - £625,000	£143,345	6
national agencies and university grants	£795,873	2.2%	2.9%	£2,000 - £375,000	£99,484	8
community projects and HLF	£743,867	2.1%	2.6%	£1,000 - £500,000	£82,652	9
heritage conservation	£530,000	1.5%	1.0%	£1,000 - £374,000	£106,000	5
education	£520,419	1.4%	1.5%	£1,000 - £245,000	£74,346	7
waste	£513,000	1.4%	0.2%	£13,000 - £500,000	£256,500	2
health	£447,248	1.2%	0.1%	£17,248 - £250,000	£111,812	4
local authority initiatives	£267,297	0.7%	0.8%	£3,000 - £129,297	£66,824	4
other research and public archaeology	£198,164	0.6%	0.6%	£300 - £100,000	£33,027	8
any other services not categorised above	£181,228	0.5%	1.5%	£4,000 - £120,000	£25,890	7
assistance to LPAs in delivering development control services	£70,000	0.2%	0.6%	£70,000	£70,000	1
leisure, sport, entertainment and tourism	£61,000	0.2%	1.3%	£2,000 - £51,000	£20,333	3
telecommunications	£0	0.0%	0.2%	n/a	£0	0
aggregate total	**£35,943,430**					



Residential development continued to represent the largest market sector by far, accounting for more than half of reported income. The second largest market sector was commercial and industrial; these two sectors combined represented over two-thirds of the reported revenue of the respondent organisations.

Transport was the next most significant sector with no other single market sector accounting for more than 5% of reported revenue.

Respondents were also asked about turnover change by market sector. The question simply asked whether turnover had increased, decreased or was unchanged for each market sector, and what expectations were for the following year.

> *In the two columns headed "**2015-16**" and "**2016-17**" please indicate whether your turnover in the UK market for each of the sectors listed grew, declined or was unchanged from the previous year in 2015-16 and whether you think it will grow, decline or be unchanged in 2016-17.*

In the table below, the figures are aggregated results for each market sector, so they represent measures of sentiment – for example, a figure of +100% would mean that every respondent considered that turnover had increased in that sector, while a figure of 0% means that the number reporting (or expecting) growth in a market sector was exactly balanced by the number expecting decline.

category	**2015-16** reported		**2016-17** predicted	
residential development	43%	14	29%	14
commercial and industrial	8%	12	42%	12
transport	-10%	10	60%	10
energy	-23%	13	0%	13
retail and town centres	0%	8	13%	8
minerals	0%	11	27%	11
water supply	0%	8	13%	8
national agencies and university grants	0%	11	0%	11
community projects and HLF	58%	12	50%	12
heritage conservation	25%	8	25%	8
education	0%	10	20%	10
waste	-25%	8	0%	8
health	0%	8	13%	8
local authority initiatives	25%	8	-13%	8
other research and public archaeology	20%	10	40%	10
any other services not categorised above	-13%	8	25%	8
assistance to LPAs in delivering development control services	0%	6	0%	6
leisure, sport, entertainment and tourism	29%	7	-14%	7
telecommunications	0%	7	0%	7

5 FORMS OF CONTRACT

Which forms of client contract do you routinely use?
Check as many as apply

	n=	% of respondents using
exchange of letters / emails	14	74%
client’s standard t&c	12	63%
your own organisation’s standard t&c	12	63%
bespoke	8	42%
NEC3 (various – family of contracts)	6	32%
ICE (short form or alternative)	5	26%
none	1	5%
other	0	0%

19 respondents answered this question, most of which used more than one form of contract. The one respondent that checked “none” also checked several other forms.

There was clearly no preferred approach within the sector to the forms of contract that are entered in to with clients, although externally standardised approaches (the Institution of Civil Engineers’ NEC3 or ICE short form) were less frequently used than exchanges of letter, or client or contractors’ own standard terms and conditions.

6 BUSINESS CONFIDENCE

While the sector continues to grow, both in terms of workforce and financial turnover, indications are that business confidence peaked in 2015 and has declined slightly in 2016. Many comments directly attribute more negative sentiments to the outcome of the referendum on Britain's status within the European Union.

The sector had been more confident in 2015 than at any time since 2008 (the start of this data collection exercise).

In 2016, confidence was still high, but not as high overall as it had been one year before.

- Respondents in 2016 reported the best ever expectations of maintaining or increasing staffing levels, exceeding even the 2015 data
- While there was overall confidence that market conditions would not deteriorate in 2016-17, the sector was not as confident about the future as it had been one year before
- More respondents expect there to be no business failures in the sector than expected some, but sentiment was not as positive as it had been in 2015
- Respondents generally expected to expand their business in 2016-17, but the level of expectation has been declining from a 2014 peak.

6.1 Staffing Levels

At the end of March 2016, did you anticipate any changes to your staffing levels over the next year (to 31 March 2017)?

change in staffing	Archaeological Market Survey 2016 March 2016		Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014	
increase staff numbers	15	60%	23	62%	13	57%
maintain staff numbers	9	36%	11	30%	8	35%
lower staff numbers	1	4%	3	8%	2	9%
total	25	+56%	37	+54%	23	+48%

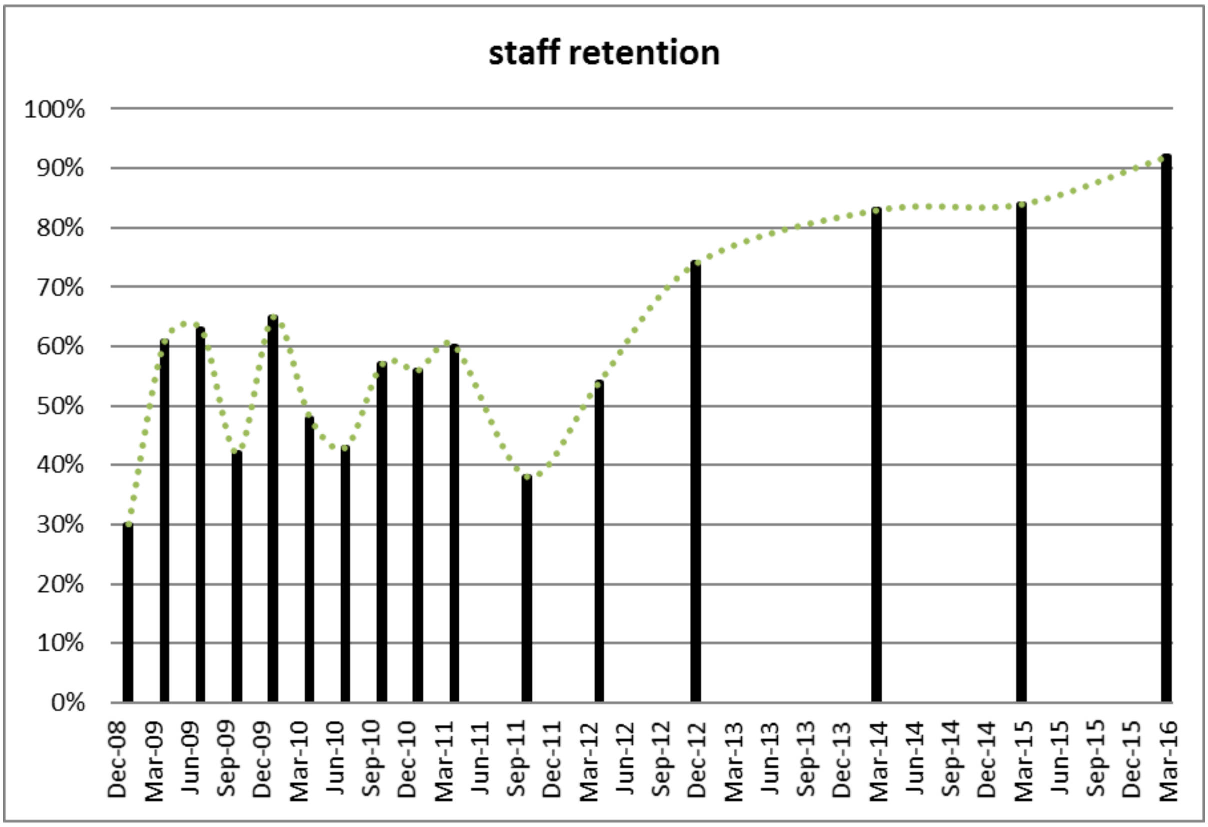
Don't know or no answer excluded

Comments received:

As in 15-16 we will increase the number of sub-contractors whilst retaining core team
Expected largest numerical increase in labour pool at technician grade but similar percentage changes up to and including Project manager grade
Keen to employ fieldworkers with experience
Only formed the company in Feb '16
Pre-Brexit vote
Sole trader with no plans to expand
There will be decline in some areas of our work, but in others we may increase.
This no longer our expectation, but correct as of March 2016

Since April 2012, the proportion of respondents who expected to maintain or increase staff levels has increased with every iteration of this survey. In 2015-16 it was at its highest level since this series of surveys began in 2008, exceeding the level recorded in 2014-15 (although it is notable that the overall sentiment in this area has always been positive, as at every survey point more businesses expected to maintain or increase their staff numbers in the forthcoming period than anticipated losing staff).

Note the graph below represents the proportion of respondents that expected to either increase or maintain their staff numbers, minus the number of respondents that expected to lose staff – so positive results mean staff numbers are not expected to fall.



6.2 Market Conditions

On 31 March 2016, did you believe that market conditions would deteriorate over the next 12 months? (to 31 March 2017)

market conditions	Archaeological Market Survey 2016 March 2016		Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014	
the market will deteriorate	6	21%	3	8%	3	13%
the market will not deteriorate	18	64%	31	84%	18	78%
don't know	4	14%	3	8%	2	9%
total	28	+43%	37	+76%	23	+65%

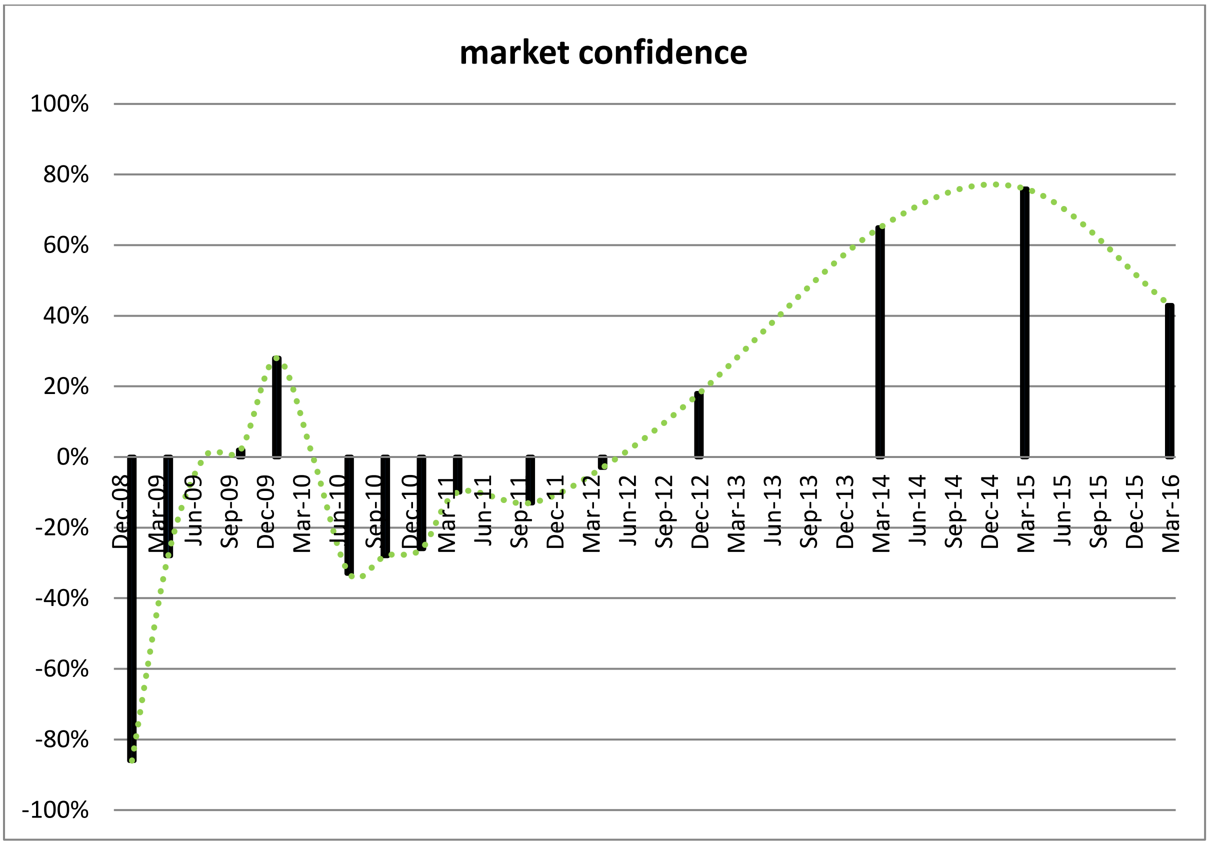
In the 2014-15 survey, the sector was extremely confident that market conditions would not deteriorate in 2015-16; this was tempered considerably in 2015-16, although an overwhelming majority of respondent still thought that the market would not deteriorate in the coming year.

Several comments from respondents suggest that the result of the June 2016 referendum on Britain's membership of the European Union had affected their responses (negatively), or that while they had responded on the basis of their expectations on 31st March, their views now had become less positive.

Comments received:

It was all looking good pre-Brexit
Market condition for us have altered but that doesn't mean that others would suffer. We lost the large number of assessments needed by the renewables industry when the change to the tariff was announced last Autumn. We are seeing increasing pressure to drop our prices and have lost tenders by maintaining levels in line with being an RO.
Pre- Brexit -------- now I think we are in for a recession
This should happen due to it being my first full year of trading, but also because I predict organic growth in the market.
Very busy except around referendum time
We already had Brexit down as a risk ... but our forward planning was on the basis that this was an unlikely outcome and that there would be a post-referendum bounce.
We saw a trend of significant increases over two quarters

In every survey since December 2012, more respondents have considered that market conditions would improve than would deteriorate, and overall confidence in the sector's market conditions had been increasing from September 2011 until March 2015. The March 2016 results were the first time confidence in future market conditions had declined since September 2011.



6.3 Businesses Ceasing Trading

Since the start of this series of surveys in 2008, respondents have been asked if they expected any archaeological practices to cease trading in the next 12 months. In the earliest iterations of the survey, an overwhelming – near universal – majority of respondents expected that this would happen.

In March 2015, for the first time in this series of surveys, more respondents did not believe that any businesses would fail than did; this was still the case in March 2016, although the overall level of confidence in this had declined.

At the end of March 2016, did you expect any archaeological practices to cease trading over the next 12 months?

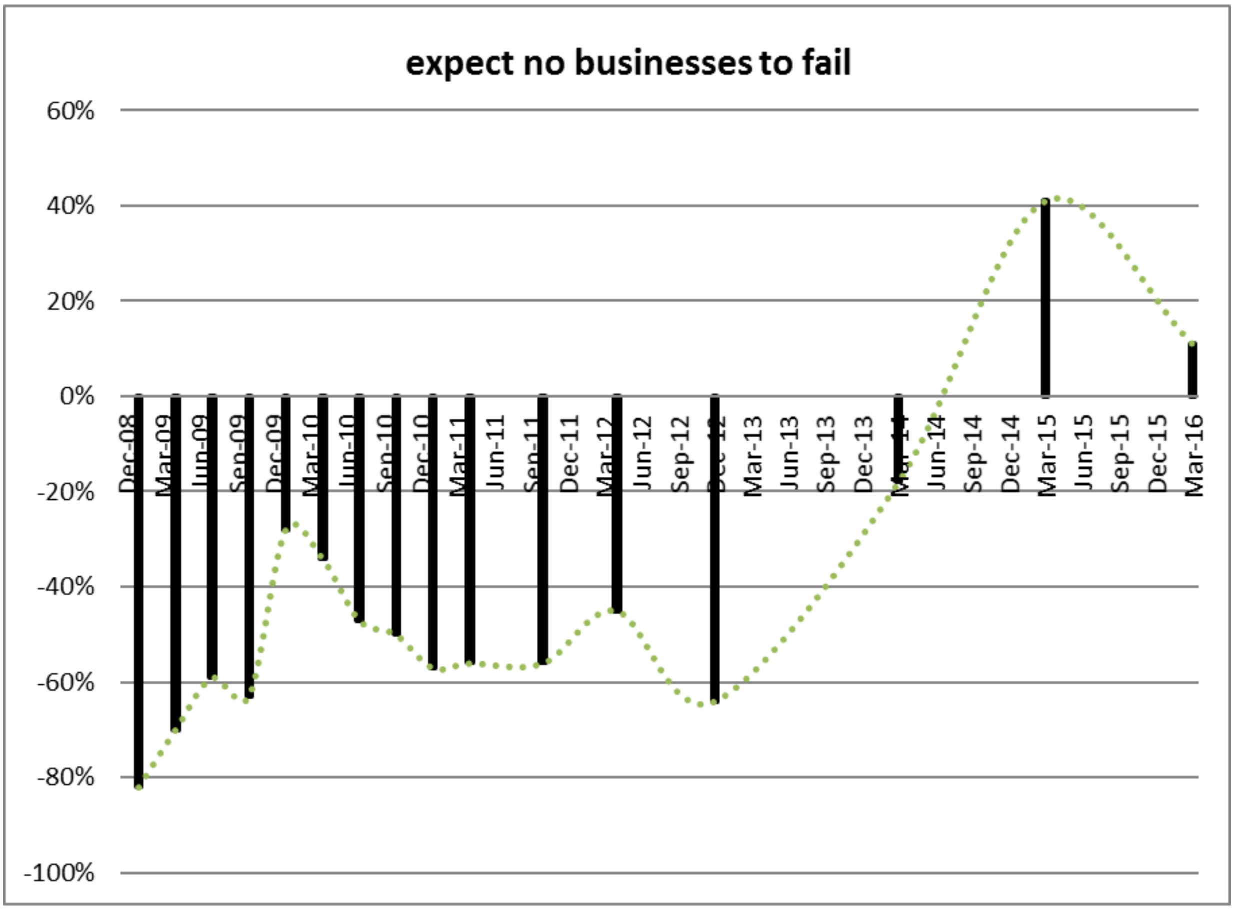
businesses ceasing trading	Archaeological Market Survey 2016 March 2016		Archaeological Market Survey 2015 March 2015		Heritage Market Survey 2014 March 2014	
yes	7	26%	6	16%	11	48%
No	10	37%	21	57%	7	30%
don't know	10	37%	10	27%	5	22%
total	27	+11%	37	+41%	23	-18%

email enquiries@landward.eu
Registered in England and Wales, number 03749035

Comments received:

Only those linked to local authorities and universities.
We were aware of the pressure many had been subjected to, including depleted reserves. We expected that the upturn might generate significant cash management challenges which would bring about collapse and/or consolidation.

The title of the graph below emphasises that positive figures reflect an expectation that no businesses in the sector will fail in the next year.



6.4 Expansion

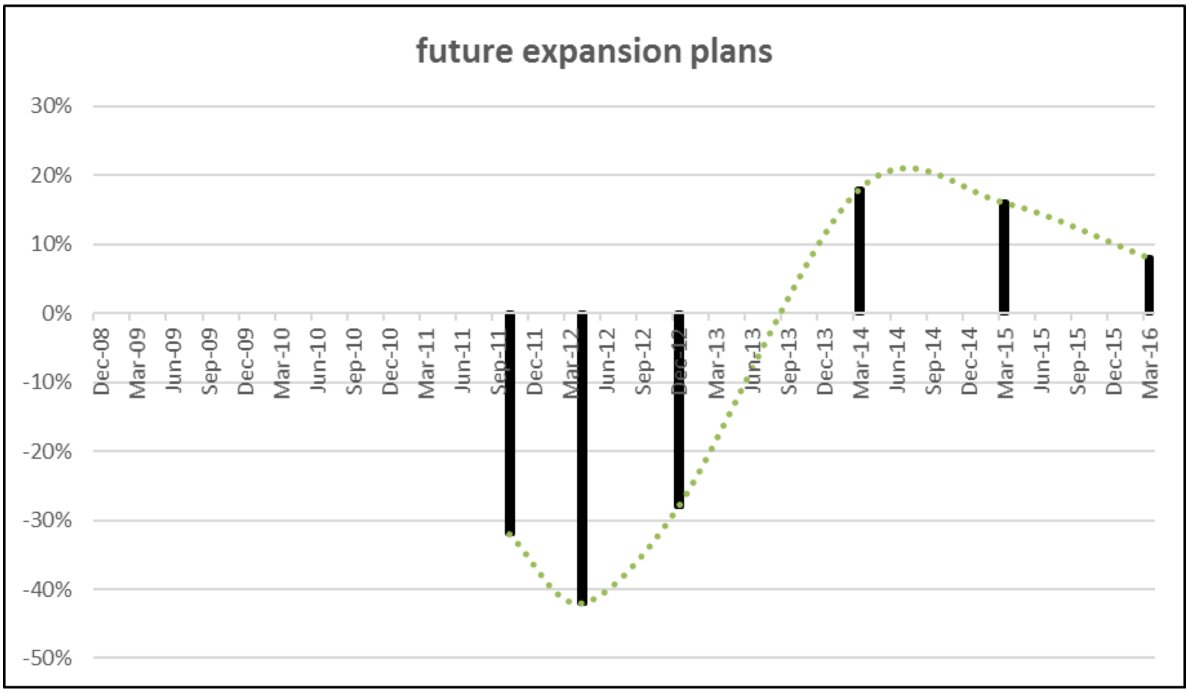
Respondents were asked about planning for future business expansion.

Did you have any plans to expand your business significantly over twelve months from March 2015 (e.g. in premises, vehicles, capital equipment)?

expansion plans	Archaeological Market Survey 2016 March 2016		Archaeological market survey 2015 March 2015		Heritage Market Survey 2014 March 2014	
yes	12	50%	21	57%	11	48%
no	10	42%	15	41%	7	30%
don't know	2	8%	1	3%	5	22%
total	24	+8%	37	+16%	23	+18%

More respondents plan to expand their businesses in 2016-17 than do not. Overall, there has been a decline in the relative enthusiasm for expansion, which peaked with the March 2014 results with businesses' plans for 2014-15.

The future expansion plans results have mapped well against the reality of changes in staff numbers; recently, March 2014 represented a peak in positive expectations for the year ahead, and in 2014-15 staff numbers increased by more than at any other survey period. In March 2015, expectations were still positive, but more modest – and staff numbers did continue to increase in the next year, but not at the rate experienced in 2014-15. Historically, the sentiment expressed for expansion began to become more positive than negative in March 2012, and the data collected from the next survey (December 2012) showed that the sector had started re-growing from that point onwards.



Comments received:

capital investment
Incremental growth
Investments in vehicles, equipment and offices
Main investment was (and is) in the development of our IT platform, and involves investment in direct fibre-optic connections between all three offices and [parent organisation] mainframe computing.
We have purchased an office building. it is partly renovated and we have moved into it. We expect it to be completely renovated during 2016.

7 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).

Throughout this part of the report, figures relate to the respondents who have experienced a particular, specific change in the previous year as a percentage of all who responded to each general question. For example, 11 respondents had lost skills in some way in the previous year; of these, 6 had lost fieldwork skills, so the percentage presented is 55% (6/11). This does not mean that 55% of fieldwork skills have been lost from the sector, nor does it mean that 55% of all organisations in commercial archaeology lost fieldwork skills.

Respondents were also asked in general terms whether they considered there were particular areas with skills problems across the sector.

7.1 Areas of Skills Losses

Relatively few respondents – in comparison with previous years – reported skills being lost.

As has been the case in every single iteration of this survey since 2008, fieldwork skills were again the area where skills loss was most frequently identified.

Post-fieldwork analysis and desk-based or environmental assessment were jointly the second-most commonly reported area where skills were being lost.

In the twelve months to the end of March 2016, did your organisation lose skills in any of these areas?

	Archaeological Market Survey 2016 March 2016		**Archaeological market survey 2015** March 2015		**Heritage Market Survey 2014** March 2014	
fieldwork (invasive or non-invasive)	6	55%	13	72%	9	69%
post-fieldwork analysis	4	36%	6	33%	4	31%
desk-based or environmental assessment	4	36%	5	28%	1	8%
data management	2	18%	4	22%	2	15%
artefact or ecofact conservation	2	18%	1	6%	1	8%
providing advice to clients	1	9%	4	22%	1	8%
other	1	9%	2	11%	3	15%
total respondents	11		18		13	

“other” skills reported as being lost:

Project Management

7.2 Areas of Skills Buy-in

Many more respondents reported buying-in skills than had reported losing them; post-fieldwork analysis was bought in by nearly two-thirds of respondents who bought in any skills, suggesting recent increase in fieldwork had led to increased demand for this service; fieldwork skills were also being bought in by a majority of respondents, reinforcing the sense of an ongoing high level of demand for these skills.

As was repeatedly seen in previous iterations of this survey, artefact or ecofact conservation was frequently bought in from external providers (and was done so by the majority of respondents who identified that they bought skills in).

Conservation was not reported as a skill being lost by employers, nor was it identified as being a priority for in-house training, because this was now very much the norm to be provided by external providers.

In the twelve months to the end of March 2016, did your organisation have to buy-in skills in any of these areas?

skills bought in	Archaeological Market Survey 2016 March 2016		Archaeological market survey 2015 March 2015		Heritage Market Survey 2014 March 2014	
post-fieldwork analysis	16	64%	16	52%	8	44%
artefact or ecofact conservation	14	56%	19	61%	12	67%
fieldwork (invasive or non-invasive)	14	56%	10	32%	9	50%
other	6	24%	3	10%	1	0%
desk-based or environmental assessment	5	20%	2	6%	4	22%
providing advice to clients	3	12%	0	0%	2	11%
data management	1	4%	5	16%	0	0%
total respondents	25		31		18	

“other” skills reported as being bought in:

Across the board apart from project management
Business support services.
fieldwork was subcontracted labour
Geophysical survey
Geophysics
Historic building recording
Historic Buildings

email enquiries@landward.eu
Registered in England and Wales, number 03749035

7.3 Areas of Training

The majority of respondents invested in fieldwork training, post-fieldwork analysis and desk-based / environmental assessment, the three areas where skills were most commonly being reported as being lost (so therefore these were skills gaps, skills that existing staff needed but lacked, that were being tackled by investment in training).

As has been seen in each survey since 2014, and in contrast with earlier surveys, a much higher proportion of FAME members and CIfA Registered Organisations were investing in training while they were simultaneously increasing the number of people on their payrolls.

When areas of skills training are compared to the areas where outside expertise was being bought in (skills shortages – where employers cannot find staff with the relevant skills), fieldwork and post-fieldwork skills are being both bought in and internally trained up, but conservation continues to be much more likely to be bought in – this is now rarely a skillset that respondent organisations have in-house.

In the twelve months to the end of March 2015 did your organisation invest in skills training in any of these areas?

training investment	**Archaeological Market Survey 2016** March 2016		**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014	
fieldwork (invasive or non-invasive)	17	68%	20	65%	12	57%
post-fieldwork analysis	15	60%	14	45%	9	43%
desk-based or environmental assessment	14	56%	17	55%	11	52%
data management	8	32%	14	45%	9	43%
providing advice to clients	8	32%	9	29%	7	33%
Other	8	32%	5	16%	7	33%
artefact or ecofact conservation	5	20%	9	29%	6	29%
total respondents	25		31		21	

The following 'other' skills were identified as having been areas where organisations invested in training:

Business/commercial skills
GIS; UAV (drone)
H and S
historic building related conservation, asset appraisal and management
Survey, Compliance, Quality, Appraisal, Leadership, Management, Mental Health, Safeguarding, Business Development, Social Media
We invest in training continually but not sure most of it fits the above boxes

7.4 Skills Issues Across the Sector

Respondents were asked about their perceptions of skills issues across the archaeological sector. The phrase "skills shortages" was used here 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 under-provision of skilled labour.

Respondents continued to identify post-fieldwork analysis as being the area where most consider that there are skills issues across the sector. As in 2015, the majority of respondents also think that there is a fieldwork skills shortage – reflecting difficulties recruiting during the current fieldwork boom.

On 31 March 2016, did you think there were skills shortages across archaeological practice in any of these areas?

skills issues	**Archaeological Market Survey 2016** March 2016		**Archaeological Market Survey 2015** March 2015		**Heritage Market Survey 2014** March 2014	
post-fieldwork analysis	13	65%	15	56%	8	57%
fieldwork (invasive or non-invasive)	11	55%	18	67%	5	36%
artefact or ecofact conservation	7	35%	8	30%	3	21%
desk-based or environmental assessment	7	35%	9	33%	4	29%
providing advice to clients	7	35%	8	30%	4	29%
data management	3	15%	3	11%	1	7%
other	7	35%	5	19%	4	29%
total respondents	20		27		14	

"Other" areas where skills issues were identified:

Advanced surveying, advanced project-management, palaeo-botanical analysis - all areas where we have struggled to recruit
artefact specialists
Business
digital workflows
Finds specialisms (artefacts)
H and S

As has been recognised since 2014, respondent organisations views on skills issues across the sector continue to closely match across to what they can identify within their own organisations – and so skills issues mirror training needs. This is very definitely a positive state of affairs, whereby employers are recognising and then taking on responsibility for addressing skills issues, rather than leaving them for outside bodies.

7.5 NVQ

The National Vocational Qualification in Archaeological Practice was first awarded in 2009 (the formal title for this qualification is now the *Level 3 NVQ Certificate in Archaeological Practice)*. 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.

On 31 March 2016, had you or were you considering supporting a member of staff to gain a vocational qualification in archaeological practice (NVQ)?

NVQ support	**Archaeological Market Survey 2016** March 2016				**Archaeological Market Survey 2015** March 2015				**Heritage Market Survey 2014** March 2014			
	have supported		would consider in future		have supported		would consider in future		have supported		would consider in future	
yes	8	31%	13	54%	15	60%	11	34%	15	60%	30	71%
no	18	69%	7	29%	3	12%	21	66%	3	12%	6	14%
don't know	0	0%	4	17%	7	28%	0	0%	7	28%	6	14%
total	26		24		25		32		25		42	

FAME members and CIfA Registered Organisations continue to express positive sentiments about the NVQ in Archaeological Practice, although the number of respondents reporting having previously supported a candidate has dropped significantly. This may be a reflection of the decrease in the numbers of candidates actually undertaking the qualification, as a result of the end of the series of HLF-funded workplace learning programmes that were administered by CIfA, through which many candidates were registered. Almost all current candidates registered with CIfA (one of only two assessment centres for the qualification) are now being directly funded by their employer, when previously none were[13].

More than half of respondents are still prepared to consider supporting a candidate in the future, although the percentage expressing this opinion has steadily fallen over time.

7.6 Apprenticeship

On 31 March 2015, had you or were you considering supporting a member of staff to undertake an Apprenticeship in Historic Environment Practice (NVQ)?

	have supported		**would consider in future**	
yes	1	4%	11	46%
no	23	96%	8	33%
don't know	0	0%	5	21%
total	24		24	

13 Kate Geary pers. comm. 9th October 2016.

email enquiries@landward.eu
Registered in England and Wales, number 03749035

As a new concept, with the Historic Environment Practice Trailblazer Apprenticeships programme being launched in 2015[14], very few respondents had previously had the opportunity to support a formal Apprentice in Historic Environment Practice in the workplace, but nearly half of all respondents would consider doing so in the future.

[14] Shepherd, N. 2016. Archaeological Apprenticeships. http://www.famearchaeology.co.uk/2016/03/archaeological-apprenticeships/

8 PERCEPTIONS

Respondents were asked about their perceptions of particular issues.

On 31 March 2016, would you have agreed or disagreed with the following statements?

Individual responses will be aggregated in any survey report and your views will not be attributed to you without your permission

	strongly disagree	**disagree**	**unsure**	**agree**	**strongly agree**
score	1	2	3	4	5
the economic climate for development will improve over the next 12 months	0	3	11	9	3
2016 average	3.46 (unsure) ↓ decrease on 2015				
2015 average	4.03 (agree) ↑ increase on 2014				
your heritage team will grow within the next 12 months	1	4	7	9	6
2016 average	3.56 (agree) ↓ decrease on 2015				
2015 average	3.74 (agree) ↑ increase on 2014				
your heritage team will contract within the next 12 months	6	14	3	3	0
2016 average	2.12 (disagree) ↑ increase on 2015				
2015 average	2.06 (disagree) ↓ decrease on 2014				
late payment of bills is an increasingly significant problem for your business	0	10	3	8	5
2016 average	3.31 (unsure) ↓ decrease on 2015				
2015 average	3.40 (unsure) ↑ increase on 2014				
non-payment of invoices has been a significant problem for your business	6	15	0	2	3
2016 average	2.27 (disagree) ↓ decrease on 2015				
2015 average	3.21 (unsure) ↑ increase on 2014				
current national planning policy frameworks are making it easier to justify heritage work and revenue levels	1	12	5	8	0
2016 average	2.77 (unsure) ↓ decrease on 2015				
2015 average	3.29 (unsure) ↓ decrease on 2014				
current national planning policy frameworks weaken the case for heritage work and revenue levels	1	12	3	10	1
2016 average	2.93 (unsure) ↑ increase on 2015				
2015 average	2.74 (unsure) ↑ increase on 2014				
a shortage of heritage staff in LPAs is a major constraint on heritage projects	0	1	3	12	10
2016 average	4.19 (agree) ↑ increase on 2015				
2015 average	4.17 (agree) ↑ increase on 2014				

In the table above, results have been aggregated, with each “strongly agree” response scoring five points, each “agree” scoring four, etc., and then an average of the responses calculated. Hence, for the average result to be 5.00, then every respondent would have strongly agreed with a statement, but if the average was 1.00 then every respondent would have strongly disagreed. The calculated average for 2016 is then categorised by which response that average is closest to, and compared with the 2015 scores.

Further comments on Perceptions:

A lack of LPA staff is a major factor in the likelihood of the commissioning of strategic work including Conservation Area Appraisals, SPD etc
Filling this in after Brexit vote= increased uncertainty generally
point 5: 'easier than' what? previous frameworks, yes.

Respondents were unsure whether the economic climate for development would improve in the next 12 months, and their views had become less positive than they were in 2015. This should be considered alongside respondents’ answers to the Business Confidence question on Market Conditions [6.2 above], where the overall view was also positive, but more cautious than a year before.

Typically, they thought their heritage teams would grow in the next year, as they had thought in 2015, although overall they were a little less confident of this. They were also confident that their teams would not contract in size, but, again, views were slightly less positive than they had been in 2015.

Respondents were split on whether late payment of bills was an increasingly significant problem for their business, and felt more negatively about this than they had in 2015. Non-payment was becoming less of a concern, as respondents felt this was more of a problem in 2015.

The sector generally does not have confidence in planning policy frameworks, or that local planning authorities are being provided with sufficient professional advice

Respondents tended to disagree with the statement that “current national planning policy frameworks are making it easier to justify heritage work and revenue levels“, with views becoming less positive since 2015. Views were split on the assertion that “current national planning policy frameworks weaken the case for heritage work and revenue levels”, but overall respondents felt this was more likely to be the case than they did in 2015.

They agreed that a shortage of heritage staff in LPAs was a major constraint on heritage projects, and this was felt more strongly than it had been in 2015, when in turn it was felt even more strongly than it had been in 2014. This is clearly a very serious issue for the respondents, and has to be seen in light of the loss of LPA archaeological advisory posts reported in Total Employment in UK Archaeology (3.1.4 above).

9 FURTHER COMMENTS

* Please note that the [organisation's] Financial Year runs from August to July. The most recent set of audited accounts and the figures provided in this survey therefore cover the period August 2014 to July 2015.
Following Brexit and changes in government future risk to Heritage appears to have increased significantly.
My answers are skewed as a result of (a) only trading from August of 2015), and (b) being a sole trader. Also, while I've answered as of 31st March, I would now say the post Brexit economic outlook is very changed, and much more uncertain. This would now make me predict, at the very least, significantly lower growth over the year, and I will be preparing for recession. This may be offset by involvement with major infrastructure, should this go ahead, (although these projects may also be delayed).
Our financial year is July to July
Q12 I am not sure what you mean by f/t and p/t casual contracts, by definition they seem to be neither. We do have two members of staff on casual contracts. We do have volunteers with contracts, but again they are on a casual basis.
Staffing and cash flow are the two main issues we face this year. In terms of staffing the main issues for us are: 1) Certain key grades are becoming very scarce - particularly those requiring experience. We are anticipating a lot of volatility in that part of the employment market. 2) Managing capacity - we know we need to scale-up and retain staff in preparation for the predicted archaeological tsunami but uncertainty about when and how the large infrastructure projects are to be let make it very difficult to plan - there are significant risks attached to having too many or too few field staff. 3) We are predicting that post-ex specialists (particularly finds and pottery) might quickly prove a bottleneck on delivery. These people do not just drop out of a university course so we have to find innovative ways to train and retain.
Uncertainty leading up to and following the referendum mean that we have to radically review our predictions regarding future prospects
We are struggling to recruit archaeologists at all levels- we are looking for both senior and junior staff with experience in fieldwork and report writing.
We must seize the opportunity that HS2 and the government infrastructure programme offers us as a catalyst for change within the market place, so professional salaries/fees can be raised, and profits generated to create a sustainable future for applied archaeological practice in the UK. This will require working together and not devaluing our own profession by under-cutting or inappropriately costing up tenders.

APPENDIX – QUESTIONNAIRE

email enquiries@landward.eu

Archaeological Market Survey 2016

Dear Colleague,

FAME and CIfA, supported by Historic England, have appointed Landward Research Ltd to undertake annual surveys of suppliers to the **Archaeological Market** .

I would like to ask you if you could please give up some of your time to answer the questions below. We seek information as it applied to your organisation on 31 March 2016 - end of financial year 2015-16.

This survey will extend the information gathered by the previous **Archaeological Market Survey 2015** and earlier surveys in this series.

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

The deadline for responses is Friday 8th July 2016.

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 hms@landward.eu.

Please complete the form by 8th July 2016.

Kenneth Aitchison Executive Director Landward Research Ltd

Landward Research Ltd is an Accredited Company Partner of the Market Research Society

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 a member of FAME?

○ **yes** ○ **no**

4. Is your organisation a CIfA Registered Organisation?

○ **yes** ○ **no**

5. How is your organisation legally constituted?

please check multiple categories if appropriate

- ☐ **private limited company (ltd)**
- ☐ **public limited company (plc)**
- ☐ **registered charity**
- ☐ **constituent part of a local planning authority**
- ☐ **constituent part of a university**
- ☐ **other**

6. Where is the head office of your organisation located?

7. 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 Eng**
- ☐ **South-West Eng**
- ☐ **West Midlands**
- ☐ **Yorkshire & Humber**
- ☐ **Scotland**
- ☐ **Wales**
- ☐ **Northern Ireland**
- ☐ **outside the UK**

8. In which year did your organisation begin trading (in applied archaeology)?

CIfA Chartered Institute for Archaeologists

FAME Federation of Archaeological Managers & Employers

Archaeological Market Survey 2016

Staff Numbers

9. How many full-time staff were based in your UK offices on 31 March 2016?

Please include all full-time or full-time equivalent staff, together with part-time staff, using estimates of full-time equivalency - for example, a member of staff working 2.5 days a week should be counted as 0.5.
Fee-earners: members of staff whose time can be billed to clients.

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

10. How many full-time staff were permanently based overseas on 31 March 2016?

Number of fee-earners permanently based outside the UK

11. How many UK members of staff (FTE) did your organisation have one year ago, on 31 March 2015 - the census date for the previous Archaeological Market Survey 2015?

12. How many of your members of staff were working on each of the following types of contract or agreement on 31 March 2016?

	full-time	part-time
permanent		
fixed term		
casual		
volunteer		

13. What level of staff turnover did you experience between 31 March 2015 and 31 March 2016?

14. If you lost staff in the period between 31 March 2015 and 31 March 2016, 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?

15. Did salaries at your organisation typically rise or fall between March 2015 and March 2016? (NB - not total salary bill)

when comparing changes to inflation, please consider the rate of inflation at the date of the salary settlement

16. How did your charge out rates change in the year to the end of March 2016, and by how much do you expect them to change in 2016-17?

by what percentage did your charge-out rates increase (+) or decrease (-) over the year ending 31 March 2016? by what percentage do you anticipate that your rates will increase (+) or decrease (-) over the year ending 31 March 2017?

Archaeological Market Survey 2016

17.
What was your annual turnover (in £) in financial year 2015-16?

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

if your accounting period does not run from April to March, please indicate fee income for the nearest 12-month period for which audited figures are available, making clear which period they cover. Guidance on types of work to be included is in the Note to Respondents on the next page. If your fee income for the year exceeded £5 million, we will ask you to provide a breakdown of at least part of this fee income in the next page.

	£
your UK turnover in year ending 31 March 2016	
your turnover from non-UK sources (including Republic of Ireland) in year ending 31 March 2016	
predicted % change in turnover between years ending 31 March 2016 and 31 March 2017	
your contribution to the community, public archaeology and education which has not been paid for directly by a client	
your profit or surplus (plus or minus) in the year ending 31 March 2016	

18.
Please estimate your UK turnover from the following sources in the year ending 31 March 2016

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

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

Chartered Institute for Archaeologists

Federation of Archaeological Managers & Employers

Archaeological Market Survey 2016

19. Market Sectors

Please do not include non-UK turnover in this section

*In the column headed "**UK income**", please indicate your UK income in the year ending 31 March 2016 for the work in each of the sectors listed.*

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

To avoid double counting, please do not include fee income from any commission in more than one box. The total for this column must not exceed total fee income reported under turnover in the question above. If you are unsure about which sector to attribute a particular commission to, please refer to the Note to Respondents below.

*In the two columns headed "**2015-16**" and "**2016-17**", please indicate whether your turnover in the UK market for each of the sectors listed grew, declined or was unchanged from the previous year in 2015-16 and whether you think it will grow, decline or be unchanged in 2016-17.*

	UK income 2015-16	2015-16			2016-17		
	£	grew	unchanged	declined	will grow	will not change	will decline
Construction							
Residential development		○	○	○	○	○	○
Commercial and industrial		○	○	○	○	○	○
Retail and town centres		○	○	○	○	○	○
Leisure, sport, entertainment and tourism		○	○	○	○	○	○
Infrastructure							
Minerals		○	○	○	○	○	○
Waste		○	○	○	○	○	○
Transport		○	○	○	○	○	○
Energy		○	○	○	○	○	○
Telecommunications		○	○	○	○	○	○
Water supply		○	○	○	○	○	○
Education		○	○	○	○	○	○
Health		○	○	○	○	○	○
Research and public archaeology							
Community projects and HLF		○	○	○	○	○	○
National agencies and university grants		○	○	○	○	○	○
Local authority initiatives		○	○	○	○	○	○
Other research and public archaeology		○	○	○	○	○	○
Other services							
Heritage conservation		○	○	○	○	○	○
Assistance to LPAs in delivering development control services		○	○	○	○	○	○
Any other services not categorised above		○	○	○	○	○	○

Notes to Respondents

Please do not include non-UK planning fee income in this section.

Inevitably there is some overlap between the categories identified in this section. To avoid double-counting, IT IS ESSENTIAL that income from any particular commission is entered in only one of the categories offered. The aggregate income shown in this table must should not exceed your figure for total UK planning fee income in *Value of work undertaken and funding sources*.

Work connected with specific development projects (including site-specific representations on LDFs) should be included in the relevant category under the headers "Construction" or "Infrastructure". Sector-specific planning work such as transport plans, housing land availability studies etc should also be included under these headings.

Work unconnected with specific development projects or types should be included at the relevant rows.

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20. Which forms of client contract do you routinely use?

check as many as apply

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

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21. At the end of March 2016, did you anticipate any changes to your staffing levels over the next year (to 31 March 2017)?

Other comments?

22. On 31 March 2016, did you believe that market conditions would deteriorate over the next 12 months? (to 31 March 2017)

Other comments?

23. At the end of March 2016, did you expect any archaeological practices to cease trading over the next 12 months?

Other comments?

24. Did you have any plans to expand your business significantly over twelve months from March 2016 (e.g. in premises, vehicles, capital equipment)?

Other comments?

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25. In the twelve months to the end of March 2016, did your organisation lose skills in any of these areas?

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

26. In the twelve months to the end of March 2016, did your organisation have to buy-in skills in any of these areas?

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

27. In the the twelve months to the end of March 2016, did your organisation invest in skills training in any of these areas?

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

28. On 31 March 2016, did you think there were skills shortages across the applied archaeological practice sector in any of these areas?

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

29. On 31 March 2016, had you or were you considering supporting a member of staff to gain a vocational qualification in archaeological practice (NVQ)?

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

30. On 31 March 2016, had you or were you considering supporting a member of staff to undertake an Apprenticeship in Historic Environment Practice?

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

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31. On 31 March 2016, would you have agreed or disagreed with the following statements?

Individual responses will be aggregated in any published survey report and your views will not be attributed to you without your permission

	strongly agree	agree	unsure	disagree	strongly disagree
current national planning policy frameworks are making it easier to justify heritage work and revenue levels	○	○	○	○	○
current national planning policy frameworks weaken the case for heritage work and revenue levels	○	○	○	○	○
your heritage team will contract within the next 12 months	○	○	○	○	○
a shortage of heritage staff in LPAs is a major constraint on heritage projects	○	○	○	○	○
non-payment of invoices has been a significant problem for your business	○	○	○	○	○
late payment of bills is an increasingly significant problem for your business	○	○	○	○	○
the economic climate for development will improve over the next 12 months	○	○	○	○	○
your heritage team will grow within the next 12 months	○	○	○	○	○

Any other comments?

Archaeological Market Survey 2016

32. If you have any further comments on your responses, or on the state of commercial archaeology in general, please let us know. FAME and CIfA 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 8th July 2016