

## **Job Losses in Archaeology – October 2009**

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

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#### **Executive Summary**

Archaeological employment has seen a slight “bounce” over the last six months, which has been initiated through capital investment in infrastructure projects.

400 archaeological jobs have been lost in the year following the collapse of the house-building market in the United Kingdom in the autumn of 2008 (and a total of 500 jobs lost since the peak of the boom in the summer of 2007).

The final quarter of 2008 and the first of 2009 both saw significant numbers of job losses; the headline figure stabilised in the three months to July 2009, and a modest increase in the numbers of individuals working as archaeologists has taken place over the three months to October 2009.

Following a reported reduction in the numbers of jobs being lost in archaeology to July 2009, over the three months to 1 October 2009 there was a moderate increase in the numbers of archaeologists in employment.

Recovery has been led by major archaeological contractors working ahead of road-building projects in the midlands and the south of England.

As it is uncertain whether projects like these will be replicated in the future, or whether other development work will recover, business confidence remains fragile. Fewer employers expect to be able to maintain current staffing levels than did in July 2009, although slightly more employers expect market conditions to improve in the next year than expect them to deteriorate. However, the overwhelming majority of respondents expect further archaeological businesses to fail in the next twelve months.

Fieldwork skills continue to be those that are being most commonly lost by organisations.

#### **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 third repetition of that January 2009 exercise, following on from previous repetitions in April and July 2009. The reports on those earlier surveys are available on the IfA website at <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 19 October 2009, asking for responses by 28 October 2009. The questionnaire replicated the April and July 2009 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 refined 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**

52 completed questionnaires were returned.

2 of the returned questionnaires came from organisations that identified themselves as not undertaking commercial archaeological practice, and so their returns are 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 1,902.6 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 1,829.1 FTE staff, a decline of 3.9% since the LMI survey.

On 1 January 2009, these organisations employed 1,674.6 FTE staff, a reduction of 8.4% over the previous quarter and 12.0% fewer than in August 2007.

On 1 April 2009, these organisations employed 1,594.9 FTE staff, a reduction of 4.8% over the previous quarter and 16.2% since August 2007.

On 1 July 2009, these organisations employed 1,583.8 FTE staff, a reduction of 0.7% over the previous quarter and 16.8% since August 2007.

On 1 October 2009, these organisations employed 1662 FTE staff, a net increase of 4.9% over the previous quarter but a reduction of 12.6% since August 2007.

### Change from 1 July 2009 to 1 October 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 offset the losses elsewhere, meaning that overall, respondents reported a net gain of 123.8 staff (FTE), a 4.9% increase over the period.

Extrapolating from this sample, this will represent a net gain of 166 jobs across the entire archaeological profession, equating an increase over the quarter of 5.0% of commercial archaeological posts or 2.7% of all archaeological posts.

In July 2009, when there was a very small increase in the numbers of individuals working in archaeology, that increase was achieved almost entirely at the largest of archaeological employers (those employing over 100 members of staff). In the three months to October 2009, the increase in staff numbers has again been led by the largest of employers, but across employers of all sizes the distribution of organisations expanding, remaining static or shrinking is distributed across a near-perfect Gaussian distribution of 22%-54%-24%.

Organisation size in August 2007	Change by size of organisation, 1 July 2009 – 1 October 2009		
	Contraction (less employees)	No change (same number of employees)	Expansion (more employees)
100+	1	0	2
50 – 100	3	2	3
20 – 50	5	5	1
- 20	2	19	6
Total	11	27	12

### Review: change from 13 August 2007 to 1 October 2009

Using smoothed data from the four surveys undertaken this year (which compensates for nonresponse errors introduced as some employers have not responded to each of the surveys), the bigger picture becomes clearer.

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. Since April 2009, the number of people in archaeological employment has stabilised and even increased modestly. As of 1 October 2009, there were approximately as many people working in archaeology as there were on 1 January 2009 – but this still represents more than 500 jobs lost since the summer 2007 peak.

	Total numbers employed, change on previous quarter and change since 13.08.07										
	01.10.09		01.07.09		01.04.09		01.01.09		01.10.08		13.08.07
Commercial archaeology	3501	+5.0% - 13.3%	3335	+0.4% - 17.4%	3323	- 6.7% - 17.7%	3561	- 8.8% - 11.8%	3906	- 3.2% - 3.2%	4036
Entire archaeological profession	6330	+2.7% - 7.8%	6164	+0.2% - 10.2%	6152	- 3.7% - 10.4%	6390	- 5.1% - 6.9%	6735	- 1.9% - 1.9%	6865

### 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 December 2009 (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 (33 of 44) 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 December 2009)?*

	Responses	Number employed on	Lost staff in previous	No change in previous	Expanded in previous

		01/07/2009	quarter	quarter	quarter
Yes (will maintain present levels)	33	1292.4	7	18	8
No (will not maintain present levels)	11	623.5	4	3	4
Don't know	8	88	2	5	1
<b>Total</b>	<b>52</b>	<b>2003.9</b>	<b>13</b>	<b>26</b>	<b>13</b>

Over time, this represents an overall reduction in confidence that staff numbers will remain at the current levels. This indicates that while there has been a slight recovery over the summer months, employers are now less confident about the coming period than they were during the spring and summer.

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

### Results: Business Confidence

Business confidence has improved slightly since July 2009, with slightly more employers expecting the market conditions to improve than expecting further deterioration (in July, the split was equal). However, the numbers of employers who are reluctant to offer an opinion has markedly increased.

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

	Responses	Number of staff employed on 01/10/2009
Yes (market conditions will deteriorate in the next 12 months)	16	425.3
No (market conditions will not deteriorate)	17	414.1
Don't know or no answer	19	940.3
<b>Total</b>	<b>52</b>	<b>1,779.7</b>

	Expect conditions to worsen	Do not expect conditions to worsen	Don't know
October 2009	31%	33%	36%
July 2009	42%	42%	16%
April 2009	54%	26%	20%

January 2009	89%	3%	8%
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Despite this cautiously positive outlook, the overwhelming majority of respondents expect further archaeological practices to cease trading, and one anonymous respondent to this questionnaire wrote that *“It is bizarre that more haven't gone out of business already, I can only assume that many organisations are trading at a very high financial risk and/or are able to contract to such a small size that they are not technically going out of business ... the market appears to be saturated with extreme price pressure at every stage of work - it is inconceivable that everyone will be able to survive.”*

*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)	37	1,383.3
No (do not expect any practices to cease trading in 12 months from April 2009)	4	192
Don't know or no answer	11	204.4
<b>Total</b>	<b>52</b>	<b>1,779.7</b>

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

	Expect practices to cease trading	Do not expect practices to cease trading
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).

<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)

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	19	12	2	5
Conducting (leading or directing) intrusive investigations (evaluation, excavation)	19	4	13	2
Desk-based historic environment research including desk-based assessment	8	2	3	3
Conducting (leading or directing) survey and interpretation of historic buildings	5	4	0	1
Contributing to non-intrusive investigations (geophysical survey) as team members	5	1	2	2
Historic environment characterisation	4	1	2	1
Artefact research	4	0	3	1
Conducting (leading or directing) non-intrusive investigations (geophysical survey)	2	1	0	1
Contributing to other non-intrusive investigations as team members	2	0	0	2
Ecofact research	1	0	1	0
Conducting (leading or directing) other non-intrusive investigations	1	0	0	1
Contributing to survey and interpretation of historic buildings as team members	1	0	0	1
Other archaeological skills ( <i>please specify</i> ) – archiving	1	0	1	0
Other archaeological skills ( <i>please specify</i> ) – designing, co-ordinating and monitoring programmes of archaeological mitigation (undertaken by archaeological contractors commissioned following our advice)	1	0	0	1
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
Providing information and advice on the conservation and management of the historic environment	0	0	0	0
Creating, managing and maintaining Historic Environment Records	0	0	0	0
Conservation of artefacts or ecofacts	0	0	0	0

Skills are being lost across the entire professional range, but it continues to be 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 and July 2009.

In comparison with the returns for July, there has been a significant reduction in the number of employers reporting skills losses in “Providing information and advice on the conservation and management of the historic environment” – to the extent that no respondents identified these skills as being particularly lost in this quarter. It is more likely that this indicates a level of recovery in terms of private sector consultancy advice, rather than a total loss of this skillset across the profession, although the skills involved in desk-based historical research continue to be lost at significant numbers of employers.

### **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 - October 2009

Dear Colleague,

Following earlier questionnaires, I am writing to you again regarding the current economic downturn and the effects this has been having on the archaeological profession. Yet 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](#), [April](#) and now [July 2009](#) surveys are available online; overall, the picture has been gloomy, with several companies going out of business and significant net job losses reported since the summer of 2007. However, the July figures indicated a cautious return towards greater business confidence, with a slowing of the numbers of jobs lost.

It is now crucially important to receive information and opinions from you to identify whether the summer figures really represented the bottom of the decline, or whether the ongoing trend remains towards a smaller profession.

We now seek information as it applied to your organisation on **1 October 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 October 2009?

How many members of staff (FTE) did your organisation have on 1 July 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 December 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 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