

## **Job Losses in Archaeology – January 2010**

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

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#### **Executive Summary**

Following a short period of relative job-market stabilisation in the second and third quarters of 2009, the number of individual archaeologists in work in the final quarter of 2009 fell back to approximately the same level as that in April 2009.

While many individual firms may have been relatively busier, the completion of major fieldwork phases for in significant projects means that the total number of people in work at large contractors has fallen on aggregate.

Most organisations have remained the same size, although more organisations have become smaller over this quarter than have grown, although two of the three largest contractors have expanded (as happened in the quarter to 1<sup>st</sup> October 2009).

A small number of business failures mean that the market is less crowded than it was at the end of 2008.

Business confidence in the sector is improving. The majority of businesses expect to be able to maintain their current staffing levels over the next three months, and a significant majority of businesses do not expect market conditions to deteriorate further over the next year.

There has been a marked fall in the proportion of respondents expecting that some archaeological practices will cease trading in the next twelve month. This remains the view held by more respondents than the reverse, but this does not represent an absolute majority of respondents.

The skills that are being most commonly lost by organisations remain those needed to conduct and contribute to invasive fieldwork.

#### **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 fourth repetition of that January 2009 exercise, following on from previous repetitions in April, July and October 2009. The reports on those earlier surveys are

available on the IfA website at

<http://www.archaeologists.net/modules/news/article.php?storyid=457>,  
<http://www.archaeologists.net/modules/news/article.php?storyid=406>,  
<http://www.archaeologists.net/modules/news/article.php?storyid=376> and  
<http://www.archaeologists.net/modules/news/article.php?storyid=354>).

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 January 2010, asking for responses by 27 January 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.

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. This also means that figures presented for previous quarters are being updated and “smoothed” as more data become available.

### **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**

47 completed questionnaires were returned.

1 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 1,998.1 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 1,968.1 FTE staff, a decline of 1.5% since the LMI survey.

On 1 January 2009, these organisations employed 1,785.3 FTE staff, a reduction of 9.1% over the previous quarter and 10.6% fewer than in August 2007.

On 1 April 2009, these organisations employed 1,675.9 FTE staff, a reduction of 6.1% over the previous quarter and 16.1% since August 2007.

On 1 July 2009, these organisations employed 1,691.4 FTE staff, a net increase of 0.9% over the previous quarter but a reduction of 15.3% since August 2007.

On 1 October 2009, these organisations employed 1,717.75 FTE staff, a net increase of 1.6% over the previous quarter but a reduction of 14.0% since August 2007.

On 1 January 2010, these organisations employed 1,673.15 FTE staff, a reduction of 2.6% over the previous quarter and 16.3% since August 2007.

### Change from 1 October 2009 to 1 January 2010

More organisations lost staff in this quarter than increased staffing numbers. Overall, respondents reported a net loss of 44.6 staff (FTE), a 2.6% decrease over the period.

Extrapolating from this sample, this will represent a net loss of 90 jobs across the entire archaeological profession, equating to a decrease over the quarter of 2.6% of commercial archaeological posts or 1.4% of all archaeological posts.

More organisations reported a reduction in staff numbers than reported growth in all sizes of organisations except the very largest (replicating the pattern in the third quarter of 2009). The majority of respondent organisations – 55% - reported no change in the size of their staff.

Organisation size in August 2007	Change by size of organisation, 1 October 2009 – 1 January 2010		
	Contraction (less employees)	No change (same number of employees)	Expansion (more employees)
100+	1	0	2
50 – 100	4	4	1
20 – 50	2	10	1
- 20	6	12	4
Total	13	26	8

### Review: change from 13 August 2007 to 1 January 2010

Using smoothed data from the five surveys undertaken (which compensates for nonresponse errors introduced as some employers have not responded to each of the surveys), 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 meaning that as of 1<sup>st</sup> January 2010 there were less people in archaeological employment than at time since the survey began, with approximately 650 less people in archaeological work than at the August 2007 peak.

	Total numbers employed, change on previous quarter and change since 13.08.07												
	01.01.10		01.10.09		01.07.09		01.04.09		01.01.09		01.10.08		13.08.07
Commercial archaeology	3380	-2.6%	3470	+1.6%	3416	+0.9%	3385	-6.1%	3606	-9.3%	3975	-1.5%	4036
		-16.3%		-14.0%		-15.3%		-16.1%		-10.7%		-1.5%	
Entire profession	6209	-1.4%	6299	+0.9%	6245	+0.5%	6214	-3.4%	6435	-5.4%	6804	-0.9%	6865
		-9.6%		-8.2%		-9.0%		-9.5%		-6.3%		-1.9%	

### Results: 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 March 2010 (nb from this point onwards, the responses from the two "non-commercial" bodies that provided information are also incorporated in the data tables and analysis).

The majority of respondents that expressed a definite view (35 of 47) 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 2010)?*

	Responses	Number employed on 01/01/2010	Lost staff in previous quarter	No change in previous quarter	Expanded in previous quarter
Yes (will maintain present levels)	35	1417.05	10	20	5
No (will not maintain)	4	88.1	2	0	2

present levels)					
Don't know	8	168	1	6	1
<b>Total</b>	<b>47</b>	<b>1673.15</b>	<b>13</b>	<b>26</b>	<b>8</b>

Over time, companies are much more confident about maintaining staff levels in the coming quarter than they were in October 2009, but slightly less confident than they were earlier in 2009. However, the percentage of companies that expect to lose staff has dropped significantly – meaning that more companies expect a stable situation over the three months to the end of March 2010.

	Maintain present levels over next quarter	Not maintain present levels over next quarter
January 2010	74%	9%
October 2009	63%	21%
July 2009	84%	16%
April 2009	83%	17%
January 2009	61%	31%

### Results: Business Confidence

Business confidence has improved significantly since July 2009, with significantly more employers expecting the market conditions to improve than expecting further deterioration (in October 2009 there were only slightly more employers expecting market conditions to improve than to deteriorate).

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

	Responses	Number of staff employed on 01/10/2009
Yes (market conditions will deteriorate in the next 12 months)	9	277.1
No (market conditions will not deteriorate)	22	879.05
Don't know or no answer	16	517
<b>Total</b>	<b>47</b>	<b>1,673.15</b>

Over time, business confidence has steadily improved.

	Expect conditions to worsen	Do not expect conditions to worsen	Don't know
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%

There has been a marked fall in the proportion of respondents expecting that some archaeological practices will cease trading in the next twelve month. This remains the view held by more respondents than the reverse, but this no longer represents an absolute majority of respondents as it has been at every previous survey.

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

	Responses	Number of staff employed on 01/10/2009
Yes (expect practices to cease trading in 12 months from April 2009)	22	975.7
No (do not expect any practices to cease trading in 12 months from April 2009)	9	386.45
Don't know or no answer	16	311
<b>Total</b>	<b>52</b>	<b>1,673.15</b>

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
January 2010	47%	19%
October 2009	71%	8%
July 2009	70%	11%
April 2009	75%	5%
January 2009	84%	2%

### 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<sup>1</sup> 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	18	8	6	4
Conducting (leading or directing) intrusive investigations (evaluation, excavation)	15	4	11	0

<sup>1</sup> 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](http://www.archaeologists.net/modules/icontent/inPages/docs/lmi%200708/Archaeology_LMI_report_colour.pdf)

Artefact research	6	0	3	3
Conducting (leading or directing) survey and interpretation of historic buildings	5	3	1	1
Desk-based historic environment research including desk-based assessment	4	2	0	2
Providing information and advice on the conservation and management of the historic environment	4	1	3	0
Contributing to non-intrusive investigations (geophysical survey) as team members	4	0	2	2
Ecofact research	3	1	2	0
Conducting (leading or directing) non-intrusive investigations (geophysical survey)	2	2	0	0
Creating, managing and maintaining Historic Environment Records	2	1	1	0
Conducting (leading or directing) other non-intrusive investigations	2	0	0	2
Contributing to other non-intrusive investigations as team members	2	0	0	2
Historic environment characterisation	1	0	0	1
Other archaeological skills ( <i>please specify</i> ) – archaeological mitigation design and management	1	0	0	1
Other archaeological skills ( <i>please specify</i> ) – post-ex	1	0	0	1
Conservation of artefacts or ecofacts	0	0	0	0
Contributing to survey and interpretation of historic buildings as team members	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 three previous surveys (April, July and October 2009).

### 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 – January 2010

Dear Colleague,

It is now a year since I first wrote to you, seeking information about how the current economic situation has been affecting archaeology. With four quarterly reports published (January 09, April 09, July 09 and most recently October 09), we have seen that there were substantial job losses at the end of 2008 and start of 2009, with several businesses ceasing trading. However, over the summer and into the autumn of 2009, there was a sense that the effects of the recession on archaeology were perhaps slowing. But this does not mean that we feel we are out of the woods yet - business confidence was still poor in October, and so 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 January 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.

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

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 31 March 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). (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 Wednesday 28 October 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