# State of the Archaeological Market 2024

Kenneth Aitchison & Doug Rocks-Macqueen

# ACKNOWLEDGEMENTS

This project was undertaken by the Federation of Archaeological Managers and Employers with support from the Chartered Institute for Archaeologists.

Published by Federation of Archaeological Managers and Employers 2025

**Cover Images:**

Archaeologists enjoying a tea break at the DIRFT III Development Area, Watling Street, Northamptonshire, August 2015 to April 2016, Cotswold Archaeology CC BY 4.0. From ADS.

Trenches being excavated for gate at Sapcote Castle and Moat, Sapcote, Blaby, Leicestershire, November-December 2020, Richard Huxley, University of Leicester Archaeological Services CC BY 4.0. From ADS.

**Version:** 1.0, check the FAME website for the most recent version, in case any corrections or changes are made to this document.

# TABLE OF CONTENTS

# FOREWORD

I am delighted to introduce the results of the annual State of the Archaeological Market Survey covering the financial year 2023-4. The survey provides a wealth of information on the size and nature of the archaeology market in the UK and its contribution to the wider economy. Over the past decade, the reports have deepened our understanding of the sector, helping us to forecast future demand for archaeological services and to identify skills gaps and other challenges. The data FAME members and CIfA Registered Organisations provide also underpins our sector advocacy, highlighting the value of development-led archaeology to society.

Just under 5000 people work in development-led archaeology in the UK, contributing £337 million to the economy. While contractors and consultants' staffing levels continue to grow, there are further losses in local authority historic environment teams, a problem that continues to be a concern for the majority of survey respondents.

As always, we keep a very close eye on the survey data relating to skills losses, gaps and shortages. Lower levels of skills being lost may reflect a slowdown in staff turnover, but gaps (where training is being provided in-house) and shortages (where skills are brought in from outside) are still being reported, notably in artefact and ecofact conservation. The shortage of specialists, and finds specialists in particular, continues to be a serious concern.

In that context, it's particularly disappointing to see the survey results again highlight the lack of take-up of NVQs and apprenticeships to meet the sector's skills issues. Despite a clear majority of survey respondents indicating that they would not consider supporting an apprentice in the future, it is encouraging to note that around 25 employers, including companies, charities, national agencies and local authorities have engaged with the development and delivery of apprenticeships, including the development of a Modern Apprenticeship in Scotland. We are very keen to work with FAME to ensure that we can provide the necessary support to employers to ensure they have access to sufficient skilled professionals to continue delivering high-quality services.

Overall, the report provides a snapshot of a sector contributing significantly to the economy, enabling delivery of the UK Government's missions around growth, housing and green energy and providing a value to clients and society that isn't always reflected in profit levels.

Kate Geary

Co-CEO, CIfA

# KEY RESULTS FOR 2023-24

Of the archaeologists working in contracting and consulting in the UK in 2023-24:

88% were British Nationals.

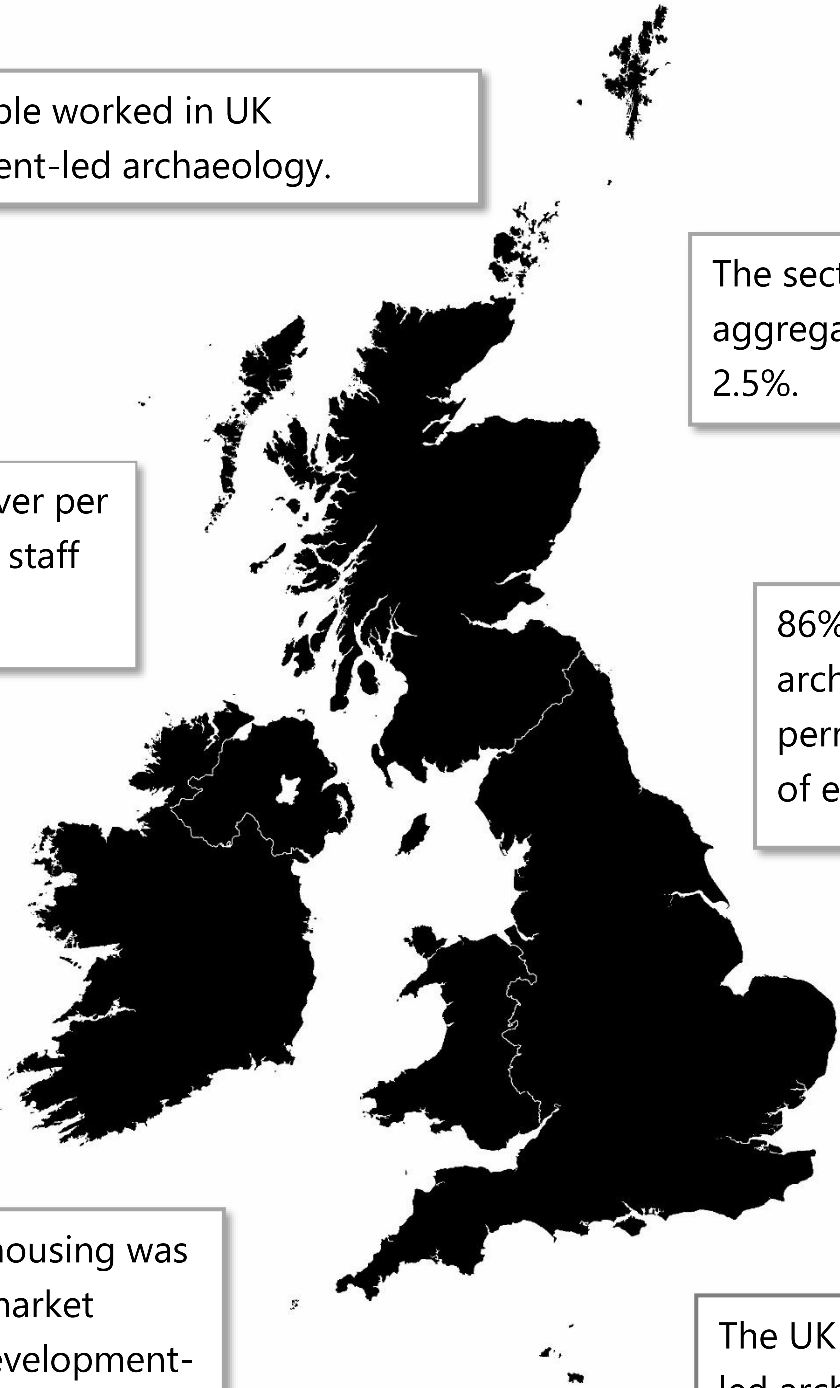
9% were from EU countries.

4,918 people worked in UK development-led archaeology.

The sector reported an aggregate profit level of 2.5%.

Average turnover per UK member of staff was £68,544.

86% of archaeologists have permanent contracts of employment.



Residential housing was the largest market sector for development-led archaeology in 2023-24.

The UK development-led archaeology sector was valued at £337 million in 2023-24.

# INTRODUCTION

This report is on the state of the market for archaeological services in the United Kingdom in 2023-24. Some respondents worked in the Republic of Ireland and elsewhere in the world, and those data have been separated where appropriate to avoid double counting.

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 development-led 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 fifteen years. First, with the onset of the 2008 financial crisis, the Chartered Institute for Archaeologists (CIfA) and the Federation of Archaeological Managers and Employers (FAME) began a series of projects to measure the changes this would bring to the sector. Nine quarterly surveys were initially conducted, gathering and presenting data from October 2008 to April 2011. Subsequently, CIfA and FAME commissioned a project to gather data on a six-monthly basis and to present reports on the state of the archaeological market. The December 2012 report was combined with the sector-wide Archaeology Labour Market Intelligence: *Profiling the Profession* 2012-13 report.

Because this information was valuable to CIfA, FAME and the sector, they, together with Historic England, commissioned further yearly surveys to analyse and evaluate the state of the market for archaeological services, examining employment, turnover, market segmentation and other relevant topics. After an initial five-years of support, Historic England stopped funding the surveys; since then, CIfA and FAME have continued this annual survey, with several years' support by Historic Environment Scotland (2019-2024). The 2019-20 report was produced using data gathered as part of a wider, pan-sector labour market intelligence project, *Profiling the Profession 2020*[1].

This report presents the results of the survey for 2023-24.

---

[1] https://profilingtheprofession.org.uk/

# METHODS

The survey (see Appendix) was conducted by polling FAME members and CIfA Registered Organisations (180 email addresses at 110 organisations).

The survey was a digital survey created using Novisurvey software. Respondents were asked to provide data that applied on 31st March 2024, and so this report is on the situation at the end of the financial year 2023-24.

Links to the questionnaire were initially sent to potential respondents on 3rd January 2025, with automated reminder and follow-up emails encouraging completion being sent periodically until the survey was closed on 2nd March 2025.

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.

# RESULTS OF 2023-24 SURVEY

Responses were received from 48 organisations (the 2022-23 survey had 36 usable responses). Not every respondent answered every question.

## Geographic Distribution

Respondents were asked about the locations of head and subsidiary offices (Table 1). 46 organisations responded, of which 17 had a total of 74 subsidiary offices.

| | head offices | subsidiary offices |
|---|---|---|
| East of England | 3 | 6 |
| East Midlands | 7 | 6 |
| London | 4 | 5 |
| North East England | 2 | 5 |
| North West England | 1 | 7 |
| South East England | 4 | 8 |
| South West England | 6 | 7 |
| West Midlands | 2 | 5 |
| Yorkshire and the Humber | 6 | 6 |
| Scotland | 3 | 7 |
| Wales | 3 | 3 |
| Northern Ireland | 0 | 3 |
| Republic of Ireland | 2 | 4 |
| outside the UK and Republic of Ireland | 3 | 2 |
| **Total** | **46** | **74** |

**Table 1: Distribution of company offices by location.** *n*=46.

## Staff Numbers

1,655 staff (FTE) were working for respondents, with between 0.5 and 368 members of staff at each (Table 2).

| | total |
|---|---|
| total staff (managerial, professional, technical and administrative) employed | 1,655.72 |
| total fee earners working full-time | 956.12 |

**Table 2: Staff numbers.** *n*=44.

The figure for total fee earners working full-time is markedly different from the figure for total staff as only 37 respondents answered this part of the question. Those 37 respondents (with 956.12 full-time equivalent fee-earners) employed a total of 1,223.12 individuals.

## Staff Nationalities

In 2024, 88% of staff members working for organisations headquartered in the UK were British nationals (Table 3), while 9% were citizens of EU states, continuing a trend of the shrinking of EU nationalities as a percentage of the workforce (Table 4).

| | Employed in UK | |
|---|---|---|
| **Staff (full-time equivalents)** | **count** | **%** |
| British (UK subjects) | 1,357.8 | 88% |
| national of EU states | 141.5 | 9% |
| nationals of other countries (non-UK, non-EU) | 61.8 | 4% |
| total | 1,536.7 | |

**Table 3: Staff nationalities (UK-headquartered respondents).**

| All staff | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
|---|---|---|---|---|---|---|---|
| British (UK subjects) | 85% | 86% | 86% | 86% | 87% | 85% | 88% |
| national of EU states | 13% | 12% | 13% | 11% | 10% | 10% | 9% |
| other | 2% | 3% | 1% | 3% | 3% | 4% | 4% |

**Table 4: Nationalities of staff (UK-headquartered respondents) from 2017-18 to 2023-24.**

## Staff Contracts

86% of workers in development-led archaeology in 2024 were on permanent contracts (85% in 2023) and 14% were employed on fixed-term contracts (Table 5). 74% of people have full-time, permanent contacts, slightly lower than the level reported in 2023 of 78% (Table 6).

| permanent | count | % |
|---|---|---|
| full-time | 1,295 | 74% |
| part-time | 214 | 12% |
| total | 1,509 | 86% |
| **fixed term** | | |
| full-time | 225 | 13% |
| part-time | 14 | 1% |
| total | 239 | 14% |
| **grand total** | **1,748** | |

**Table 5: Staff by contract type for UK-based organisations in 2023-24.**

| Contract type | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
|---|---|---|---|---|---|---|---|---|---|---|
| **permanent** | | | | | | | | | | |
| full-time | 68% | 68% | 71% | 65% | 66% | 76% | 76% | 73% | 78% | 74% |
| part-time | 9% | 6% | 6% | 14% | 13% | 11% | 9% | 8% | 7% | 12% |
| **fixed term** | | | | | | | | | | |
| full-time | 18% | 21% | 20% | 16% | 18% | 12% | 15% | 18% | 13% | 13% |
| part-time | 1% | 2% | 1% | 2% | 1% | 2% | 0% | 1% | 2% | 1% |
| **casual** | | | | | | | | | | |
| full-time | 2% | 2% | 1% | 0% | 0% | | | | | |
| part-time | 1% | 0% | 0% | 0% | 1% | | | | | |
| **volunteer** | | | | | | | | | | |
| full-time | 0% | 0% | 0% | 0% | 0% | | | | | |
| part-time | 2% | 1% | 2% | 1% | 3% | | | | | |

**Table 6: Staff by contract type for UK-based organisations from 2014-15 to 2023-2024.**

## 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[2] (not in specific terms, but at an overall level) and if they had typically risen or fallen during the 2023-24 financial year.

71% 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

[2] This was specifically not a question about total salary bills, as those would be directly influenced by the number of personnel on the payroll.

date of the salary settlement; the CPI rate of inflation in March 2024 was 3.2%[3]. This question has only been asked in the last three years, so trends are preliminary at this point, though it appears wages rarely fall (Table 8).

| salary changes | count | % |
|---|---|---|
| rose by above inflation | 14 | 34% |
| rose by inflation | 15 | 37% |
| unchanged | 12 | 29% |
| fell by up to 10% | 0 | 0% |
| fell by over 10% | 0 | 0% |

**Table 7: Salary changes 2023-24.** *n*=41**.**

| | 2021-22 | | 2022-23 | | 2023-24 | |
|---|---|---|---|---|---|---|
| **salary changes** | **count** | **%** | **count** | **%** | **count** | **%** |
| rose by above inflation | 9 | 36% | 15 | 50% | 14 | 34% |
| rose by inflation | 12 | 48% | 9 | 30% | 15 | 37% |
| unchanged | 2 | 8% | 4 | 13% | 12 | 29% |
| fell by up to 10% | 2 | 8% | 2 | 7% | 0 | 0% |
| fell by over 10% | 0 | 0% | 0 | 0% | 0 | 0% |
| total | 25 | | 30 | | 41 | |

**Table 8: Salary changes 2021-22 to 2023-24.**

## Charge Out Rates

Respondents were also asked about any changes to their charge-out rates in the year ending 31st March 2024, and then about how they anticipated they would change in the next year (Table 9).

| | reported change to March 2024 | anticipated change to March 2025 |
|---|---|---|
| range | 0.0% to 15.0% | 0.0% to 15.0% |
| mean | 6.1% | 4.7% |
| median | 5.0% | 5.0% |
| mode | 5.0% (6 responses) | 5.0% (10 responses) |
| *n*= | 34 | 34 |

**Table 9: Charge-out rate changes 2023-24.** *n*=34.

[3] UK Historical Inflation Rates - 1988 to 2025 | Inflation Rate and Consumer Price Index accessed 13th June 2025

Charge-out rates rose by an average of 6.1% in the year to March 2024. Looking forward, respondents expected their charge-out rates to rise by 4.7% in the year to March 2025. Since this question was first asked in 2021, the actual median and mean rates have tended to be higher than the anticipated rates (Table 10). Though this has occurred during historically high inflation, so under-anticipating is to be expected.

In March 2024, the annual UK inflation rate (CPI) was 3.2%; 71% of respondents (24 of 34) increased their charge-out rates in 2023-24 by this amount or more.

| | **reported change to March 2021** | **anticipated change to March 2022** | **reported change to March 2022** | **anticipated change to March 2023** |
|---|---|---|---|---|
| range | 0-30% | 0-20% | 0-30% | 0-20% |
| mean | 4.6% | 5.4% | 6.8% | 6.9% |
| median | 3.0% | 5.0% | 5.0% | 5.5% |
| mode | 0% (7) | 5.0% (9) | | |
| N= | 27 | 27 | 22 | 22 |
| | **reported change to March 2023** | **anticipated change to March 2024** | **reported change to March 2024** | **anticipated change to March 2025** |
| range | 0.0-30.0% | -0.4-15.0% | 0.0-15.0% | 0.0-15.0% |
| mean | 7.9% | 5.7% | 6.1% | 4.7% |
| median | 6.0% | 5.0% | 5.0% | 5.0% |
| mode | 5.0% (7) | 10.0% (5) | 5.0% (6) | 5.0% (10) |
| n= | 27 | 27 | 34 | 34 |

**Table 10: Charge-out rate changes 2020-21 to 2023-24.**

## Competition for Projects

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 20% - 100% of projects they tendered for, with an average win rate of 40% (Table 12). Since 2020-21, this rate has been between 39-45% (Table 12).

| | **2023-24** | |
|---|---|---|
| | **range** | **average** |
| number tendered for | 0 - 1566 | 277 |
| number won | 1 - 567 | 112 |
| percentage won | 20-100% | 40% |

**Table 11: Competition for projects 2023-24.** *n*=32.

| | 2020-21 | | 2021-22 | | 2022-23 | | 2023-24 | |
|---|---|---|---|---|---|---|---|---|
| | range | average | range | average | range | average | range | average |
| # tendered for | 12 - 1966 | 414 | 10 – 2000 | 551 | 0 – 2205 | 427 | 0 - 1566 | 277 |
| # won | 3 - 974 | 183 | 7 - 963 | 217 | 2 - 924 | 185 | 1 - 567 | 112 |
| % won | 23 -79% | 44% | 29 -86% | 39% | 24 - 100% | 45% | 20-100% | 40% |

**Table 12: Competition for projects 2020-21 to 2023-24.**

## Sector Growth

42 organisations provided data on the number of staff they employed in 2024 (1,644.72) together with retrospective figures for 2023 (1,578.12). This is an aggregate increase across those organisations of 66.6 individuals – an increase of 4.2%.

Between 2012-13 and 2018-19, it was assumed that this change seen in the survey respondents was representative of the whole sector and so this percentage increase was applied to the sector to calculate the change in staffing numbers, but this led to an overcount in staff levels, as discussed in *State of the Archaeological Market 2020* report. To avoid this problem, we have taken a cautious approach to reporting staff number changes, and assume the known change in staffing numbers –66.6 individuals – represents the overall development-led sector increase.

This equates to 1.4% of the workforce; the number of people employed in the development-led sector, contacting and consulting, has grown year-on-year since 2012, but the rate of growth has slowed considerably since 2021 (Table 13).

| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|---|---|---|---|---|
| count | 3284 | 3481 | 3743 | 3997 | 4152 | 4375 | 4700 | 4800 | 4851 | 4918 |
| annual growth | 14.4% | 6.0% | 7.5% | 6.8% | 3.9% | 5.4% | 7.4% | 2.2% | 1.1% | 1.4% |

**Table 13: Calculated Figures – Employment in Development-led Archaeology 2015-2024, contractors and consultants.**

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 2024[4]. That dataset is only for England, and it

[4]https://historicengland.org.uk/research/results/reports/9162/Series2Issue4_ReportonLocalAuthorityHistoricEnvironmentStaffResources2024

reported a 11.2% decrease in the number of posts in the archaeological curatorial sector in the course of the year 2023-24; UK totals have been extrapolated by assuming the same rate of change for employment in curatorial archaeology also applied elsewhere in the UK.

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 2024 results.

Overall, the total number of people employed in archaeology in the UK grew by only 0.4% in the year to March 2024, with the estimated total of 38 jobs lost in curatorial archaeology mostly offsetting the estimated 67 jobs gained by contractors and consultants.


**Figure 1: Estimated total numbers of archaeologists employed in the United Kingdom 2007-2024.**

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

| | Apr-10 | Jul-10 | Jul-10 | Oct-10 | Jan-11 | Apr-11 | Oct-11 |
|---|---|---|---|---|---|---|---|
| curatorial | 485 | 485 | 485 | 485 | 485 | 442 | 442 |
| other | 1800 | 1771 | 1771 | 1743 | 1714 | 1686 | 1628 |
| contractor /consultant | 3404 | 3669 | 3669 | 3333 | 3189 | 3225 | 3399 |
| total | 5689 | 5925 | 5925 | 5561 | 5388 | 5353 | 5469 |

| | Apr-12 | Dec-12 | Dec-12 | Mar-14 | Mar-15 | Mar-16 | Mar-17 |
|---|---|---|---|---|---|---|---|
| curatorial | 440 | 485 | 485 | 439 | 459 | 416 | 407 |
| other | 1571 | 1495 | 1495 | 1495 | 1495 | 1495 | 1495 |
| contractor /consultant | 3467 | 2812 | 2812 | 2871 | 3284 | 3481 | 3743 |
| total | 5478 | 4792 | 4792 | 4805 | 5238 | 5392 | 5645 |

| | Mar-18 | Mar-19 | Mar-20 | Mar-21 | Mar-22 | Mar-23 | Mar-24 |
|---|---|---|---|---|---|---|---|
| curatorial | 409 | 409 | 338 | 351 | 353 | 336 | 298 |
| other | 1495 | 1495 | 1550 | 1550 | 1550 | 1550 | 1550 |
| contractor /consultant | 3997 | 4152 | 4375 | 4700 | 4800 | 4851 | 4918 |
| total | 5901 | 6056 | 6263 | 6601 | 6703 | 6737 | 6766 |

**Table 14: Reported and estimated numbers in archaeological employment from 2007 to 2024.**

## Turnover

Thirty respondents provided turnover figures for their latest financial years; twenty-seven were headquartered in the UK and reported in pounds sterling (Table 15), and three were headquartered outside the UK and reported in Euro (Table 16). The mean figures are the arithmetical averages, the medians are the figures for which 50% of respondents turned over more and 50% turned over less.

| | UK - pounds turnover in year ending 31 March 2024 |
|---|---|
| respondents | 27 |
| total turnover | £92,850,287 |
| mean | £3,438,900 |
| median | £570,000 |

**Table 15: Number of respondents to UK turnover question and the combined total turnover in 2023-24.**

| | Non-UK - euro turnover in year ending 31 March 2024 |
|---|---|
| respondents | 3 |
| total turnover | €3,413,000 |
| mean | €1,137,667 |
| median | €1,033.000 |

**Table 16: Number of respondents to Euro turnover question and combined total turnover in 2023-24.**

Turnover has been tracked by geographic source since 2017 (Table 17).

| | England | Scotland | Wales | Northern Ireland | Ireland | Rest of the world |
|---|---|---|---|---|---|---|
| 2023-24 | 96% | 2% | 1% | 0% | 0% | 1% |
| 2022-23 | 93% | 3% | 2% | 0% | 1% | 1% |
| 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 17: Turnover originating from work undertaken by UK-headquartered organisations in each of these locations from 2016-17 to 2023-24.**

For each of the three companies reporting turnover in Euro, 100% of that turnover had been generated in Ireland.

Total turnover has been tracked for ten years. There have been fluctuations between each year (Table 18), in large part attributable to differences between which organisations responded, but in every iteration until 2019-20 the majority of respondents had annual turnovers of below £1m.

| | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
|---|---|---|---|---|---|
| >=£10m | 10% | 17% | 17% | 17% | 11% |
| £5m -> £10m | 2% | 0% | 4% | 8% | 4% |
| £2.5m -> £5m | 8% | 17% | 13% | 8% | 11% |
| £1m -> £2.5m | 21% | 50% | 25% | 17% | 11% |
| £500,000 -> £1m | 13% | 6% | 8% | 17% | 22% |
| £250,000 -> £500,000 | 13% | 11% | 8% | 8% | 4% |
| <£250,000 | 33% | 22% | 25% | 25% | 37% |

**Table 18: Distribution of turnover from 2019-20 to 2023-24. UK only.**

## Contribution to the Economy

The calculated average turnover reported per member of staff in 2023-24 was £68,544, an increase on the previous year of 7.5% (Table 19), which, when multiplied by the number of people working in development-led archaeology results in the entire sector's revenue being valued at £337million (an increase on 2022-23 of 9.1%). Note – this excludes curatorial staff. The average turnover per staff member for the companies reporting in Euro that were headquartered in Ireland was €79,372 (=£67,944).

| | avg. per staff member | estimated contractors/ consultants | sector size | mean per organisation | median per organisation |
|---|---|---|---|---|---|
| 2023-24 | £68,544 | 4,918 | £337m | £3,316,082 | £570,000 |
| 2022-23 | £63,780 | 4,851 | £309m | £6,561,906 | £2,750,000 |
| 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 19: The average turnover per employee, estimated number of archaeologists, total value of the development-led archaeology sector, mean turnover per respondent and median turnover per respondent from 2013-14 to 2023-24. UK only.**

## Profits

24 UK-headquartered respondents reported aggregate profits (or surplus, for not-for-profit organisations) of £2,211,811 on their combined turnovers of £86,789,287 in 2023-24, equating to an aggregate profit margin of 2.5%. This represents a decrease on 2022-23 (when aggregate profit levels were 3.1%, and had been 7.0% in 2021-22) (Table 20). 11 of 24 respondents (46%) reported profit levels that represented less than 5% of their turnovers; this includes the 29% of respondents that reported having made losses during 2023-24. This is lower than the previous year and significantly lower than when this data was first gathered a decade ago (Figure 2).

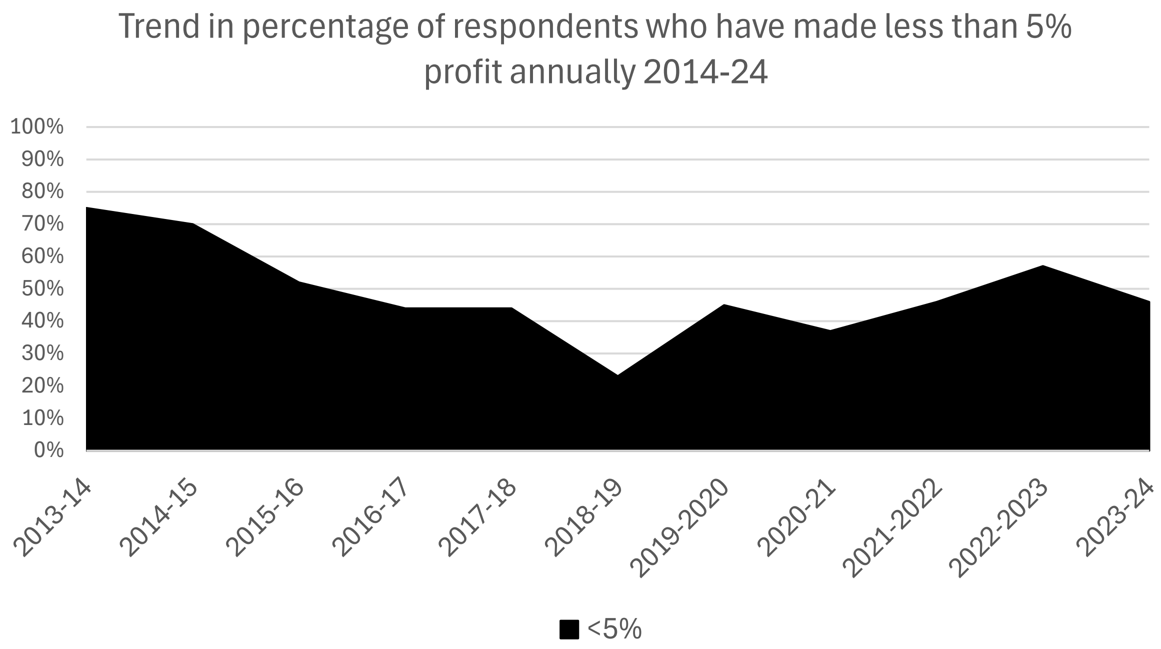



**Figure 2: Trend in percentage of respondents who have made less than 5% profit annually 2013-14 to 2023-24**

| profit as % of turnover | Dec-12 | Mar-14 | Mar-15 | Mar-16 | Mar-17 | Mar-18 | Mar-17 |
|---|---|---|---|---|---|---|---|
| >25% | 3% | 0% | 0% | 14% | 3% | 15% | 3% |
| 10-25% | 5% | 12% | 12% | 14% | 41% | 22% | 41% |
| 5-10% | 23% | 12% | 18% | 19% | 13% | 19% | 13% |
| <5% | 70% | 75% | 70% | 52% | 44% | 44% | 44% |
| mean | | £31,582 | £46,637 | £154,438 | £121,252 | £211,531 | £121,252 |
| median | | £0 | £5,500 | £50,000 | £43,000 | £60,000 | £43,000 |
| range of profits | | -£3,000 to £251,000 | -£1m to £935,000 | -75,000 to £799,000 | -286,000 to £1m | -£26,297 to £1.8m | -286,000 to £1m |

| profit as % of turnover | Mar-19 | Mar-20 | Mar-21 | Mar-22 | Mar-23 | Mar-24 |
|---|---|---|---|---|---|---|
| >25% | 35% | 17% | 11% | 13% | 4% | 25% |
| 10-25% | 23% | 21% | 26% | 17% | 22% | 4% |
| 5-10% | 19% | 17% | 26% | 29% | 17% | 25% |
| <5% | 23% | 45% | 37% | 46% | 57% | 46% |
| mean | £93,630 | £127,547 | £308.934 | £472,762 | £228,778 | £92,159 |
| median | £50,000 | £400,000 | £90,000 | £324,153 | £117,000 | £31,447 |
| range of profits | -£49,000 to £828,383 | -£145,000 to £2,329,494 | -£300,000 to £2,972,722 | -£1,917,000 to £2,784,226 | -£1,933,919 to £3,094,402 | -£233,998 to £1,576,832 |

**Table 20: Distribution of profits, mean, median and ranges of reported profits from December 2012 to March 2024.** *n=24*

## Funding Sources

Most of development-led archaeology's funding comes from private sector clients, as it has in every iteration of this survey (Table 21).

| source | respondent turnover | % |
|---|---|---|
| private sector clients | £77,526,031 | 89% |
| national heritage agencies (Historic England, Historic Environment Scotland, Cadw, Heritage Council etc) | £726,431 | 1% |
| central government departments and agencies | £2,122,459 | 2% |
| local, district, city, county or unitary councils (local planning authorities). | £2,828,430 | 3% |
| other public bodies (including universities, public-private partnerships and local enterprise partnerships) | £2,842,906 | 3% |
| community groups (including lottery-funded projects, town and parish councils and neighbourhood forums) | £616,317 | 1% |
| total | £86,662,572 | 100% |

**Table 21: Sources of turnover funding 2023-24, reporting in £.** *n*=26.

For the first time, this survey had multiple answers to this question from respondents who were reporting in Euro, and this is presented separately in Table 22. For these respondents, private sector clients provided the majority of funding, but not as overwhelmingly as for the respondents reporting in UK Pounds. For the Euro respondents, central and local government funding was more significant than it was for the UK respondents.

| source | respondent turnover | % |
|---|---|---|
| private sector clients | €1,916,250 | 56% |
| national heritage agencies | €111,000 | 3% |
| central government departments and agencies | €819,110 | 24% |
| local planning authorities | €416,650 | 12% |
| other public bodies | €109,460 | 3% |
| community groups | €40,530 | 1% |
| total | €3,413,000 | 100% |

**Table 22: Sources of turnover funding 2023-24, reporting in €.** *n*=3.

## Market Sectors

In 2023-24, the largest source of funding for archaeological practice was Residential Development, followed by Energy (Table 23).

| source of income | 2023-24 £ | 2023-24 % | relative change |
|---|---|---|---|
| residential development | £100.2m | 59.0% | ↔ |
| energy | £22.2m | 13.1% | ↔ |
| commercial and industrial | £16.7m | 9.8% | ↑ |
| water Supply | £12.8m | 7.5% | ↑ |
| transport | £11.4m | 6.7% | ↓ |
| education | £1.7m | 1.0% | ↑ |
| other research and public archaeology | £1.6m | 0.6% | ↑ |
| minerals | £1.2m | 0.7% | ↓ |
| community projects and NHLF | £0.9m | 0.5% | ↑ |
| any other services not categorised above | £0.6m | 0.3% | ↓ |
| health | £0.2m | 0.1% | ↑ |
| national agencies and university grants | £0.1m | 0.1% | ↑ |
| local authority initiatives | £0.1m | 0.1% | ↓ |
| heritage conservation | £0.1m | 0.1% | ↓ |
| waste | £0.1m | 0.0% | ↓ |
| assistance to LPAs delivering development control services | £0.0m | 0.0% | ↓ |
| telecommunications | £0.0m | 0.0% | ↔ |
| total | £170.0m | 100.0% | |

**Table 23: Sources of income by sector 2023-24.**

Historically, Residential Development has been the most significant source of annual market income for development-led archaeology, as it has been in 2024 and six of the eight years before that (Table 24). Transport's share of the market has diminished substantially since 2022. Energy remains the second most important market sector as work on renewables – with solar increasing more rapidly than wind - (and nuclear) projects continuing to be significant.

| source of Income | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
|---|---|---|---|---|---|---|---|---|
| residential development | 42% | 36% | 34% | 28% | 34% | 32% | 38% | 59% |
| energy | 6% | 14% | 18% | 7% | 5% | 6% | 22% | 13% |
| commercial and industrial | 18% | 13% | 10% | 17% | 17% | 11% | 8% | 10% |
| water supply | 2% | 1% | 2% | 1% | 2% | 2% | 6% | 8% |
| transport | 6% | 14% | 15% | 34% | 33% | 39% | 15% | 7% |
| education | 1% | 1% | 2% | 1% | 0% | 1% | 2% | 1% |
| research/public archaeology | 1% | 5% | 0% | 0% | 0% | 1% | 2% | 1% |
| minerals | 2% | 5% | 9% | 3% | 2% | 3% | 2% | 1% |
| community projects and HLF | 3% | 4% | 1% | 2% | 1% | 2% | 1% | 1% |
| other | 9% | 0% | 5% | 3% | 1% | 1% | 3% | 0% |
| health | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| grants | 1% | 1% | 1% | 2% | 2% | 1% | 0% | 0% |
| local authority initiatives | 0% | 1% | 0% | 1% | 0% | 0% | 1% | 0% |
| heritage conservation | 1% | 0% | 2% | 1% | 0% | 1% | 1% | 0% |
| waste | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| assistance to LPAs | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| telecommunications | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| leisure, sport, etc. | 5% | 2% | N/A | N/A | N/A | N/A | N/A | N/A |
| retail and town centres | 2% | 3% | N/A | N/A | N/A | N/A | N/A | N/A |

**Table 24: Sources of income by sector from 2016-17 to 2023-24.**

## Forms of Contract

Respondents were asked which Forms of Contract they used; respondents could indicate that they used multiple different forms. Table 25 demonstrates that while some organisations will use externally created forms of contract (NEC or ICE), exchange of letters, own standard T&Cs or client's standard T&Cs are more popular.

| | 2023-24 |
|---|---|
| exchange of letters / emails | 89% |
| your own organisation's standard T&Cs | 67% |
| client's standard T&Cs | 67% |
| bespoke | 33% |
| NEC3 (various - family of contracts) | 19% |
| ICE (short form or alternatives) | 26% |
| none | 4% |
| other | 22% |
| don't know | 0% |

**Table 25: Forms of Contract used in 2023-24** (*n*=27)

Questions about Forms of Contract used are not asked every year; Table 26 presents historic data from the years when this question was asked. No clear patterns of change over time emerge from these figures.

| | 2016-17 | 2017-18 | 2018-19 | 2020-21 | 2023-24 |
|---|---|---|---|---|---|
| exchange of letters / emails | 70% | 74% | 77% | 64% | 89% |
| your own organisation's standard T&Cs | 70% | 70% | 60% | 77% | 67% |
| client's standard T&Cs | 59% | 70% | 54% | 86% | 67% |
| bespoke | 48% | 33% | 29% | 36% | 33% |
| NEC3 (various - family of contracts) | 26% | 37% | 20% | 9% | 19% |
| ICE (short form or alternatives) | 22% | 15% | 14% | 32% | 26% |
| none | 7% | 0% | 11% | 5% | 4% |
| other | 0% | 4% | 3% | 0% | 22% |
| don't know | | | 3% | 0% | 0% |

**Table 26: Forms of Contract used 2016-17 to 2023-24**

## Market Conditions

Respondents were asked if they thought the market for archaeological services would deteriorate in financial year 2024-25. In March 2024, a plurality (but not an absolute majority) considered that the market would improve in the coming year (Table 27). This was the first time there had been an overall positive sentiment about market conditions since 2021 (Figure 3, Table 28) (when the expectations were based on an anticipated reduction of the impact of COVID-19).

| | count | % |
|---|---|---|
| yes - market conditions would deteriorate | 9 | 36% |
| no - market conditions would improve | 12 | 48% |
| don't know | 4 | 16% |
| total | 25 | |

**Table 27: Market conditions expectations in March 2024.**

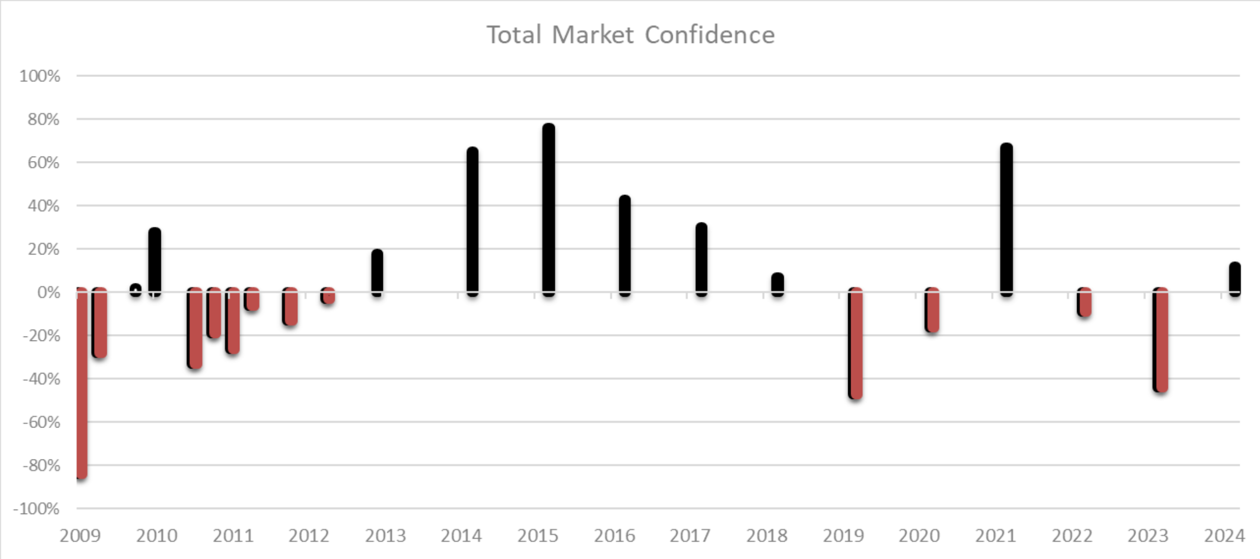



**Figure 3: Market Confidence from April 2009 to March 2024. Total confidence is those that think the market won't deteriorate minus those that think it will.**

Respondents were asked if they had specific comments to accompany their answers to the question, "*on 1st March 2024, did you believe that market conditions would deteriorate over the next 12 months*" and three did.

> *Impending new government and anticipated investment in infrastructure, housing and green energy.*
>
> *Potentially*
>
> *We work generally only for existing clients and demand for our specialist knowledge/experience exceeds the time we have available having semi retired*

| | Apr-09 | Jul-09 | Oct-09 | Jan-10 | Apr-10 | Jul-10 | Oct-10 | Jan-11 |
|---|---|---|---|---|---|---|---|---|
| market will deteriorate | 54% | 42% | 31% | 19% | 29% | 51% | 41% | 46% |
| market will improve / will not deteriorate | 26% | 42% | 33% | 47% | 29% | 18% | 22% | 20% |
| don't know | 19% | 17% | 26% | 34% | 43% | 31% | 28% | 35% |
| total confidence | -28% | 0% | 2% | 28% | 0% | -33% | -19% | -26% |
| | **Apr-11** | **Oct-11** | **Apr-12** | **Dec-12** | **Mar-14** | **Mar-15** | **Mar-16** | **Mar-17** |
| market will deteriorate | 32% | 37% | 32% | 30% | 13% | 8% | 21% | 26% |
| market will improve / will not deteriorate | 26% | 24% | 29% | 48% | 78% | 84% | 64% | 56% |
| don't know | 42% | 39% | 39% | 23% | 9% | 8% | 14% | 19% |
| total confidence | -6% | -13% | -3% | 18% | 65% | 76% | 43% | 30% |
| | **Mar-18** | **Mar-19** | **Mar-20** | **Mar-21** | **Mar-22** | **Mar-23** | **Mar-24** | |
| market will deteriorate | 37% | 68% | 49% | 14% | 50% | 70% | 36% | |
| market will improve / will not deteriorate | 44% | 21% | 33% | 81% | 41% | 26% | 48% | |
| don't know | 19% | 12% | 18% | 5% | 9% | 4% | 16% | |
| total confidence | 7% | -47% | -16% | 67% | -9% | -44% | 12% | |

**Table 28: Market Confidence from April 2009 to March 2024. Total confidence is those that think the market won't deteriorate minus those that think it will.**

## Skills

Respondents were asked whether there were areas where they had lost skills, had hired-in skills or skills areas where they had trained staff. 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.

The levels of skills reported as being lost were remarkably low in 2023-24 (Table 29). Buying in, or cross-hiring, fieldwork staff and expertise was routine practice, although it was reported at a lower frequency than in most previous years of the survey (Table 30, Table 31, Table 32). Hiring conservation expertise was routine, while buying in any other skill areas was relatively less common. In all areas of expertise except artefact or ecofact conservation, the majority of respondents to each question reported that they were training staff in these areas.

| skills lost, hired or trained | lost skills # | lost skills % | hired skills # | hired skills % | trained skills # | trained skills % | n= |
|---|---|---|---|---|---|---|---|
| fieldwork (intrusive or non-intrusive) | 5 | 29% | 9 | 53% | 13 | 76% | 17 |
| post-fieldwork analysis | 2 | 20% | 5 | 50% | 9 | 90% | 10 |
| artefact or ecofact conservation | 0 | 0% | 6 | 86% | 2 | 29% | 7 |
| providing advice to clients or other service users | 0 | 0% | 1 | 14% | 7 | 100% | 7 |
| desk-based or environmental assessment | 1 | 8% | 2 | 17% | 11 | 92% | 12 |
| data management | 0 | 0% | 4 | 44% | 7 | 78% | 9 |
| other | 1 | 17% | 3 | 50% | 4 | 67% | 6 |

**Table 29: Skills that were lost, hired or trained in 2023-24.** *n*=21.

Overall, this means that the sector considered that there were skills gaps in nearly every area (requiring training) and the area where skills shortages (requiring expertise to be hired in) were most acute was in artefact or ecofact conservation.

In all of tables, the assumption is made that those who did not respond did so because they had no losses/need to train staff/buy in skills.

| skills Lost | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
|---|---|---|---|---|---|---|---|---|---|
| fieldwork (intrusive or non-intrusive) | 25% | 27% | 40% | 19% | 5% | 38% | 28% | 58% | 24% |
| post-fieldwork analysis | 17% | 23% | 20% | 6% | 5% | 14% | 0% | 39% | 10% |
| artefact or ecofact conservation | 17% | 15% | 16% | 6% | 2% | 5% | 0% | 15% | 0% |
| providing advice to clients | 8% | 12% | 16% | 6% | 3% | 14% | 6% | 18% | 0% |
| desk-based/environmental assessment | 8% | 8% | 12% | 10% | 4% | 10% | 17% | 38% | 5% |
| data management | 4% | 8% | 0% | 0% | 1% | 5% | 11% | 31% | 0% |
| other | 4% | 0% | 0% | 0% | 1% | 0% | 11% | 38% | 5% |

**Table 30: Skills lost from 2015-16 to 2023-24. Percentages calculated on total responses to all skills questions and not just those to each specific question.**

| skills Bought-in | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
|---|---|---|---|---|---|---|---|---|---|
| fieldwork (intrusive or non-intrusive) | 67% | 62% | 68% | 52% | 39% | 62% | 39% | 53% | 43% |
| post-fieldwork analysis | 58% | 62% | 60% | 42% | 38% | 43% | 50% | 56% | 24% |
| artefact or ecofact conservation | 58% | 46% | 44% | 39% | 43% | 48% | 50% | 77% | 29% |
| desk-based/ environmental assessment | 21% | 12% | 12% | 23% | 5% | 24% | 11% | 27% | 5% |
| providing advice to clients | 25% | 15% | 12% | 13% | 9% | 29% | 22% | 15% | 10% |
| data management | 13% | 12% | 4% | 10% | 3% | 14% | 17% | 15% | 19% |
| other | 4% | 8% | 4% | 16% | 6% | 0% | 22% | 38% | 14% |

**Table 31: Skills bought-in from 2015-16 to 2023-24. Percentages calculated on total responses to all skills questions and not just those to this specific question.**

| training provided | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
|---|---|---|---|---|---|---|---|---|---|
| fieldwork (intrusive or non-intrusive) | 71% | 62% | 72% | 55% | 27% | 57% | 100% | 84% | 62% |
| post-fieldwork analysis | 63% | 62% | 68% | 42% | 26% | 52% | 22% | 78% | 43% |
| artefact or ecofact conservation | 58% | 58% | 68% | 13% | 6% | 29% | 22% | 69% | 10% |
| providing advice to clients | 33% | 38% | 44% | 45% | 25% | 43% | 56% | 91% | 33% |
| desk-based/ environmental assessment | 33% | 35% | 36% | 42% | 34% | 52% | 72% | 85% | 52% |
| data management | 33% | 31% | 28% | 23% | 31% | 28% | 33% | 85% | 33% |
| other | 21% | 15% | 8% | 10% | 10% | 5% | 17% | 75% | 19% |

**Table 32: Skills training provided from 2015-16 to 2023-24. Percentages calculated on total responses to all skills questions and not just those to this specific question.**

## NVQ

The popularity of the NVQ in Archaeological Practice continues to decline. The survey continues to show that only a very small minority of respondents have previously accessed the Level 3 NVQ Certification in Archaeological Practice (Table 33), as has been the case in every iteration of the survey (Table 34). Looking forward, the majority of respondents would not consider supporting a member of staff in the future as was the case in 2023. In every year from 2011 to 2022, a majority of employers felt that they would consider supporting a member of staff to gain an NVQ in the future; this is no longer the case (Figure 5, Table 35).

| NVQ - (Level 3 NVQ Certificate in Archaeological Practice) | yes | no | don't know |
|---|---|---|---|
| have supported a member of staff in the past | 2 | 18 | 0 |
| would consider supporting a member of staff in the future | 7 | 11 | 1 |

**Table 33: NVQ use responses.** n=*20*.

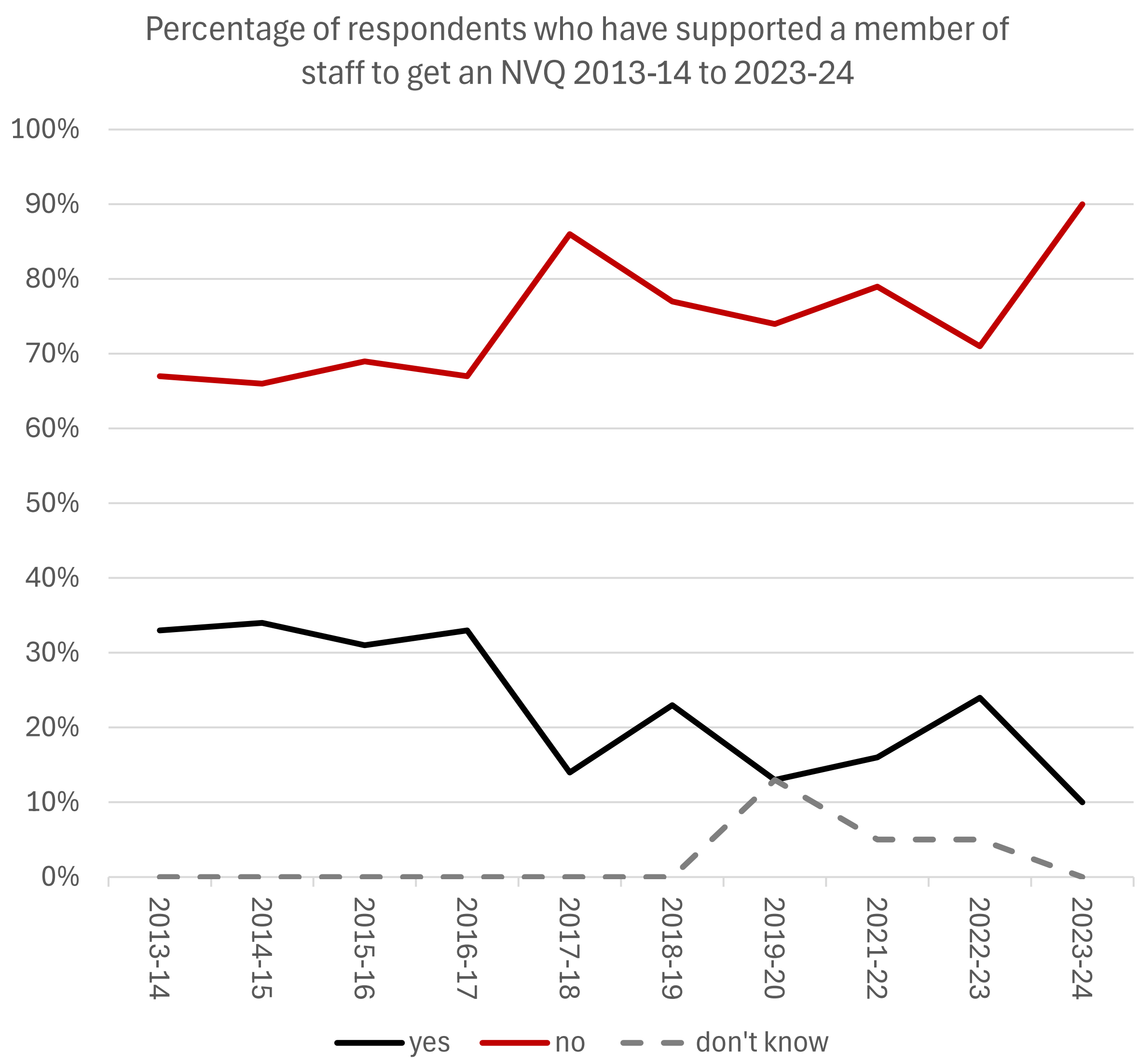



**Figure 4: Percentage of respondents who have supported a member of staff to get an NVQ, 2013-14 to 2023-24.**

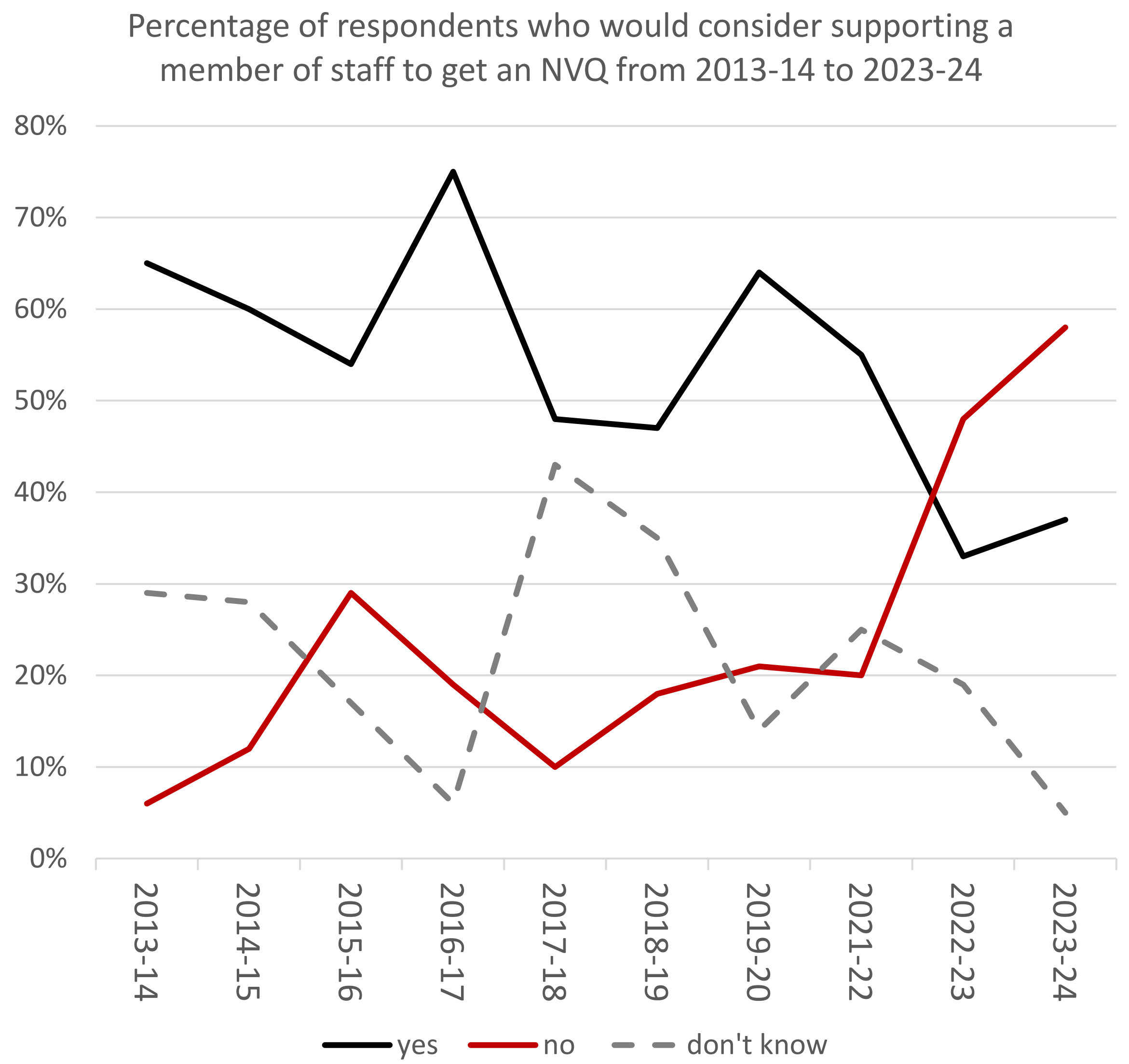



**Figure 5: Percentage of respondents who would consider supporting a member of staff to get an NVQ, 2013-14 to 2023-24.**

| have supported | Oct-11 | Apr-12 | Dec-12 | Dec-12 | Mar-14 | Mar-15 | Mar-16 |
|---|---|---|---|---|---|---|---|
| yes | 14% | 13% | 42% | 21% | 33% | 34% | 31% |
| no | 55% | 87% | 53% | 68% | 67% | 66% | 69% |
| don't know | 31% | 0% | 6% | 11% | 0% | 0% | 0% |
| | **Mar-17** | **Mar-18** | **Mar-19** | **Mar-21** | **Mar-22** | **Mar-23** | **Mar-24** |
| yes | 33% | 14% | 23% | 13% | 16% | 24% | 10% |
| no | 67% | 86% | 77% | 74% | 79% | 71% | 90% |
| don't know | 0% | 0% | 0% | 13% | 5% | 5% | 0% |

**Table 34: Percentage of respondents who have supported a member of staff to get an NVQ from October 2011 to March 2024, excluding 2020.**

| would consider supporting | Oct-11 | Apr-12 | Dec-12 | Dec-12 | Mar-14 | Mar-15 | Mar-16 |
|---|---|---|---|---|---|---|---|
| yes | 56% | 68% | 71% | 49% | 65% | 60% | 54% |
| no | 24% | 14% | 14% | 26% | 6% | 12% | 29% |
| don't know | 21% | 18% | 14% | 24% | 29% | 28% | 17% |
| | **Mar-17** | **Mar-18** | **Mar-19** | **Mar-21** | **Mar-22** | **Mar-23** | **Mar-24** |
| yes | 75% | 48% | 47% | 64% | 55% | 33% | 37% |
| no | 19% | 10% | 18% | 21% | 20% | 48% | 58% |
| don't know | 6% | 43% | 35% | 14% | 25% | 19% | 5% |

**Table 35: Percentage of respondents who would consider supporting a member of staff to get an NVQ from October 2011 to March 2024, excluding 2020.**

## Apprenticeships

Formal Apprenticeships continue fail to gain traction with employers, and so continue to be under-used in development-led archaeology (Table 36). From 2016 to 2022, a majority of respondents reported that they would consider supporting a member of staff to become an Apprentice; but since 2023 this has significantly changed and for the first time, in 2024, a clear majority of respondents would not consider supporting a member of staff to become an Apprentice in the future (Table 37, Figure 7), even though there has been an increased number of respondents doing so (Table 37, Figure 6**Error! Reference source not found.**), though still a small number.

| Apprenticeships | yes | no | don't know |
|---|---|---|---|
| have supported a member of staff in the past | 3 | 17 | 0 |
| would consider supporting a member of staff in the future | 4 | 15 | 0 |

**Table 36: Apprenticeships use responses 2023-24.** n=*20*

| | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
|---|---|---|---|---|---|---|---|---|
| **have supported a member of staff in the past** | | | | | | | | |
| yes | 4% | 11% | 5% | 0% | 7% | 6% | 24% | 15% |
| no | 96% | 89% | 95% | 100% | 93% | 83% | 71% | 85% |
| don't know | 0% | 0% | 0% | 0% | 0% | 11% | 5% | 0% |
| **would consider supporting a member of staff in the future** | | | | | | | | |
| yes | 46% | 71% | 40% | 63% | 60% | 50% | 45% | 21% |
| no | 33% | 12% | 3% | 11% | 20% | 30% | 45% | 79% |
| don't know | 5% | 18% | 9% | 26% | 20% | 20% | 9% | 0% |

**Table 37: Apprenticeships use responses 2015-16 to 2023-24, excluding 2019-2020.**

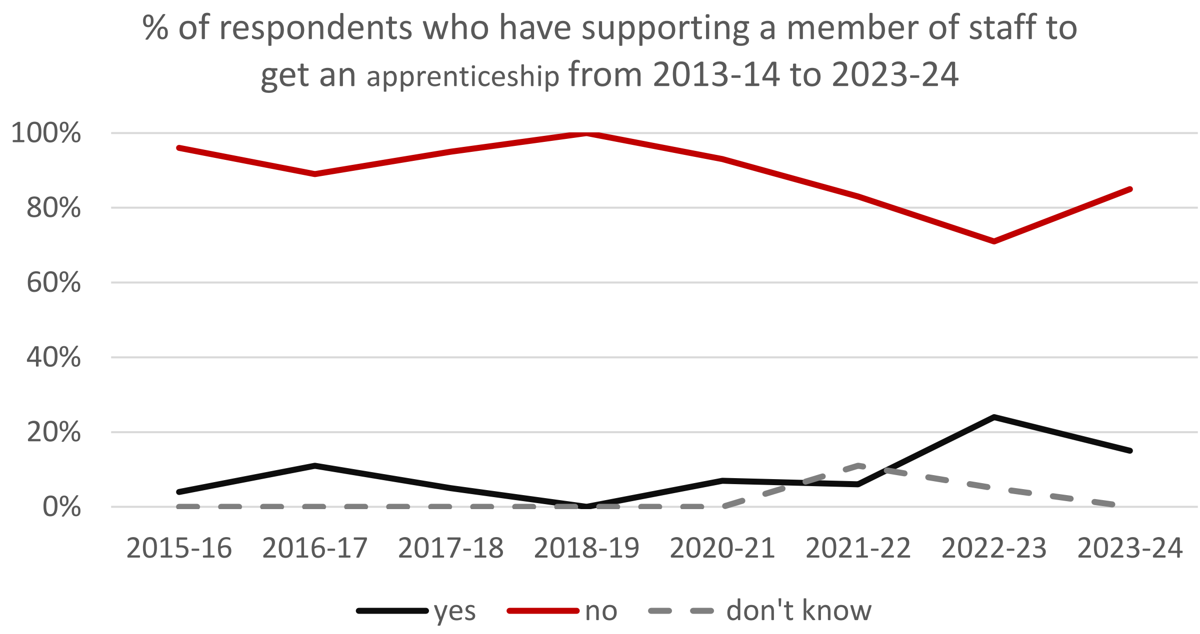



**Figure 6: Percentage of respondents who have supporting a member of staff to undertake an apprenticeship in the future, 2015-16 to 2023-24, excluding 2019-2020.**

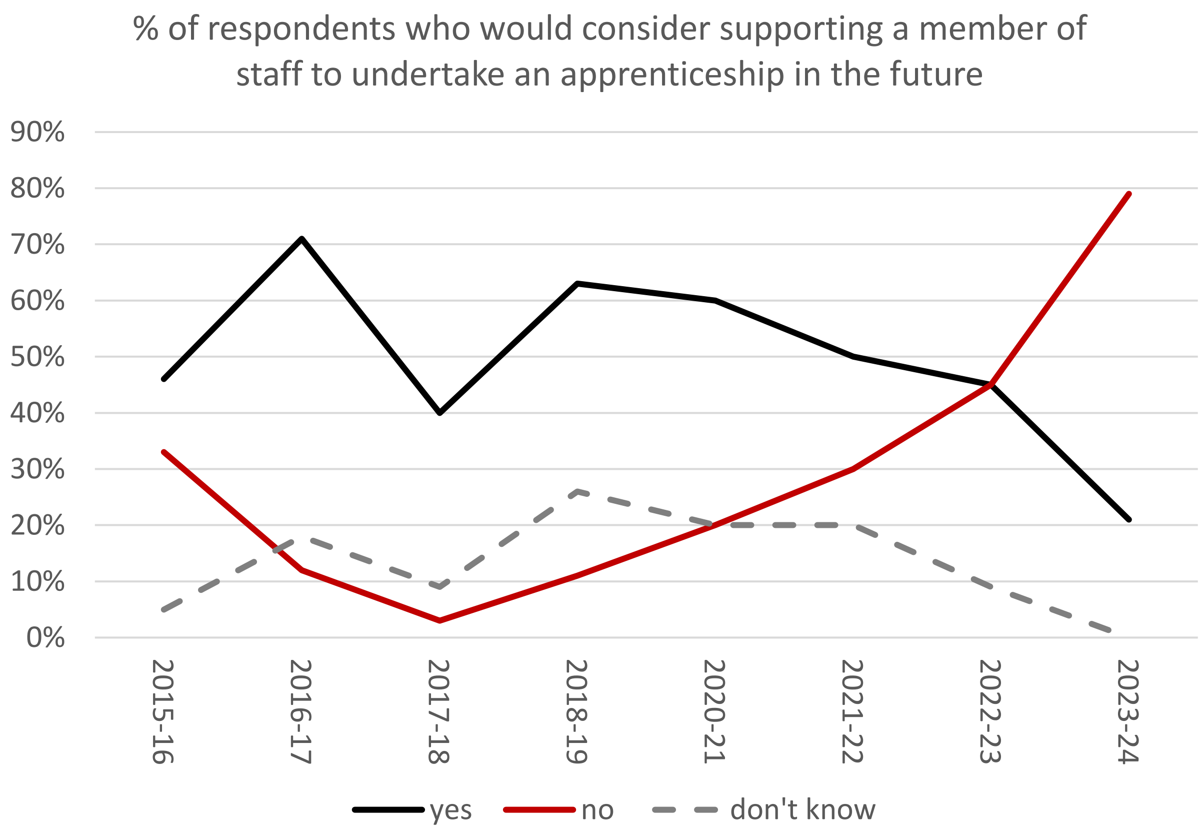



**Figure 7: Percentage of respondents who would consider supporting a member of staff to undertake an apprenticeship in the future, 2015-16 to 2023-24, excluding 2019-2020.**

## NVQ and Apprenticeship Support by Number of Staff

Given the recent drop in support for NVQs and apprenticeships, we investigated this question further to see if there were trends that could shed light on this pattern. One hypothesis was that smaller organisations were less interested, so we examined the resources by the number of staff employed by the respondents for the previous three years and this year (Table 38). The responses by the number of staff mostly followed the individual organisations' responses, except for future consideration of the NVQ, this year, only smaller organisations would not support its future use. For apprenticeships, there appears to be less support, regardless of the size of the organisation. For the NVQs, the picture is less clear, but this may reflect the respondents to this year's survey. We will continue to monitor these trends in the future.

| | 2020-12 | | 2021-22 | | 2022-23 | | 2023-24 | |
|---|---|---|---|---|---|---|---|---|
| | # | % | # | % | # | % | # | % |
| **NVQ has supported a member of staff in the past** | | | | | | | | |
| yes | 260 | 20% | 80 | 7% | 368 | 16% | 326 | 25% |
| no | 1032 | 78% | 980 | 91% | 1954 | 84% | 982 | 75% |
| don't know | 29 | 2% | 16 | 1% | 6 | 0% | 0 | 0% |
| n= | 1320 | | 1076 | | 2328 | | 1308 | |
| **NVQ - would consider supporting a member of staff in the future** | | | | | | | | |
| yes | 518 | 58% | 1059 | 66% | 1026 | 43% | 1160 | 90% |
| no | 303 | 34% | 436 | 27% | 1094 | 46% | 109 | 8% |
| don't know | 75 | 8% | 102 | 6% | 273 | 11% | 25 | 2% |
| n= | 895 | | 1597 | | 2394 | | 1294 | |
| **Apprenticeship - have supported a member of staff in the past** | | | | | | | | |
| yes | 260 | 20% | 264 | 26% | 1068 | 46% | 351 | 27% |
| no | 1060 | 80% | 744 | 72% | 1254 | 54% | 957 | 73% |
| don't know | 0 | 0% | 23 | 2% | 6 | 0% | 0 | 0% |
| n= | 1320 | | 1031 | | 2328 | | 1308 | |
| **Apprenticeship - would consider supporting a member of staff in the future** | | | | | | | | |
| yes | 929 | 87% | 1267 | 79% | 1586 | 65% | 639 | 49% |
| no | 43 | 4% | 232 | 15% | 781 | 32% | 655 | 51% |
| don't know | 92 | 9% | 99 | 6% | 67 | 3% | 0 | 0% |
| n= | 1063 | | 1597 | | 2434 | | 1294 | |

**Table 38: Responses to supporting or future support of NVQs and Apprenticeships by number of FTE staff employed by respondents from 2020-24**

## Perceptions

Respondents were asked about their perceptions about the current market for archaeological services (Table 39). Respondents were almost precisely split in terms of views on whether their heritage teams would grow in the next year or not and were more concerned about non-payment of bills than they had been in 2023. The 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. The majority of respondents "had vacancies that we considered to be hard to fill".

| | 2017-18 | 2018-19 | 2019-20 | 2000-21 | 2021-22 | 2022-23 | 2023-24 |
|---|---|---|---|---|---|---|---|
| **my heritage team will grow within the next 12 months** | | | | | | | |
| strongly agree | 15% | 12% | 12% | 27% | 5% | 13% | 14% |
| agree | 37% | 15% | 26% | 41% | 38% | 35% | 23% |
| unsure | 33% | 29% | 21% | 14% | 29% | 43% | 27% |
| disagree | 7% | 26% | 23% | 23% | 24% | 9% | 18% |
| strongly disagree | 7% | 18% | 18% | 18% | 5% | 0% | 18% |
| **non-payment of bills has been a significant problem for my business** | | | | | | | |
| strongly agree | 0% | 3% | 9% | 9% | 5% | 13% | 13% |
| agree | 67% | 26% | 17% | 18% | 33% | 26% | 39% |
| unsure | 7% | 9% | 6% | 9% | 10% | 17% | 9% |
| disagree | 19% | 44% | 56% | 45% | 38% | 26% | 26% |
| strongly disagree | 7% | 15% | 12% | 18% | 14% | 17% | 13% |
| **a shortage of heritage staff in LPAs is a major constraint on heritage projects** | | | | | | | |
| strongly agree | 30% | 9% | 19% | 23% | 38% | 30% | 13% |
| agree | 33% | 56% | 50% | 32% | 38% | 43% | 39% |
| unsure | 19% | 18% | 19% | 27% | 10% | 17% | 30% |
| disagree | 15% | 12% | 9% | 14% | 14% | 9% | 13% |
| strongly disagree | 4% | 3% | 3% | 5% | 0% | 0% | 4% |
| **we have had vacancies that we considered to be hard to fill** | | | | | | | |
| strongly agree | | | | 32% | 29% | 30% | 32% |
| agree | | | | 45% | 52% | 43% | 23% |
| unsure | | | | 5% | 0% | 4% | 18% |
| disagree | | | | 9% | 14% | 13% | 14% |
| strongly disagree | | | | 9% | 5% | 9% | 14% |

**Table 39: Respondents' perceptions from 2017-18 to 2023-24.** (2024 *n*=22/23/23/22)

## Carbon Reduction and Carbon Management

Respondents were asked about carbon measurement, planning and certification. The majority of the 25 organisations answering this question were not measuring their organisation's carbon footprint (Table 40), in contrast with the returns from 2023 when 50% of respondents were.

| currently measuring carbon footprint | 2022-23 | | 2023-24 | |
|---|---|---|---|---|
| | count | % | count | % |
| yes | 12 | 50% | 9 | 36% |
| no | 12 | 50% | 16 | 64% |

**Table 40: Measuring carbon footprint.**

An increased proportion of respondents did have a carbon reduction plan in place in 2024, although none reported that they had science-based targets in place and approved by SBTi (Table 41).

| | 2022-23 | | 2023-24 | |
|---|---|---|---|---|
| carbon reduction plan | count | % | count | % |
| do not have a carbon reduction plan | 8 | 33% | 9 | 39% |
| development in progress | 12 | 50% | 8 | 35% |
| carbon reduction plan in place | 3 | 13% | 6 | 26% |
| science based targets in place & approved by SBTi | 1 | 4% | 0 | 0% |

**Table 41: Carbon reduction plan.**

There continues to be a high level of unawareness of PAS 2080 in the sector (Table 42).

| | 2022-23 | | 2023-24 | |
|---|---|---|---|---|
| working towards PAS 2080 | count | % | count | % |
| not aware of the standard | 8 | 33% | 9 | 41% |
| considered but not relevant | 4 | 17% | 8 | 36% |
| working towards project specific reduction & reporting | 11 | 46% | 4 | 18% |
| have received PAS 2080 certificate of conformity | 1 | 4% | 1 | 5% |

**Table 42: PAS 2080.**

## Health and Safety

The health and safety results have been reported in a separate FAME document, *Development-led Archaeology Health and Safety Survey 2023-24* [5].

## Further Comments

respondents took advantage of the opportunity to add further comments.

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

- * staff nationalities - some staff are dual nationals
  * figures are approximate due to changes in accountancy systems part-way through FY and do not reflect variations in uplift rates
- I am a freelance consultant so have filled in the answers as best fit as there is (from my experience) a lack of data on the specialist sector. As I said previously, we desparately need to invest in the next generation of specialists.
- Questions very largely irrelevant to us as very small specialist organization....and the woke "carbon" questions prove that you have really lost the plot...we remain proudly carbon based life forms exhaling carbon dioxide for the benefit of plants and planet.
- Staff shortages, lack of graduates etc - this is going to cause enormous problems in the next few years
- We have not provided a response to Question 8 or 9 regarding funding sources and funding sectors, but intend to make updates to our database so that this information can be captured in the future.

[5] https://famearchaeology.co.uk/wp-content/uploads/2025/04/Development-led-Archaeology-Health-and-Safety-Survey-2023-24.pdf

# 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

   *[IF Q1= United Kingdom]*
2. Where in the UK is the head office of your organisation located?
3. Do you have multiple 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 2024?

   *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 2023 - the census date for State of the Archaeological Market 2022-23?

7. How many of your members of staff were working on each of the following types of contract or agreement on 31 March 2024?

| | full-time | part-time |
|---|---|---|
| permanent | | |
| fixed term | | |
| casual | | |

8. Did salaries at your organisation typically rise or fall between April 2023 and March 2024? (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 2024, and by how much do you expect them to have changed in 2024-25?

   by what percentage did your charge-out rates increase (+) or decrease (-) over the year ending 31 March 2024?

   by what percentage do you anticipate that your rates will increase (+) or decrease (-) over the year ending 31 March 2025?

10. between April 2023 and March 2024, how many projects did you bid for, and how many did you win?

    projects bid or tendered for

    projects won or secured

*[IF Q1 = United Kingdom]*
11a. What was your annual financial turnover for work in financial year 2023-24?

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 2024 | |

*[IF Q1 ≠ United Kingdom]*
11b. What was your annual financial turnover for work in 2023?

*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 2024 | |

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

*[IF Q1 = United Kingdom]*
13a. What was your annual profit (or surplus) (in £) in financial year 2023-24?

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

*If you made a loss in 2023-24, please enter a negative figure.*

| | £ |
|---|---|
| your profit or surplus (plus or minus) in the year ending 31 March 2024 | |

*[IF Q1 ≠ United Kingdom]*
13b. What was your annual profit (or surplus) (in €) in 2024?

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

*If you made a loss in 2024 please enter a negative figure.*

| | € |
|---|---|
| your profit or surplus (plus or minus) in the year ending 31 December 2024 | |

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)

*[IF Q1 = United Kingdom]*
15a. please indicate your income in the year ending 31 March 2024 for work in each of the sectors listed. Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc.

| | income 2023-24 |
|---|---|

| | £ |
|---|---|
| **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 | |

*[IF Q1 ≠ United Kingdom]*

15b. please indicate your income in the year ending 31 December 2024 for work in each of the sectors listed. Please enter full numbers of euro, eg 1250000, not decimal fractions of millions etc.

| | income 2024 |
|---|---|
| | € |
| **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 | |

16. At the end of last financial year (4th April 2024 in UK, 31st December 2024 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 (2023-24)?

| | 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 (2023-24)?

| | total numbers of: | | |
|---|---|---|---|
| | non-reportable accidents (no days absence) | near misses | non-reportable accidents resulting in one or more days absence |
| slip, trip or fall | | | |
| injured while handling, lifting or carrying | | | |
| struck by moving object - including vehicles | | | |
| vehicle related incident (including all business usage) | | | |
| musculoskeletal injury sustained over a period of time rather than due to a specific accident, e.g. repetitive strain injury, tendonitis, chronic back pain | | | |
| other | | | |

20. further information about any other accidents

21. how many total days absence from the following categories have you/your staff had in the last financial year (2023-24)?

- injuries
- ill health days
- stress, depression or anxiety
- musculoskeletal disorder

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

23. please tell us how you are tracking them?

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

25. 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 | | | |

26. On 31 March 2024, 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 | | | |

27. On 31 March 2024, had you or were you considering supporting a member of staff to undertake an Apprenticeship in Historic Environment Practice?

*nb: at this time, these Apprenticeships were available in England only. For employers outside England, please answer "would consider supporting a member of staff in the future" to indicate whether you would support staff to complete Apprenticeships if they were available to you*

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

28. At the end of last financial year (31 March 2024 in UK, 31 December 2024 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 | | | | | |

29. Any other comments?

30. do you currently measure your organisation's carbon footprint?

currently measuring organisation's carbon footprint

not currently measuring or

31. do you have an organisational carbon reduction plan?

do not have a carbon reduction plan

development of carbon reduction plan in progress

carbon reduction plan in place

science based targets in place and approved by SBTi

32. are you working towards PAS 2080: Carbon management in buildings and infrastructure certification?

not aware of the standard

considered but not relevant

working towards project specific reduction and reporting

have received PAS 2080 certificate of conformity

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