



STATE OF THE ARCHAEOLOGICAL MARKET 2024-25



FAMTE
Federation of Archaeological Managers & Employers

CIFA | Chartered
Institute for
Archaeologists

Acknowledgements

This project was undertaken by the Federation of Archaeological Managers and Employers with support from the Chartered Institute for Archaeologists.

Design and layout by: Doug Rocks-Macqueen

Foreword by: Tim Malim

Report by: Kenneth Aitchison, completed by Doug Rocks-Macqueen

Reviewed by: Tim Malim and Kate Geary

Cover images: Top: Headland Archaeology © CC BY 4.0. Bottom: Geomatics survey at Liverpool Street Station, MOLA/Crossrail © CC BY 4.0

Published by FAME 2026 CC BY 4.0.

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

CONTENTS

Acknowledgements	2
Foreword	4
Executive summary	5
<i>Key results in 2024-25</i>	<i>6</i>
Introduction	7
Methods	7
Results of 2024-25 survey	8
<i>Geographic distribution</i>	<i>8</i>
<i>Staff numbers</i>	<i>8</i>
<i>Staff nationalities</i>	<i>9</i>
<i>Staff contracts</i>	<i>10</i>
<i>Salary level changes</i>	<i>11</i>
<i>Charge-out rates</i>	<i>12</i>
<i>Competition for projects</i>	<i>12</i>
<i>Sector growth</i>	<i>13</i>
<i>Revenue</i>	<i>15</i>
<i>*Important revenue note*</i>	<i>15</i>
<i>Contribution to the economy</i>	<i>16</i>
<i>Profits</i>	<i>17</i>
<i>Funding sources</i>	<i>19</i>
<i>Market sectors</i>	<i>19</i>
<i>Forms of contract</i>	<i>21</i>
<i>Market conditions</i>	<i>22</i>
<i>Client failure</i>	<i>23</i>
<i>Skills</i>	<i>24</i>
<i>NVQ</i>	<i>26</i>
<i>Apprenticeships</i>	<i>28</i>
<i>Perceptions</i>	<i>28</i>
<i>Carbon reduction and carbon management</i>	<i>30</i>
<i>Health and Safety</i>	<i>31</i>
<i>Further Comments</i>	<i>31</i>
References	32
Appendix – Survey Questionnaire	33

Foreword

The latest State of the Archaeological Market Survey continues to provide our industry with essential information on developments within the marketplace and how resilient our organisations are, how they contribute to the overall economy and what issues they face in the current commercial environment. I am heartened to see that companies have had the confidence to raise salaries in line with inflation or above it, and that the average surplus or profit is at 3.7%, ensuring a margin for reinvestment into each organisation.

Since the beginning of the 2020s, when most funding came from transport schemes, the main sectors in which archaeologists have been employed are now residential housing and energy, the latter including large nuclear facilities currently under construction. The scale of some of these projects challenges our industry to recruit sufficient trained staff, and the survey reveals how we have skills shortages in every category, but especially fieldwork. This has prompted several of the larger companies to design training programmes, showing how businesses have had to adapt creatively, and an increased interest in NVQs and apprenticeships.

The survey identifies a generally more optimistic outlook than might have been expected within an economic environment that has very low levels of growth, and with a near-zero increase in the number of archaeologists over the year, it is refreshing to see that our industry has managed something that the UK has struggled to achieve, an improvement in productivity. I am very grateful for the efficiency that FAME's secretariat have provided in gathering and analysing the data, and trust that the results will prove helpful to a wide readership.

A handwritten signature in black ink, appearing to read 'Tim Malim', with a large, stylized initial 'T'.

Tim Malim

Chair of FAME's Board of Directors

Executive summary

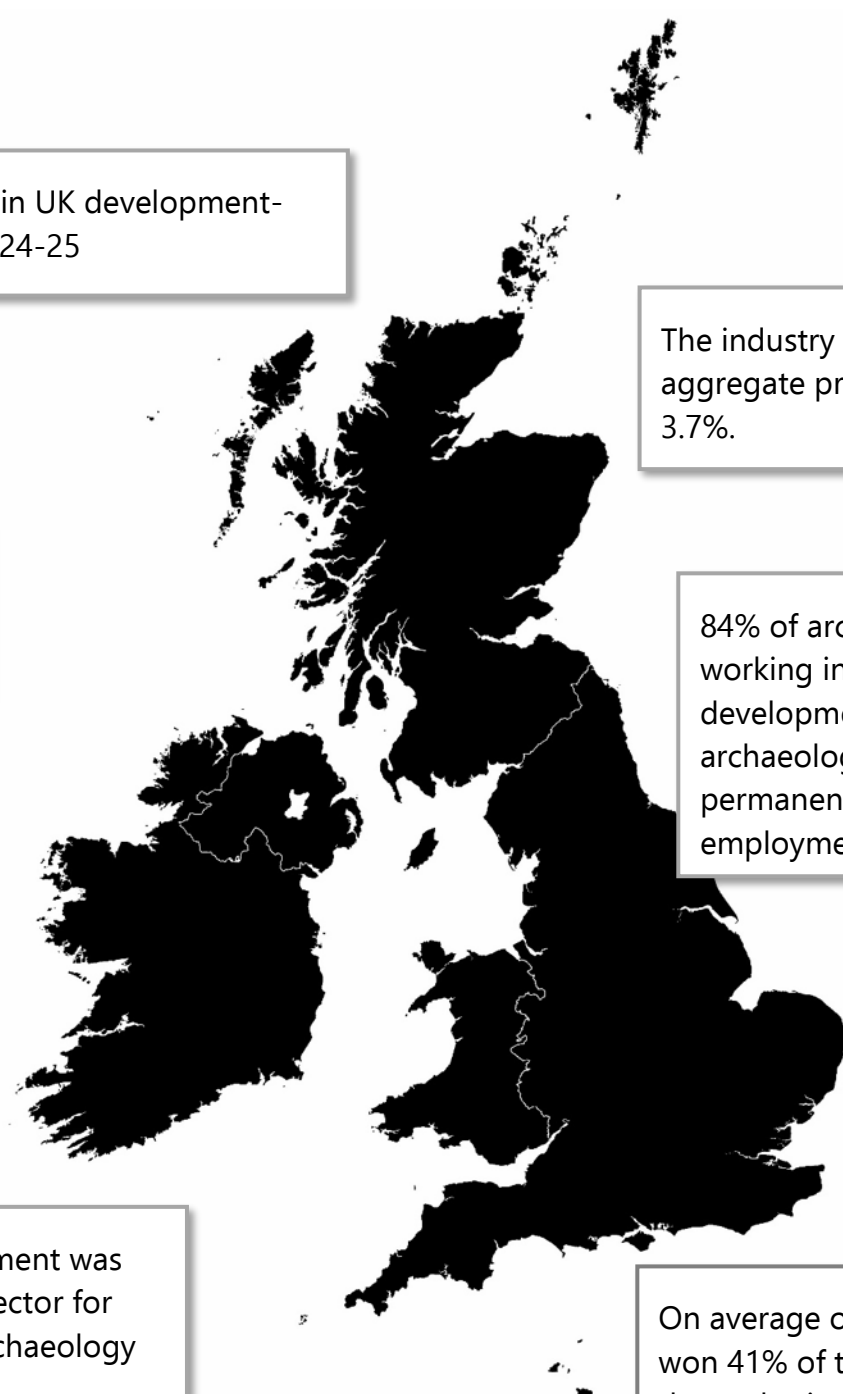
This report is on the state of the market for archaeological services in the United Kingdom in 2024-25. Some respondents worked in the Republic of Ireland and elsewhere in the world, and those data have been separated where appropriate to avoid incorrect counting. The survey gathered data via a questionnaire sent to all FAME members and Chartered Institute for Archaeologists' Registered Organisations.

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.

The number of people working in UK development-led archaeology barely increased in the year 2024-25.

Key results in 2024-25



4,935 people worked in UK development-led archaeology in 2024-25

The industry reported an aggregate profit level of 3.7%.

88% of UK-based staff were British nationals

84% of archaeologists working in development-led archaeology have permanent contracts of employment.

Residential development was the largest market sector for development-led archaeology in 2024-25.

On average organisations won 41% of the tenders they submitted.

Introduction

This project is a continuation of a series of projects that have been undertaken for seventeen years by the **Chartered Institute for Archaeologists** (CIfA) and the **Federation of Archaeological Managers and Employers** (FAME) with the support of other organisations:

- Nine quarterly surveys were initially conducted, gathering and presenting data from October 2008 to April 2011.
- Subsequently, CIfA and FAME commissioned a project to gather data on a six-monthly basis and to present reports on the state of the archaeological market.
- From 2013-14 up to 2017-18, with the support of **Historic England**, the first state of the market survey was conducted yearly.
- From 2017-18 to 2022-23, with the support of **Historic Environment Scotland**, the state of the market survey was conducted again yearly.
- And since 2023-24 CIfA and FAME have been continuing this series.

This report presents the results of the survey for 2024-25.

Some questions have been identified that do not need to be asked every year, and so selected questions have been asked less frequently than on an annual basis. The results of those questions are not included in this report but can be found in other State of the Market reports.

Methods

The survey (see Appendix) was conducted by polling FAME members and CIfA Registered Organisations (224 email addresses at 110 organisations).

The survey was a digital survey created using Novi Survey software. Respondents were asked to provide data that applied on 31st March 2025, so this report is on the situation at the end of financial year 2024-25.

Links to the questionnaire were initially sent to potential respondents on 10th February 2026, with automated reminders and follow-up emails encouraging completion being sent periodically until the survey was closed on 13th March 2026.

Data were also collected from publicly available returns to **Companies House**, which provided usable data on staffing for 58 organisations and on financial revenues for nine.

Longitudinal datasets are now normally presented for no more than the last ten years – earlier data are accessible in predecessor reports.

Results of 2024-25 survey

Responses were received from 28 organisations (the 2023-24 survey had 48 usable responses). Not every respondent answered every question.

Geographic distribution

Respondents were asked about the locations of their head and subsidiary offices (but not about staffing or turnover per office) (Table 1). 27 organisations responded, of which 13 had a total of 34 subsidiary offices.

	Head offices	Subsidiary offices
East of England	3	5
East Midlands	3	5
London	3	1
North East England	0	2
North West England	0	4
South East England	5	6
South West England	7	3
West Midlands	2	1
Yorkshire and the Humber	1	5
Scotland	2	1
Wales	1	1
Northern Ireland	0	0
Republic of Ireland	0	0
outside the UK and Republic of Ireland	0	0
total	27	34

Table 1: Distribution of company offices by location. n=27.

Staff numbers

In a change to the methodology used in previous years, in addition to using survey returns, data were also extracted from publicly accessible Companies House records to identify the number of staff working at organisations that were invited to contribute. On this basis, it was found that 2,677.39 staff (FTE) were working for 67 respondents, with between 0 and 411 members of staff at each (Table 2).

staff	total
total staff (managerial, professional, technical and administrative) employed	2,756.39
total fee earners working full-time	2,004.30

Table 2: Staff numbers. n=27.

The figure for total fee earners working full-time is different from the figure for total staff as data were only available for 27 respondents regarding this part of the question. Those 27 respondents (with 2,004.3 full-time equivalent fee-earners) employed a total of 2,591.99 FTE staff. This suggests that for every ten fee-earning archaeologists, companies also employ one additional person (fee-earning staff are 88.2% of the full staffing complement).

Staff nationalities

In 2025, 88% of staff members working for archaeological companies headquartered in the UK were British nationals (Table 3), unchanged from the level reported in 2024, while 9% were citizens of EU states, a figure that was also unchanged from the level reported in 2024 (Table 4).

staff (full-time equivalents) employed in UK	count	%
British (UK subjects)	1,472.29	87.6%
nationals of EU states	155	9.2%
nationals of other countries (non-UK, non-EU)	52	3.1%
total	1,679.29	

Table 3: Staff nationalities (UK-headquartered respondents).

nationalities	2018	2019	2020	2021	2022	2023	2024	2025
British (UK subjects)	85%	86%	86%	86%	87%	85%	88%	88%
nationals of EU states	13%	12%	13%	11%	10%	10%	9%	9%
nationals of other countries (non-UK, non-EU)	2%	3%	1%	3%	3%	4%	4%	3%

Table 4: Nationalities of staff (UK-headquartered respondents) from 2018-25.

Staff contracts

Overall, 84% of workers in development-led archaeology in 2025 were on permanent contracts (86% in 2024), and 15% were employed on fixed-term contracts (Table 5).

72% of people working in commercial archaeological practice have full-time, permanent contracts, slightly lower than the level reported in 2024 of 74% (Table 6).

contracts	count	%
permanent		
full-time	1,217	72.4%
part-time	196.9	11.7%
fixed term		
full-time	241	14.3%
part-time	4	0.2%
casual		
full-time	4	0.2%
part-time	19	1.1%
total	1,681.9	

Table 5: Staff by contract type for UK-based organisations in 2024-25 (n=26)

contracts (historical)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
permanent										
full-time	68%	68%	71%	65%	66%	76%	76%	73%	78%	72%
part-time	9%	6%	6%	14%	13%	11%	9%	8%	7%	12%
fixed term										
full-time	21%	20%	16%	18%	12%	15%	18%	13%	13%	14%
part-time	2%	1%	2%	1%	2%	0%	1%	2%	1%	0%
casual										
full-time	2%	1%	0%	0%						0%
part-time	0%	0%	0%	1%						1%

Table 6: Staff by contract type for UK-based organisations from 2016 to 2025.

Salary level changes

Respondents were asked about overall changes in two key economic indicators – salary levels and charge-out 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 2024-25 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.

87% 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 2025 was 2.6%¹.

salaries	count	%
rose by above inflation	11	48%
rose by inflation	9	39%
unchanged	2	9%
fell by up to 10%	1	4%
fell by over 10%	0	0%
total	23	

Table 7: Salary changes 2025.

¹ Office for National Statistics 2026.

Charge-out rates

Respondents were also asked about any changes to their charge-out rates in the year ending 31st March 2025, and then about how they anticipated they would change in the next year (Table 8).

charge-out rates	reported change to March 2025	anticipated change to March 2026
range	0% to 23%	0% to 10%
mean	4.5%	5.5%
median	4.0%	5.0%
mode	0.0% (7 respondents)	5.0% (6 respondents)
n=	20	19

Table 8: Charge-out rate changes 2024-25.

Charge-out rates rose by an average of 4.5% in the year to March 2025. Looking forward, respondents expected their charge-out rates would rise by an average of 5.5% in the year to March 2026.

In March 2025, the annual UK inflation rate (CPI) was 2.6%; 65% of respondents (13 of 20) increased their charge-out rates in 2024-25 by this amount or more.

Competition for projects

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 each won between 20% - 100% of projects they tendered for, with an average win rate of 41% (Table 9). In 2024, the equivalent figure was 40%, and in 2023 it was 45%.

competition for projects	range	average
number tendered for	0-1535	490
number won	4-891	203
percentage won	20-100%	41%

Table 9: Competition for projects 2024-25. n=18.

Sector growth

Data were available from 57 organisations regarding the number of fee-earning staff they employed in 2025 (2,522.94) together with retrospective figures for 2024 (2,506.27). This includes respondents to the 2024 survey that were known to be no longer trading in 2025, being treated as having zero staff in 2025. This results in an aggregate increase across those organisations of 16.67 individuals – an increase of 0.7%.

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 2020², 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 for which data were not available for both questions for 2024 and 2025 staffing levels there was no net change, meaning that we are assuming the known change in staffing numbers – 16.67 individuals – represents the overall commercial sector increase.

This equates to 0.3% of the workforce; the number of people employed in the commercial sector has grown year-on-year since 2012, but the rate of growth has slowed considerably to near zero since 2021 (Table 10).

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
count	3481	3743	3997	4152	4375	4700	4800	4851	4918	4935
annual growth	6.0%	7.5%	6.8%	3.9%	5.4%	7.4%	2.2%	1.1%	1.4%	0.3%

Table 10: Calculated figures – employment in development-led archaeology 2016-2025.

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 2024³. No update for 2025 had been published at the time of preparing this report, and so this remains unchanged from the 2024 results. That dataset was only for England, and UK totals were extrapolated by assuming the same rate of change for employment in curatorial archaeology also applied elsewhere in the UK.

² Aitchison, German & Rocks-Macqueen 2021.

³ Historic England 2024.

The figures for 'other' employers – including universities, museums, national government - were collected in the Profiling the Profession 2020 survey, and as no updated figures are available for these sectors, they remain unchanged in the 2025 results.

Overall, the total number of people employed in archaeology in the UK grew by the extremely small amount of only 0.3% in the year to March 2025 (Table 11 and Figure 1), with the estimated total of 17 jobs gained in development-led archaeology.

archaeological workforce	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
curatorial	416	407	409	409	338	351	353	336	298	298
other	1,495	1,495	1,495	1,495	1,550	1,550	1,550	1,550	1,550	1,550
commercial	3,481	3,743	3,997	4,152	4,375	4,700	4,800	4,851	4,918	4,935
total	5,392	5,645	5,901	6,056	6,263	6,601	6,703	6,737	6,766	6,783

Table 11: Reported and estimated numbers in archaeological employment from 2016 to 2025.

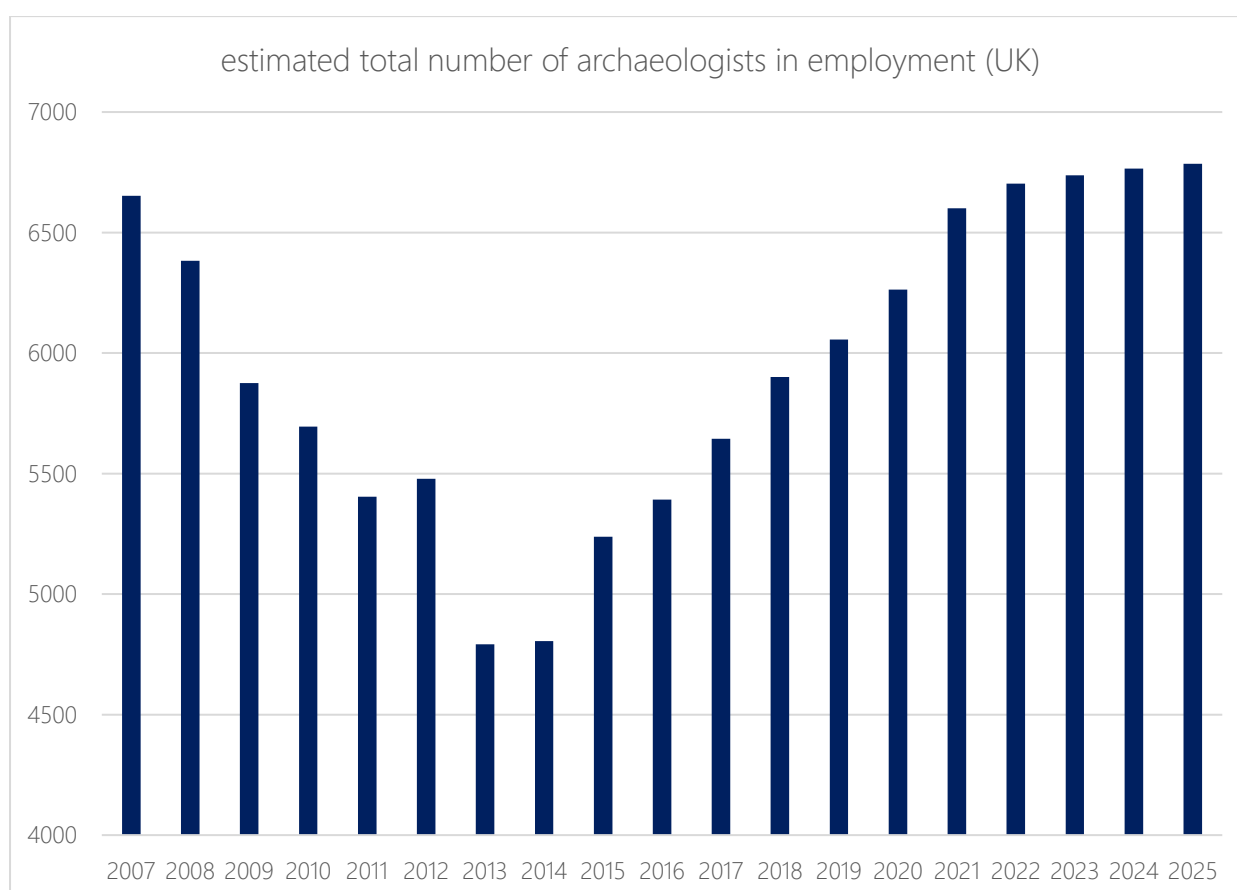


Figure 1: Estimated total numbers of archaeologists employed in the United Kingdom 2007-2025.

Revenue

Important revenue note

After this data was gathered the FAME Board raised a concern of double counting of revenue through sub-contracting and joint projects. Some organisations may be involved in joint ventures where revenue would come into one partner and then be sent to another, with both recording those amounts as revenue which could result in double counting in this survey. Similarly, sub-contracting may be counted by two organisations as the same revenue. We do not know the extent of this in the sector and future surveys will account for this. However, for now, these numbers should be used with caution.

In a change to the methodology used in previous years, in addition to using survey returns data were also extracted from publicly accessible *Companies House* records to identify the level of revenue that was secured by organisations that were invited to contribute (but that had not provided returns).

Combining data from Companies House records and respondents' returns provided 23 organisations' revenue (financial turnover) figures for their latest financial years; all were headquartered in the UK and reported in pounds sterling (Table 12). The mean figures are the arithmetical averages; the medians are the figures for which 50% of respondents turned over more and 50% turned over less.

	UK Pounds revenue (turnover) in year ending 31 March 2025
respondents	23
total turnover	£182,321,812
mean	£7,927,035
median	£2,017,149

Table 12: UK revenue in 2025.

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

revenue (historical)	England	Scotland	Wales	Northern Ireland	Ireland	Rest of World
2024-25	93%	2%	4%	0%	0%	1%
2023-24	96%	2%	1%	0%	0%	1%
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: Revenue by geographic location from 2017 to 2025

Total revenue has been tracked for over ten 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.

	2020-21	2021-22	2022-23	2023-24	2024-25
>=£10m	17%	17%	17%	11%	26%
£5m -> £10m	0%	4%	8%	4%	9%
£2.5m -> £5m	17%	13%	8%	11%	17%
£1m -> £2.5m	50%	25%	17%	11%	13%
£500,000 -> £1m	6%	8%	17%	22%	26%
£250,000 -> £500,000	11%	8%	8%	4%	3%
<£250,000	22%	25%	25%	37%	4%

Table 14: Distribution of turnover from 2021 to 2025. UK only.

Contribution to the economy

The calculated average revenue reported per member of staff in 2024-25 was £72,130, an increase on the previous year of 5.2% (Table 15), which, when multiplied by the number of people working in development-led archaeology results in the entire sector's revenue being valued at £356million (an increase on 2023-24 of 5.6%).

value of the industry	avg. per staff member	estimated development-led archaeologists	industry size
2025	£72,130	4,935	£356m
2024	£68,544	4,918	£337m
2023	£63,780	4,851	£309m
2022	£55,878	4,800	£268m
2021	£52,528	4,700	£247m
2020	£51,187	4,375	£224m
2019	£48,696	4,152	£202m
2018	£48,747	3,997	£195m
2017	£45,309	3,743	£170m

Table 15: Average revenue per employee, estimated number of archaeologists, total value of the development-led archaeology industry from 2016 to 2025. UK only.

No data were received on financial turnover for companies reporting in Euro. In 2023-24, the calculated average figure for companies that were headquartered in Ireland was €79,372 (=£67,944).

Profits

17 UK-headquartered respondents reported aggregate profits (or surplus, for not-for-profit organisations) of £4,281,506 on their combined turnovers of £115,583,021 in 2024-25, equating to an aggregate profit margin of 3.7%.

This is higher than was the case in 2023-24 (when aggregate profit levels were 2.5%, and had been 3.1% in 2022-23) (Table 16).

11 of 17 respondents (65%) reported profit levels that represented less than 5% of their turnovers; this includes the 4 respondents (24%) that reported having made losses in 2024-25.

One respondent that was not headquartered in the United Kingdom reported a profit margin of 47.6% in 2024-25.

profit as % of turnover	Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21	Mar 22	Mar 23	Mar 24	Mar 25
>25%	14%	3%	15%	35%	17%	11%	13%	4%	25%	6%
10->25%	14%	41%	22%	23%	21%	26%	17%	22%	4%	18%
5->10%	19%	13%	19%	19%	17%	26%	29%	17%	25%	12%
<5%	52%	44%	44%	23%	45%	37%	46%	57%	46%	65%
mean	£154,438	£121,252	£211,531	£93,630	£127,547	£308,934	£472,762	£228,778	£92,159	£251,853
median	£50,000	£43,000	£60,000	£50,000	£400,000	£90,000	£324,153	£117,000	£31,447	£55,000
range of profits reported	-75,000 to £799,000	-286,000 to £1,000,000	-£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	-£233,998 to £1,576,832	-£271,161 to £1,664,143

Table 16: Distribution of profits, mean, median and ranges of reported profits from 2016 to 2025

Funding sources

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

source of income	respondent revenue	%
private sector clients	£103,472,523	90%
national heritage agencies (Historic England, Historic Environment Scotland, Cadw, Heritage Council etc)	£2,247,258	2%
central government departments and agencies	£1,762,307	2%
local, district, city, county or unitary councils (local planning authorities).	£2,469,501	2%
other public bodies (including universities, public-private partnerships and local enterprise partnerships)	£808,553	1%
community groups (including lottery-funded projects, town and parish councils and neighbourhood forums)	£1,007,884	1%
total	£111,768,026	

Table 17: Sources of turnover funding 2024-25, reporting in £. n=18.

Market sectors

In 2024-25, the largest source of funding for archaeological practice was Residential Development, followed by Energy (Table 18), as was the case in 2023-24.

source of income	March 25	relative change	
residential development	£32,130,469	34.8%	↔
energy	£28,086,027	30.5%	↔
commercial and industrial	£8,540,826	9.3%	↔
transport	£6,180,305	6.7%	↑
water supply	£3,248,078	3.5%	↓
any other services not elsewhere categorised	£4,282,828	4.6%	↑
minerals	£3,215,397	3.5%	↑
community projects and NHLF	£1,518,139	1.6%	↑
education	£1,377,488	1.5%	↓
national agencies and university grants	£1,327,106	1.4%	↑
heritage conservation	£605,126	0.7%	↑
health	£563,872	0.6%	↓
waste	£352,754	0.4%	↑
local authority initiatives	£335,759	0.4%	↓
assistance to LPAs delivering development control services	£237,762	0.3%	↑
telecommunications	£176,055	0.2%	↑
other research and public archaeology	£39,216	0.04%	↓
total	£92,217,205		

Table 18: Sources of income by sector 2024-25.

Historically, Residential Development has been the most significant source of annual market income for development-led archaeology, as it has been in 2024 and six of the eight years before that (Table 19). Transport's share of the market has diminished substantially since 2022. Energy remains the second most important market sector and has significantly increased in relative size in 20225 as work on renewables, nuclear, storage and grid upgrade projects continue to be significant.

source of income (historical)	2017	2018	2019	2020	2021	2022	2023	2024	2025
residential development	42%	36%	34%	28%	34%	32%	38%	59%	35%
energy	6%	14%	18%	7%	5%	6%	22%	13%	30%
commercial and industrial	18%	13%	10%	17%	17%	11%	8%	10%	10%
water supply	2%	1%	2%	1%	2%	2%	6%	8%	4%
transport	6%	14%	15%	34%	33%	39%	15%	7%	7%
education	1%	1%	2%	1%	0%	1%	2%	1%	1%
other research and public archaeology	1%	5%	0%	0%	0%	1%	2%	1%	0%
minerals	2%	5%	9%	3%	2%	3%	2%	1%	3%
community projects and HLF	3%	4%	1%	2%	1%	2%	1%	1%	2%
any other services not categorised	9%	0%	5%	3%	1%	1%	3%	0%	5%
health	1%	0%	0%	0%	0%	0%	0%	0%	1%
national agencies and university grants	1%	1%	1%	2%	2%	1%	0%	0%	1%
local authority initiatives	0%	1%	0%	1%	0%	0%	1%	0%	0%
heritage conservation	1%	0%	2%	1%	0%	1%	1%	0%	1%
waste	0%	0%	0%	0%	0%	0%	0%	0%	0%
assistance to LPAs dev. control services	0%	0%	0%	0%	0%	0%	0%	0%	0%
telecommunications	0%	0%	0%	0%	0%	0%	0%	0%	0%

Table 19: Sources of income by sector from 2017 to 2025.

Forms of contract

Questions about Forms of Contract used by respondents are not asked every year, and were not asked in 2024-25. Table 20 presents historic data from the years when this question was asked.

forms of contract	Mar-17	Mar-18	Mar-19	Mar-21	Mar-24
exchange of letters / emails	70%	74%	77%	64%	89%
your own organisation's standard T&Cs	70%	70%	60%	77%	67%
client's standard T&Cs	59%	70%	54%	86%	67%
bespoke	48%	33%	29%	36%	33%
NEC3 (various - family of contracts)	26%	37%	20%	9%	19%
ICE (short form or alternatives)	22%	15%	14%	32%	26%
none	7%	0%	11%	5%	4%
other	0%	4%	3%	0%	22%
don't know			3%	0%	0%

Table 20: Forms of Contract used 2017-24

Market conditions

Respondents were asked if they thought the market for archaeological services would deteriorate in financial year 2024-25.

In March 2025, more respondents considered that the market would improve in the coming year than thought it would not (Table 21). This continued the overall positive sentiment recorded in 2024 (Table 22 and Figure 2).

market conditions	count	%
yes - market conditions would deteriorate	7	35%
no - market conditions would improve	10	50%
don't know	3	15%
total	20	

Table 21: Market conditions expectations in 2025.

market confidence	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
confidence	43%	30%	7%	-47%	-16%	67%	-9%	-44%	12%	15%

Table 22: Market confidence from March 2016 to March 2025. Total confidence is those that think the market won't deteriorate minus those that think it will.

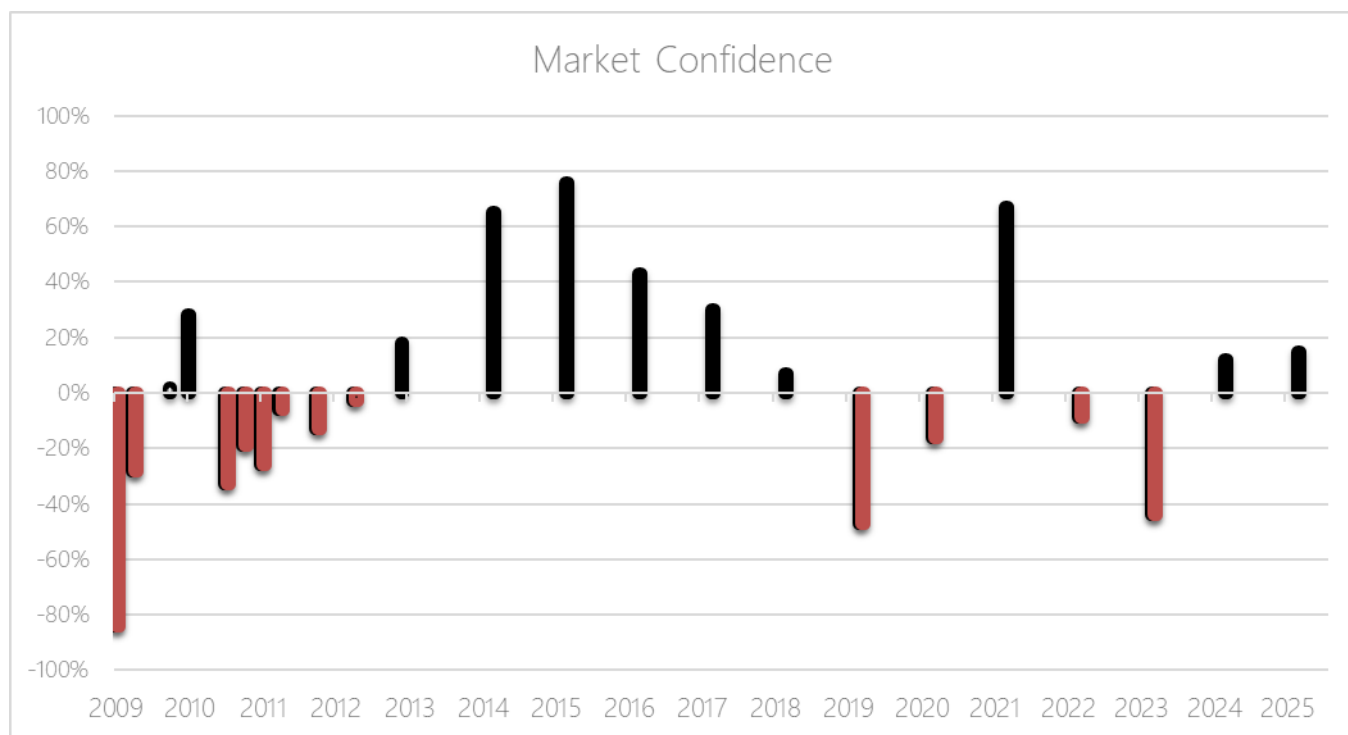


Figure 2: Market confidence from April 2009 to March 2025. Confidence is calculated as those that think the market won't deteriorate minus those that think it will.

Respondents were asked if they had specific comments to accompany their answers to the question, "on 1st March 2025, did you believe that market conditions would deteriorate over the next 12 months" and three did.

- Housing development has collapsed in London.
- Maritime heritage protection would possibly become more important due to wind farm expansion. However, legislation may curtail just that expansion.
- Trump presidency.

Client failure

Five respondents reported that projects had not completed because of a client suffering business failure, and this had affected a total of 14 projects, with details provided of where this happened in the process for six of these.

details of client failure (historical)	2019	2022	2025
pre-fieldwork	5	3	1
during evaluation	0	0	2
during mitigation	1	0	3
during post-fieldwork analysis	7	10	0
total	13	13	6

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

Respondents were asked if they had any additional comments on this matter, and one did.

- The bigger problem was projects completed but clients not paying, due to 'business failure'...

Skills

Respondents were asked whether there were areas where they had lost skills, had hired-in skills or skills areas where they had trained staff (Table 24). Note: some respondents 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)	4	31%	8	62%	12	92%	13
post-fieldwork analysis	3	23%	4	31%	12	92%	13
artefact or ecofact conservation	1	8%	7	54%	7	54%	13
providing advice to clients or other service users	1	11%	0	0%	9	100%	9
desk-based or environmental assessment	2	14%	3	21%	12	86%	14
data management	2	20%	2	20%	10	100%	10
other	2	33%	2	33%	5	83%	6

Table 24: Skills that were lost, hired or trained in 2025. n=14.

The levels of skills reported as being lost were higher in 2024-25 than they had been in 2023-24 (Table 25).

Buying in, or cross-hiring, fieldwork staff and expertise was routine practice, although it was reported at a lower frequency than in most previous iterations of the survey (Table 26). Hiring conservation expertise was routine, while buying in any other skill areas was relatively less common.

In all areas of expertise, the majority of respondents to each question reported that they were training staff in these areas; this had also been the case in 2023, but not in other years (Table 27).

Overall, this means that the sector considered that there were skills gaps in every area (requiring training) and the areas where skills shortages (requiring expertise to be hired in) were most acute were in fieldwork and conservation.

skills lost	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
fieldwork (intrusive or non-intrusive)	25%	27%	40%	19%	5%	38%	28%	58%	25%	27%
post-fieldwork analysis	17%	23%	20%	6%	5%	14%	0%	39%	17%	23%
artefact or ecofact conservation	17%	15%	16%	6%	2%	5%	0%	15%	17%	15%
providing advice to clients or other service users	8%	12%	16%	6%	3%	14%	6%	18%	8%	12%
desk-based or environmental assessment	8%	8%	12%	10%	4%	10%	17%	38%	8%	8%
data management	25%	27%	40%	19%	5%	38%	28%	58%	25%	27%
other	17%	23%	20%	6%	5%	14%	0%	39%	17%	23%

Table 25: Skills lost from 2016 to 2025. Percentages calculated on total responses to all skills questions and not just those to each specific question. The assumption has been made that those who did not respond did so because they had no losses.

skills hired	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
fieldwork (intrusive or non-intrusive)	67%	62%	68%	52%	39%	62%	39%	53%	67%	62%
post-fieldwork analysis	58%	62%	60%	42%	38%	43%	50%	56%	58%	62%
artefact or ecofact conservation	58%	46%	44%	39%	43%	48%	50%	77%	58%	46%
providing advice to clients or other service users	21%	12%	12%	23%	5%	24%	11%	27%	21%	12%
desk-based or environmental assessment	25%	15%	12%	13%	9%	29%	22%	15%	25%	15%
data management	67%	62%	68%	52%	39%	62%	39%	53%	67%	62%
other	58%	62%	60%	42%	38%	43%	50%	56%	58%	62%

Table 26: Skills bought in from 2016 to 2025. Percentages calculated on total responses to all skills questions and not just those to this specific question. The assumption has been made that those who did not respond did so because they had no need to buy in skills.

skills trained	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
fieldwork (intrusive or non-intrusive)	71%	62%	72%	55%	27%	57%	100%	84%	71%	62%
post-fieldwork analysis	63%	62%	68%	42%	26%	52%	22%	78%	63%	62%
artefact or ecofact conservation	58%	58%	68%	13%	6%	29%	22%	69%	58%	58%
providing advice to clients or other service users	33%	38%	44%	45%	25%	43%	56%	91%	33%	38%
desk-based or environmental assessment	33%	35%	36%	42%	34%	52%	72%	85%	33%	35%
data management	71%	62%	72%	55%	27%	57%	100%	84%	71%	62%
other	63%	62%	68%	42%	26%	52%	22%	78%	63%	62%

Table 27: Skills training provided from 2016 to 2025. Percentages calculated on total responses to all skills questions and not just those to this specific question. The assumption has been made that those who did not respond did so because they had no need to train staff.

NVQ

The survey continues to show that only a small minority of respondents have previously accessed the Level 3 NVQ Certification in Archaeological Practice (Table 28), as has been the case in every iteration of the survey (Figure 3).

Looking forward, there has been a recovery in those willing to use it in the future (Figure 4).

NVQ	yes		no		don't know	
have supported a member of staff in the past	3	16%	16	84%		
would consider supporting a member of staff in the future	9	50%	5	28%	4	22%

Table 28: NVQ use responses. n=19.

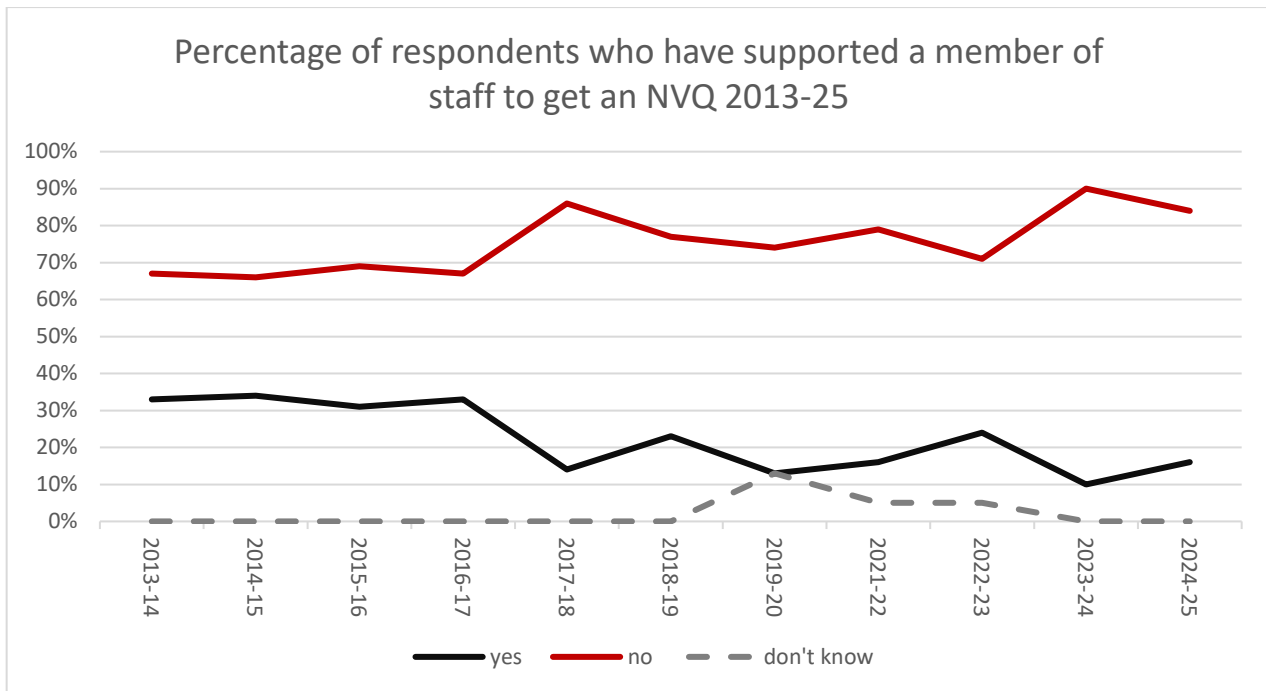


Figure 3: Percentage of respondents who have supported a member of staff to get an NVQ, 2013-14 to 2024-25.

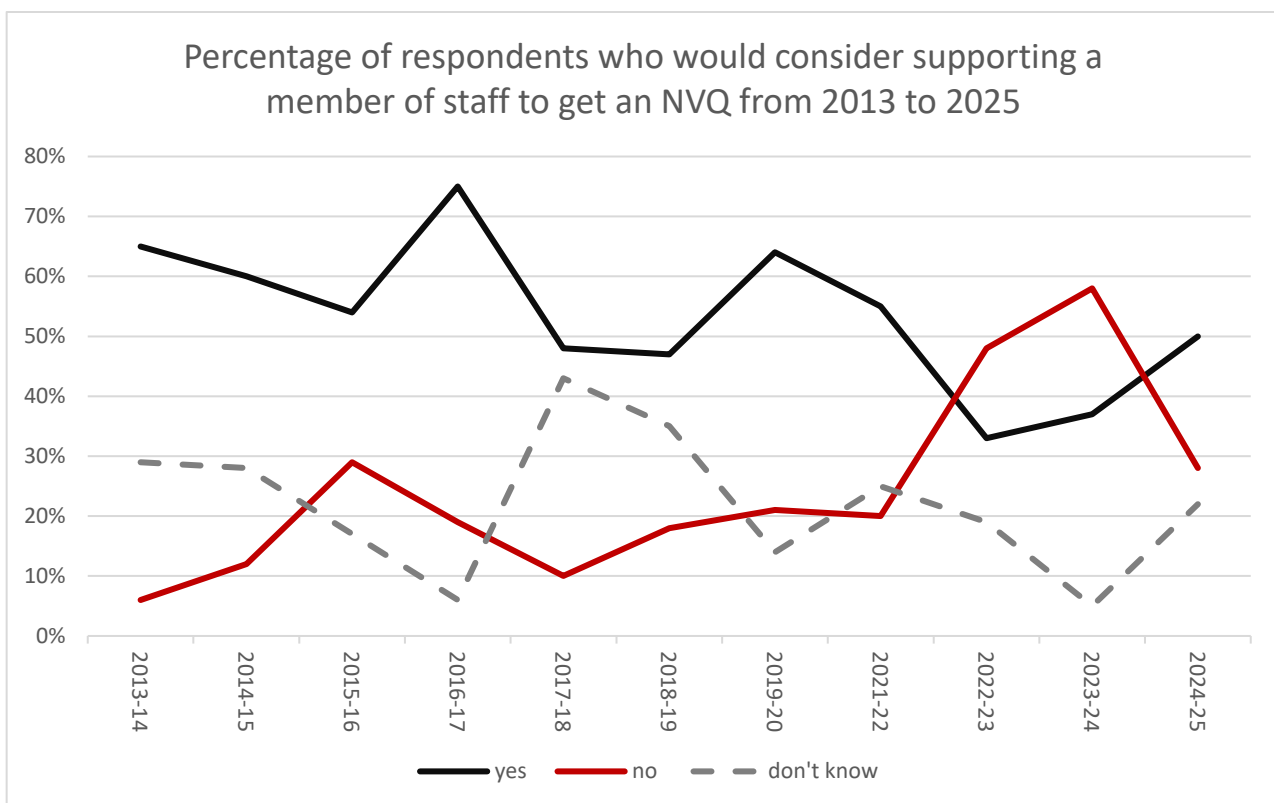


Figure 4: Percentage of respondents who would consider supporting a member of staff to get an NVQ, 2013-14 to 2024-25.

Apprenticeships

Formal Apprenticeships are not, and have not been, widely used in development-led archaeology (Table 29). However, the majority of respondents indicated that they would consider supporting a member of staff to become an Apprentice in the future, as has been the case in every iteration of this survey except 2024 (Table 30).

apprenticeships	yes		no		don't know	
have supported a member of staff in the past	3	17%	15	83%		
would consider supporting a member of staff in the future	10	56%	5	28%	3	17%

Table 29: Apprenticeships use responses. n=18

	2015-16	2016-17	2017-18	2018-19	2020-21	2021-22	2022-23	2023-24	2024-25
have supported a member of staff in the past									
yes	4%	11%	5%	0%	7%	6%	24%	15%	17%
no	96%	89%	95%	100%	93%	83%	71%	85%	83%
don't know	0%	0%	0%	0%	0%	11%	5%	0%	0%
would consider supporting a member of staff in the future									
yes	46%	71%	40%	63%	60%	50%	45%	21%	56%
no	33%	12%	3%	11%	20%	30%	45%	79%	28%
don't know	5%	18%	9%	26%	20%	20%	9%	0%	17%

Table 30: Apprenticeships use responses 2015-16 to 2024-25, excluding 2019-2020.

Perceptions

Respondents were asked about their perceptions about the current market for archaeological services (Table 31).

my heritage team will grow within the next 12 months	2018	2019	2020	2021	2022	2023	2024	2025
strongly agree	15%	12%	12%	27%	5%	13%	14%	16%
agree	37%	15%	26%	41%	38%	35%	23%	37%
unsure	33%	29%	21%	14%	29%	43%	27%	21%
disagree	7%	26%	23%	23%	24%	9%	18%	16%
strongly disagree	7%	18%	18%	18%	5%	0%	18%	11%
non-payment of bills has been a significant problem for my business	2018	2019	2020	2021	2022	2023	2024	2025
strongly agree	0%	3%	9%	9%	5%	13%	13%	5%
agree	67%	26%	17%	18%	33%	26%	39%	37%
unsure	7%	9%	6%	9%	10%	17%	9%	11%
disagree	19%	44%	56%	45%	38%	26%	26%	37%
strongly disagree	7%	15%	12%	18%	14%	17%	13%	11%
a shortage of heritage staff in LPAs is a major constraint on heritage projects	2018	2019	2020	2021	2022	2023	2024	2025
strongly agree	30%	9%	19%	23%	38%	30%	13%	17%
agree	33%	56%	50%	32%	38%	43%	39%	39%
unsure	19%	18%	19%	27%	10%	17%	30%	22%
disagree	15%	12%	9%	14%	14%	9%	13%	11%
strongly disagree	4%	3%	3%	5%	0%	0%	4%	11%
we have had vacancies that we considered to be hard to fill	2018	2019	2020	2021	2022	2023	2024	2025
strongly agree				32%	29%	30%	32%	21%
agree				45%	52%	43%	23%	53%
unsure				5%	0%	4%	18%	5%
disagree				9%	14%	13%	14%	16%
strongly disagree				9%	5%	9%	14%	5%

Table 31: Respondents' perceptions from 2018 to 2025. (2025 n=22/23/23/22)

Respondents were more likely to consider that their staff numbers would grow in the next year than decline, an increase from 2024.

Respondents were less concerned about non-payment of bills than they had been in 2024.

The 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,

The majority of respondents considered that they “had vacancies that we considered to be hard to fill”; this has been the case in every iteration of this survey since this question was first asked in 2020-21.

Carbon reduction and carbon management

Respondents were asked about carbon measurement, planning and certification. The majority of the 19 organisations answering the question about carbon measurement were not measuring their organisation’s carbon footprint, with figures almost unchanged from the responses one year before (Table 32).

	2022-23	2023-24	2024-25	
			count	%
currently measuring organisation's carbon footprint	50%	36%	7	37%
not currently measuring organisation's carbon footprint	50%	64%	12	63%

Table 32: Measuring carbon footprint. n=19.

An increased proportion of respondents were developing a carbon reduction plan in 2025 (Table 33), although the proportion that had a plan in place did not increase, and still none reported that they had science-based targets in place and approved by SBTi.

	2022-23	2023-24	2024-25	
			count	%
do not have a carbon reduction plan	33%	39%	2	11%
development of carbon reduction plan in progress	50%	35%	12	63%
carbon reduction plan in place	15%	26%	5	26%
science based targets in place and approved by SBTi	4%	0%	0	0%

Table 33: Carbon reduction plan. n=19.

Respondents are increasingly aware of PAS 2080, and the number reporting that they have received PAS 2080 certificates of conformity has increased (Table 34).

	2022-23	2023-24	2024-25	
			count	%
not aware of the standard	33%	41%	5	26%
considered but not relevant	17%	36%	9	47%
working towards project specific reduction and reporting	46%	18%	3	16%
have received PAS 2080 certificate of conformity	4%	5%	2	11%

Table 34: PAS 2080. n=19.

Health and Safety

The health and safety results will be reported in a separate FAME document, Development-led Archaeology Health and Safety Survey 2024-25.

<https://famearchaeology.co.uk/development-led-archaeology-health-and-safety-statistics-2024-25/>

Further Comments

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

- extremely difficult to recruit people with any experience, and the level of competence of recent graduates has significantly dropped
- It is getting harder to hire in suitable staff. Where previously we would receive 20-30 applicants for a post, we now often receive only 5 or 6. We recently lost an excellent employee due to the rise in pay required for a UK visa as he was at the early stages of his career and we could unfortunately not afford to pay him £32+k.
- Much of the questionnaire is not particularly relevant to local government archaeology advice - aimed at commercial sector

References

- Aitchison, K., German, P. & Rocks-Macqueen, D. 2021a. **Profiling the Profession 2020**. Landward Research. <https://profilingtheprofession.org.uk/profiling-the-profession-2020-introduction/> [accessed 2026-05-20]
- Aitchison, K., German, P. & Rocks-Macqueen, D. 2021b. **State of the Archaeological Market 2020**. FAME. <https://famearchaeology.co.uk/wp-content/uploads/2021/10/State-of-the-Archaeological-Market-2020.pdf> [accessed 2026-05-27]
- Aitchison, K. & Rocks-Macqueen, D. 2013. **Archaeology Labour Market Intelligence: Profiling the Profession 2021-13**. Landward Research Ltd. <https://profilingtheprofession.org.uk/wp-content/uploads/sites/5/Archaeology-Labour-Market-Intelligence-Profiling-the-Profession-2012-135.pdf> [accessed 2026-05-27]
- Historic England. 2024. **Series 2 Issue 4: Report On Local Authority Historic Environment Staff Resources 2024**. Historic England. https://historicengland.org.uk/research/results/reports/9162/Series2Issue4_ReportonLocalAuthorityHistoricEnvironmentStaffResources2024 [accessed 2026-05-20]
- Office for National Statistics. 2026. **Consumer Price Inflation Detailed Reference Tables** May 2026. ONS. <https://www.ons.gov.uk/file?uri=/economy/inflationandpriceindices/datasets/consumerpriceinflation/current/consumerpriceinflationdetailedreferencetables.xlsx> [accessed 2026-05-20]

Appendix – Survey Questionnaire

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 2025?

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 2024 - the census date for State of the Archaeological Market 2023-24?

7. How many of your members of staff were working on each of the following types of contract or agreement on 31 March 2025?

	full-time	part-time
permanent		
fixed term		
casual		

8. Did salaries at your organisation typically rise or fall between April 2024 and March 2025?
(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 2025, and by how much do you expect them to have changed in 2025-26?

by what percentage did your charge-out rates increase (+) or decrease (-) over the year ending 31 March 2025?

by what percentage do you anticipate that your rates will increase (+) or decrease (-) over the year ending 31 March 2026?

10. between April 2024 and March 2025, 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 2024-25?

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 2025	

[IF Q1 ≠ United Kingdom]

11b. What was your annual financial turnover for work in 2024?

*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 2024	

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 2024-25?

*Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc
If you made a loss in 2024-25, please enter a negative figure.*

	£
your profit or surplus (plus or minus) in the year ending 31 March 2025	

[IF Q1 ≠ United Kingdom]

13b. What was your annual profit (or surplus) (in €) in 2024?

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 2024	

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 2025 for work in each of the sectors listed. Please enter full numbers of pounds, eg 1250000, not decimal fractions of millions etc.

	income 2024-25
	£
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 2024 for work in each of the sectors listed. Please enter full numbers of euro, eg 1250000, not decimal fractions of millions etc.

	income 2024
	€
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 2024 in UK, 31st December 2024 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 (2023-24)?

	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 (2024-25)?

	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 (2024-25)?

- 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 2025, 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 2025, 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 2025 in UK, 31 December 2024 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.