

Job Losses in Archaeology – July 2009

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

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4 August 2009

Executive Summary

The current economic situation continues to adversely affect archaeology. The majority of employers surveyed in July 2009 have continued to either lose staff or remain unchanged in staff numbers over the first quarter of 2009-10 (figures to 1 July 2009), although these losses were almost exactly offset by a small number of employers taking on staff in this period. This means that, while technically there has been a small increase in the number of people working, effectively there has been neither a net loss nor a net gain in the total number of people working in archaeology over the period 1 April – 1 July 2009.

However, this can probably not be seen as the end of the downturn. Even those employers who have taken on staff – which are typically linked to specific infrastructure projects – expect this to be a relatively short-term alleviation. It is thus likely to represent a plateau in an ongoing pattern of job losses.

We remain in a position where, since the summer of 2007, approximately 660 jobs have been lost across professional archaeology in the UK. This figure continues to represent 1 in 6 (16.5%) of all commercial archaeological posts, which equates to nearly 10% of all the jobs in professional archaeology that existed in 2007.

While no further business failures leading to practices ceasing trading have been reported, it is known that at least one will cease to trade in the next quarter. An increasing number of businesses are working reduced hours, in several cases with individual members of staff or the whole business working four-day weeks.

The largest organisations (employing over 100 people) have typically been the organisations that have increased their staffing capacities, whereas medium sized and smaller organisations have continued to either lose staff or for staffing levels to remain unchanged.

While some further job losses are anticipated in the quarter to the end of September 2009, the employers of 19% of the staff at all respondent organisations do not expect to be able to maintain current staffing levels. This remains significantly high, although it is a slight reduction on the April 2009 figure, when the employers of 25% of staff at respondents expected to lose workers, and a marked reduction from the January 2009 figure, when the organisations employing 66% of the total number of archaeologists working for respondents expected to lose staff.

Business confidence is slowly improving, but remains poor. As many employers expect the situation to deteriorate further in the coming twelve months as expect it to improve, but most expect more commercial archaeological businesses to cease trading.

Fieldworker skills continue to be lost, in both senior and junior roles. Consultancy (advice provision) skills are also being lost by the sector.

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 second repetition of that January 2009 exercise, following on from a first repetition in April 2009. The reports on those earlier surveys are available on the IfA website at <http://www.archaeologists.net/modules/news/article.php?storyid=354> and <http://www.archaeologists.net/modules/news/article.php?storyid=376>.

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 9 July 2009, asking for responses by 17 July 2009. The questionnaire replicated the April 2009 questionnaire. 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.

As occurred in April, 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

54 completed questionnaires were returned.

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

Results: Job Losses

The respondent organisations employed the equivalent of 2,094 people at the time of the *Archaeology Labour Market Intelligence Profiling the Profession 2007-08* (LMI) survey in August 2007.

On 1 October 2008, they employed 2,005.1 FTE staff, a decline of 4.2% since the LMI survey.

On 1 January 2009, these organisations employed 1,850.6 FTE staff, a reduction of 7.7% over the previous quarter and 11.6% fewer than in August 2007.

On 1 April 2009, these organisations employed 1,794.9 FTE staff, a reduction of 3.0% over the previous quarter, 10.5% over the previous six months and 14.3% since August 2007.

On 1 July 2009, these organisations employer 1,801.4 FTE staff, a net increase of 0.4% over the previous quarter.

Change from 1 April 2009 to 1 July 2009

More organisations lost staff in this quarter than increased staffing numbers. However, the small number that did report an increase in staff took on sufficient numbers of individuals to more than slightly offset the losses elsewhere, meaning that overall respondents reported a net gain of 6.5 staff (0.4%).

Extrapolating from this sample, this will represent a net gain of 12 jobs across the entire archaeological profession, equating to 0.3% of commercial archaeological posts or 0.2% of all archaeological posts.

| Employer size in August 2007 (number of employees) | Total number employed | | | | Change 01/04/09 – 01/07/09 | Change 01/01/09 – 01/04/09 | Change 13/08/07 – 01/01/09 | Sample size |
|--|-----------------------|---------------|----------------|----------------|----------------------------|----------------------------|----------------------------|-------------|
| | 1 July 2009 | 1 April 2009 | 1 January 2009 | 13 August 2007 | | | | |
| 100+ | 688 | 631 | 666 | 738 | +9.0% | -5.3% | -9.8% | 3 |
| 50 – 100 | 524 | 543 | 548 | 725 | -3.5% | -0.9% | -24.4% | 10 |
| 20 – 50 | 370.5 | 386.5 | 381 | 395.5 | -4.1% | +1.4% | -3.7% | 13 |
| - 20 | 218.9 | 234.4 | 255.6 | 235.5 | -6.6% | -8.3% | 8.5% | 27 |
| Total | 1801.4 | 1794.9 | 1850.6 | 2094 | +0.4% | -3.0% | -11.6% | 53 |

This modest increase has been achieved almost entirely at the largest of archaeological employers (those employing over 100 members of staff). Across employers with less than 100 staff, workforces have typically either remained at static levels or reduced.

| Employer size in August 2007 (number of employees) | Change 1 April 09 – 1 July 09 (number of organisations) | | | Change 1 January 09 – 1 April 09 (number of organisations) | | | Change 1 October 08 – 1 January 09 (number of organisations) | | |
|--|---|--------------------------------------|----------------------------|--|--------------------------------------|----------------------------|--|--------------------------------------|----------------------------|
| | Contraction (less employees) | No change (same number of employees) | Expansion (more employees) | Contraction (less employees) | No change (same number of employees) | Expansion (more employees) | Contraction (less employees) | No change (same number of employees) | Expansion (more employees) |
| 100+ | 1 | 0 | 2 | 2 | 1 | 0 | 3 | 0 | 1 |
| 50 – 100 | 5 | 3 | 2 | 4 | 2 | 3 | 7 | 1 | 0 |
| 20 – 50 | 6 | 5 | 2 | 6 | 5 | 2 | 12 | 4 | 1 |
| - 20 | 8 | 17 | 2 | 12 | 17 | 5 | 6 | 25 | 3 |
| Total | 20 | 25 | 8 | 24 | 25 | 10 | 28 | 30 | 5 |

It is also recognised that these increases have largely been in response to government funding for road-building and other infrastructure projects, and this is likely to be a temporary alleviation. One respondent wrote “I think there is a blip of major infrastructure jobs that the government has rushed through to breathe some life into the economy, but it is difficult to see these extending much into 2010 - I think therefore that the [archaeological] economy will falter or become stagnant in 2010”.

Several organisations also responded that they have moved to shorter working hours to reduce the threat of job losses.

Change from 1 January 2009 to 1 April 2009 (reported in April 2009 report)

While most organisations either maintained the same levels of staffing or expanded over the quarter, 40% of organisations did lose staff. This meant that in total there were 97.4 less FTE staff working for the respondent organisations on 1 April 2009 than had been working for them three months previously.

Extrapolating from this sample, it is estimated that 195 archaeological jobs were lost in this quarter, 5.4% of the workforce in commercial archaeology.

This then represents an aggregate loss of 540 jobs over the six months from 1 October 2008, and a total reduction in workforce of 670 people from the August 2007 high. This figure equates to a total loss (since August 2007) of 16.5% of all commercial archaeological posts, equivalent to 9.7% of all posts in professional archaeology.

In the quarter to 1 January 2009, organisations that employed between 50 and 100 people were most seriously affected by job losses as 26.5% of jobs at organisations of that size were lost in that period. In the first quarter of 2009, organisations of all sizes lost staff, with very small organisations (those with less than 20 employees) being particularly heavily affected, as 8.1% of jobs at these organisations were lost. Organisations of this size had been less affected in the previous three months.

Change from 1 October 2008 to 1 January 2009 (reported in January 2009 report)

In total, there were 191.2 less jobs at the respondent organisations on 1 January 2009 than there had been on 1 October 2008, a decline of 8.6% over the quarter, and a cumulative loss of 263.1 jobs (11.8%) since August 2007.

This represents a substantial loss of staff over a very short period of time.

Extrapolating from the survey sample, it is estimated that a total of 345 archaeological jobs will have been lost in the period from 1 October 2008 to 1 January 2009.

On a case-by-case basis, 28 of the 63 responding organisations reported a reduction in staff numbers over the previous quarter, but although this was a minority of organisations they represent the overwhelming majority of employers with more than 20 staff.

Change from August 2007 to 1 October 2008 (reported in January 2009 report)

The census date for the LMI survey was 13 August 2007; this was the most recent reliable benchmark of archaeological employment available. Respondents were asked how many people they employed at that date, and how many people they employed on 1 October 2008, the start of the third quarter of financial year 2008-09.

Overall, there had been a modest decline in the number of people working for the respondent organisations (3.2%) over that period of slightly more than a year.

There is a level of seasonal variation in the numbers of people employed in commercial archaeology. As the 2007 figure relates to a summer census date, the level of decline until the start of October 2008 can be partly explained by this but is unlikely to have been entirely within the normal range of fluctuation.

Anticipation of Further Losses

The questionnaire asked respondents whether they feel they will be able to maintain their present numbers of staff over the three months to the end of September 2009.

The majority of respondents that expressed a definite view (41 of 49) 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 31 March 2009)?

| | Response s | Number employed on 01/07/2009 | Lost staff in previous quarter | No change in previous quarter | Expanded in previous quarter |
|---------------------------------------|---------------|-------------------------------------|---|-------------------------------------|------------------------------------|
| Yes (will maintain present levels) | 41 | 1,400.4 | 14 | 20 | 7 |
| No (will not maintain present levels) | 8 | 327.5 | 2 | 5 | 1 |
| Don't know | 4 | 73.5 | 4 | 0 | 0 |
| Total | 53 | 1,741.4 | 20 | 25 | 8 |

Over time, this remains almost exactly unchanged over the three month period since the previous survey.

| | Maintain present levels over next quarter | Not maintain present levels over next quarter |
|--------------|---|---|
| July 2009 | 83.7% | 16.3% |
| April 2009 | 83.0% | 17.0% |
| January 2009 | 60.8% | 31.2% |

Results: Business Confidence

Business confidence continues to slowly improve; as many organisations consider that the market will not deteriorate in the next 12 months as think that things will get worse. However, the respondents who hold the negative viewpoint are the employers of more archaeologists than those that are not seeing a further deterioration.

Do you believe that the market conditions will deteriorate further in the next twelve months (from April 2009)?

| | Response s | Number of staff employed on 01/01/2009 |
|--|---------------|--|
| Yes (market conditions will deteriorate in the next 12 months) | 22 | 917 |
| No (market conditions will not deteriorate) | 22 | 403.4 |
| Don't know or no answer | 9 | 481 |
| Total | 53 | 1,801.4 |

However, the overwhelming majority of respondents expect further archaeological practices to cease trading. This is reasonable, as it had been widely reported that the University of Manchester Archaeology Unit would cease trading on 31 July 2009.

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

| | Responses | Number of staff employed on 01/04/2009 |
|--|-----------|--|
| Yes (expect practices to cease trading in 12 months from April 2009) | 37 | 1,486.9 |
| No (do not expect any practices to cease trading in 12 months from April 2009) | 6 | 121.5 |
| Don't know or no answer | 10 | 193 |
| Total | 53 | 1,801.4 |

Results: Skills Losses

Respondents were also asked to help 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 2008¹ 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 | 21 | 15 | 4 | 2 |
| Conducting (leading or directing) intrusive investigations (evaluation, excavation) | 16 | 4 | 11 | 1 |
| Artefact research | 9 | 0 | 6 | 3 |
| Providing information and advice on the conservation and management of the historic environment | 6 | 2 | 1 | 3 |
| Desk-based historic environment research including desk-based assessment | 6 | 1 | 2 | 3 |
| Contributing to non-intrusive investigations (geophysical survey) as team members | 5 | 0 | 3 | 2 |
| Conducting (leading or directing) survey and interpretation of historic buildings | 4 | 2 | 2 | 0 |
| Contributing to survey and interpretation of historic buildings as team members | 4 | 1 | 1 | 2 |
| Contributing to other non-intrusive investigations as team members | 3 | 0 | 0 | 3 |
| Conducting (leading or directing) other non-intrusive investigations | 2 | 2 | 0 | 0 |
| Creating, managing and maintaining Historic | 2 | 0 | 2 | 0 |

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

| | | | | |
|---|---|---|---|---|
| Environment Records | | | | |
| Conducting (leading or directing) non-intrusive investigations (geophysical survey) | 1 | 1 | 0 | 0 |
| Other archaeological skills (<i>please specify</i>) – editing and publication | 1 | 1 | 0 | 0 |
| Other archaeological skills (<i>please specify</i>) – education | 1 | 1 | 0 | 0 |
| Conservation of artefacts or ecofacts | 1 | 0 | 1 | 0 |
| Ecofact research | 1 | 0 | 1 | 0 |
| Historic environment characterisation | 1 | 0 | 1 | 0 |
| Other archaeological skills (<i>please specify</i>) – post-ex | 1 | 0 | 0 | 1 |
| Other archaeological skills (<i>please specify</i>) – processing | 1 | 0 | 0 | 1 |

Skills are being lost across the entire professional range, but it is the skills involved in contributing to and conducting intrusive, excavation projects that remain those which are being most seriously impacted upon. This continues and deepens the pattern of reported losses in April 2009.

There has also been a noticeable increase in the number of employers reporting skills losses in “Providing information and advice on the conservation and management of the historic environment”. This is likely to represent the loss of private sector consultancy advice, rather than that within Historic Environment Records, and will be a direct consequence in the reduction in the number of development projects being proposed.

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

Dear Colleague,

As I am sure you will remember, I previously wrote to you six months ago and again three months ago regarding the current economic downturn and the effects this has been having on the archaeological profession. Again, I would like to ask you to give up some of your time to complete a short questionnaire to help IfA, together with FAME, to evaluate the ongoing effects of the recession on our profession.

The reports of the [January](#) and [April](#) surveys are available online; the picture has been gloomy, with net job losses reported in both of the previous quarters. We estimate that, between the summer of 2007 and the end of March 2009, there was a net loss of approximately 670 archaeological jobs. This figure represents 1 in 6 (16.5%) of all commercial archaeological posts, equating to nearly 10% of all the jobs in professional archaeology that existed in 2007.

We now seek information as it applied to your organisation on **1 July 2009**. Please help us to produce as full a picture as possible.

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 July 2009?

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

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). (NB - this question was asked in the April survey, and was not clearly put. 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 17 July 2009.

Your answers will be treated in the strictest confidentiality; while aggregated and extrapolated figures will be provided to FAME and published on the IfA website and elsewhere, I personally will be the only individual who ever sees the organisational 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