Job Losses in Archaeology – October 2010, January 2011

Prepared for

Kate Geary
Standards Development Manager

Institute for Archaeologists

and

Adrian Tindall
Chief Executive

Federation of Archaeological Managers and Employers

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Confidential
Prepared by
Landward Research Ltd

161 Industry Street, Sheffield S6 2WX
tel +44(0)114 281 0904
email enquiries@landward.eu
Registered in England and Wales, number 03749035

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Principal Author(s)

Kenneth Aitchison

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161 Industry Street, Sheffield S6 2WX
tel +44(0)114 281 0904
email enquiries@landward.eu
Registered in England and Wales, number 03749035

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161 Industry Street, Sheffield S6 2WX
tel +44(0)114 281 0904
email enquiries@landward.eu
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1 EXECUTIVE SUMMARY

The number of people in archaeological employment fell considerably over the six months from 1 July 2010 to 1 January 2011.

It is estimated that on 1 January 2011 there were 5827 people in archaeological employment in the United Kingdom, a fall of 7.6% since July 2010.

3189 of these individuals were working in commercial, applied archaeology, a decrease of 13.1% since July 2010. This figure is 21.0% below the August 2007 peak.

There are now fewer people in archaeological employment than at any time since this series of surveys began in January 2009.

The proportion of businesses that expected to be able to maintain their current staff numbers fell sharply in the three months from July to October 2010, but recovered very slightly in the final three months of 2010. The proportion of businesses that expected market conditions to deteriorate has increased in every quarter of 2010. The overwhelming majority of businesses now expect conditions to be worse in the next year than better. The overwhelming majority of respondents expect some archaeological practices to cease trading in the next twelve months.

For the sixth and seventh quarters in succession the skills needed to conduct and contribute to invasive field investigation were reported as being those that were most frequently being lost.

Note: this report addresses data gathered that related to business conditions on 1 October 2010 and 1 January 2011. It also incorporates data on employment in local government archaeological advisory services that had not been previously considered in this series of reports.

161 Industry Street, Sheffield S6 2WX
tel +44(0)114 281 0904
email enquiries@landward.eu
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2 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 report is on the results of the seventh 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 and on the FAME website http://www.famearchaeology.co.uk/news/.

The organisations that were approached represented the majority of employers working in commercial, client-funded applied archaeology. While data have not been sought for this exercise from organisations exclusively providing curatorial advice to local or national government, information has been received from ALGAO which allows for a more accurate estimate of the number of individuals working in local government advisory roles.

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tel +44(0)114 281 0904
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3 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 link to a short questionnaire which closely replicated those used previously by email on 14 January 2011, asking for responses by 28 January 2011.

This asked for data that applied to their organisations on 1 October 2010 and 1 January 2011, relating to 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.

Questionnaires were sent to the list of 65 IfA Registered Organisation Responsible Postholders provided by IfA and to the list of 69 FAME members provided by FAME. There is a significant degree of overlap (with some organisations being both IfA Registered Organisations and FAME members).

Results are extrapolated from the data returned to generate total numbers of individuals estimated to be employed within commercial, applied archaeology.

Data provided by ALGAO have given total numbers for those archaeologists employed to provide advisory services to local authorities. That dataset was collected in May 2010.

The total number of individuals who were working in all other areas of archaeological practice in August 2007, as reported in *Archaeology Labour Market Intelligence Profiling the Profession 2007-08*[1] is added to these numbers to produce overall figures for the entire archaeological profession.

3.1 Responses

46 completed questionnaires were returned.

[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

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4 RESULTS

4.1 Individuals in Archaeological Employment

The data provided by ALGAO shows that 401.14 (FTE) individuals were in archaeological advisory posts with local authorities in England in late 2008 (14 months after the *Archaeology Labour Market Intelligence Profiling the Profession 2007-08* had estimated that there were approximately 576 individuals working in such positions in August 2007. The ALGAO data gathering exercise was much more finely grained than the profession wide survey, and obtained a near complete data set for local government advisory archaeology in England, and thus can be considered to be more reliable than the 2007-8 data (although there will have been some changes in staffing in the intervening 14 months, they are unlikely to represent the entirety of the difference between the figures). Accordingly, the total estimated size of the profession in 2008 has been adjusted downwards by 175, from 6,865 to 6,690.

The most recent repetition of the ALGAO survey, in May 2010, found that the number of individuals working in such positions in England had fallen from 401.14 to 385.25 FTE, meaning that the best estimates for the total size of the profession for the series of job loss surveys are further adjusted from that date onwards.

All figures presented here have now taken these into account; these data had not been considered in previous iterations of this survey.

The respondent organisations to this current survey employed 1723.98 (FTE) individuals on 1 October 2010 and then 1675.98 (FTE) individuals on 1 January 2011. The same organisations employed 2050.01 (FTE) individuals in August 2007 at the time of the *Archaeology Labour Market Intelligence Profiling the Profession 2007-08* survey, a reduction of 15.9% over the period from August 2007 to October 2010 and of 18.2% over the period from August 2007 to January 2011.

Since the previous survey, in July 2010, the total number of people that they employed had fallen by 3.5% over the three months to October and by a further 2.8% over the period to January 2011.

Extrapolating from this sample and in comparison with previous results (recalculated to use updated ALGAO figures), this represents a net loss of 336 jobs across the entire archaeological profession in the third quarter of 2010, and a further net loss of 144 in the final quarter, equating to decreases over the two quarters of 9.2% and 4.3% of commercial archaeological posts, or 5.3% and 2.4% of all archaeological posts.

Larger organisations have been more likely to lose staff than smaller businesses.

It is estimated that on 1 January 2011 there were 5827 people in archaeological employment in the United Kingdom, 3189 of whom worked in applied, commercial archaeology.

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4.2 Change Over Time

Using data from the eight quarterly surveys undertaken to date, 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 following April 2009, the number of people in archaeological employment stabilised, but the numbers fell again in the final quarter of 2009. A modest rise in the number of people working in the first quarter of 2010 was followed by a more substantial increase in the second quarter, which represented the largest quarterly increase since this series of reports began. The numbers in employment fell significantly in the third quarter of 2010, and continued to fall in the final quarter.

At the start of January 2011, there were fewer people in archaeological employment than at any time since the series of surveys began, approximately 863 fewer people in archaeological work than at the August 2007 peak.

	Aug 07	Oct 08	Jan 09	Apr 09	Jul 09	Oct 09	Jan 10	Apr 10	Jul 10	Oct 10	Jan 11
Commercial Archaeology	4036	3906	3561	3323	3472	3526	3270	3404	3669	3333	3189
Entire Profession	6690	6560	6215	5977	6126	6180	5924	6058	6307	5971	5827

Employment in UK archaeology, August 2007 – January 2011

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tel +44(0)114 281 0904
email enquiries@landward.eu

4.3 Business Confidence

The questionnaire asked three questions relating to business confidence, regarding staff retention, opinion on the future condition of the archaeological market, and whether the respondents expected any businesses failures in the sector.

Overall confidence is declining under all three measures, after all had slowly been showing signs of improvement until the start of 2010.

4.3.1 Maintenance of Staffing Levels

The questionnaire asked respondents firstly whether, on 1 October 2010, they felt that they would be able to maintain their then current staff numbers over the three months to the end of 2010, and then asked whether they felt they would be able to maintain their staff numbers on 1 January 2011 over the next three months (to the end of March 2011).

In October 2010, the overwhelming majority of respondents that expressed a definite view (33 of 40) felt that they would be able to maintain their present staffing levels. However, the group that expected that they would not be able to retain their then current staff levels included several of the larger employers, and so those that expected to maintain staff levels were typically smaller employers.

By January 2011, a significant majority of respondents continued to expect to maintain their staff levels, but again those organisations that expect to lose staff in the next three months are typically larger than those that do not expect losses.

On 1 October 2010, did you anticipate being able to maintain your present staffing levels over the next three month period (to 31 December 2010)?

	Responses	Number employed on 01/10/2010	Lost staff in previous quarter	No change in previous quarter	Expanded in previous quarter
Yes (would maintain then current levels)	33	921.88	5	18	11
No (would not maintain then current levels)	7	563	6	1	0
Don’t know	6	239.1	0	3	3
Total	46	1723.98	11	22	14

Do you now anticipate being able to maintain your present staffing levels over the next three month period (to 31 March 2011)?

	Responses	Number employed on 01/01/2011	Lost staff in previous quarter	No change in previous quarter	Expanded in previous quarter
Yes (will maintain present levels)	31	1096.98	8	20	3
No (will not maintain present levels)	5	296	3	2	0
Don’t know	10	283	5	3	2
Total	46	1675.98	16	25	5

161 Industry Street, Sheffield S6 2WX
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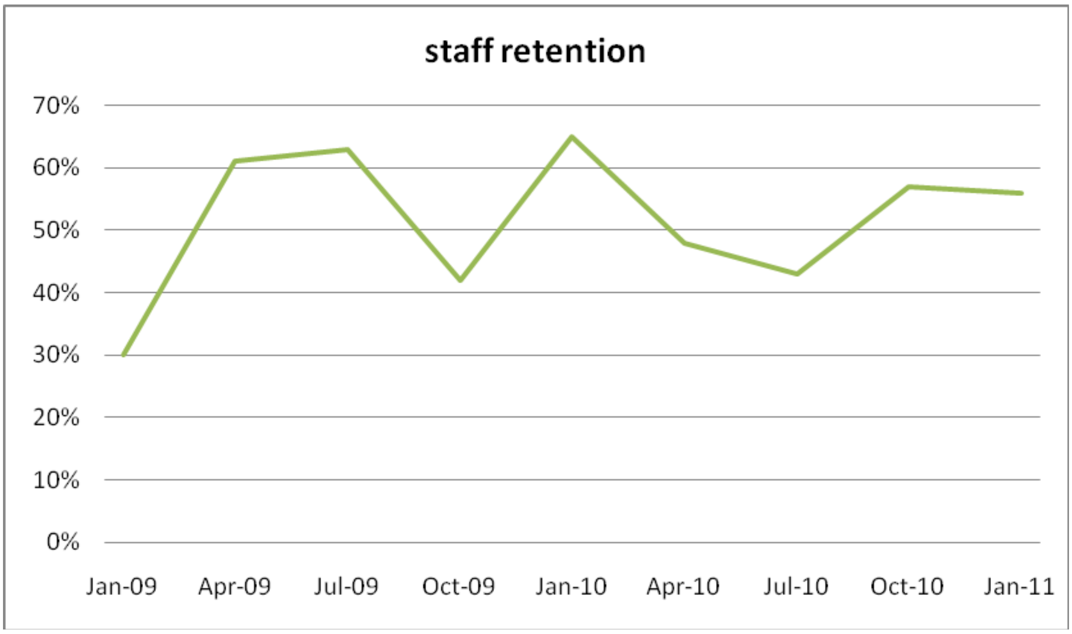
Over time, companies have generally been confident in their abilities to retain staff, even in periods when the profession as a whole has been losing staff numbers.

	Will maintain present levels over next quarter	Will not maintain present levels over next quarter
January 2011	67%	11%
October 2010	72%	15%
July 2010	67%	24%
April 2010	62%	14%
January 2010	74%	9%
October 2009	63%	21%
July 2009	77%	14%
April 2009	77%	16%
January 2009	61%	31%

Graphing the total number of positive responses less the number of negative responses as a percentage of the total number of responses received (where if every response was positive the result would be 100%, and if every response was negative the result would be -100%) presents more legible results.



Over time, respondents have generally been confident of being able to maintain staffing levels. This fell in the first two quarters of 2010, but recovered slightly towards the end of the year.

161 Industry Street, Sheffield S6 2WX
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4.3.2 Future Situation

Respondents were also asked for their views on whether the market would deteriorate or not over the next year. They were asked this question both in retrospect, seeking the views that they remembered having on 1 October 2010, and relating to the current situation, asking for their views on 1 January 2011.

Did you believe that the market conditions would deteriorate further in the twelve months from October 2010?

	Responses	Number of staff employed on 01/10/2010
Yes (market conditions will deteriorate in the next 12 months)	23	954.98
No (market conditions will not deteriorate)	10	303
Don't know or no answer	13	466
Total	46	1723.98

Do you believe that the market conditions will deteriorate further in the next twelve months (from January 2011)?

	Responses	Number of staff employed on 01/01/2011
Yes (market conditions will deteriorate in the next 12 months)	21	809.48
No (market conditions will not deteriorate)	9	281
Don't know or no answer	16	585.5
Total	46	1675.98

The majority of businesses expected the market to deteriorate over the year from 1 October 2010 and also from 1 January 2011.

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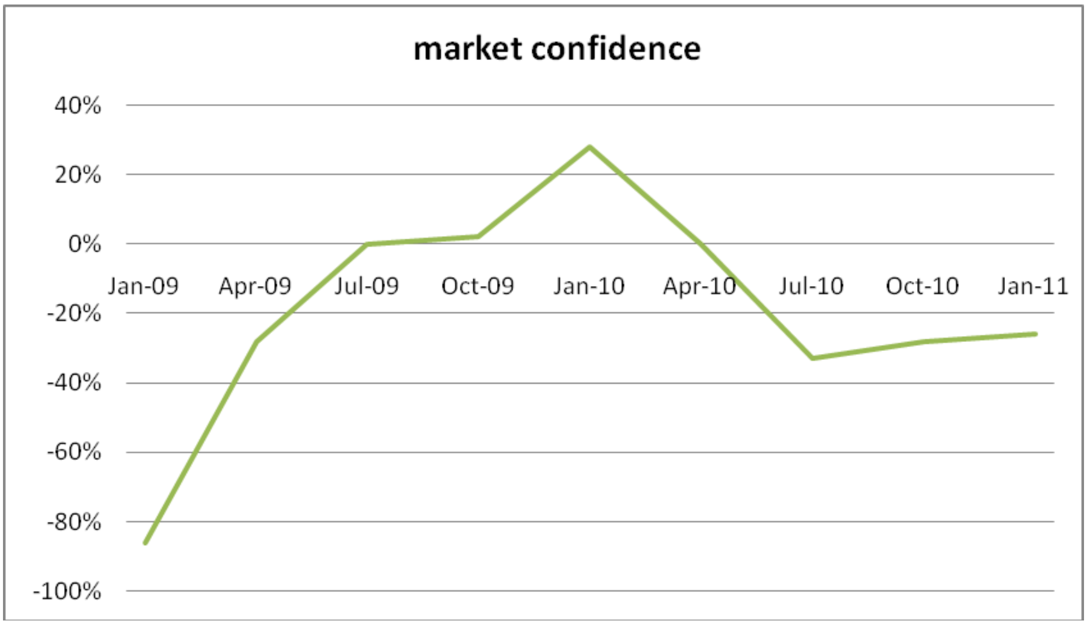
Over time, responses to this question had suggested that feelings were becoming more positive until the April 2010 survey, which reported a reduction in confidence, which was reinforced in July 2010. Subsequently, attitudes have softened slightly, but more employers still expect conditions to worsen than to get better.

	Expect conditions to worsen	Do not expect conditions to worsen	Don't know or no answer
January 2011	46%	20%	35%
October 2010	50%	22%	28%
July 2010	51%	18%	31%
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%

As above, graphing the number of responses with a positive sentiment (the market will not deteriorate) less the number of negative responses (the market will deteriorate) as a percentage of the total number of responses received (where if every response was positive the result would be 100%, and if every response was negative the result would be -100%) presents more legible results.



This graph demonstrates very clearly that business confidence in future market conditions had been steadily improving until the beginning of 2010, but has shifted significantly towards the negative since that point, with a slight improvement (but still an overall negative level of confidence) in the second half of 2010.

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4.3.3 Business Failures

The respondents were also asked if they anticipated any archaeological businesses to fail and cease trading in the twelve months from 1 October 2010 and from 1 January 2011.

On 1 October 2010, did you expect any archaeological practices to cease trading in the next 12 months?

	Responses	Number of staff employed on 01/10/2010
Yes (expect practices to cease trading in 12 months from October 2010)	26	985.9
No (do not expect any practices to cease trading in 12 months from October 2010)	3	38
Don't know or no answer	17	700.08
Total	46	1723.98

On 1 January 2011, do you expect any archaeological practices to cease trading in the next 12 months?

	Responses	Number of staff employed on 01/01/2011
Yes (expect practices to cease trading in 12 months from January 2011)	28	1111.98
No (do not expect any practices to cease trading in 12 months from January 2011)	2	10
Don't know or no answer	16	554
Total	46	1675.98

Over time, respondents have had a steadily high expectation that businesses will fail in the forthcoming 12 months. Every survey has produced results that suggest considerably more respondents expected businesses to fail than did not.

	Expect practices to cease trading	Do not expect practices to cease trading	Don't know or no answer
January 2011	61%	4%	35%
October 2010	57%	7%	37%
July 2010	56%	9%	36%
April 2010	53%	19%	18%
January 2010	47%	19%	34%
October 2009	71%	8%	21%
July 2009	70%	11%	19%
April 2009	75%	5%	20%
January 2009	84%	2%	14%

The percentage of respondents that expect businesses to fail has continued to rise in the final six months of 2010, and the percentage that does not expect this to happen has also fallen.

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As with the two datasets above, graphing the number of responses with a positive sentiment (practices will not cease trading) less the number of negative responses (practices will cease trading) as a percentage of the total number of responses received (where if every response was positive the result would be 100%, and if every response was negative the result would be -100%) presents more legible results.

At no point have more respondents expected positive outcomes than negative, although overall opinion had been generally ameliorating until the January 2010 survey. Since then, attitudes have become more and more pessimistic with each successive survey.

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4.4 Skills Lost

Respondents were also asked to identify which specific skills areas were 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. This iteration of the survey did not ask the respondents to grade the relative severity of the skills losses (as had been done in previous iterations).

The table below grades the responses by the total number of times a skill area was identified as being lost.

	Total
Contributing to intrusive investigations (evaluation, excavation) as team members or diggers	13
Conducting (leading or directing) intrusive investigations (evaluation, excavation)	12
Artefact research	6
Contributing to non-intrusive investigations (geophysical survey) as team members	6
Desk-based historic environment research including desk-based assessment	5
Conducting (leading or directing) survey and interpretation of historic buildings	3
Conservation of artefacts or ecofacts	3
Contributing to other non-intrusive investigations as team members	2
Contributing to survey and interpretation of historic buildings as team members	2
Creating, managing and maintaining Historic Environment Records	2
Ecofact research	2
Providing information and advice on the conservation and management of the historic environment	2
Conducting (leading or directing) non-intrusive investigations (geophysical survey)	1
Conducting (leading or directing) other non-intrusive investigations	1
Historic environment characterisation	1
Other archaeological skills (*please specify*)	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 six previous surveys (since April 2009).

The results for January 2011 identify an increased recognition of artefact and ecofact research and conservation skills as being lost.

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5 FUTURE SURVEYS

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

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6 RESPONDENTS' COMMENTS

Below, comments from respondents are reproduced verbatim (except where organisational names have been suppressed). They have been grouped under recurrent themes.

6.1 Recruitment and Staffing

Although relatively busy with slightly reduced numbers we have not yet been confident enough to recruit to any of the vacant positions.

It is harder to predict short term staff levels with the uncertainty that developers seem to have even on projects already awarded to us. In a lot of cases clients expect almost instant (if not immediate) responses to the requirement for staff to be provided.

Please note that our figures show a significant reduction from the summer of 2010 as a result of a couple of very major projects coming to an end. [This organisation] has also had a round of redundancies, as (like most of our competitors) we have had to reduce our scale to the new reduced demand for archaeological services. We were somewhat atypical of many in the sector in that our involvement in a small number of big schemes kept our numbers high throughout 2009 and most of 2010. We anticipate being able to maintain our size at about two-thirds of our peak and indeed imagine that we might see an increase in our staff numbers over the next couple of months.

People are bound to leave the industry if they can't make a decent living.

We are currently going through a redundancy process, which will kick in in April 2011. So although we will maintain our current staff numbers until April, after that date we expect have 4/5 fewer staff.

I do not view our staffing expansion as a significant market recovery, more securing specific clients / projects while at the same time other companies struggle or restructure.

6.2 The State and Future of the Market

The market remains highly volatile, there is immense pressure, particularly from archaeological consultants, to negotiate prices down in order to secure work, and although we are increasingly involved in large developments at the LDF or initial pre-planning stages it is extremely difficult to predict or plan resourcing levels. This will presumably lead to a much more fluid labour market with people and organisations trying to patch together small scale work in between fewer larger projects. One imagines that most of the few remaining *local authority 'units' will cease trading either through externalisation or, if that fails, closure.*

Following the disaster that was 2009, last year was a particularly good one for [this company]. Indications for 2011 are encouraging at our end of the market, which is primarily concerned with small to medium-scale projects.

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Particular concerns at present are the effect of local government cutbacks on archaeological curators (increased charges: even lower efficiency), and the current tendency of certain contractors to attempt to establish 'regional' offices in areas already well-served by contracting units.

It would appear that a number of organisations are positioning themselves ready for a return to significant growth - opening new offices, etc. Is this an indicator that an upturn is soon to happen?

I think, though, that it is still very difficult to read the market and we have yet to see the full impact of austerity measures in terms of the regulatory framework and its wider impact on the economy. It could be an interesting 2011!

Still a fragile market with stagnant house prices in the Midlands. Some encouraging signs but a slow recovery likely with uncertainty over whether planning archaeologists survive the Local authority cuts and whether a de-regulating government introduces weaker new planning guidance to replace PPS5.

Overall the capacity within the commercial archaeology sector in Scotland continues to reduce, so individual companies can expand or improve their position even though overall the market may be relatively level.

We do not expect reduction in staffing by April 2011 but do expect some reduction after that due to local authority cutbacks. In the longer term the reduced grant funding available from English Heritage is regarded as a risk which may have an impact on staffing levels.

6.3 Competition

In addition to weakness of the development market we are also finding that competition is increasingly fierce. Prices for archaeological commissions are being driven downwards, to a point where I begin to wonder whether the contracts are viable (profit-making or doing justice to the archaeology). There is an increasing move away from curators providing specifications for work and an increase in contractors being asked to prepare them - a retrograde step in my view. Add to this, moves on the part of the government to change the planning system by reducing the powers of county and local authority planning committee's to place conditions on applications, and the situation grows ever more difficult for us all. Job losses with RAOs has increased the numbers of lower to middle ranking archaeologists seeking to set up on their own or as small consortia. With lower overheads, none of the responsibilities of RAOs, and given that clients are seeking lowest cost, life grows increasingly difficult for archaeological companies in general.

Our biggest concern is that some contracting units continue to take massive risks to win work. Those with deep pockets are able to risk their reserves (often charitable reserves) and can afford to incur losses. But the funding of cheap tenders can only perpetuate instability and keep salaries down.

6.4 Comments on the Questionnaire

I think there is need for research into the availability of archaeologists within the workforce for when there is a significant upturn in construction; tracking at some level regional/national variation in company confidence would also be useful (I appreciate difficult when so many national companies) *[response from report author – unfortunately, given the relatively small size of the data population (typically 40 to 50 respondents) and the fact that many companies have several offices, this is unfortunately not feasible at present].*

We are now sitting at a higher staffing level with a better skills base than when we entered the recession. I think you need an option in your skills lost page for 'no problem' or 'improved position' [this will be included in future iterations of the survey].

What about taking people on? *[rather than introducing a new question, this can simply be addressed by recording an increased number of staff. Also see response above].*

Shouldn't the scope of this survey now be widened to 'historic environment'? [data from ALGAO have been included in this report – the author, IfA, FAME and ALGAO are discussing what further enhancements could be made to the scope of the survey].

The new on-line submission form is very nice but there is no mechanism for us to keep the details of our submission as we have done in the past. This has allowed us to track our responses and makes future submissions easier. Any thoughts? [*for future iterations of the survey, respondents will be able to contact Landward Research to obtain data they have previously supplied*].

It would be useful to categorise organisations by numbers of staff and find out a bit more about level of fluctuations in staff numbers e.g., I imagine that on a good day someone filling in the questionnaire may have 20 staff, a week later they may only have 3. Average staff numbers show many employment contracts issued would be a useful statistic. There is a vast difference between a smaller but more stable market supporting organisations who are able to offer smaller numbers of employees relatively long-term contracts and one where organisations are fluctuating widely ['average staff numbers' will be difficult to introduce as an alternative to the current 'snapshot' approach, which produces reliable time-series datasets. The possibility of introducing an exploration of fluctuations within organisational staff numbers will be explored ahead of the next iteration of the survey].

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7 QUESTIONNAIRE

Job Losses in Archaeology, IfA and FAME consultation - October 2010 and January 2011

Dear Colleague,

IfA and FAME wish to continue to gather data on the state of the labour market in commercial archaeology, and so I would once again like to invite you to please complete the questionnaire below. This work is now being carried out by Landward Research Ltd on behalf of IfA and FAME.

Over the last two years, the situation has been volatile; the worst quarter for job losses was the final three months of 2008, and since then there have been quarterly fluctuations in the total numbers of people in archaeological employment. Over the first half of 2010, there was an increase in the number of working archaeologists, but business confidence was deteriorating.

All of the quarterly reports have been published by the IfA at http://www.archaeologists.net/profession/recession and in the members' area of the FAME website http://www.famearchaeology.co.uk/ The most recent report (for July 2010) is available at http://www.archaeologists.net/profession/recession, with a news story at http://www.famearchaeology.co.uk/news/

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

We now seek information as it applied to your organisation both on 1 October 2010 and 1 January 2011. 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.

Please complete the form by 28 January 2011.

Kenneth Aitchison

Executive Director Landward Research Ltd

*Required

Company Name *

please add your company's name to avoid duplicate entries being made

Your email address *

Please provide an email address where you can be contacted in the event of any queries

161 Industry Street, Sheffield S6 2WX
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Staff Numbers

How many members of staff (FTE) did your organisation have on 1 January 2011?

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

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

Business Confidence

On 1 October 2010, did you anticipate being able to maintain your then staffing levels over the next three month period (to 1 January 2011)? please note this question is retrospective, and not asking about your current opinions

- don't know
- yes
- no

Do you now, as of 1 January 2011, anticipate being able to maintain your current staffing levels over the next three month period (to 1 April 2011)?

- don't know
- yes
- no

On 1 October 2010, did you believe that the market conditions would deteriorate further over the following 12 months (to 30 September 2011)? please note this question is retrospective, and not asking about your current opinions

- don't know
- yes
- no

Do you now believe that the market conditions will deteriorate further over the next 12 months (to 31 December 2011)?

- don't know
- yes
- no

On 1 October 2010, did you expect any archaeological practices would cease trading over the following 12 months (to 30 September 2011)? please note this question is retrospective, and not asking about your current opinions

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- don't know
- yes
- no

Do you now expect any archaeological practices to cease trading over the next 12 months (to 31 December 2011)?

- don't know
- yes
- no

Skills Losses

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 the areas where you feel your organisation has lost skills during the present crisis.

Please mark up to three areas which 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

161 Industry Street, Sheffield S6 2WX
tel +44(0)114 281 0904
email enquiries@landward.eu
Registered in England and Wales, number 03749035

Further Comments

Comments or suggestions for future research. If you have any further comments on your responses, or on the state of commercial archaeology in general, please let us know. FAME and IfA would also particularly value respondents' views on the type of market information you would most value in future surveys

Please complete your response by Friday 28 January 2011.

Thank you for providing this information. Your answers will be treated in the strictest confidence. kenneth.aitchison@landward.eu