

Job Losses in Archaeology – April 2010

Report for the Institute for Archaeologists and the Federation of Archaeological Managers and Employers

Kenneth Aitchison
IfA Head of Projects and Professional Development
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Executive Summary

The job-market in commercial archaeology remains volatile. There was a small increase in the number of individuals in work in the three months ending 31 March 2010, but this followed a decline in the previous quarter.

It is estimated that there was a total of 6233 individuals in UK archaeological employment on 1 April 2010. In August 2007, the total was 6865, and so archaeology as a whole is now 9% smaller than it was at that time. 3404 of the individuals in work on 1 April 2010 were working in commercial archaeology, a drop of 15.7% from the August 2007 peak of 4036.

Business confidence fell in April 2010, with companies feeling less confident in their capabilities to retain staff in the forthcoming quarter than they were three months before and markedly less positive about the outlook for the next year.

Companies continue to lose fieldworker skills.

Introduction

In January 2009, the Institute for Archaeologists (IfA), together with FAME (the Federation of Archaeological Managers and Employers) responded to learning that the economic downturn was having serious effects on commercial archaeological practice by conducting a rapid survey of archaeological employers in order to gather statistical data on job losses and business confidence which could be used to support businesses and individual archaeologists.

This survey is the fifth repetition of the January 2009 exercise which has been repeated on a quarterly basis since that date. The reports on those earlier surveys are available on the IfA website at through the [Recession – managing and planning](#) page.

The organisations that were approached represent the majority of employers working in commercial, client-funded archaeology.

Methodology

Archaeological employers that are either Registered Organisations with the Institute for Archaeologists (IfA) or members of the Federation of Archaeological Managers and Employers (FAME) were sent a short questionnaire by email on 18 May 2010, asking for responses by 28 May 2010. The questionnaire replicated the three previous questionnaires. It asked about past and present staffing levels, business confidence in the future and which

skills were being most heavily lost. The full questionnaire is presented at the end of this report.

It may be significant that some of the respondents' views on business confidence and future expectations were coloured by the results of the general election on May 6 and the establishment of the new government on May 12.

As occurred in previous exercises, there was not a precise coincidence between the organisations that have answered each iteration of the questionnaire. This has allowed for overlap and cross-checking, but has also introduced slight, manageable inconsistencies. All figures presented here are comparable with those set out in the earlier reports.

Sample

Questionnaires were sent to 64 IfA Registered Organisations and to the 59 members of FAME. As there is a degree of overlap (with some organisations being both IfA Registered and FAME members), 98 questionnaires were sent in total. As two of these organisations do not employ archaeologists in the UK (and did not reply to the consultation), and two questionnaires went to subsidiary offices of larger organisations, in total 94 organisations were contacted.

Responses

42 completed questionnaires were returned.

One of the returned questionnaires came from an organisation that identified itself as not undertaking commercial archaeological practice, and so that return is excluded from the analysis of job losses, but their responses regarding business confidence are included.

Results: reported job losses

The respondent organisations employed the equivalent of 1,978.6 people at the time of the *Archaeology Labour Market Intelligence Profiling the Profession 2007-08*¹ (LMI) survey in August 2007.

On 1 April 2010, these organisations employed 1,701.02 FTE staff, 14.0% less than they did in August 2007 but an increase of 0.1% since January 2010.

Change from 1 January 2010 to 1 April 2010

More organisations gained staff in this quarter than lost personnel.

Extrapolating from this sample, this represents a net gain of 88 jobs across the entire archaeological profession, equating to an increase over the quarter of 2.7% of commercial archaeological posts or 1.4% of all archaeological posts.

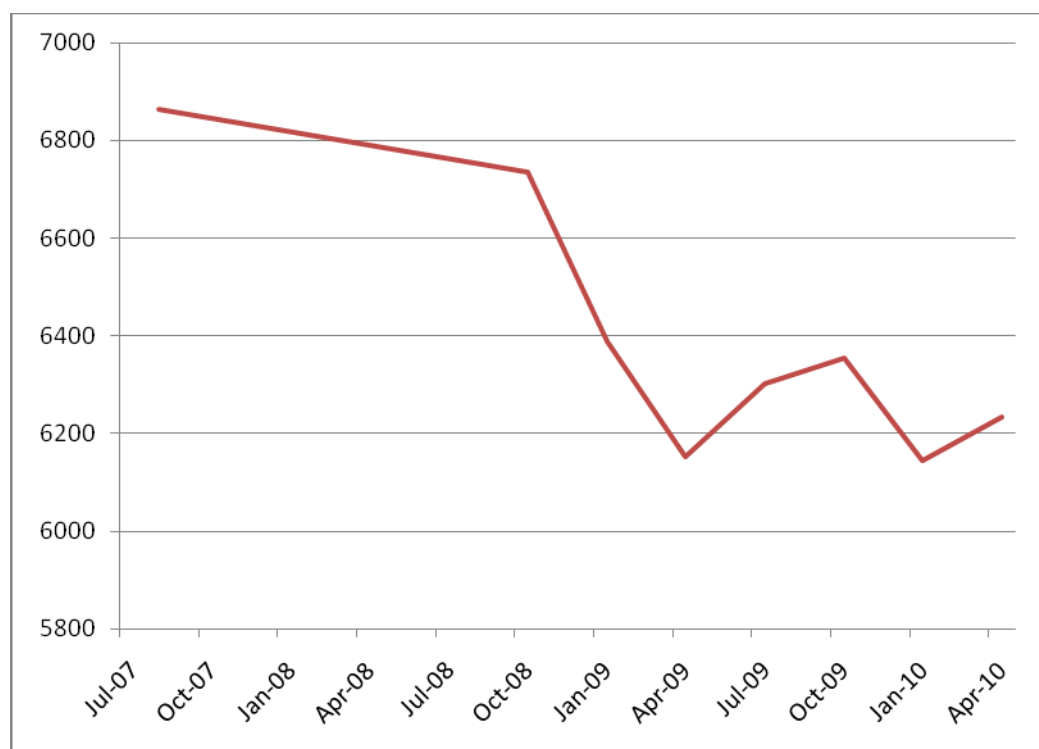
¹ Aitchison, K. & Edwards, R. 2008. *Archaeology Labour Market Intelligence: Profiling the Profession 2007-08*. Reading: Institute for Archaeologists.
http://www.archaeologists.net/modules/icontent/inPages/docs/lmi%200708/Archaeology_LMI_report_colour.pdf

Review: change from 13 August 2007 to 1 April 2010

Using data from the six surveys undertaken, further details become apparent.

There was a modest decline in the number of people employed between August 2007 and October 2008, but then very significant numbers of jobs were lost in the final quarter of 2008 and the first quarter of 2009. Over the two quarters after April 2009, the number of people in archaeological employment stabilised, but the numbers fell again in the final quarter of 2009. With numbers rising again (very modestly) in the first quarter of 2010, there were still approximately 650 less people in archaeological work than at the August 2007 peak. While the number of people in archaeological work has fluctuated over the year since April 2009, this has not involved as marked changes as were experienced in late 2008 and the first quarter of 2009.

	13 Aug 07	01 Oct 08	01 Jan 09	01 Apr 09	01 Jul 09	01 Oct 09	01 Jan 10	01 Apr 10
Commercial Archaeology	4036	3906	3559	3323	3472	3526	3316	3404
Entire Profession	6865	6735	6388	6152	6301	6355	6145	6233



Employment in UK archaeology, August 2007 – April 2010.

Results: anticipation of further losses

The questionnaire asked respondents whether they felt that they would be able to maintain their present numbers of staff over the three months to the end of June 2010 (nb from this point onwards, the responses from the “non-commercial” body that provided information are also incorporated in the data tables and analysis).

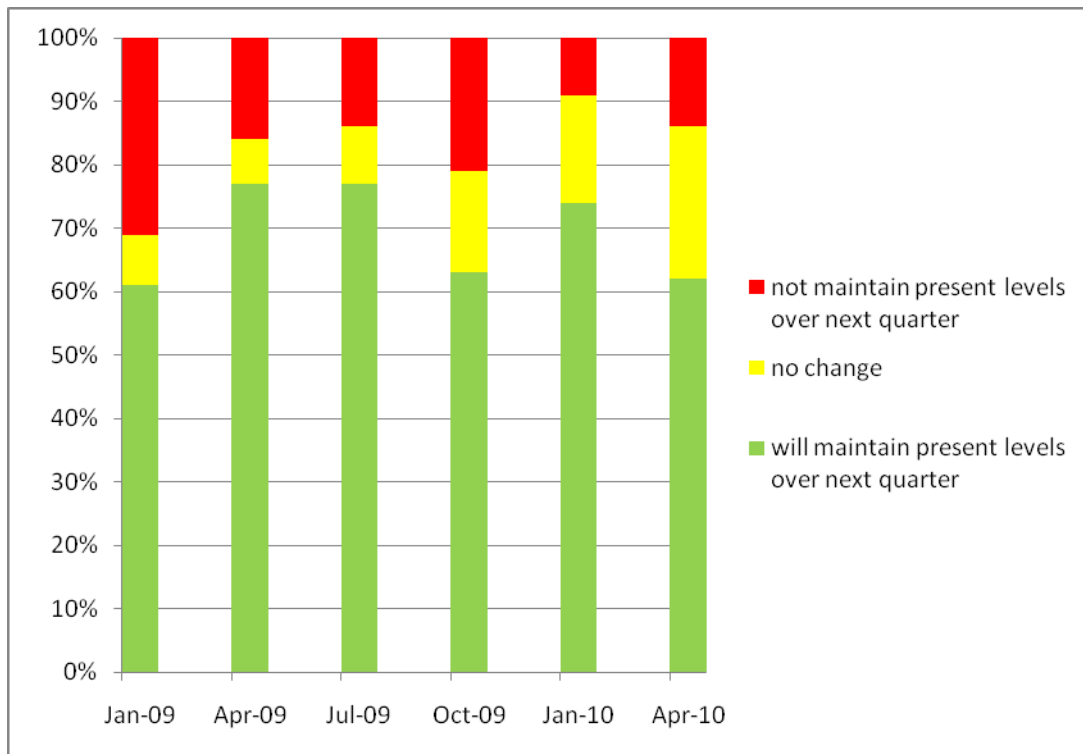
The majority of respondents that expressed a definite view (26 of 39) felt that they would be able to maintain their present staffing levels.

Do you anticipate being able to maintain your present staffing levels over the next three month period (to 30 June 2010)?

	Responses	Number employed on 01/04/2010	Lost staff in previous quarter	No change in previous quarter	Expanded in previous quarter
Yes (will maintain present levels)	26	913	2	13	11
No (will not maintain present levels)	6	592	3	3	0
Don't know	10	302	2	5	3
Total	42	1807	7	21	14

Over time, companies have generally been confident in their abilities to retain staff, but less confident than they in the first half of 2009. Companies are now less confident for the quarter to the end of June 2010 than they were three months before.

	Will maintain present levels over next quarter	Not maintain present levels over next quarter
April 2010	62%	14%
January 2010	74%	9%
October 2009	63%	21%
July 2009	77%	14%
April 2009	77%	16%
January 2009	61%	31%



Anticipation of future staffing levels, January 2009 – April 2010

Results: business confidence

Business confidence has slipped markedly. As of 1 April 2010, as many companies expect the situation to deteriorate as expect that it will not, and several respondents expressed concern about the tendering practices of their competitors.

One respondent commented: “After a shaky start in January and February, due at least in part to the poor weather, business seems to be picking up for us. This year to date we have received and responded to more tender invitations than we have had to this date in the last ten years, and our success rate in tendering has not diminished. Our major problem has been in getting this work started, completed and invoiced.

From contacts with other contractors I get the impression that others in our area are experiencing a similar increase in work levels. One thing that does concern me is that I know there are organisations, some ROs, who are still behaving as if they are in the depths of recession, putting in unrealistically low tenders for work. There is also the issue of organisations, also including ROs, using casual, self-employed staff to minimise their overheads and enable them to charge silly prices. Neither of these phenomena makes it any easier for those of us who are trying to improve wages, conditions, training and standards generally, let alone survive in the present climate. I realise there has been some (belated) deliberation of self-employed ‘staff’ at IfA: perhaps FAME should be addressing the tendering issue.”

Another respondent commented “I think that the incredibly competitive prices that currently dominate the market demonstrate that many organisations are under considerable financial stress and are looking to win work at any margin. This will not be sustainable in the long

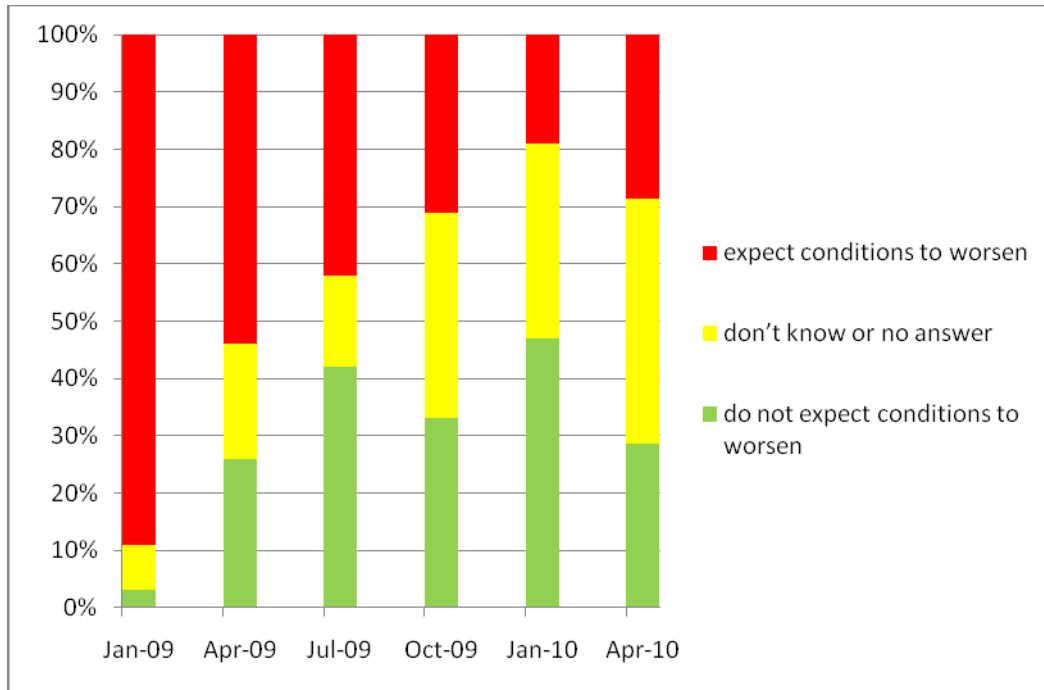
term as the balance sheets of the organisations are eroded and will ultimately fail. For the archaeological market I think the recession is just about to start in earnest and over the next few years we will see a radical restructuring of the UK archaeological market”.

Do you believe that the market conditions will deteriorate further in the next twelve months (from January 2010)?

	Responses	Number of staff employed on 01/04/2010
Yes (market conditions will deteriorate in the next 12 months)	12	645
No (market conditions will not deteriorate)	12	538
Don't know or no answer	18	624
Total	42	1807

Over time, business confidence had been steadily improving until April 2010, but now this is the first quarter when there has been an increase in the proportion of businesses expecting things to get worse (and a concomitant reduction in those expecting things will not deteriorate further).

	Expect conditions to worsen	Do not expect conditions to worsen	Don't know or no answer
April 2010	29%	29%	43%
January 2010	19%	47%	34%
October 2009	31%	33%	36%
July 2009	42%	42%	16%
April 2009	54%	26%	20%
January 2009	89%	3%	8%



Market expectations, January 2009 – April 2010

The majority of respondents expect some archaeological businesses to fail in the next 12 months. In the previous quarter (January 2010), less than 50% of respondents thought this.

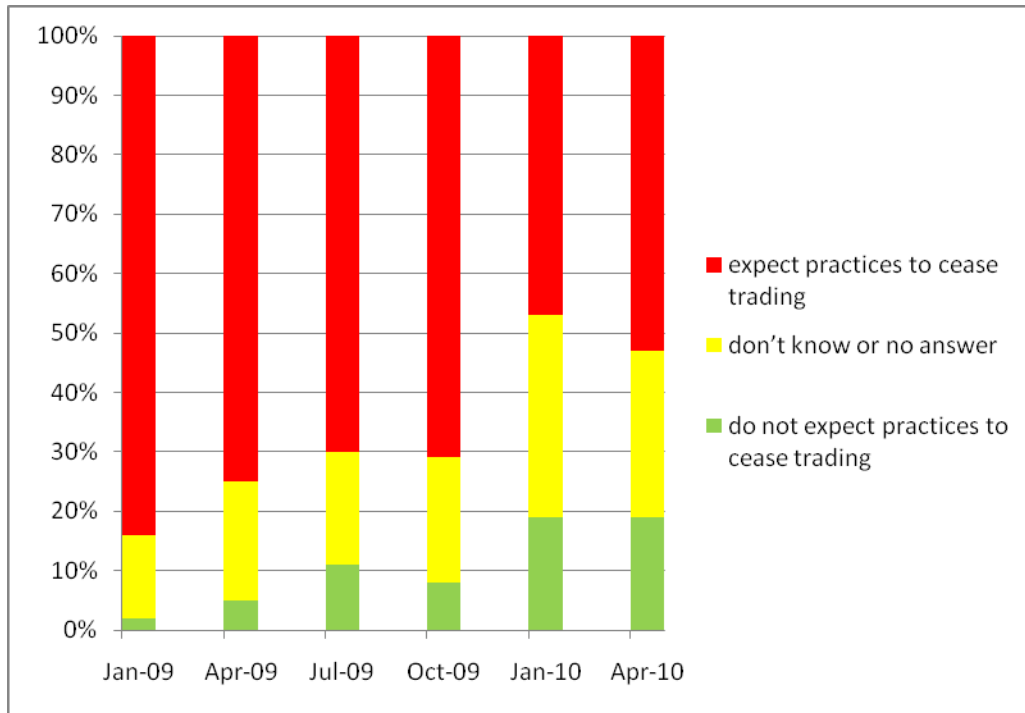
One respondent commented: “Only the robust, properly run and lucky organisations can survive, everyone else will end up in a mess to be re-invented as sole traders or small 2-3 person outfit prone to taking on work that they do not have the capacity to do with all the issues for employment conditions and standards”.

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

	Responses	Number of staff employed on 01/04/2010
Yes (expect practices to cease trading in 12 months from April 2009)	22	1258
No (do not expect any practices to cease trading in 12 months from April 2009)	8	241
Don't know or no answer	12	309
Total	42	1708

Over time, expectations that some businesses will fail have remained at high levels.

	Expect practices to cease trading	Do not expect practices to cease trading
April 2010	53%	19%
January 2010	47%	19%
October 2009	71%	8%
July 2009	70%	11%
April 2009	75%	5%
January 2009	84%	2%



Expectations of business failures, January 2009 – April 2010

Results: skills losses

Respondents were also asked to identify which specific skills areas are being particularly affected. The questionnaire asked them to indicate up to three areas from the shortlist of skill areas used in Aitchison & Edwards 2008 where they felt that their organisation had lost skills during the present crisis. They were asked to mark these 1, 2 and 3 in order of severity (1 being the area where skills have been most severely affected).

The table below grades the responses according firstly to the total number of times a skill area was identified as being lost, and secondarily by the significance that respondents attached to that loss.

	Total	1 (most severely affected)	2 (severely affected)	3 (affected)
Contributing to intrusive investigations (evaluation, excavation) as team members or diggers	14	7	4	3
Conducting (leading or directing) intrusive investigations (evaluation, excavation)	11	4	5	2
Contributing to non-intrusive investigations (geophysical survey) as team members	5	0	3	2
Providing information and advice on the conservation and management of the historic environment	4	2	1	1
Conducting (leading or directing) survey and interpretation of historic buildings	3	2	0	1
Artefact research	3	1	1	1
Contributing to other non-intrusive investigations as team members	3	1	0	2
Conducting (leading or directing) other non-intrusive investigations	2	0	0	2
Conducting (leading or directing) non-intrusive investigations (geophysical survey)	1	1	0	0
Conservation of artefacts or ecofacts	1	0	1	0
Contributing to survey and interpretation of historic buildings as team members	1	0	1	0
Other archaeological skills (<i>please specify</i>) – administration	1	0	1	0
Creating, managing and maintaining Historic Environment Records	1	0	0	1
Other archaeological skills (<i>please specify</i>) – post-ex	1	0	0	1
Desk-based historic environment research including desk-based assessment	0	0	0	0
Ecofact research	0	0	0	0
Historic environment characterisation	0	0	0	0

Skills continue to be lost across almost all professional activities, but as in previous quarters it is the skills that are needed to conduct and contribute to intrusive, excavation projects which are being most notably lost – which repeats the pattern reported in the four previous surveys (January 2010 and April, July and October 2009).

Notably, no organisation reported losing the skills involved in conducting desk-based historic environment research including desk-based assessment, as had been reported fairly regularly in previous surveys.

Future Surveys

IfA will continue to repeat this survey on a quarterly basis, reporting the results on its website and tracking changes in the situation, until further notice.

Questionnaire

Job Losses in Archaeology - April 2010

Dear Colleague,

As we enter a new financial year, and now with a new UK Government, IfA continues to collect information on the current state of archaeological employment.

At the end of 2009, it appeared that the "bounce" that the sector experienced last summer was a temporary phenomenon, and that the numbers in employment as of 1st January 2010 had dropped back to the level of one year before. However, business confidence was improving.

All of the previous reports are available through the IfA website, specifically at [January 09](#), [April 09](#), [July 09](#), [October 09](#) and [January 10](#).

I would like to ask you once again if you would please give up some of your time to answer the same set of questions below.

We now seek information as it applied to your organisation on **1 April 2010**. Please help us to produce as full a picture as possible; as before, your responses are fully confidential and will not be seen by any individual other than myself.

This email has been sent to all IfA Registered Organisations and FAME member organisations.

How many members of staff (FTE) did your organisation have on 1 April 2010?

How many members of staff (FTE) did your organisation have on 1 October 2009?

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

Do you anticipate being able to maintain your present staffing levels over the next three month period (to 30 June 2010)?

Do you believe that the market conditions will deteriorate further over the next 12 months?

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

As well as tracking the key data regarding job losses, in order to help us track which specific skills areas are being particularly affected, and so to help plan for the recovery, please now also indicate up to three areas from the following list where you feel your organisation has

lost skills during the present crisis. Please mark these 1, 2 and 3 in order of severity (1 being the area where skills have been most severely affected). Please try to limit your responses to the **three** areas that you feel have been most seriously affected).

- Conducting (leading or directing) intrusive investigations (evaluation, excavation)
- Contributing to intrusive investigations (evaluation, excavation) as team members or diggers
- Conducting (leading or directing) survey and interpretation of historic buildings
- Contributing to survey and interpretation of historic buildings as team members
- Conducting (leading or directing) non-intrusive investigations (geophysical survey)
- Contributing to non-intrusive investigations (geophysical survey) as team members
- Conducting (leading or directing) other non-intrusive investigations
- Contributing to other non-intrusive investigations as team members
- Desk-based historic environment research including desk-based assessment
- Creating, managing and maintaining Historic Environment Records
- Historic environment characterisation
- Providing information and advice on the conservation and management of the historic environment
- Conservation of artefacts or ecofacts
- Artefact research
- Ecofact research
- Other archaeological skills (please specify)

Please send your responses to me, [Kenneth Aitchison](#), by Friday 28 May 2010.

Your answers will be treated in the strictest confidentiality; while aggregated and extrapolated figures will be provided to FAME and published on the [recession - managing and planning](#) page of the IfA website and elsewhere, I personally will be the only individual who ever sees your separate responses.

The information gathered will continue to be used to see how IfA members, Registered Organisations and the profession as a whole can be supported through this period. We expect to continue to repeat this questionnaire on a quarterly basis until further notice.

Kenneth Aitchison: IfA Head of Projects and Professional Development