State of the Archaeological Market 2022

by Kenneth Aitchison & Doug Rocks-Macqueen

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FOREWORD

I am delighted to introduce the results of the annual State of the Archaeological Market Survey covering the financial year 2021-2. The gathered data are of great interest and use to archaeologists employed in many different types of organisations, and provide valuable statistics for wider application within industrial, governmental and political circles. Without these data the important role that we carry out in safeguarding our heritage, and the value that this work brings to the national economy and society, would be lost to policymakers and decision-makers.

Some key points from this year's survey are that archaeological practice has contributed £268 million to the economy, with Transport providing the stimulus for 39% of this total, and housing 32%. There has been a slight growth in the numbers employed in archaeology, and the majority of staff saw pay rise above or in line with inflation at around 7.1%. Average charge out rates rose slightly less at 6.3%, but average profit levels at 7% are reassuring as it shows the industry is operating a sustainable model, accumulating funds for investment. Indeed the majority of organisations are upskilling and training staff, and this combined with a tight labour market, makes it essential for organisations to have attractive employment packages to recruit and retain staff. Nonetheless, there is a significant minority of respondents who made a loss during the financial year (17%), or whose profit margin was below 5% (46%), and this suggests a large differential between profitable and non-profitable organisations. As an industry we need to address this disparity, and encourage those returning low profits to amend their charging structures so they can plan effectively for a sustainable future.

Additional topics have also been covered by this survey. The annual Health & Safety audit is reported separately, but questions over the quantity of archive materials being stored at the expense of the responding organisations because there is no facility that will curate them, no museum or store where the archives can be deposited, is very concerning. This issue has been raised by FAME as a major problem since 2012, and we have been actively working with partners to find solutions. The answers provided show each respondent had hundreds of archives, costing them thousands of pounds each year, which it is not their remit or appropriate for them to do. The data should assist Historic England with their campaigning for a national archaeological archive repository to be created. In addition, the data gathered over what relationships exist between commercial practice and university departments of archaeology, should allow greater collaboration and mutual benefit to be developed for the future.

I trust you find this well-presented report of interest and value, and I wish to extend my thanks to the authors and coordinators of the survey for their clarity and tenacity in extracting such worthwhile results from the complex data that have been gathered.

Tim Malim

Chair of FAME

KEY RESULTS FOR 2021-22

Of the archaeologists working in contracting and consulting in the UK:

87% are British Nationals.

10% are from EU countries.

4,800 people work in UK development-led archaeology.

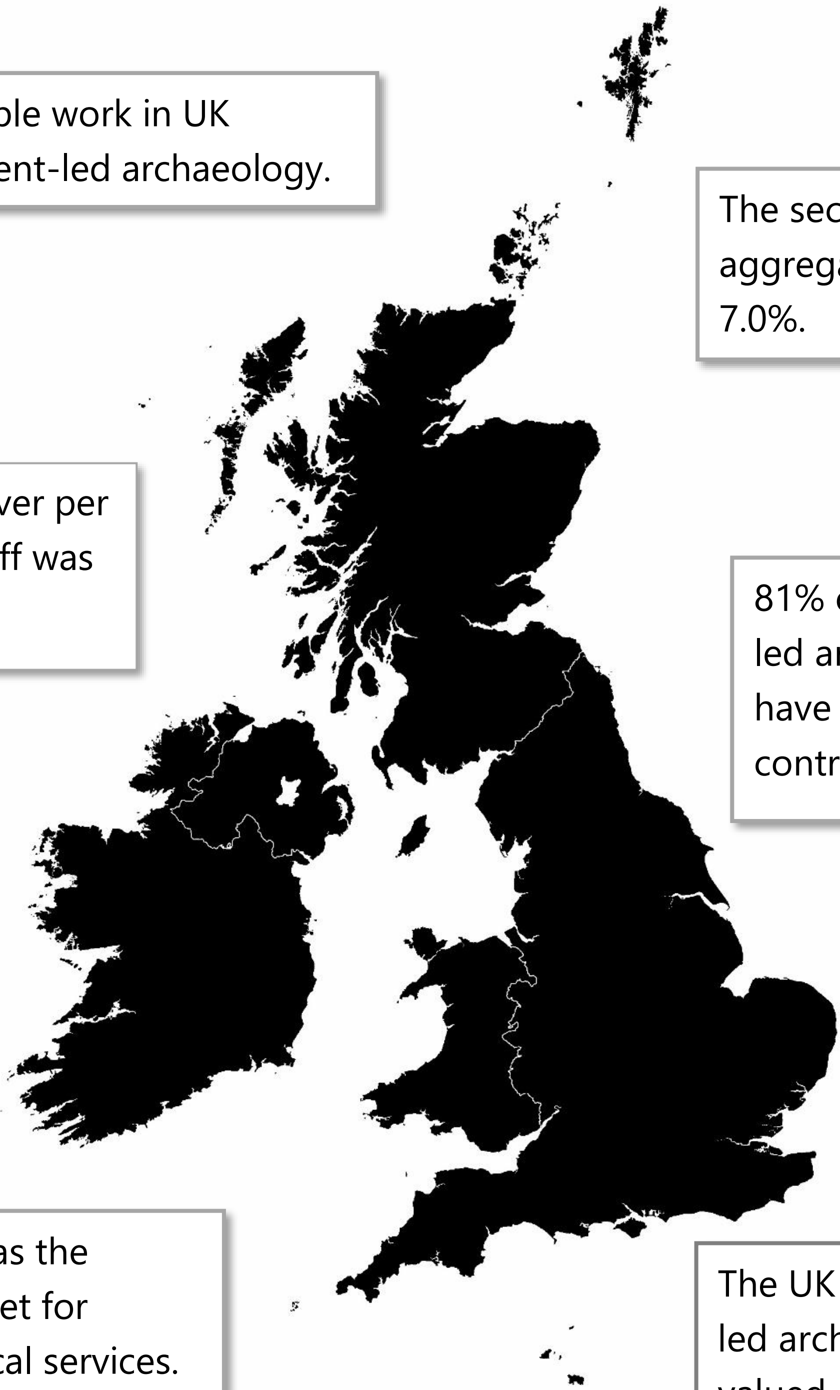
The sector reported an aggregate profit level of 7.0%.

Average turnover per member of staff was £55,878.

81% of development-led archaeologists have permanent contracts.

Transport was the largest market for archaeological services.

The UK development-led archaeology sector is valued at £268 million.



INTRODUCTION

This report is on the state of the market for archaeological services in the United Kingdom in 2021-22. Some respondents also work in the Republic of Ireland and elsewhere in the world, and those data have been separated where appropriate to avoid double counting. The survey gathered data via a questionnaire sent to all FAME members and Chartered Institute for Archaeologists' Registered Organisations.

The overall aims of this survey are to provide:

- a unique analysis of the archaeological sector as part of the overall economy;
- statistics that allow estimation of total value of the sector to the economy;
- data on indicative numbers of employed professional archaeologists working in the commercial sector with comparative figures for other areas;
- data for analysis of long-term sustainability for the sector;
- data that can enable informed lobbying to help protect heritage; and
- data to support planning effectively for the future so that the industry is sustainable and results in a benefit for society.

This project is a continuation of a series of projects that have been undertaken for over a decade. This report presents the results of the survey for 2021-22. Some questions have been identified that do not need to be asked every year, and so selected questions are now being asked less frequently than on an annual basis.

This year two sets of one-off questions were introduced, relating:

(1) to the storage of archaeological archives by commercial companies and

(2) to interaction with university archaeology departments.

METHODS

The survey (see Appendix) was conducted by polling FAME members and CIfA Registered Organisations (162 email addresses at 108 organisations).

The survey was a digital survey created using Novisurvey software. Respondents were asked to provide data that applied on 31st March 2022, and so this report is on the situation at the end of financial year 2021-22.

Links to the questionnaire were initially sent to potential respondents on 12th January 2022, with automated reminder and follow-up emails encouraging completion being sent periodically until the survey was closed on 24th February 2022.

RESULTS OF 2021-22 SURVEY

Responses were received from 35 organisations (the 2020-21 survey had 41 usable responses; the larger 2019-20 survey had 70 useable responses). Not every respondent answered every question.

Geographic Distribution

Respondents were asked about the locations of head and subsidiary offices (but not about staffing or turnover per office) (Table 1).

	Head offices	Subsidiary offices
East of England	1	7
East Midlands	5	5
London	5	2
North East England	0	4
North West England	1	8
South East England	4	8
South West England	4	7
West Midlands	2	6
Yorkshire and the Humber	3	6
Scotland	3	7
Wales	4	4
Northern Ireland	0	1
Republic of Ireland	0	2
outside the UK and Republic of Ireland	1	2
total	**33**	**69**

Table 1: Distribution of company offices by location. *n*=33.

Staff Numbers

Over 2,300 staff were working for respondents, with between 1 and 428 members of staff at each (Table 2).

	total
total staff (managerial, professional, technical and administrative) employed	2,356.85
total fee earners working full-time	2,153.00

Table 2: Staff numbers. *n*=31.

Staff Nationalities

In 2022, 87% of staff members working for organisations headquartered in the UK were British nationals (Table 3), slightly higher than the levels reported from 2019 to 2021, while 10% were citizens of EU states – a figure that has been declining since 2017 (Table 4).

	Count	%
British (UK subjects)	1,690	87%
National of EU states	186	10%
Nationals of other countries (non-UK, non-EU)	65	3%
total	1,940	

Table 3: Staff nationalities (UK respondents). *n*=28.

All staff	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22
British (UK subjects)	83%	85%	86%	86%	86%	87%
National of EU states	15%	13%	12%	13%	11%	10%
Nationals of other countries	2%	2%	3%	1%	3%	3%

Table 4: Nationalities of staff (UK respondents) from 2017-22.

Staff Contracts

Overall, 81% of workers in development-led archaeology in 2022 were on permanent contracts (down from 85% in 2021) and 19% were employed on fixed-term contracts (Table 5). Nearly three-quarters of the people working in development-led archaeological practice have full time, permanent contacts, close to the level reported in 2021 of 76% (Table 6). This project has not gathered data for 'casual' or 'volunteer' staff since 2019.

Permanent	Count	%
full-time	1,476	73%
part-time	167.5	8%
total	1,643.5	
Fixed term		
full-time	361	18%
part-time	28	1%
total	389	
grand total	**2,032.5**	

Table 5: Staff by contract type for UK based organisations in 2021-22. *n*=27.

Contract type	Apr-12	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22
Permanent										
full-time	74%	66%	68%	68%	71%	65%	66%	76%	76%	73%
part-time	11%	10%	9%	6%	6%	14%	13%	11%	9%	8%
Fixed term										
full-time	11%	21%	18%	21%	20%	16%	18%	12%	15%	18%
part-time	0%	1%	1%	2%	1%	2%	1%	2%	0%	1%
Casual										
full-time	3%	1%	2%	2%	1%	0%	0%			
part-time	0%	0%	1%	0%	0%	0%	1%			
Volunteer										
full-time	0%	0%	0%	0%	0%	0%	0%			
part-time	0%	0%	2%	1%	2%	1%	3%			

Table 6: Staff by contract type for UK based organisations from 2012 to 2022.

Salary Level Changes

Respondents were asked about overall changes in two key economic indicators – salary levels and charging rates.

Respondents were asked about changes to salaries (not in specific terms, but at an overall level), by being asked whether salaries had typically risen or fallen during the 2021-22 financial year. 84% of respondents identified that their overall salary levels had risen by inflation or more (Table 7). Respondents were asked to compare changes with inflation at the date of the salary settlement; the CPI rate of inflation in March 2022 was 7.0%[1].

salary changes	Count	%
rose by above inflation	9	36%
rose by inflation	12	48%
unchanged	2	8%
fell by up to 10%	2	8%
fell by over 10%	0	0%

Table 7: Salary changes 2022. *n*=25.

[1] http://www.rateinflation.com/inflation-rate/uk-historical-inflation-rate accessed 12th June 2022

Charge Out Rates

Respondents were also asked about any changes to their charge-out rates in the year ending 31st March 2022, and then about how they anticipated they would change in the next year (Table 8).

	reported change to March 2022	anticipated change to March 2023
range	0% to 30%	0% to 20%
mean	6.8%	6.9%
median	5.0%	5.5%

Table 8: Charge-out rate changes 2021-22. *n*=22.

Charge-out rates rose by an average of 6.8% in the year to March 2022. Looking forward, respondents expected their charge-out rates to rise by 6.9% in the year to March 2023. The March 2022 annual UK inflation rate (CPI) was 7.0%; 32% of respondents (7 of 22) increased their charge-out rates in 2021-22 by this amount or more.

Competition for Projects

In order to gather indicative data about the intensity of competition for work, respondents were asked how many projects each had tendered for and how many they had successfully secured. Respondents won between 29-86% of projects tendered for, with an average win rate of 39% (Table 9). In 2021, the equivalent figure was 44%.

	range	average
number tendered for	10 – 2000	551
number won	7 - 963	217
percentage won	29% - 86%	39%

Table 9: Competition for projects 2021-22. *n*=20.

Sector Growth

31 organisations provided data on the number of staff they employed in 2022 (2,357) together with retrospective figures for 2021 (2,229). This is an aggregate increase across those 31 organisations of 128 individuals – an increase of 5.4% (Table 10). The increasing number of archaeologists is part of a trend that has been occurring for several years (Table 11 & Figure 1).

From discussions with sectoral business leaders, we do not consider that this level of growth was replicated across the entire sector. Remembering the methodological flaws that the simple extrapolation led to unrepresentative increases being reported between 2012-13 and 2018-19, discussed in *State of the Archaeological Market 2020*, we have taken a cautious approach to reporting growth.

On this cautious approach, it has been assumed that overall, for all the organisations that did not answer both questions in 2021 and 2022 staffing levels there was no net change, meaning that we are assuming the known change in staffing numbers – 128 individuals – represents the overall commercial sector increase. This equates to 2.2%.

	2014	2015	2016	2017	2018	2019	2020	2021	2022
count	2871	3284	3481	3743	3997	4152	4375	4700	4800
annual growth	2.1%	14.4%	6.0%	7.5%	6.8%	3.9%	5.4%	7.4%	2.2%

Table 10: Calculated Figures – Employment in Commercial Archaeology 2014-2022.

The figures for people employed by local heritage management ('curatorial') have been generated and updated from the publication of local authority historic environment staff resource figures for 2020, 2021 and 2022[2]

The publication of these data has allowed recalibration of the figures presented here for curatorial totals for 2020 and 2021 (using the published figures for England and extrapolating to the UK on a population basis), and so the total figures have been retrospectively updated for 2020 and 2021.

The figures for 'other' employers – including universities, museums, national government - were collected in the *Profiling the Profession 2020* survey, and as no updated figures are available for these sectors, they remain unchanged in the 2022 results.

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[2] https://historicengland.org.uk/images-books/publications/la-staff-resources-2020-22/report-local-authority-staff-resources-2020-2022/

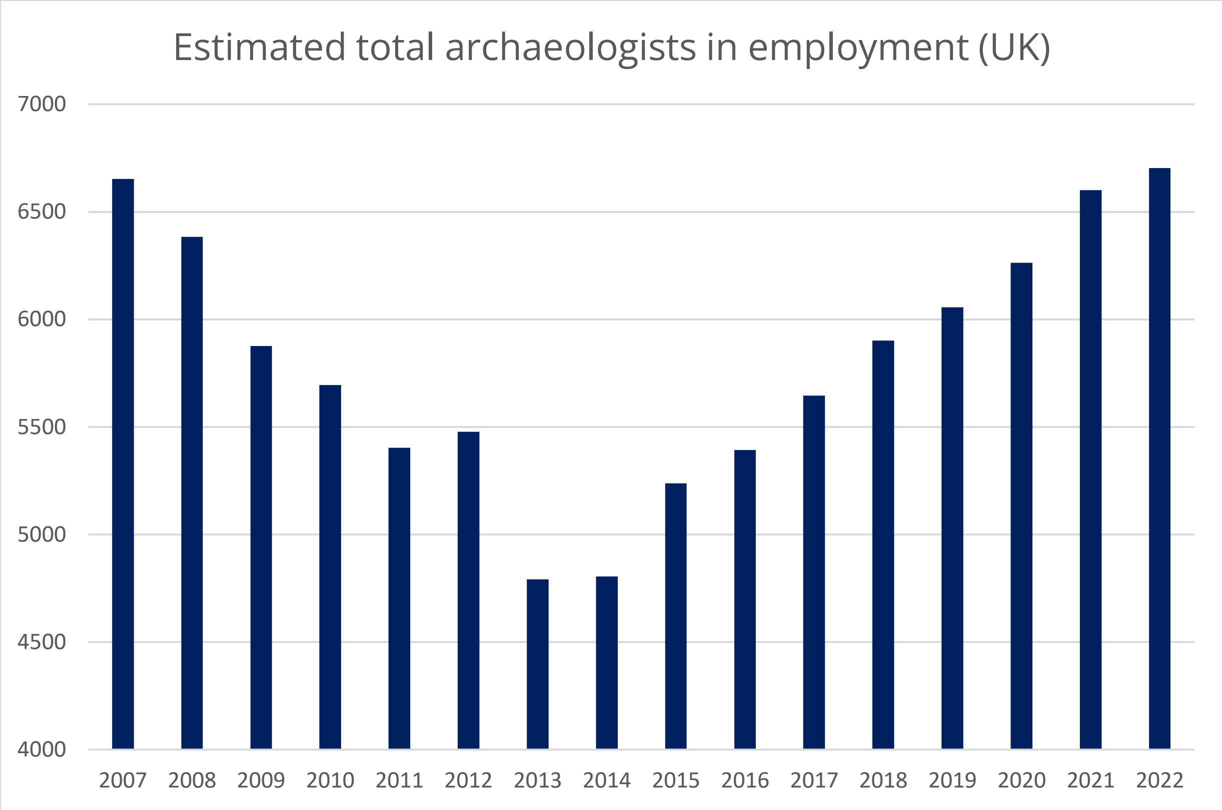

Figure 1: Estimated total numbers of archaeologists employed in the United Kingdom 2007-2022.

	Aug-07	Oct-08	Jan-09	Apr-09	Jul-09	Oct-09	Jan-10	Apr-10
curatorial	512	505	505	505	505	505	505	485
other	2105	1972	1943	1914	1886	1857	1829	1800
commercial	4036	3906	3561	3323	3472	3526	3270	3404
total	6653	6383	6009	5742	5863	5888	5604	5689

	Jul-10	Oct-10	Jan-11	Apr-11	Oct-11	Apr-12	Dec-12	Mar-14
curatorial	485	485	485	442	442	440	485	439
other	1771	1743	1714	1686	1628	1571	1495	1495
commercial	3669	3333	3189	3225	3399	3467	2812	2871
total	5925	5561	5388	5353	5469	5478	4792	4805

	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22
curatorial	459	416	407	409	409	338	351	353
other	1495	1495	1495	1495	1495	1550	1550	1550
commercial	3284	3481	3743	3997	4152	4375	4700	4800
total	5238	5392	5645	5901	6056	6263	6601	6703

Table 11: Reported and estimated size of the archaeological sector from 2007 to 2022.

Turnover

Twenty-four respondents provided turnover figures for their latest financial years (Table 12). This question was presented separately to organisations headquartered in the UK (reporting in pounds sterling) and to those headquartered in the EU (reporting in Euro), but no responses were received to this question from organisations headquartered outside the UK. Turnover has been tracked by geographic source since 2017 (Table 13).

	UK - pounds turnover in year ending 31 March 2022
total turnover	£159,233,033
mean	£6,634,710
median	£2,030,210

Table 12: Number of respondents to UK turnover question and combined total turnover in 2022. *n*=24.

	England	Scotland	Wales	Northern Ireland	Republic of Ireland	Rest of the world
2021-22	94%	4%	2%	0%	0%	1%
2020-21	91%	2%	2%	0%	0%	5%
2019-20	85%	7%	2%	0%	4%	2%
2018-19	87%	6%	6%	0%	0%	1%
2017-18	92%	3%	4%	1%		
2016-17	88%	7%	4%	0%		

Table 13: Turnover originating from work undertaken by UK-headquartered organisations in each of these locations from 2017 to 2022.

Total turnover has been tracked for eight years and there have been fluctuations between each year, (Table 14), mainly due to differences between which organisations responded, but in every iteration until 2019-20 the majority of respondents had annual turnovers of below £1m. In 2021-22, the majority of respondents (from 24 returns) reported annual turnovers greater than £1m.

	2017-18	2018-19	2019-20	2020-21	2021-22
>=£10m	10%	6%	10%	17%	17%
£5m -> £10m	10%	3%	2%	0%	4%
£2.5m -> £5m	3%	6%	8%	17%	13%
£1m -> £2.5m	29%	18%	21%	50%	25%
£500,000 -> £1m	23%	3%	13%	6%	8%
£250,000 -> £500,000	19%	15%	13%	11%	8%
<£250,000	10%	52%	33%	22%	25%

Table 14: Distribution of turnover from 2018 to 2022. UK only.

The calculated average turnover reported per member of staff in 2021-22 was £55,878, an increase on the previous year of 6.3% (Table 15), which, combined with the increase in the number of people working in commercial archaeology results in the entire sector being valued at £268 million pounds (an increase on 2020-21 of 8.5%).

	avg. per staff member	estimated commercial archaeologists	sector size	mean per organisation	median per organisation
2021-22	£55,878	4,800	£268m	£6,363,730	£1,716,420
2020-21	£52,528	4,700	£247m	£4,050,041	£1,446,200
2019-20	£51,187	4,375	£224m	£2,142,424	£472,725
2018-19	£48,696	4,152	£202m	£1,577,742	£250,000
2017-18	£48,747	3,997	£195m	£2,553,346	£1,000,000
2016-17	£45,309	3,743	£170m	£2,348,383	£643,500
2015-16	£45,615	3,481	£159m	£2,928,146	£755,618
2014-15	£45,914	3,284	£151m	£1,879,543	£864,000
2013-14	£56,237	2,871	£161m	£1,641,720	£740,935

Table 15: The average turnover per employee, estimated number of archaeologists, total value of the commercial archaeology sector, mean turnover per respondent and median turnover per respondent from 2014 to 2022. UK only.

Funding Sources

The overwhelming majority of commercial archaeology's funding comes from private sector clients, as it has in every iteration of this survey (Table 16).

Source	respondent turnover	%
private sector clients	£103,650,456	93%
national heritage agencies (Historic England, Historic Environment Scotland, Cadw, Heritage Council etc)	£1,806,302	2%
central government departments and agencies	£979,211	1%
local, district, city, county or unitary councils (local planning authorities).	£1,194,818	1%
other public bodies (including universities, public-private partnerships and local enterprise partnerships)	£2,051,404	2%
community groups (including lottery-funded projects, town and parish councils and neighbourhood forums)	£1,597,296	1%
total	£111,279,487	

Table 16: Sources of turnover funding 2021-22. *n*=18.

Profits/Surplus

24 respondents reported aggregate profits (or surplus, for not-for-profit organisations) of £11,346,289 on their combined turnovers of £162,293,033 equating to a profit margin of 7.0%, a slight decrease on 2020-21 (when aggregate profit levels were 7.1%) (Table 17).

46% of respondents reported profit levels that represented less than 5% of their turnovers; this includes the 17% of respondents that reported having made losses during 2021-22.

	>25% profit	10-25% profit	5-10% profit	<5% profit	mean	median	range
Mar-22	13%	17%	29%	46%	£472,762	£324,153	-£1,917,000 to £2,784,226
Mar-21	11%	26%	26%	37%	£308.93	£90,000	-£300,000 to £2,972,722
Mar 20 PP	17%	21%	17%	45%	£127,547	£400,000	-£145,000 to £2,329,494
Mar-19	35%	23%	19%	23%	£93,630	£50,000	-£49,000 to £828,383
Mar-18	15%	22%	19%	44%	£211,531	£60,000	-£26,297 to £1,800,000
Mar-17	3%	41%	13%	44%	£121,252	£43,000	-286,000 to £1,000,000
Mar-16	14%	14%	19%	52%	£154,438	£50,000	-75,000 to £799,000
Mar-15	0%	12%	18%	70%	£46,637	£5,500	-£1,000,000 to £935,000
Mar-14	0%	12%	12%	75%	£31,582	£0	-£3,000 to £251,000
Dec-12 PP	12%	11%	18%	60%			
Dec-12	3%	5%	23%	70%			
Apr-12	0%	10%	15%	75%			

Table 17: Distribution of profits, mean, median and ranges of reported profits from 2012 to 2022. PP = Profiling the profession, data from *Profiling the Profession* projects.

Market Sectors

In 2021-22, the largest source of funding for archaeological practice was Transport projects (Table 18), as had been the case in 2019-20. Residential Development was the second largest market sector (by source of funding).

source of income	Mar-22	
	£	%
Transport	£38,194,657	39%
Residential development	£30,819,324	32%
Commercial and industrial	£10,944,982	11%
Energy	£6,228,915	6%
Minerals	£2,626,578	3%
Water Supply	£2,297,983	2%
Community projects and NHLF	£1,469,464	2%
Education	£1,105,537	1%
Heritage conservation	£1,218,712	1%
National Agencies and University Grants	£883,308	1%
Any other services not categorised above	£609,611	1%
Other research and public archaeology	£526,524	1%
Telecommunications	£341,476	0%
Local Authority Initiatives	£106,129	0%
Health	£83,299	0%
Assistance to LPAs delivering development control services	£20,000	0%
Waste	£20,000	0%
Total	£97,496,500	

Table 18: Sources of income by sector 2021-22. *n*=15.

In six of the previous eight years, Residential Development had been the most significant source of market income, followed by Transport and then Commercial & Industrial (Table 19). Over the last three years, Transport has overtaken Residential Development to become commercial archaeology’s dominant source of income (being the most significant source in 2019-20 and 2021-22).

source of Income	Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21	Mar 22
Transport	10%	6%	14%	15%	34%	33%	39%
Residential development	53%	42%	36%	34%	28%	34%	32%
Commercial and industrial	14%	18%	13%	10%	17%	17%	11%
Energy	3%	6%	14%	18%	7%	5%	6%
Minerals	3%	2%	5%	9%	3%	2%	3%
Community projects and HLF	2%	3%	4%	1%	2%	1%	2%
Water Supply	2%	2%	1%	2%	1%	2%	2%
National Agencies and University Grants	2%	1%	1%	1%	2%	2%	1%
Other research and public archaeology	1%	1%	5%	0%	0%	0%	1%
Education	1%	1%	1%	2%	1%	0%	1%
Heritage conservation	2%	1%	0%	2%	1%	0%	1%
Local Authority Initiatives	1%	0%	1%	0%	1%	0%	0%
Health	1%	1%	0%	0%	0%	0%	0%
Waste	1%	0%	0%	0%	0%	0%	0%
Assistance to LPAs dev. control services	0%	0%	0%	0%	0%	0%	0%
Telecommunications	0%	0%	0%	0%	0%	0%	0%
Any other services not categorised above	1%	9%	0%	5%	3%	1%	1%
Leisure, sport, entertainment and tourism	0%	5%	2%	N/A	N/A	N/A	N/A
Retail and town centres	3%	2%	3%	N/A	N/A	N/A	N/A

Table 19: Sources of income by sector from 2016 to 2022.

Market Conditions

Respondents were asked if they thought the market for archaeological services would deteriorate in financial year 2022-23. In March 2022, a slight majority of respondents considered that they thought the market would deteriorate in the coming year (Table 20).

The sector was far less positive than it had been a year before (Figure 2).

	Count	%
yes - market conditions would deteriorate	11	50%
no - market conditions would improve	9	41%
don't know	2	9%

Table 20: Market condition expectations in 2022. *n*=22.

	market will deteriorate	market will improve / will not deteriorate	don't know	total confidence
Apr-09	54%	26%	19%	-28%
Jul-09	42%	42%	17%	0%
Oct-09	31%	33%	26%	2%
Jan-10	19%	47%	34%	28%
Apr-10	29%	29%	43%	0%
Jul-10	51%	18%	31%	-33%
Oct-10	41%	22%	28%	-19%
Jan-11	46%	20%	35%	-26%
Apr-11	32%	26%	42%	-6%
Oct-11	37%	24%	39%	-13%
Apr-12	32%	29%	39%	-3%
Dec-12	30%	48%	23%	18%
Mar-14	13%	78%	9%	65%
Mar-15	8%	84%	8%	76%
Mar-16	21%	64%	14%	43%
Mar-17	26%	56%	19%	30%
Mar-18	37%	44%	19%	7%
Mar-19	68%	21%	12%	-47%
Mar-20	49%	33%	18%	-16%
Mar-21	14%	81%	5%	67%
Mar-22	50%	41%	9%	-9%

Table 21: Market Confidence from April 2009 to March 2022. Total confidence is those that think the market won’t deteriorate minus those that think it will.

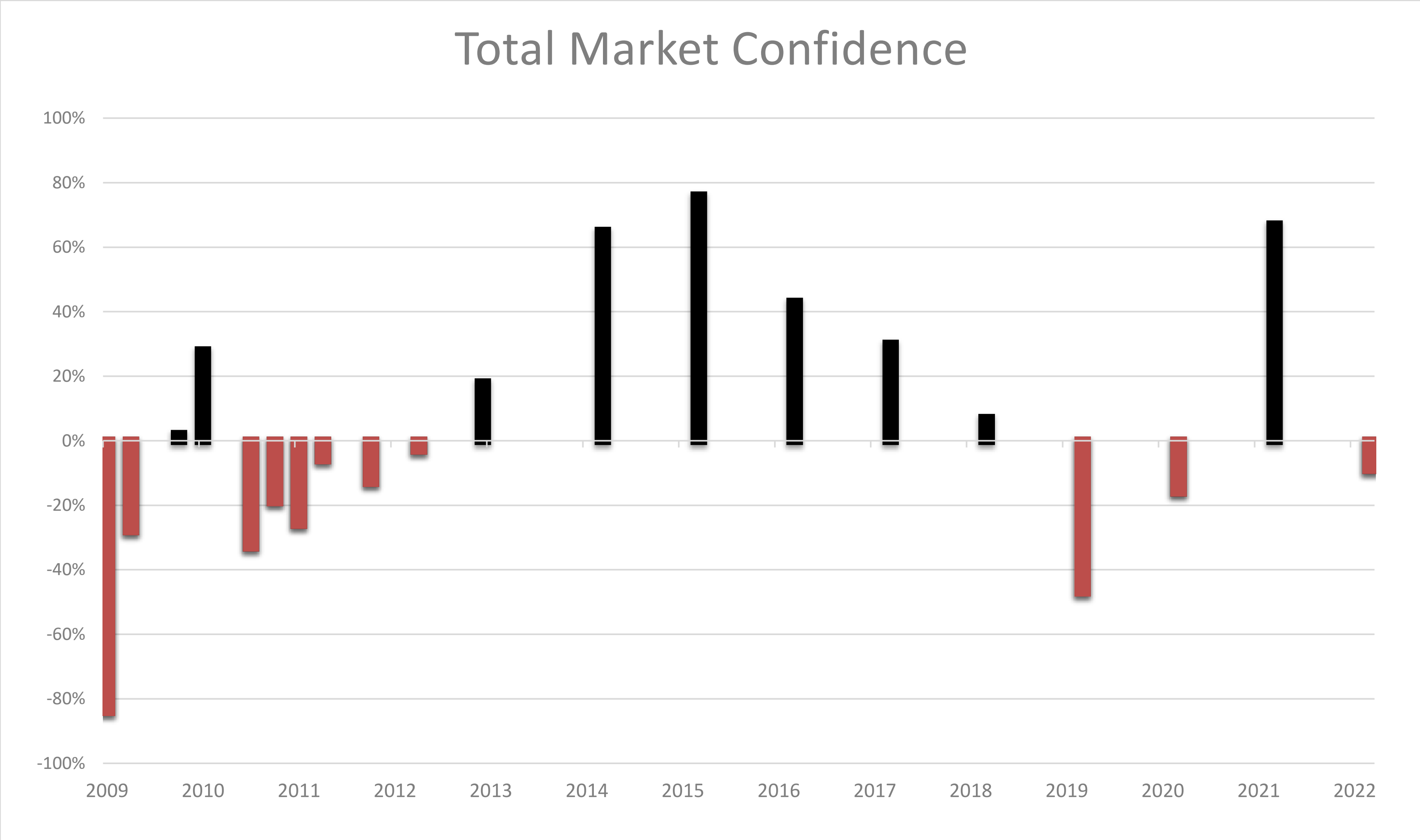

Figure 2: Market Confidence from April 2009 to March 2022. Total confidence is those that think the market won't deteriorate minus those that think it will.

Respondents were asked if they had specific comments.

- Breakdowns by sector not available
- Clear that inflation and the emerging cost of living crisis were going to have a major impact on the sector
- Expected that the coming year would be challenging, but overall conditions expected to improve
- I had hoped we were recovering from Brexit, and the pandemic: I had not foreseen the impact of the war in Ukraine and other factors on the UK economy.
- Likely less fieldwork on major infrastructure in 22 as there was in 21
- We would think that commercial contracts in the energy sector might increase but heritage conservation may well decrease as research funding is restricted.

Client Failure

Questions about Client Failure are not asked every year, and were not asked in 2021; below presents historic data from 2019 and the current data from 2022 (Table 23).

	pre-fieldwork	during evaluation	during mitigation	during post-fieldwork analysis
2019	5	0	1	7
2022	3	0	0	10

Table 22: Projects stopped because of client failure and where in the process this occurred. *n*=13 (2019); *n*=13 (2022).

Health and Safety

The health and safety results will be reported in a separate FAME H&S report.

Perceptions

As in past years, respondents were asked about their perceptions about the current market (Table 23). The range of questions was slimmed in the 2021-22 survey.

- **Non-payment of bills** was of greater concern for the sector than it had been a year previously.
- An increasing majority of respondents either agreed, or strongly agreed with the perception that **a shortage of heritage staff in LPAs is a major constraint on heritage projects.**
- Recruitment continued to be a serious concern for the sector. 81% of respondents agreed or strongly agreed with the perception that **we have had vacancies that we considered to be hard to fill**.

	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22
my heritage team will grow within the next 12 months							
strongly agree	22%	12%	15%	12%	12%	27%	5%
agree	33%	36%	37%	15%	26%	41%	38%
unsure	26%	24%	33%	29%	21%	14%	29%
disagree	15%	16%	7%	26%	23%	23%	24%
strongly disagree	4%	12%	7%	18%	18%	18%	5%
non-payment of bills has been a significant problem for my business							
strongly agree	12%	12%	0%	3%	9%	9%	5%
agree	8%	20%	67%	26%	17%	18%	33%
unsure	0%	8%	7%	9%	6%	9%	10%
disagree	58%	52%	19%	44%	56%	45%	38%
strongly disagree	23%	8%	7%	15%	12%	18%	14%
a shortage of heritage staff in LPAs is a major constraint on heritage projects							
strongly agree	38%	27%	30%	9%	19%	23%	38%
agree	46%	58%	33%	56%	50%	32%	38%
unsure	12%	8%	19%	18%	19%	27%	10%
disagree	4%	8%	15%	12%	9%	14%	14%
strongly disagree	0%	0%	4%	3%	3%	5%	0%
we have had vacancies that we considered to be hard to fill							
strongly agree						32%	29%
agree						45%	52%
unsure						5%	0%
disagree						9%	14%
strongly disagree						9%	5%

Table 23: Respondents' perceptions from 2016 to 2022.

One respondent offered additional comment on this set of questions:

- There is a skills shortage across many sectors and a large pool of talent on the near continent!!

NVQ

Relatively few respondents have previously accessed the Level 3 NVQ Certification in Archaeological Practice (Table 24), but more consider that they will do so in the future – which has been the consistent pattern reported in every survey when this question has been asked.

	yes	no	don't know
have supported a member of staff in the past	3	15	1
would consider supporting a member of staff in the future	11	4	5

Table 24: NVQ use responses. *n*=21.

Skills

In 2021-22, the area where skills were most frequently reported as being lost was fieldwork (Table 25), as it has been in every year except 2019-20 (Table 26). This year, fieldwork skills was the area where employers most frequently reported investing in training (a skills gap) – but not where skills were most frequently hired in (skills shortages); that was in both post-fieldwork analysis and artefact or ecofact conservation.

Every respondent that answered the questions about skills had been training staff members in fieldwork skills – an unprecedented level of investment in skills training that has not been seen in any previous iteration of this survey. 18 respondents answered at least some of the questions relating to skills. In table 20 below, for each identified skill area – e.g., *Fieldwork (intrusive or non-intrusive)*, the numbers of respondents reporting having lost skills in that area, having hired in skills in that area, having trained staff in that area of skills as a percentage of all respondents. Note: some respondents may have checked more than one category for a particular skills area – e.g. where respondents both hired in post-excavation skills and trained their own staff in this area.

	lost skills		hired skills		trained skills		
	#	%	#	%	#	%	*n*=
fieldwork (intrusive or non-intrusive)	5	28%	7	39%	18	100%	18
post-fieldwork analysis	0	0%	9	50%	4	22%	11
artefact or ecofact conservation	0	0%	9	50%	4	22%	11
providing advice to clients or other service users	1	6%	2	11%	10	56%	11
desk-based or environmental assessment	3	17%	4	22%	13	72%	16
data management	2	11%	3	17%	6	33%	9
other	2	11%	4	22%	3	17%	5

Table 25: Skills that were lost, hired or trained in 2022. *n*=18.

Skills Lost	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22
fieldwork (intrusive or non-intrusive)	39%	35%	25%	27%	40%	19%	5%	38%	28%
post-fieldwork analysis	17%	16%	17%	23%	20%	6%	5%	14%	0%
artefact or ecofact conservation	4%	14%	17%	15%	16%	6%	2%	5%	0%
providing advice to clients	4%	11%	8%	12%	16%	6%	3%	14%	6%
desk-based/environmental assessment	4%	11%	8%	8%	12%	10%	4%	10%	17%
data management	9%	5%	4%	8%	0%	0%	1%	5%	11%
other	13%	3%	4%	0%	0%	0%	1%	0%	11%

Table 26: Skills lost from 2014 to 2022. Percentages calculated on total responses to all skills questions and not just those to each specific question. The assumption is made that those who did not respond did so because they had no losses.

Skills Bought-in	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22
fieldwork (intrusive or non-intrusive)	39%	51%	67%	62%	68%	52%	39%	62%	39%
post-fieldwork analysis	35%	43%	58%	62%	60%	42%	38%	43%	50%
artefact or ecofact conservation	52%	27%	58%	46%	44%	39%	43%	48%	50%
desk-based/environmental assessment	17%	8%	21%	12%	12%	23%	5%	24%	11%
providing advice to clients	9%	14%	25%	15%	12%	13%	9%	29%	22%
data management	0%	5%	13%	12%	4%	10%	3%	14%	17%
other	4%	0%	4%	8%	4%	16%	6%	0%	22%

Table 27: Skills bought-in from 2014 to 2022. Percentages calculated on total responses to all skills questions and not just those to this specific question. The assumption is made that those who did not respond did so because they had no need to buy in skills.

Training Provided	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22
fieldwork (intrusive or non-intrusive)	52%	54%	71%	62%	72%	55%	27%	57%	100%
post-fieldwork analysis	48%	46%	63%	62%	68%	42%	26%	52%	22%
artefact or ecofact conservation	39%	38%	58%	58%	68%	13%	6%	29%	22%
providing advice to clients	39%	38%	33%	38%	44%	45%	25%	43%	56%
desk-based/environmental assessment	30%	14%	33%	35%	36%	42%	34%	52%	72%
data management	26%	24%	33%	31%	28%	23%	31%	28%	33%
other	30%	24%	21%	15%	8%	10%	10%	5%	17%

Table 28: Skills training provided from 2014 to 2022. Percentages calculated on total responses to all skills questions and not just those to this specific question. The assumption is made that those who did not respond did so because they had no need to train staff.

Apprenticeships

Formal Apprenticeships continue to be under-used in commercial archaeology (Table 29), and as in previous years but more respondents would consider using them in the future than reported having had experience of them to date.

	yes	no	don't know
have supported a member of staff in the past	1	15	2
would consider supporting a member of staff in the future	10	6	4

Table 29: Apprenticeships use responses. *n*=21.

Archives

Fifteen organisations answered questions about undeposited archives; three respondents identified that they had no undeposited archives.

On 31 March 2022, how many archaeological project archives did you hold which were ready for deposition but which could not be deposited because the recipient museum or store was unable or unwilling to accept them? number of projects - eg 117 projects

	undeposited archives held
range	10 – 1,750
mean	262
median	120

Table 30: Numbers of Undeposited Archives. *n*=12 (+3 responses of zero).

Organisations that held undeposited archives typically held hundreds of such archives.

How many metres of shelf-space are currently taken up by archaeological project archives, which are ready for deposition but which cannot be deposited because the recipient museum or store is unable or unwilling to accept them? (by length of shelf, eg 2.35m)

	archive metres of shelf-space
range	5 - 200
mean	65
median	42

Table 31: Archive Metres of Shelf-Space. *n*=8.

Typically, this is costing organisations that hold undeposited archives tens of thousands of pounds every year.

How much does it cost your organisation annually to store archives that cannot be deposited? Please provide at least a guesstimate (eg c£50k annually)

	annual cost of undeposited archives
range	£0 - £50,000
mean	£16,667
median	£12,500
average per archive	£52
average per metre of storage	£266

Table 32: annual cost of undeposited archives[3]. *n*=9.

Organisations holding undeposited archives rarely have to provide stakeholders with information on those archives.

How often do you provide information on your un-deposited archives to the following stakeholders?

	annually	**every 2-5 years**	**every 5 years or more**	**only when asked**	**never**
relevant museum or store	1	2	1	4	1
the local authority curator	1	1	0	4	1
the client	0	1	0	5	1
CIfA	2	2	0	5	0
other	0	0	0	2	1

Table 33: provision of information on archives. *n*=10.

[3] Notes - 1 response of zero, 8 responses greater than zero.
Average per archive (where data provided on number of archives and cost) *n*=9
Average per metre of storage (where data provided on metres and cost) *n*=8

University Relationships

In association with *University Archaeology UK* (UAUK), a series of one-off questions were asked about organisations' relationships with universities. Twenty-one organisations answered these questions, although not every respondent answered every question in this section.

Does your company have any formal or informal relationships with university archaeology departments (e.g., research project partnerships)?

yes	no
13	7

Table 34: Relationships with Universities. *n*=20.

Respondents were asked to '*Please provide additional information*' on this question.

- Formal relationships through our IRO status and leadership of multiple UKRI-funded grants
- Formal relationships through our Collaborative Doctoral Partnerships, including 9 PhDs with different university departments
- Formal relationships through grants funded by other institutions and the National Lottery, including our work on Higher Education Institution Alignment, and CITiZAN/TDP
- Formal relationships through commercially-funded projects
- Formal relationships through our voluntary (unfunded) participation on different projects
- Formal relationships through academics' participation on steering committees and assessment panels for UKRI-funded activities (e.g., Impact Acceleration Account)
- Formal and information relationships through staff members' participation on external academic steering committee and advisory boards of different academic projects
- Informal relationships through work placements and volunteering
- Informal relationships through academics' contributions to our monthly research seminars
- Informal relationships through staff members participation in academic conferences, collaborative publications with universities; advice offered to those who approach staff for their expertise
- 1 staff member is an Industry Supervisor on a PhD, contributions to University led research
- xxxx University - student training, geophysics

- Collaborate and provide student placements
- Collaborative projects + some staff visiting reserachers
- Informal - every so often with xxxx and xxxx
- Part of the Department of Archaeology xxxx
- Training and work placements for students of at xxxx University
- We are undertaking join projects with xxxx and xxxx University,

Do you offer 'Year in Employment' placements for undergraduate students?

yes	**no**
5	16

Table 35: Offer year in employment placements. *n*=21.

Respondents were asked *Could you provide details of the roles you recruit for?*

- Archaeological geophysicist
- Have advertised for Field Staff
- Research/project roles - usually post-ex works

Would you like to offer this opportunity?

yes	**no**
8	5

Table 36: Like to offer Year in Employment placements. *n*=13.

Do you offer shorter placement opportunities for undergraduate or postgraduate students?

yes	**no**
14	7

Table 37: Offer shorter placement opportunities. *n*=21.

Do you support University Career Fair events to represent employment opportunities in the sector?

yes	**no**
10	11

Table 38: Support University Career Fair events. *n*=21.

Do any of your staff deliver talks to archaeology students about a career in commercial archaeology?

yes	no
14	7

Table 39: Talk to students about careers. *n*=21.

Do you host organised visits to your workplace for archaeology students?

yes	no
8	13

Table 40: Host workplace visits for students. *n*=21.

Do any of your staff hold visiting lectureships, or similar, with a university archaeology department?

yes	no
6	15

Table 41: Visiting lectureships. *n*=21.

Does your company facilitate summer field school opportunities for archaeology students?

yes	no
8	13

Table 42: Facilitate field school opportunities. *n*=21.

Do you source any CPD from university archaeology departments for your employees?

yes	no
8	13

Table 43: Source CPD from university archaeology departments. *n*=21.

Would your organisation like to develop stronger links with university archaeology departments?

yes	no
20	1

Table 44: Like to develop stronger links with university archaeology departments. *n*=21.

Final Comments

Three respondents took advantage of the opportunity to add further comments to their responses.

- Chronic shortage of officers/managers
- Shortage of archaeological geophysical skills
- Note we exist within a University archaeology department so obviously have strong links with staff and students

APPENDIX: SURVEY QUESTIONS

The survey questions asked were as follows:

1. Which country is your organisation headquartered in?
    - United Kingdom
    - Republic of Ireland
    - Another country - please enter below
2. Where in the UK is the head office of your organisation located?
3. Are you also answering on behalf of any subsidiary offices? if so, please indicate where they are located?
    - East of England
    - East Midlands (England)
    - Greater London
    - North East England
    - North West England
    - South East England
    - South West England
    - West Midlands (England)
    - Yorkshire and the Humber
    - Scotland
    - Wales
    - Northern Ireland
    - Republic of Ireland
    - outside the UK and Republic of Ireland

4. How many full-time staff were working for your organisation on 31 March 2022?

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

5. Of your staff, how many were:

	FTE
British nationals (UK subjects)	
Irish nationals (Irish citizens)	
nationals of other EU states	
nationals of other countries (non-UK, non-EU)	

6. How many members of staff (FTE) did your organisation have one year before, on 31 March 2021 - the census date for State of the Archaeological Market 2021?

7. How many of your members of staff were working on each of the following types of contract or agreement on 31 March 2022?

	full-time	part-time
permanent		
fixed term		
casual		

-

8. Did salaries at your organisation typically rise or fall between March 2021 and March 2022? (NB - not total salary bill)

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

9. How did your charge out rates change in the year to the end of March 2022, and by how much do you expect them to have changed in 2022-23?

   by what percentage did your charge-out rates increase (+) or decrease (-) over the year ending 31 March 2022?

   by what percentage do you anticipate that your rates will increase (+) or decrease (-) over the year ending 31 March 2023?

10. between April 2021 and March 2022, how many projects did you bid for, and how many did you win?

    projects bid or tendered for

    projects won or secured

11a. What was your annual financial turnover for work in financial year 2021-22?

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 figures are available.*

	£
turnover in year ending 31 March 2022	

11b. What was your annual financial turnover for work in 2022?

Please enter full numbers of euros, eg 1250000, not decimal fractions of millions etc. if your accounting period does not run from January to December, please indicate fee income for the nearest 12-month period for which figures are available.

	€
turnover in year ending 31 December 2022	

12. How much of your turnover originated from work undertaken in each of these locations?

please enter percentages, ensuring that the total = 100%

- England
- Scotland
- Wales
- Northern Ireland
- Republic of Ireland
- rest of the world

13a. What was your annual profit (or surplus) (in £) in financial year 2021-22?

Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc If you made a loss in 2021-22, please enter a negative figure.

	£
your profit or surplus (plus or minus) in the year ending 31 March 2023	

13b. What was your annual profit (or surplus) (in €) in 2022?

Please enter full numbers of euros, eg 1250000, not decimal fractions of millions etc. If you made a loss in 2022, please enter a negative figure.

	€
your profit or surplus (plus or minus) in the year ending 31 December 2022	

14. How much of your turnover originated from your direct client from each of these sources? *please enter percentages, ensuring that the total = 100%*

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

15a. please indicate your income in the year ending 31 March 2022 for work in each of the sectors listed. Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc.

	income 2021-22 £
Construction	
Residential development	
Commercial and industrial	
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	

15b. please indicate your income in the year ending 31 December 2022 for work in each of the sectors listed. Please enter full numbers of euro, eg 1250000, not decimal fractions of millions etc.

(Same table as 15a but in €)

16. At the end of last financial year (4th April 2022 in UK, 31st December 2022 in Republic of Ireland), did you believe that market conditions would deteriorate over the next 12 months?

17. Other comments?

18. how many of the following RIDDOR reportable incidents occurred in your workplace in the last financial year (2021-22)?

	incidents
specified injuries (including fatality)	
injuries resulting in over 7 days absence	
occupational diseases (including carpal tunnel syndrome, tendonitis and occupational dermatitis)	
occupational disease caused by exposure to carcinogens, mutagens & biological agents (including occupational cancers)	
specified dangerous occurrences	

19. how many non-RIDDOR reportable accidents were there in your workplace in the last financial year (2021-22)?

	total numbers of:	
	non-reportable accidents	near misses
ergonomic / manual handling		
slip, trip or fall		
contact with or knocking into object		
vehicle accident (travelling on work business, including to or from site)		
other		

20. further information about any other accidents

21. are you tracking mental health concerns with your staff?

22. please tell us how you are tracking them?

23. what provisions do you have to support staff mental health?

24. Considering these areas of archaeological skills, please check any boxes where (in the last financial year) your organisation:

lost skills

had to buy in skills (hired subcontractors)

invested in skills training

	lost skills	**hired skills**	**trained skills**
fieldwork (intrusive or non-intrusive)			
post-fieldwork analysis			
artefact or ecofact conservation			
providing advice to clients			
desk-based or environmental assessment			
data management			
Other			

25. On 31 March 2022, had you or were you considering supporting a member of staff to gain a vocational qualification in archaeological practice (Level 3 NVQ Certificate in Archaeological 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			

26. On 31 March 2022, 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			

25. At the end of last financial year (31 March 2022 in UK, 31 December 2022 in Ireland), 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
my heritage team will grow within the next 12 months					
non-payment of bills has been a significant problem for my business					
a shortage of heritage staff in LPAs is a major constraint on heritage projects					
we have had vacancies that we considered to be hard to fill					

26. Any other comments?

27. On 31 March 2022, how many archaeological project archives did you hold which were ready for deposition but which could not be deposited because the recipient museum or store was unable or unwilling to accept them?

28. How many metres of shelf-space are currently taken up by archaeological project archives, which are ready for deposition but which cannot be deposited because the recipient museum or store is unable or unwilling to accept them?

29. How much does it cost your organisation annually to store archives that cannot be deposited?

30. How often do you provide information on your un-deposited archives to the following stakeholders?

	annually	**every 2–5 years**	**every 5 years or more**	**only when asked**	**never**
Relevant museum or store					
The local authority archaeological curat or					
The client					
CIfA					
other					

31. Does your company have any formal or informal relationships with university archaeology departments (e.g., research project partnerships)?

32. Please provide additional information

33. Do you offer 'Year in Employment' placements for undergraduate students?

34. Could you provide details of the roles you recruit for?

35. Would you like to offer this opportunity?

36. Do you offer shorter placement opportunities for undergraduate or postgraduate students?

37. Do you support University Career Fair events to represent employment opportunities in the sector?

38. Do any of your staff deliver talks to archaeology students about a career in commercial archaeology?

39. Do you host organised visits to your workplace for archaeology students?

40. Do any of your staff hold visiting lectureships, or similar, with a university archaeology department?

41. Does your company facilitate summer field school opportunities for archaeology students?

42. Do you source any CPD from university archaeology departments for your employees?

43. Would your organisation like to develop stronger links with university archaeology departments?

50. If you have any further comments on your responses, or on the state of commercial archaeology in general, please let us know.