

State of the Archaeological Market 2023



Kenneth Aitchison & Doug Rocks-Macqueen



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Cover Images: Archaeologists holding a bottle found on a watching brief at Waterside Priory Marina, Bedford, November-December 2021, Annie Moore, Albion Archaeology. CC BY 4.0

https://archaeologydataservice.ac.uk/archives/view/object.cfm?object_id=2597438

Archaeologist unwrapping a cremation vessel from an archaeological watching brief at East Farm, Fovant, Wiltshire, August 2020. Wessex Archaeology CC BY 4.0

https://archaeologydataservice.ac.uk/archives/collections/view/object.cfm?object_id=2632538

Version: 1.0, check the FAME website for the most recent version, in case any corrections or changes are made to this document.

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Chair's Foreword

Archaeological businesses have had to contend with the highest inflation rates for over 40 years and a largely flat-lining economy over the period that this survey covers. I am very pleased to see that, despite these headwinds, commercial practice in archaeology has grown in number of employees, in overall turnover, and that 80% of respondents reported that they had awarded pay increases at inflation levels or above.

Another interesting statistic is that the success rate for tendering was, on average, 45%. This result shows that investment in quoting for archaeological work has a high chance of winning each tender, which counters the perception that we operate in a competitive market governed by tight margins.

There are more troubling statistics presented by respondents, however, which indicates a major risk to the sustainability of archaeological businesses. Profit levels have dropped significantly to just 3.1% as an aggregate level, even though turnover and charge out rates have risen in the same period, and this low statistic has been influenced partly by over a quarter of respondents having made losses. The high level of inflation probably contributed to this decline, with typical increase in charge out rates being significantly less than the increase in inflation, but it is a red warning signal to us all. The industry must address this issue, with archaeological businesses recognizing the value they bring to clients, and that they must include a higher level of profit target in their cost estimates. If not, we risk not bringing in sufficient surplus for research and development, staff training, or reserves to weather unexpected costs, which would result in market failure and companies going into receivership.

Another interesting trend shown by the survey, is that house building has once again become the most important market sector for archaeology, and that energy has emerged as the second most important. The drop in income from transport probably reflects the life cycle of HS2.

In conclusion, these annual surveys are an essential tool for effective management of archaeology as part of development, and help provide valuable information for the wider heritage sector, and national policy makers. Thanks to our funding partners, and to all of you who have contributed as respondents.

A handwritten signature in black ink, appearing to read 'Tim Malim', with a stylized flourish at the end.

Tim Malim, Chair of FAME

Key Results for 2022-23

Of the archaeologists working in contracting and consulting in the UK in 2022-23:



85% were British Nationals.



10% were from EU countries.

4,851 people work in UK development-led archaeology.

The sector reported an aggregate profit level of 3.1%.

Average turnover per member of staff was £63,780.

85% of contractor and consultant archaeologists have permanent contracts of employment.

Residential development was the largest market sector for development-led archaeology in 2022-23.

The UK development-led archaeology sector was valued at £309 million in 2022-23.

Introduction

This project is a continuation of a series of projects that have been undertaken for fifteen years. With the onset of the 2008 financial crisis, the Chartered Institute for Archaeologists (CIfA) and the Federation of Archaeological Managers and Employers (FAME) began a series of projects to measure the changes this would bring to the sector. Nine quarterly surveys were initially conducted, gathering and presenting data from October 2008 to April 2011. Kenneth Aitchison, first with CIfA and then with Landward Research, undertook this work. Subsequently, CIfA and FAME commissioned a project to gather data on a six-monthly basis till 2013. Then, they, together with Historic England, commissioned Landward Research Ltd to continue to analyse and evaluate the state of the market for archaeological services, from 2013-14 up to 2017-18. Since 2018-19, CIfA and FAME¹, with support from Historic Environment Scotland, have continue this work. Kenneth Aitchison continues to lead these surveys, though now in his role as CEO of FAME, and working with Doug Rocks-Macqueen, the Deputy CEO of FAME.

This report presents the results of the survey for 2022-23, in the United Kingdom. Some respondents also work in the Republic of Ireland and elsewhere in the world, and those data have been separated where appropriate to avoid double counting.

The overall aims of this survey are to provide:

- a unique analysis of the archaeological sector as part of the overall economy;
- statistics that allow estimation of total value of the sector to the economy;
- data on indicative numbers of employed professional archaeologists working in the commercial sector with comparative figures for other areas;
- data for analysis of long-term sustainability for the sector;
- data that can enable informed lobbying to help protect heritage; and
- data to support planning effectively for the future so that the industry is sustainable and results in a benefit for society.

Some questions have been identified that do not need to be asked every year, and so selected questions are now being asked less frequently than on an annual basis.

This year a new set of questions was introduced on carbon recording and management.

¹ The 2019-20 report was produced using data gathered as part of a wider, pan-sector labour market intelligence project, Profiling the Profession 2020 <https://profilingtheprofession.org.uk/>. The same for the 2012 report.

Methods

The survey (see Appendix) was conducted by polling FAME members and CifA Registered Organisations (217 email addresses at 112 organisations).

The survey was a digital survey created using Novisurvey software. Respondents were asked to provide data that applied on 31st March 2023, and so this report is on the situation at the end of financial year 2022-23.

Links to the questionnaire were initially sent to potential respondents on 18th March 2024, with automated reminder and follow-up emails encouraging completion being sent periodically until the survey was closed on 21st April 2024.

Results of 2022-23 Survey

Responses were received from 36 organisations (the 2021-22 survey had 35 usable responses). Not every respondent answered every question.

Geographic Distribution

Respondents were asked about the locations of head and subsidiary offices (but not about staffing or turnover per office) (Table 1).

	Head offices	Subsidiary offices
East of England	1	9
East Midlands	3	4
London	3	5
North East England	1	2
North West England	0	8
South East England	3	7
South West England	6	9
West Midlands	3	5
Yorkshire and the Humber	7	7
Scotland	4	9
Wales	1	1
Northern Ireland	0	1
Republic of Ireland	0	3
outside the UK and Republic of Ireland	2	2
total	34	72

Table 1: Distribution of company offices by location. n=34.

Staff Numbers

Over 2,600 staff were working for respondents, with between 1 and 424 members of staff at each (Table 2).

	total
total staff (managerial, professional, technical and administrative) employed	2,653.2
total fee earners working full-time	1,634.6

Table 2: Staff numbers. n=34.

Staff Nationalities

In 2023, 85% of staff members working for organisations headquartered in the UK were British nationals (Table 3), slightly lower than the level reported in 2022, while 10% were citizens of EU states – a figure that was consistent with 2022 (Table 4).

Staff (full-time equivalents)	Employed in UK	
	Count	%
British (UK subjects)	1,683.0	85%
National of EU states	203.4	10%
Nationals of other countries (non-UK, non-EU)	88.4	4%
total	1,974.8	

Table 3: Staff nationalities (UK respondents).

All staff	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22	Mar- 23
British (UK subjects)	83%	85%	86%	86%	86%	87%	85%
National of EU states	15%	13%	12%	13%	11%	10%	10%
Nationals of other countries (non-UK, non-EU)	2%	2%	3%	1%	3%	3%	4%

Table 4: Nationalities of staff (UK respondents) from 2017-23.

Staff Contracts

Overall, 85% of workers in commercial archaeology in 2023 were on permanent contracts (up from 81% in 2022) and 15% were employed on fixed-term contracts (Table 5).

More than three-quarters of the people working in commercial archaeological practice have full time, permanent contacts (78%), higher than the level reported in 2022 of 73% (Table 6). This continues to reflect a competitive labour market, where employers are actively seeking to recruit and then retain staff.

Permanent	Count	%
full-time	1,788.0	78%
part-time	171.4	7%
total	1,959.4	85%
Fixed term		
full-time	300.10	13%
part-time	39.91	2%
total	340.01	15%
total	2,299.41	

Table 5: Staff by contract type for UK based organisations in 2022-23.

Contract type	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22	Mar-23
Permanent										
full-time	66%	68%	68%	71%	65%	66%	76%	76%	73%	78%
part-time	10%	9%	6%	6%	14%	13%	11%	9%	8%	7%
Fixed Term										
full-time	21%	18%	21%	20%	16%	18%	12%	15%	18%	13%
part-time	1%	1%	2%	1%	2%	1%	2%	0%	1%	2%
Casual										
full-time	1%	2%	2%	1%	0%	0%				
part-time	0%	1%	0%	0%	0%	1%				
Volunteer										
full-time	0%	0%	0%	0%	0%	0%				
part-time	0%	2%	1%	2%	1%	3%				

Table 6: Staff by contract type for UK based organisations from 2014 to 2023.

Salary Level Changes

Respondents were asked about overall changes in two key economic indicators – salary levels and charging rates.

Respondents were asked about changes to salaries (not in specific terms, but at an overall level), by being asked whether salaries had typically risen or fallen during the 2022-23 financial year. This was specifically not a question about total salary bills, as those would be directly influenced by the number of personnel on the payroll.

80% of respondents identified that their overall salary levels had risen by inflation or more (Table 7). Respondents were asked to compare changes with inflation at the date of the salary settlement; the CPI rate of inflation in March 2023 was 10.1%².

Salary changes	Count	%
rose by above inflation	15	50%
rose by inflation	9	30%
unchanged	4	13%
fell by up to 10%	2	7%
fell by over 10%	0	0%
total	30	

Table 7: Salary changes 2023. n=30.

² <http://www.rateinflation.com/inflation-rate/uk-historical-inflation-rate> accessed 23rd May 2023

Charge Out Rates

Respondents were also asked about any changes to their charge-out rates in the year ending 31st March 2023, and then about how they anticipated they would change in the next year (Table 8).

	Reported change to March 2023	Anticipated change to March 2024
range	0.0% to 30.0%	-0.4% to 15.0%
mean	7.9%	5.7%
median	6.0%	5.0%
mode	5.0% (7 responses)	10.0% (5 responses)
n	27	27

Table 8: Charge-out rate changes 2022-23.

Charge-out rates rose by an average of 7.9% in the year to March 2023. Looking forward, respondents expected their charge-out rates to rise by 5.7% in the year to March 2024.

The March 2023 annual UK inflation rate (CPI) was 10.1%; 19% of respondents (5 of 27) increased their charge-out rates in 2022-23 by this amount or more.

Competition for Projects

In order to gather indicative data about the intensity of competition for work, respondents were asked how many projects each had tendered for and how many they had successfully secured. Respondents won between 24-100% of projects tendered for, with an average win rate of 45% (Table 9). In 2022 the equivalent figure was 39%.

	Range	Average
number tendered for	0 – 2205	427
number won	2 - 924	185
percentage won	24% - 100%	45%

Table 9: Competition for projects 2022-23. n=25.

Sector Growth

31 organisations provided data on the number of staff they employed in 2023 (2,217.2) together with retrospective figures for 2022 (2,165.96). This is an aggregate increase across those 31 organisations of 51.24 individuals – an increase of 2.3%.

Remembering the methodological flaws that the simple extrapolation led to unrepresentative increases being reported between 2012-13 and 2018-19, discussed in **State of the Archaeological Market 2020**, we have taken a cautious approach to reporting staff number changes.

On this cautious approach, it has been assumed that overall, for all the organisations that did not answer both questions for 2022 and 2023 staffing levels there was no net change, meaning that we are assuming the known change in staffing numbers – 51.24 individuals – represents the overall commercial sector increase.

This equates to 1.1% of the workforce; the numbers of people employed in the commercial sector has grown year-on-year since 2012, but the rate of growth has slowed considerably since 2021 (Table 10).

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
count	2871	3284	3481	3743	3997	4152	4375	4700	4800	4851
annual growth	2.1%	14.4%	6.0%	7.5%	6.8%	3.9%	5.4%	7.4%	2.2%	1.1%

Table 10: Calculated Figures – Employment in Development-led Archaeology 2014-2023.

The figures for people employed by local heritage management ('curatorial') have been generated and updated from the publication of local authority historic environment staff resource figures for 2023³. That dataset is only for England, and it reported a 4.7% fall in the size of the archaeological curatorial sector; UK totals have been extrapolated by assuming the same rate of change for employment in curatorial archaeology also applied elsewhere in the UK.

The figures for 'other' employers – including universities, museums, national government - were collected in the **Profiling the Profession 2020** survey, and as no

³ <https://historicengland.org.uk/images-books/publications/la-staff-resources-2023/report-local-authority-staff-resources-2023/>

updated figures are available for these sectors, they remain unchanged in the 2023 results.

Overall, the total number of people working in archaeology in the UK grew very slightly in the year to March 2023 (by an almost negligible amount, of only half of a percentage point). The reduction of people working in curatorial roles was offset by the small growth in the (much larger) development-led sector (Figure 1 & Table 11).

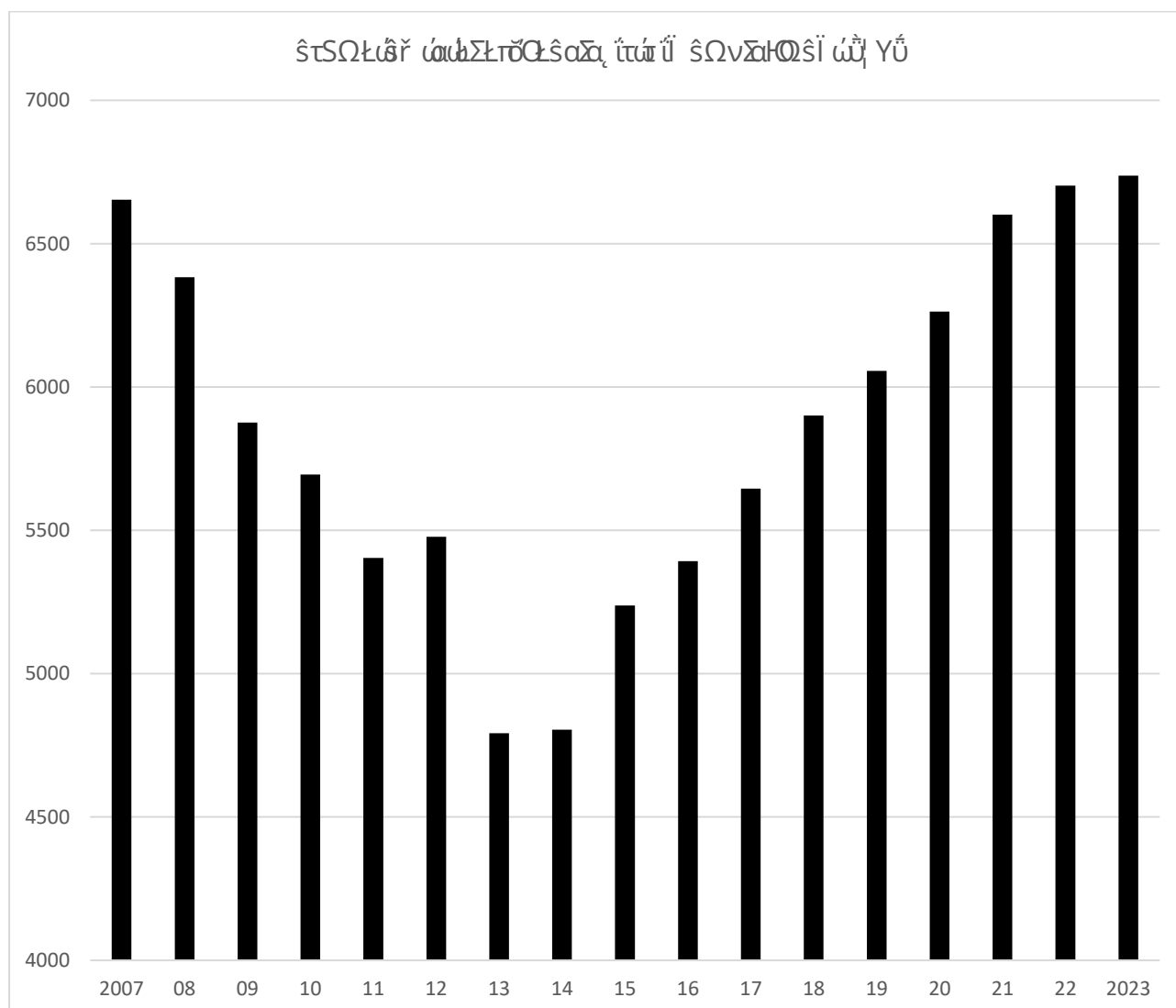


Figure 1: Estimated total numbers of archaeologists employed in the United Kingdom 2007-2023.

	Aug-07	Oct-08	Jan-09	Apr-09	Jul-09	Oct-09	Jan-10
curatorial	512	505	505	505	505	505	505
other	2105	1972	1943	1914	1886	1857	1829
commercial	4036	3906	3561	3323	3472	3526	3270
total	6653	6383	6009	5742	5863	5888	5604

	Apr-10	Jul-10	Jul-10	Oct-10	Jan-11	Apr-11	Oct-11
curatorial	485	485	485	485	485	442	442
other	1800	1771	1771	1743	1714	1686	1628
commercial	3404	3669	3669	3333	3189	3225	3399
total	5689	5925	5925	5561	5388	5353	5469

	Apr-12	Dec-12	Dec-12	Mar-14	Mar-15	Mar-16	Mar-17
curatorial	440	485	485	439	459	416	407
other	1571	1495	1495	1495	1495	1495	1495
commercial	3467	2812	2812	2871	3284	3481	3743
total	5478	4792	4792	4805	5238	5392	5645

	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22	Mar-23
curatorial	409	409	338	351	353	336
other	1495	1495	1550	1550	1550	1550
commercial	3997	4152	4375	4700	4800	4851
total	5901	6056	6263	6601	6703	6737

Table 11: Reported and estimated numbers in archaeological employment from 2007 to 2023.

Turnover

Twenty-four respondents provided turnover figures for their latest financial years (Table 12). This question was presented separately to organisations headquartered in the UK (reporting in pounds sterling) and to those headquartered in the EU (reporting in Euro). All responses received were from organisations headquartered in the UK; no responses were received to this question from organisations headquartered outside the UK.

	UK - pounds turnover in year ending 31 March 2023
respondents	24
total turnover	£157,485,748
mean	£6,561,906
median	£2,750,000

Table 12: Number of respondents to UK turnover question and combined total turnover in 2023.

Turnover has been tracked by geographic source since 2017 (Table 13).

	England	Scotland	Wales	Northern Ireland	Republic of Ireland	Rest of the world
2022-23	93%	3%	2%	0%	1%	1%
2021-22	94%	4%	2%	0%	0%	1%
2020-21	91%	2%	2%	0%	0%	5%
2019-20	85%	7%	2%	0%	4%	2%
2018-19	87%	6%	6%	0%	0%	1%
2017-18	92%	3%	4%	1%		
2016-17	88%	7%	4%	0%		

Table 13: Turnover originating from work undertaken by UK-headquartered organisations in each of these locations from 2017 to 2023.

Total turnover has been tracked for nine years. There have been fluctuations between each year (Table 14), in large part attributable to differences between which organisations responded, but in every iteration until 2019-20 the majority of respondents had annual turnovers of below £1m. Since 2020-21, the majority of respondents have reported annual turnovers greater than £1m.

	2018-19	2019-20	2020-21	2021-22	2022-23
>=£10m	6%	10%	17%	17%	17%
£5m -> £10m	3%	2%	0%	4%	8%
£2.5m -> £5m	6%	8%	17%	13%	8%
£1m -> £2.5m	18%	21%	50%	25%	17%
£500,000 -> £1m	3%	13%	6%	8%	17%
£250,000 -> £500,000	15%	13%	11%	8%	8%
<£250,000	52%	33%	22%	25%	25%

Table 14: Distribution of turnover from 2019 to 2023. UK only.

Contribution to the Economy

The calculated average turnover reported per member of staff in 2022-23 was £63,780, an increase on the previous year of 14.1% (Table 15), which, multiplied by the number of people working in commercial archaeology results in the entire sector's revenue being valued at £309 million pounds (an increase on 2021-22 of 15.4%).

	Avg. per staff member	Estimated commercial archaeologists	Sector size	Mean per organisation	Median per organisation
2022-23	£63,780	4,851	£309m	£6,561,906	£2,750,000
2021-22	£55,878	4,800	£268m	£6,363,730	£1,716,420
2020-21	£52,528	4,700	£247m	£4,050,041	£1,446,200
2019-20	£51,187	4,375	£224m	£2,142,424	£472,725
2018-19	£48,696	4,152	£202m	£1,577,742	£250,000
2017-18	£48,747	3,997	£195m	£2,553,346	£1,000,000
2016-17	£45,309	3,743	£170m	£2,348,383	£643,500
2015-16	£45,615	3,481	£159m	£2,928,146	£755,618
2014-15	£45,914	3,284	£151m	£1,879,543	£864,000
2013-14	£56,237	2,871	£161m	£1,641,720	£740,935

Table 15: The average turnover per employee, estimated number of archaeologists, total value of the commercial archaeology sector, mean turnover per respondent and median turnover per respondent from 2014 to 2023. UK only.

Profits

23 respondents reported aggregate profits (or surplus, for not-for-profit organisations) of £4,804,346 on their combined turnovers of £153,690,748 in 2022-23, equating to an aggregate profit margin of 3.1%.

This represents a substantial decrease on 2021-22 (when aggregate profit levels were 7.0 %, and had been 7.1% in 2020-21) (Table 16).

57% of respondents reported profit levels that represented less than 5% of their turnovers; this includes the 26% of respondents that reported having made losses during 2022-23.

Profit as % of turnover	Dec-12	Dec-12 PP	Mar-14	Mar-15	Mar-16	Mar-17
>25%	3%	12%	0%	0%	14%	3%
10-25%	5%	11%	12%	12%	14%	41%
5-10%	23%	18%	12%	18%	19%	13%
<5%	70%	60%	75%	70%	52%	44%
Mean			£31,582	£46,637	£154,438	£121,252
Median			£0	£5,500	£50,000	£43,000
Range of profits reported			-£3,000 to £251,000	-£1,000,000 to £935,000	-75,000 to £799,000	-286,000 to £1,000,000

Profit as % of turnover	Mar-18	Mar-19	Mar 20 PP	Mar 21	Mar 22	Mar 23
>25%	15%	35%	17%	11%	13%	4%
10-25%	22%	23%	21%	26%	17%	22%
5-10%	19%	19%	17%	26%	29%	17%
<5%	44%	23%	45%	37%	46%	57%
Mean	£211,531	£93,630	£127,547	£308,934	£472,762	£228,778
Median	£60,000	£50,000	£400,000	£90,000	£324,153	£117,000
Range of profits reported	-£26,297 to £1,800,000	-£49,000 to £828,383	-£145,000 to £2,329,494	-£300,000 to £2,972,722	-£1,917,000 to £2,784,226	-£1,933,919 to £3,094,402

Table 16: Distribution of profits, mean, median and ranges of reported profits from 2012 to 2023. PP = Profiling the Profession, data from *Profiling the Profession* projects.

Funding Sources

The overwhelming majority of commercial archaeology's funding comes from private sector clients, as it has in every iteration of this survey (Table 17).

Source	Respondent turnover	%
private sector clients	£102,132,840	86%
national heritage agencies (Historic England, Historic Environment Scotland, Cadw, Heritage Council etc)	£3,332,369	3%
central government departments and agencies	£5,974,452	5%
local, district, city, county or unitary councils (local planning authorities).	£4,129,147	3%
other public bodies (including universities, public-private partnerships and local enterprise partnerships)	£2,325,136	2%
community groups (including lottery-funded projects, town and parish councils and neighbourhood forums)	£1,118,559	1%
total	£119,012,502	

Table 17: Sources of turnover funding 2022-23. n=20.

Market Sectors

In 2022-23 the largest source of funding for archaeological practice was Residential development; Transport had been the largest source of funding in 2019-20 and 2021-22. Energy was the second largest market sector (by source of funding) (Table 18).

Source of income	Mar-23		Relative change
	£	%	
residential development	£36,049,772	38%	↑
energy	£21,247,809	22%	↑
transport	£14,404,669	15%	↓
commercial and industrial	£7,340,885	8%	↓
water supply	£5,427,919	6%	↑
any other services not categorised above	£2,395,471	3%	↑
minerals	£2,089,685	2%	↓
education	£1,805,158	2%	↔
other research and public archaeology	£1,531,436	2%	↑
heritage conservation	£1,053,199	1%	↓
local authority initiatives	£872,561	1%	↑
community projects and NHLF	£529,883	1%	↓
assistance to LPAs delivering development control services	£178,274	0%	↑
national agencies and university grants	£172,406	0%	↓
health	£137,735	0%	↔
waste	£70,103	0%	↑
telecommunications	£52,985	0%	↓
total	£95,359,949	(n=14)	

Table 18: Sources of income by sector 2022-23.

Historically, Residential Development has been the most significant source of annual market income for commercial archaeology, as it has been in 2023 and five of the seven years before that (Table 19). In 2023, Transport's share of the market diminished substantially – it had been the main source of income in two of the three previous years - with numerous major projects being held in abeyance. It was overtaken by Energy as a market sector as work on renewables (and nuclear) projects took on more significance.

Source of Income	Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21	Mar 22	Mar 23
residential development	53%	42%	36%	34%	28%	34%	32%	38%
transport	10%	6%	14%	15%	34%	33%	39%	15%
commercial and industrial	14%	18%	13%	10%	17%	17%	11%	8%
energy	3%	6%	14%	18%	7%	5%	6%	22%
minerals	3%	2%	5%	9%	3%	2%	3%	2%
community projects and HLF/NHLF	2%	3%	4%	1%	2%	1%	2%	1%
water supply	2%	2%	1%	2%	1%	2%	2%	6%
national agencies and university grants	2%	1%	1%	1%	2%	2%	1%	0%
other research and public archaeology	1%	1%	5%	0%	0%	0%	1%	2%
education	1%	1%	1%	2%	1%	0%	1%	2%
heritage conservation	2%	1%	0%	2%	1%	0%	1%	1%
local authority initiatives	1%	0%	1%	0%	1%	0%	0%	1%
health	1%	1%	0%	0%	0%	0%	0%	0%
waste	1%	0%	0%	0%	0%	0%	0%	0%
assistance to LPAs dev. control services	0%	0%	0%	0%	0%	0%	0%	0%
telecommunications	0%	0%	0%	0%	0%	0%	0%	0%
any other services not categorised	1%	9%	0%	5%	3%	1%	1%	3%
leisure, sport, entertainment and tourism	0%	5%	2%	N/A	N/A	N/A	N/A	N/A
retail and town centres	3%	2%	3%	N/A	N/A	N/A	N/A	N/A

Table 19: Sources of income by sector from 2016 to 2023.

Forms of Contract

Questions about Forms of Contract used are not asked every year, and were not asked for 2023; Table 20 below presents historic data.

Forms of contracts	Mar-17	Mar-18	Mar-19	Mar-21
exchange of letters / emails	70%	74%	77%	64%
your own organisation's standard T&Cs	70%	70%	60%	77%
client's standard T&Cs	59%	70%	54%	86%
bespoke	48%	33%	29%	36%
NEC3 (various - family of contracts)	26%	37%	20%	9%
ICE (short form or alternatives)	22%	15%	14%	32%
none	7%	0%	11%	5%
other	0%	4%	3%	0%
don't know			3%	0%

Table 20: Forms of Contract used in 2017-21.

Market Conditions

Respondents were asked if they thought the market for archaeological services would deteriorate in financial year 2023-24. In March 2023, a clear majority of respondents considered that they thought the market would deteriorate in the coming year (Table 21).

The sector was far less positive than it had been a year before (Table 21, Table 22 & Figure 2); the sentiment was gloomier than it had been in any previous survey except that recording data for 2019.

Market condition expectations	Count	%
yes - market conditions would deteriorate	16	70%
no - market conditions would improve	6	26%
don't know	1	4%
Total	23	

Table 21: Market condition expectations in 2023.

	Apr-09	Jul-09	Oct-09	Jan-10	Apr-10	Jul-10	Oct-10	Jan-11
market will deteriorate	54%	42%	31%	19%	29%	51%	41%	46%
market will improve / will not deteriorate	26%	42%	33%	47%	29%	18%	22%	20%
don't know	19%	17%	26%	34%	43%	31%	28%	35%
total confidence	-28%	0%	2%	28%	0%	-33%	-19%	-26%
	Apr-11	Oct-11	Apr-12	Dec-12	Mar-14	Mar-15	Mar-16	Mar-17
market will deteriorate	32%	37%	32%	30%	13%	8%	21%	26%
market will improve / will not deteriorate	26%	24%	29%	48%	78%	84%	64%	56%
don't know	42%	39%	39%	23%	9%	8%	14%	19%
total confidence	-6%	-13%	-3%	18%	65%	76%	43%	30%
	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22	Mar-23		
market will deteriorate	37%	68%	49%	14%	50%	70%		
market will improve / will not deteriorate	44%	21%	33%	81%	41%	26%		
don't know	19%	12%	18%	5%	9%	4%		
total confidence	7%	-47%	-16%	67%	-9%	-44%		

Table 22: Market Confidence from April 2009 to March 2023. Total confidence is those that think the market won't deteriorate minus those that think it will.

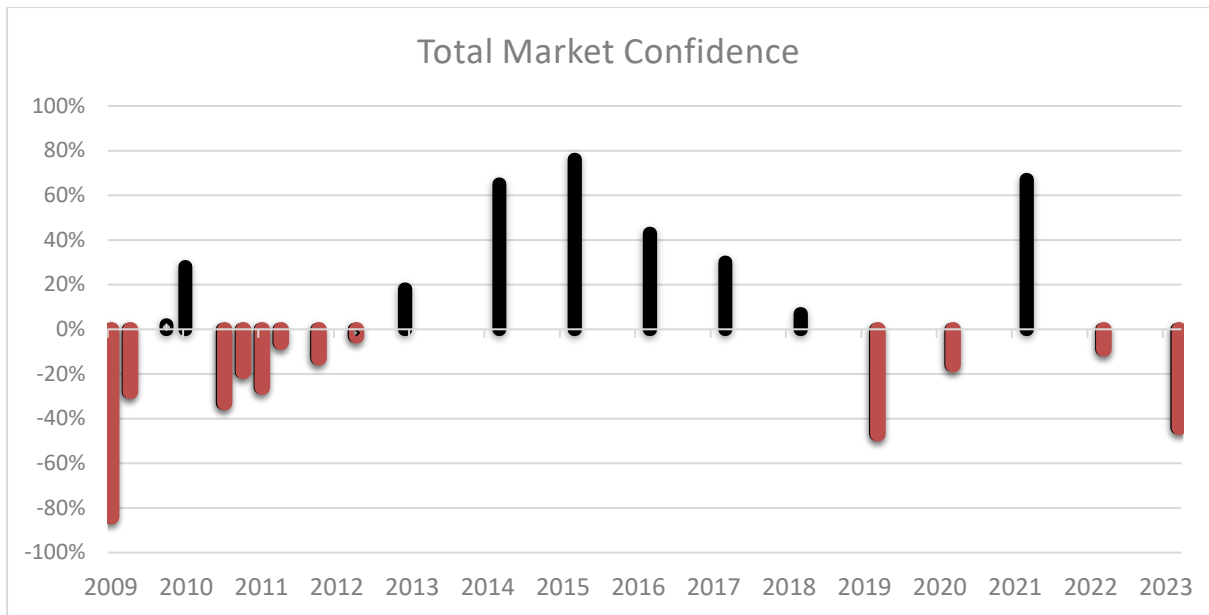


Figure 2: Market Confidence from April 2009 to March 2023. Total confidence is those that think the market won't deteriorate minus those that think it will.

Respondents were asked if they had specific comments to accompany their answers to the question, **“on 1st March 2023, did you believe that market conditions would deteriorate over the next 12 months”** and five did.

- [market will deteriorate] ...but not drastically
- Infrastructure work seemed to be caught in planning and approvals via JR or appeals which looked likely to have a devastating impact on long term programmes
- It was clear UK was heading into recession with slowing market and patchy work demands
- The renewables sector seems to be reinvigorated and this makes up for any other industry/commercial or private deteriorations.
- Trend continues upward

Client Failure

Questions about Client Failure are not asked every year, and were not asked for 2023; Table 23 below presents historic data from 2019 and 2022.

total	Pre-fieldwork	During evaluation	During mitigation	During post-fieldwork analysis
2019	5	0	1	7
2022	3	0	0	10

Table 23: Projects stopped because of client failure and where in the process this occurred.

Skills

Overall, a general higher level of skills being lost was reported for 2022-23 than had been the case in previous years. In 2022-23, the area where skills were most frequently reported as being lost was fieldwork (Table 24), as it has been in every year except 2019-20 (Table 25).

There was also a significant rise in the level of skills training reported (Table 27), across nearly all skills areas (these are skills gaps), and this was also the case in terms of skills being hired in (Table 26, skills shortages), where an increase in the levels of skills being bought in was recorded across most skills areas. There was also a remarkable increase in post-fieldwork analysis skills being lost, hired and trained. Two other areas where the level of training notably increased were in artefact / ecofact conservation and in providing advice to clients. Clearly, employers were losing skills in many areas, and were addressing this both by training in-house and by hiring in external expertise.

Note: some respondents may have checked more than one category for a particular skills area – e.g. where respondents both hired in post-excavation skills and trained their own staff in this area.

Skills lost, hired or trained	Lost skills		Hired skills		Trained skills		Number answering
	#	%	#	%	#	%	
fieldwork (intrusive or non-intrusive)	11	58%	10	53%	16	84%	19
post-fieldwork analysis	7	39%	10	56%	14	78%	18
artefact or ecofact conservation	2	15%	10	77%	9	69%	13
providing advice to clients or other service users	2	18%	3	27%	10	91%	11
desk-based or environmental assessment	5	38%	2	15%	11	85%	13
data management	4	31%	2	15%	11	85%	13
other	3	38%	3	38%	6	75%	8

Table 24: Skills that were lost, hired or trained in 2023. n=22.

Skills lost	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22	Mar-23
fieldwork (intrusive or non-intrusive)	35%	25%	27%	40%	19%	5%	38%	28%	58%
post-fieldwork analysis	16%	17%	23%	20%	6%	5%	14%	0%	39%
artefact or ecofact conservation	14%	17%	15%	16%	6%	2%	5%	0%	15%
providing advice to clients	11%	8%	12%	16%	6%	3%	14%	6%	18%
desk-based/environmental assessment	11%	8%	8%	12%	10%	4%	10%	17%	38%
data management	5%	4%	8%	0%	0%	1%	5%	11%	31%
other	3%	4%	0%	0%	0%	1%	0%	11%	38%

Table 25: Skills lost from 2015 to 2023. Percentages calculated on total responses to all skills questions and not just those to each specific question.

The assumption is made that those who did not respond did so because they had no losses.

Skills bought-in	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22	Mar-23
fieldwork (intrusive or non-intrusive)	51%	67%	62%	68%	52%	39%	62%	39%	53%
post-fieldwork analysis	43%	58%	62%	60%	42%	38%	43%	50%	56%
artefact or ecofact conservation	27%	58%	46%	44%	39%	43%	48%	50%	77%
desk-based/environmental assessment	8%	21%	12%	12%	23%	5%	24%	11%	27%
providing advice to clients	14%	25%	15%	12%	13%	9%	29%	22%	15%
data management	5%	13%	12%	4%	10%	3%	14%	17%	15%
other	0%	4%	8%	4%	16%	6%	0%	22%	38%

Table 26: Skills bought-in from 2015 to 2023. Percentages calculated on total responses to all skills questions and not just those to this specific question.

The assumption is made that those who did not respond did so because they had no need to buy in skills.

Training provided	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22	Mar-23
fieldwork (intrusive or non-intrusive)	54%	71%	62%	72%	55%	27%	57%	100%	84%
post-fieldwork analysis	46%	63%	62%	68%	42%	26%	52%	22%	78%
artefact or ecofact conservation	38%	58%	58%	68%	13%	6%	29%	22%	69%
providing advice to clients	38%	33%	38%	44%	45%	25%	43%	56%	91%
desk-based/environmental assessment	14%	33%	35%	36%	42%	34%	52%	72%	85%
data management	24%	33%	31%	28%	23%	31%	28%	33%	85%
other	24%	21%	15%	8%	10%	10%	5%	17%	75%

Table 27: Skills training provided from 2015 to 2023. Percentages calculated on total responses to all skills questions and not just those to this specific question.

A question about whether respondents considered there were sector-wide shortages of particular skills areas was not asked in 2023. Table 28 (below) is included for historical reference purposes. The assumption is made that those who did not respond did so because they had no need to train staff.

Sector shortages	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21
fieldwork (intrusive or non-intrusive)	35%	41%	46%	50%	64%	19%	25%	62%
post-fieldwork analysis	22%	49%	54%	65%	64%	29%	15%	62%
artefact or ecofact conservation	13%	24%	29%	42%	48%	16%	12%	38%
providing advice to clients	17%	22%	29%	38%	32%	16%	6%	33%
desk-based/environmental assessment	17%	22%	29%	23%	32%	23%	10%	29%
data management	4%	8%	13%	15%	20%	13%	6%	9%
other	17%	14%	29%	12%	20%	6%	5%	10%

Table 28: Sectoral Skills shortages from 2014 to 2021. Percentages calculated on total responses to all skills questions and not just those to this specific question.

The assumption is made that those who did not respond did so because they did not believe there were sector shortages.

NVQ

The popularity of the NVQ in Archaeological Practice is declining. The survey continues to show that only a minority of respondents have previously accessed the Level 3 NVQ Certification in Archaeological Practice (Table 29), as has been the case in every iteration of the survey, and for the first time since this question was first asked (in 2011), the majority of respondents would not consider supporting a member of staff in the future.

NVQ - (Level 3 NVQ Certificate in Archaeological Practice)	yes	no	don't know
have supported a member of staff in the past	5	15	1
would consider supporting a member of staff in the future	7	10	4

Table 29: NVQ use responses. n=21.

Apprenticeships

Formal Apprenticeships continue to be under-used in commercial archaeology (Table 30). In each previous survey where these questions were asked (since 2016), a majority of respondents reported that they would consider supporting a member of staff to become an Apprentice; this year, for the first time, the number that would and would not consider supporting a member of staff in the future was balanced.

Apprenticeships	yes	No	don't know
have supported a member of staff in the past	5	15	1
would consider supporting a member of staff in the future	10	10	2

Table 30: Apprenticeships use responses. n=22.

Perceptions

As in past years, respondents were asked about their perceptions about the current market (Table 31). Respondents typically believed that **their heritage teams would grow in the next year**. The level of concern over **non-payment of bills** remained steady. A substantial majority of respondents either agreed, or strongly agreed with the perception that **a shortage of heritage staff in LPAs is a major constraint on heritage projects**. This has been the case in every iteration of this survey since 2014, and may be particularly relevant given that the absolute numbers of archaeological heritage staff employed in local planning authorities declined in 2022-23 (Table 11).

Recruitment continued to be a serious concern for the sector. 73% of respondents agreed or strongly agreed with the statement that **we have had vacancies that we considered to be hard to fill**.

	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22	Mar 23
My heritage team will grow within the next 12 months							
strongly agree	12%	15%	12%	12%	27%	5%	13%
agree	36%	37%	15%	26%	41%	38%	35%
unsure	24%	33%	29%	21%	14%	29%	43%
disagree	16%	7%	26%	23%	23%	24%	9%
strongly disagree	12%	7%	18%	18%	18%	5%	0%
Non-payment of bills has been a significant problem for my business							
strongly agree	12%	0%	3%	9%	9%	5%	13%
agree	20%	67%	26%	17%	18%	33%	26%
unsure	8%	7%	9%	6%	9%	10%	17%
disagree	52%	19%	44%	56%	45%	38%	26%
strongly disagree	8%	7%	15%	12%	18%	14%	17%
A shortage of heritage staff in LPAs is a major constraint on heritage projects							
strongly agree	27%	30%	9%	19%	23%	38%	30%
agree	58%	33%	56%	50%	32%	38%	43%
unsure	8%	19%	18%	19%	27%	10%	17%
disagree	8%	15%	12%	9%	14%	14%	9%
strongly disagree	0%	4%	3%	3%	5%	0%	0%
We have had vacancies that we considered to be hard to fill							
strongly agree					32%	29%	30%
agree					45%	52%	43%
unsure					5%	0%	4%
disagree					9%	14%	13%
strongly disagree					9%	5%	9%

Table 31: Respondents' perceptions from 2017 to 2023. (*n*=23)

One respondent offered additional comment on this set of questions:

- Non (or late)-payment is a problem, whether it would be considered "significant" is debatable. Recruitment of trained and experienced staff continues to be a major challenge.

Historical answers to perception questions that are no longer asked in this survey are presented in Table 32.

	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21
The economic climate for development will improve over the next 12 months						
strongly agree	12%	4%	25%	9%	2%	9%
agree	35%	15%	19%	3%	20%	50%
unsure	42%	42%	31%	29%	39%	23%
disagree	12%	31%	17%	38%	27%	18%
strongly disagree	0%	8%	8%	18%	12%	0%
Late payment of bills is an increasingly significant problem for my business						
strongly agree	19%	15%	19%	9%	15%	9%
agree	31%	46%	30%	41%	26%	18%
unsure	12%	8%	15%	12%	8%	32%
disagree	38%	31%	37%	32%	42%	36%
strongly disagree	0%	0%	0%	3%	9%	5%
Current national planning policy frameworks are making it easier to justify heritage work and revenue levels						
strongly agree	0%	4%	8%	3%	9%	9%
agree	31%	48%	42%	44%	34%	27%
unsure	19%	20%	27%	24%	32%	55%
disagree	46%	24%	19%	26%	25%	9%
strongly disagree	4%	4%	4%	0%	0%	0%

Table 32: Respondents' perceptions from 2016 to 2021.

Carbon Reduction and Carbon Management

A new series of questions were asked regarding organisational carbon reduction and carbon management. This will help to establish sectoral baselines before the introduction of the FAME Carbon Calculator for Commercial Archaeology, which is anticipated to be launched in the second half of 2024. Half of the respondents were measuring their footprint, and half were not (Table 33).

Do you currently measure your organisation's carbon footprint?	Count	%
currently measuring organisation's carbon footprint	12	50%
not currently measuring organisation's carbon footprint	12	50%

Table 33: Measuring carbon footprint. n=24.

Half of the respondents reported that they were developing a carbon reduction plan, and a minority had a plan in place, with one having science-based targets in place and these had been approved by the Science-Based Targets initiative (SBTi), which defines and promotes best practice in emissions reductions and net-zero targets in line with climate science (Table 34).

Do you have an organisational carbon reduction plan?	Count	%
do not have a carbon reduction plan	8	33%
development of carbon reduction plan in progress	12	50%
carbon reduction plan in place	3	13%
science based targets in place and approved by SBTi	1	4%

Table 34: Carbon reduction plan. n=24.

And half of respondents were working towards or had received PAS 2080 certification, the global standard for managing infrastructure carbon (Table 35).

Are you working towards PAS 2080: Carbon management in buildings and infrastructure certification?	Count	%
not aware of the standard	8	33%
considered but not relevant	4	17%
working towards project specific reduction and reporting	11	46%
have received PAS 2080 certificate of conformity	1	4%

Table 35: PAS 2080. n=24.

Health and Safety

The health and safety results will be reported in a separate FAME H&S report.

Further Comments

Four respondents took advantage of the opportunity to add further comments.

- Hi - as part of a large local authority I have not always been able to provide fully up-to-date answers to some questions as data is centrally held and not readily accessed (eg Sickness records)
- It would be helpful to demonstrate the actual wages for selected skill levels currently paid across the sector to counterbalance the hyperbole given credence on social media which is damaging to morale
- The university financial year runs to different dates (Aug to Jul) so it is difficult for us to fully align our data but we have done our best. We also do not categorise income by sector in the same way so are unable to provide data on this question.
- This organisation does not fit into the normal commercial box - we do have some funded projects eg NLHF bids and other grants etc but we are not a directly commercial operation. We are grant aided by [LOCAL PLANNING AUTHORITY] and others to deliver advice and services.

Appendix: Survey Questions

The survey questions asked were as follows:

1. Which country is your organisation headquartered in?

- United Kingdom
- Republic of Ireland
- Another country - please enter below

[IF Q1= United Kingdom]

2. Where in the UK is the head office of your organisation located?

3. Do you have multiple offices? if so, please indicate where they are located?

- East of England
- East Midlands (England)
- Greater London
- North East England
- North West England
- South East England
- South West England
- West Midlands (England)
- Yorkshire and the Humber
- Scotland
- Wales
- Northern Ireland
- Republic of Ireland
- outside the UK and Republic of Ireland

4. How many full-time staff were working for your organisation on 31 March 2023?

Please include all full-time or full-time equivalent staff, together with part-time staff, using estimates of full-time equivalency - for example, a member of staff working 2.5 days a week should be counted as 0.5.

Fee-earners: members of staff whose time can be billed to clients.

	FTE
total staff (managerial, professional, technical and administrative) employed	
total fee earners working full-time	

5. Of your staff, how many were:

	FTE
British nationals (UK subjects)	
Irish nationals (Irish citizens)	
nationals of other EU states	
nationals of other countries (non-UK, non-EU)	

6. How many members of staff (FTE) did your organisation have one year before, on 31 March 2022 - the census date for State of the Archaeological Market 2021-22?

7. How many of your members of staff were working on each of the following types of contract or agreement on 31 March 2023?

	full-time	part-time
permanent		
fixed term		
casual		

8. Did salaries at your organisation typically rise or fall between April 2022 and March 2023? (NB - not total salary bill)

when comparing changes to inflation, please consider the rate of inflation at the date of the salary settlement

9. How did your charge out rates change in the year to the end of March 2023, and by how much do you expect them to have changed in 2023-24?

by what percentage did your charge-out rates increase (+) or decrease (-) over the year ending 31 March 2023?

by what percentage do you anticipate that your rates will increase (+) or decrease (-) over the year ending 31 March 2024?

10. between April 2022 and March 2023, how many projects did you bid for, and how many did you win?

projects bid or tendered for

projects won or secured

[IF Q1 = United Kingdom]

11a. What was your annual financial turnover for work in financial year 2022-23?

Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc

if your accounting period does not run from April to March, please indicate fee income for the nearest 12-month period for which figures are available.

	£
turnover in year ending 31 March 2023	

[IF Q1 ≠ United Kingdom]

11b. What was your annual financial turnover for work in 2022?

Please enter full numbers of euros, eg 1250000, not decimal fractions of millions etc

if your accounting period does not run from January to December, please indicate fee income for the nearest 12-month period for which figures are available.

	€
turnover in year ending 31 December 2023	

12. How much of your turnover originated from work undertaken in each of these locations?

please enter percentages, ensuring that the total = 100%

- England
- Scotland
- Wales
- Northern Ireland
- Republic of Ireland
- rest of the world

[IF Q1 = United Kingdom]

13a. What was your annual profit (or surplus) (in £) in financial year 2022-23?

Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc

If you made a loss in 2022-23, please enter a negative figure.

	£
your profit or surplus (plus or minus) in the year ending 31 March 2023	

[IF Q1 ≠ United Kingdom]

13b. What was your annual profit (or surplus) (in €) in 2023?

Please enter full numbers of euros, eg 1250000, not decimal fractions of millions etc

If you made a loss in 2023 please enter a negative figure.

	€
your profit or surplus (plus or minus) in the year ending 31 December 2023	

14. How much of your turnover originated from your direct client from each of these sources?

please enter percentages, ensuring that the total = 100%

- private sector clients
- national heritage agencies (Historic England, Historic Environment Scotland, Cadw, Heritage Council etc)
- central government departments and agencies
- local, district, city, county or unitary councils (local planning authorities)
- other public bodies (including universities, public-private partnerships and local enterprise partnerships)
- community groups (including lottery-funded projects, town and parish councils and neighbourhood forums)

[IF Q1 = United Kingdom]

15a. please indicate your income in the year ending 31 March 2022 for work in each of the sectors listed. Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc.

	income 2022-23
--	----------------

	£
Construction	
Residential development	
Commercial and industrial	
Infrastructure	
Minerals	
Waste	
Transport	
Energy	
Telecommunications	
Water supply	
Education	
Health	
Research and public archaeology	
Community projects and HLF	
National agencies and university grants	
Local authority initiatives	
Other research and public archaeology	
Other services	
Heritage conservation	
Assistance to LPAs in delivering development control services	
Any other services not categorised above	

[IF Q1 ≠ United Kingdom]

15b. please indicate your income in the year ending 31 December 2023 for work in each of the sectors listed. Please enter full numbers of euro, eg 1250000, not decimal fractions of millions etc.

	income 2023
	€
Construction	
Residential development	
Commercial and industrial	
Infrastructure	

Minerals	
Waste	
Transport	
Energy	
Telecommunications	
Water supply	
Education	
Health	
Research and public archaeology	
Community projects and HLF	
National agencies and university grants	
Local authority initiatives	
Other research and public archaeology	
Other services	
Heritage conservation	
Assistance to LPAs in delivering development control services	
Any other services not categorised above	

16. At the end of last financial year (4th April 2022 in UK, 31st December 2022 in Republic of Ireland), did you believe that market conditions would deteriorate over the next 12 months?

17. Other comments?

18. how many of the following RIDDOR reportable incidents occurred in your workplace in the last financial year (2022-23)?

	incidents
specified injuries (including fatality)	
injuries resulting in over 7 days absence	
occupational diseases (including carpal tunnel syndrome, tendonitis and occupational dermatitis)	
occupational disease caused by exposure to carcinogens, mutagens & biological agents (including occupational cancers)	

specified dangerous occurrences	
---------------------------------	--

19. how many non-RIDDOR reportable accidents were there in your workplace in the last financial year (2022-23)?

	total numbers of:		
	non-reportable accidents (no days absence)	near misses	non-reportable accidents resulting in one or more days absence
slip, trip or fall			
injured while handling, lifting or carrying			
struck by moving object - including vehicles			
vehicle related incident (including all business usage)			
musculoskeletal injury sustained over a period of time rather than due to a specific accident, e.g. repetitive strain injury, tendonitis, chronic back pain			
other			

20. further information about any other accidents

21. how many total days absence from the following categories have you/your staff had in the last financial year (2022-23)?

- injuries
- ill health days
- stress, depression or anxiety
- musculoskeletal disorder

22. are you tracking mental health concerns with your staff?

23. please tell us how you are tracking them?

24. what provisions do you have to support staff mental health?

25. Considering these areas of archaeological skills, please check any boxes where (in the last financial year) your organisation:

lost skills

had to buy in skills (hired subcontractors)

invested in skills training

	lost skills	hired skills	trained skills
fieldwork (intrusive or non-intrusive)			
post-fieldwork analysis			
artefact or ecofact conservation			
providing advice to clients			
desk-based or environmental assessment			
data management			
other			

26. On 31 March 2023, had you or were you considering supporting a member of staff to gain a vocational qualification in archaeological practice (Level 3 NVQ Certificate in Archaeological Practice)?

	yes	no	don't know
have supported a member of staff in the past			
would consider supporting a member of staff in the future			

27. On 31 March 2023, had you or were you considering supporting a member of staff to undertake an Apprenticeship in Historic Environment Practice?

nb: at this time, these Apprenticeships were available in England only. For employers outside England, please answer "would consider supporting a member of staff in the future" to indicate whether you would support staff to complete Apprenticeships if they were available to you

	yes	no	don't know
have supported a member of staff in the past			
would consider supporting a member of staff in the future			

28. At the end of last financial year (31 March 2023 in UK, 31 December 2023 in Ireland), would you have agreed or disagreed with the following statements?

Individual responses will be aggregated in any published survey report and your views will not be attributed to you without your permission

	strongly agree	agree	unsure	disagree	strongly disagree
my heritage team will grow within the next 12 months					
non-payment of bills has been a significant problem for my business					
a shortage of heritage staff in LPAs is a major constraint on heritage projects					
we have had vacancies that we considered to be hard to fill					

29. Any other comments?

30. do you currently measure your organisation's carbon footprint?

currently measuring organisation's carbon footprint

not currently measuring or

31. do you have an organisational carbon reduction plan?

do not have a carbon reduction plan

development of carbon reduction plan in progress

carbon reduction plan in place

science based targets in place and approved by SBTi

32. are you working towards PAS 2080: Carbon management in buildings and infrastructure certification?

not aware of the standard

considered but not relevant

working towards project specific reduction and reporting

have received PAS 2080 certificate of conformity

33. If you have any further comments on your responses, or on the state of commercial archaeology in general, please let us know.