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**FOOTE IT NEWS ANALYSIS – Technology employment trends in the
 April 2014 Bureau of Labor Statistics – U.S. Employment Report**

A third consecutive month of strong employment numbers for IT professionals: 16,900 jobs added to U.S. payrolls in April, well above the 9,200 monthly average for the last twelve months.

IT job gains in April are the highest since July 2013 led by IT services industry segments.

Overall national workforce numbers---288,000 new jobs---surprises many analysts but with the number of ‘discouraged workers’ no longer looking for work expanding by 85,000 and a drop of 806,000 in the number of Americans in the labor force, enthusiasm about a true jobs recovery remains elusive.

Vero Beach, FL – Saturday, May 3, 2014. An analysis of Friday’s release of U.S. employment numbers for April 2014 by the Bureau of Labor Statistics (BLS) reveals a **net increase of 16,900 IT jobs** across four industry job segments commonly associated with technology professionals. This gain is a continuation of strong February and March numbers (+21,100 jobs) and a vast improvement over the three months prior to this latest surge when a total of only 5,400 IT jobs were added to US payrolls.

April results are markedly higher than 9,200 average monthly job growth during the past twelve month. But as encouraging as this may be it will take several more strong months of similar (or better) job growth before 2014 can achieve the 10,708 monthly average job growth in calendar year 2013. Moreover, it would be optimistic to imagine monthly numbers returning to those seen in the first seven months of 2013 when monthly gains were averaging more than 14,000 jobs (see Figures 1 and 2).

Two IT segments that have been responsible for more than 95 percent of all IT jobs added to US payrolls in the past twelve months continue to very strong performances (Figure 5). *Computer Systems Design/Related Services* produced 8,900 new jobs last month, an increase compared to much lower monthly gains in November, December, January, February and March (2,700; 1,400; 4,700; 5,000; and 6,100 respectively). April’s gain in this segment is nearly 4,800 jobs higher than that monthly average gains during all of 2013. The second job segment, *Management and Technical Consulting Services* grew by 5,000 jobs last month, up from 3,500 in March. This gain is nearly 1,000 more than the monthly average in this segment for the past twelve months (4,025).

The other two job segments relating to IT hiring, *Telecommunications* and *Data Processing, Hosting and Related Services* together posted a net gain of 3,000 jobs in April following gains of only 1,300 jobs in March. Both segments have display significant month-to-month volatility going back to mid-2012, averaging months gains of 467 jobs in the twelve months ending April 2014.

ANALYSIS

“I think that despite the seemingly great news that our country added the highest number of new jobs in two year and the unemployment rate has been reduced to 6.3 percent , this month’s jobs reports is a lot like the last several: it does little to inspire any real comfort that a serious sustained jobs recovery not being undermined by a sluggish economy and the fact that too many people are too discouraged to even look for work,” notes David Foote, chief analyst at Foote Partners which has been tracking and reporting on IT labor trends since 1997. “Sure, 1.3 million more Americans counted themselves as either having a job or looking for one in March than in December, the strongest three-month gain in the size of the labor force since early 2000. But the number of people in the labor force fell by 806,000 in April and the labor force participation rate fell by 0.4 points to 62.8 percent. That wiped out gains that had been made in the first three months of 2014. And that’s how it’s been for a while with the general workforce. IT jobs however have been doing better than the overall employment market and that continues to be good news for IT professionals. ”

“Surely some of the positive numbers last month can be attributed to a comeback from a weather-induced slowdown earlier in the year. But payroll numbers still indicate that wages are low for too many of the 146 million Americans who already have jobs. Plus there were roughly one million more part time workers added in April.[see Figure 9] What we need to see to build confidence in the employment scene is fewer month-to-month swings in hiring and a higher sustained participation rate. Too many people are out of work or underemployed in our country.”

“IT job creation in each of the last three months has dramatically blown out the numbers we were seeing in November through February when our country was either losing technology jobs on a monthly basis or only adding a small number every month, not the 10,000 plus job gains we’re seeing now,” notes Foote. “In 2013 the Department of Labor indicated we added 10,700 new IT jobs on average every month. We’re now getting back on that track after some horrible months for tech professionals, but for how long? The truth is that there remains a lot of volatility even in the IT employment marketplace which lately has been expanding mostly in the IT services industries according to these federal jobs reports. What they’re not reporting is all the new IT-business hybrid jobs that have been created and for which employers are feverishly mounting recruiting efforts. They cannot find and hire them fast enough. The truth is that there are probably ten or fifteen open positions for every one suitable candidate and that person is almost always already employed. So the questions becomes, ‘Where are all these unemployed tech workers going to find work?’ if the services industries don’t find them attractive hires?”

“As hiring of full time workers has been volatile the IT contingent workforce continues to expand. Many of these workers are independent consultants. Recent studies peg the number of independent IT professionals at about 1 million and growing and contract workers as a portion of the internal IT workforce at many medium to large size organizations has been rising, often between 10 percent and 25 percent. The *Management and Technical Consulting Services* and *Computer Systems Design/Related Services* segments of the U.S. workforce have been very strong performer throughout the economic turmoil of the last seven years adding 360,600 jobs just in the past three years,” reveals Foote (Figures 3 and 5). “The focus of IT leadership has for some time been on *skills acquisition* rather than hiring full timers. That’s because it has become less clear exactly what an employer’s internal IT workforce should look like going forward. Change is accelerating and the mandate for agility and flexibility too ingrained in a CIOs thinking

to risk their performance as a leader on job searches that can last for months. If you look at skills as one of the main components of executing predictably then that becomes your currency and your focus. And that's why it's not necessarily bad news that hiring of IT full timers has been so volatile. They're simply sourcing the labor from other channels for now."

"Businesses have long been searching for more multidimensional skills sets in their workers: combinations of both business and technology knowledge and experience, and skill sets unlike those you might find in the tracking of labor more common to a traditional IT organization. Employers can acquire the wide variety of hard and soft skills required to get the job done without resorting to full- or part-time hire. Many of the most in-demand jobs require combinations of knowledge and skill in a business or customer context applied to problems and solutions with a high degree of difficulty. And this is where a contingent workforce has become a valuable and necessary source for talent. Converting contract labor to full time status remains one of the most popular strategies for filling full time roles. Speed may be important but not at the sacrifice of caution in bringing aboard the right people who not only have the technical expertise but also fit in with the organizational culture."

Overall U.S. Employment Report (see Figures 6, 7 and 8)

- Total **nonfarm payroll employment** rose by 288,000, and the **unemployment rate** fell by 0.4 percentage point to 6.3 percent in April, the U.S. Bureau of Labor Statistics reported today. Employment gains were widespread, led by job growth in professional and business services, retail trade, food services and drinking places, and construction.
- In April, the **unemployment rate** fell from 6.7 percent to 6.3 percent, and the number of **unemployed persons**, at 9.8 million, decreased by 733,000. Both measures had shown little movement over the prior 4 months. Over the year, the unemployment rate and the number of unemployed persons declined by 1.2 percentage points and 1.9 million, respectively.
- Among the **major worker groups**, unemployment rates declined in April for adult men (5.9 percent), adult women (5.7 percent), teenagers (19.1 percent), whites (5.3 percent), blacks (11.6 percent), and Hispanics (7.3 percent). The jobless rate for Asians was 5.7 percent (not seasonally adjusted), little changed over the year.

- The number of **long-term unemployed** (those jobless for 27 weeks or more) declined by 287,000 in April to 3.5 million; these individuals accounted for 35.3 percent of the unemployed. Over the past 12 months, the number of long-term unemployed has decreased by 908,000.
- The **civilian labor force** dropped by 806,000 in April, following an increase of 503,000 in March. The **labor force participation rate** fell by 0.4 percentage point to 62.8 percent in April. The participation rate has shown no clear trend in recent months and currently is the same as it was this past October. The **employment-population ratio** showed no change over the month (58.9 percent) and has changed little over the year.
- The number of persons employed **part time for economic reasons** (sometimes referred to as involuntary part-time workers) was little changed at 7.5 million in April. These individuals were working part time because their hours had been cut back or because they were unable to find full-time work.
- In April, 2.2 million persons were **marginally attached to the labor force**, down slightly from a year earlier. (The data are not seasonally adjusted.) These individuals were not in the labor force, wanted and were available for work, and had looked for a job sometime in the prior 12 months. They were not counted as unemployed because they had not searched for work in the 4 weeks preceding the survey.
- Among the marginally attached, there were 783,000 **discouraged workers** in April, little changed from a year earlier. (The data are not seasonally adjusted.) Discouraged workers are persons not currently looking for work because they believe no jobs are available for them. The remaining 1.4 million persons marginally attached to the labor force in April had not searched for work for reasons such as school attendance or family responsibilities.

Industry Highlights – April 2014

- **Professional and business services** added 75,000 jobs in April. Employment in this industry had increased by an average of 55,000 per month over the prior 12 months. In April, employment growth continued in temporary help services (+24,000), in management of companies and enterprises (+12,000), and in computer systems design and related services (+9,000).
- **Retail trade** employment rose by 35,000 in April. Over the past 12 months, employment in this industry has grown by 327,000. Within retail trade, job growth over the month occurred in food and beverage stores (+9,000), general merchandise stores (+8,000), motor vehicle and parts dealers (+6,000), and nonstore retailers (+4,000). Electronics and appliance stores lost 11,000 jobs in April. **Wholesale trade** added 16,000 jobs over the month and has added 126,000 jobs over the year.
- In April, employment rose in **food services and drinking places** (+33,000), about in line with its prior 12-month average gain of 28,000 per month.

- In April, employment in **construction** grew by 32,000, with job growth in heavy and civil engineering construction (+11,000) and residential building (+7,000). Construction has added 189,000 jobs over the past year, with almost three-fourths of the gain occurring in the past 6 months.
- **Health care** employment increased by 19,000 in April, about in line with the prior 12-month average gain of 17,000 per month. Employment in **other services**, which includes membership associations and personal and laundry services, rose by 15,000 over the month.
- **Mining** added 10,000 jobs in April, with most of the gain in support activities for mining (+7,000).
- Employment in other major industries, including **manufacturing, transportation and warehousing, information, financial activities**, and **government**, changed little over the month.

Hiring Trend Charts – IT Employment Segments

April 2014 Employment Situation Summary Report

Department of Labor/Bureau of Labor Statistics

FIGURE 1 – U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (January 2013 to April 2014)

MONTHLY JOB SITUATION TRENDS – IT Professional Job Segments

(Highlights for four bellwether IT jobs segments)

	2013												2014			
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Nonfarm job loss/gain (month)	148,000	332,000	138,000	199,000	176,000	172,000	89,000	193,000	175,000	200,000	274,000	84,000	144,000	197,000	192,000	288,000
National unemployment rate	7.9%	7.7%	7.6%	7.5%	7.6%	7.6%	7.4%	7.4%	7.2%	7.2%	7.0%	6.7%	6.6%	6.7%	6.7%	6.3%
Professional/Technical Services	14,800	26,800	24,600	22,800	18,200	9,800	21,100	10,900	6,300	21,400	17,500	-11,700	20,400	35,400	10,400	25,100
<i>Segment 5:</i> Management/Technical Consulting Services	11,500	4,400	6,200	5,700	3,200	8,400	6,900	1,700	1,500	7,700	600	3,900	600	5,300	3,500	5,000
<i>Segment 4:</i> Computer Systems Design/Related Services	4,600	5,800	3,900	3,300	6,000	7,300	4,300	2,400	4,500	3,200	2,700	1,400	4,700	5,000	6,100	8,900
Information	9,000	20,000	5,000	-9,000	3,000	-5,000	9,000	-18,000	4,000	5,000	-1,000	-12,000	0	-16,000	2,000	-3,000
<i>Segment 4:</i> Telecommunications	4,900	400	1,800	1,200	1,000	700	3,600	2,700	-2,700	-300	-2,100	1,700	-10,200	800	2,200	2,900
<i>Segment 5:</i> Data Processing/Hosting/ Related Services	1,100	-800	-500	-500	-400	1,800	3,600	-100	200	-200	-200	500	1,800	-900	-900	100
Net gain/loss-ALL IT SEGMENTS	22,100	9,800	11,400	9,700	9,800	18,200	18,400	6,700	3,500	10,400	1,000	7,500	-3,100	10,200	10,900	16,900
Net gain/loss-ONLY IT SERVICES SEGMENTS	16,100	10,200	10,100	9,000	9,200	15,700	11,200	4,100	6,000	10,900	3,300	5,300	5,300	10,300	9,600	13,900

Key: Job gains in green
Job losses in red

Source: US Department of Labor/Bureau of Labor Statistics.
Data chart and analysis by Foote Partners LLC

FIGURE 2 – U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (January 2011 to December 2012)

(Continued) MONTHLY JOB SITUATION TRENDS – IT Professional Job Segments

(Highlights for four bellwether IT jobs segments)

	2011												2012											
	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Nonfarm job loss/gain (month)	36,000	192,000	216,000	244,000	54,000	18,000	127,000	57,000	103,000	100,000	120,000	223,000	284,000	227,000	143,000	68,000	87,000	64,000	181,000	192,000	132,000	137,000	247,000	219,000
National unemployment rate	9.0%	8.9%	8.8%	9.0%	9.1%	9.2%	9.1%	9.1%	9.1%	9.0%	8.6%	8.5%	8.3%	8.3%	8.2%	8.1%	8.2%	8.2%	8.3%	8.1%	7.8%	7.8%	7.7%	7.8%
Professional/Technical Services	7,900	10,000	34,700	33,000	40,300	24,200	17,700	16,100	24,100	320	8,800	8,500	30,300	34,200	13,800	27,500	-4,000	18,200	17,900	26,800	4,900	15,500	15,300	16,900
Segment 5: Management/Technical Consulting Services	3,600	6,600	-300	11,300	5,200	1,200	5,400	6,000	5,500	3,800	4,500	4,300	3,000	7,400	5,300	6,400	2,200	8,900	6,300	8,700	-1,800	4,500	0	5,800
Segment 4: Computer Systems Design/Related Services	8,600	4,200	6,400	7,900	8,200	5,700	6,100	7,700	6,000	2,900	5,100	1,200	1,700	10,200	3,900	7,400	5,300	6,600	7,000	10,600	2,900	6,600	7,100	5,600
Information	-1,000	0	-4,000	2,000	-1,000	0	-1,000	-48,000	34,000	-5,000	-4,000	6,000	13,000	-1,000	-900	-2,000	-2,000	-8,000	11,000	3,000	3,000	1,000	12,000	-9,000
Segment 4: Telecommunications	-3,600	-2,200	-3,800	-1,000	-3,400	-400	-2,700	-47,300	37,600	-4,900	-2,600	-3,000	-300	-6,400	-3,600	-3,500	-2,000	-2,100	2,800	-2,300	-400	1,400	300	-1,800
Segment 5: Data Processing/Hosting/Related Services	-1,900	-700	-500	-400	700	-300	-200	100	-600	400	-900	-200	-1,300	1,900	-600	-500	-300	0	2,100	1,100	-2,400	0	-600	200
Net gain/loss-ALL IT SEGMENTS	6,700	7,900	1,800	17,800	10,700	6,200	8,600	-33,500	48,500	2,200	6,100	2,300	3,100	13,100	5,000	9,800	5,200	13,400	18,200	18,100	-1,700	12,500	6,800	9,800
Net gain/loss-ONLY IT SERVICES SEGMENTS	12,200	10,800	6,100	19,200	13,400	6,900	11,500	13,700	11,500	6,700	9,600	5,500	4,700	17,600	9,200	13,800	7,500	15,500	13,300	19,300	1,100	11,100	7,100	11,400

Key: **Job gains in green**
 Job losses in red

NOTE: A labor strike in the telecommunications industry caused the temporary loss of 47,300 *Telecommunications* jobs in August 2011 and recovery of 37,600 in September 2011.

Source: US Department of Labor/Bureau of Labor Statistics.
Data chart and analysis by Foote Partners LLC

FIGURE 3 – U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (Through April 2014)

CUMULATIVE JOB SITUATION TRENDS – IT PROFESSIONALS

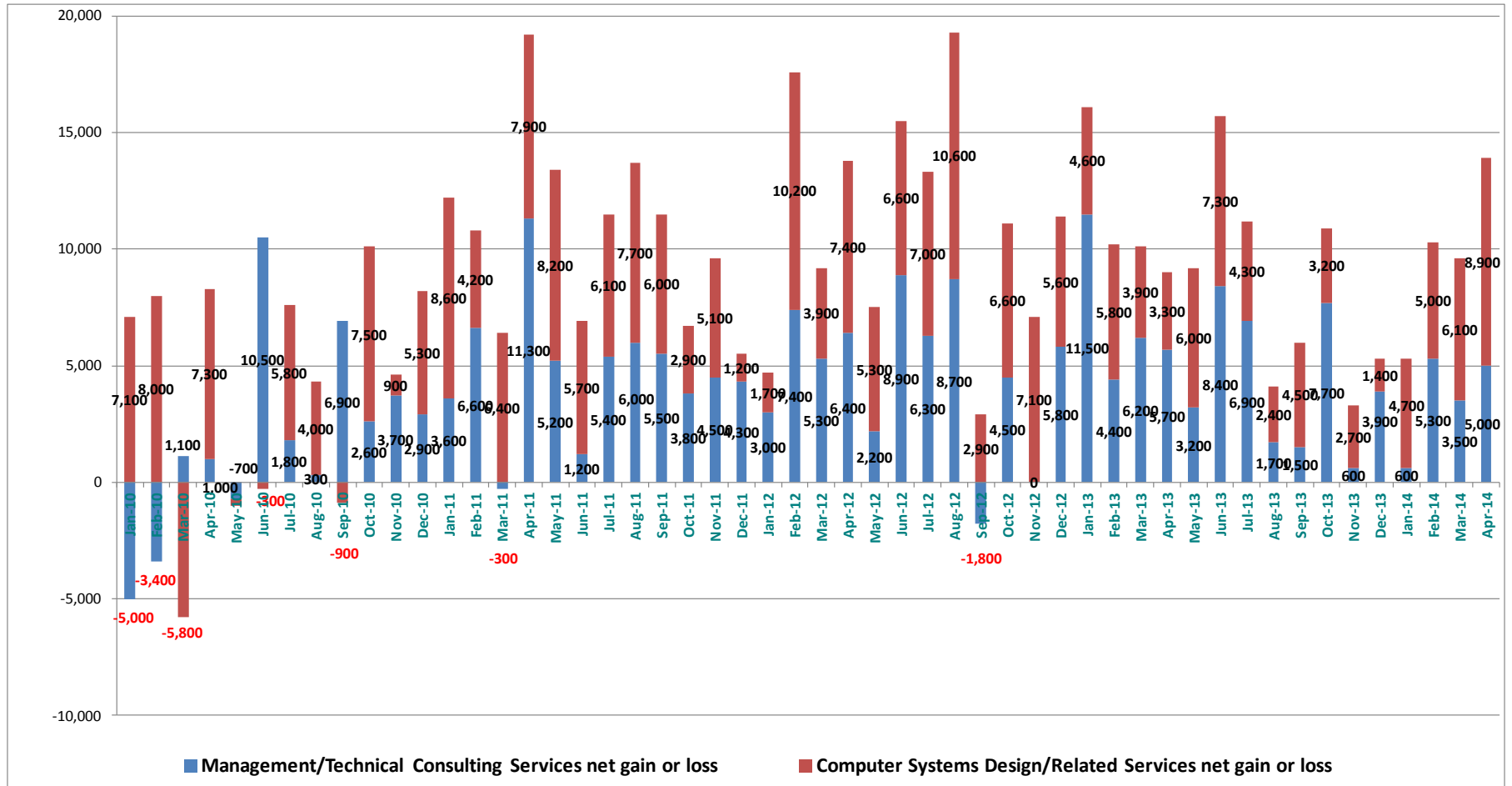
Highlights for four bellwether IT jobs segments)

U.S. LABOR DEPT CUMULATIVE NET JOB GAINS/DECLINES: through April 2014								
JOBS SEGMENT	36 mos.	24 mos.	12 mos.	8 mos.	6 mos.	4 mos.	3 mos.	2 mos.
	May'11 - Apr'14	May'12 - Apr'14	May'13 - Apr'14	Sep'13 - Apr'14	Nov'13 -Apr'14	Jan'14 -Apr'14	Feb'14 -Apr'14	Mar'14 - Apr'14
Professional and Technical Services	631,120	385,300	184,800	124,800	97,100	91,300	70,900	35,500
<i>Segment 5:</i> Management/Technical Consulting Services	168,700	110,700	48,300	28,100	18,900	14,400	13,800	8,500
<i>Segment 4:</i> Computer Systems Design/Related Services	191,900	125,800	56,500	36,500	28,800	24,700	20,000	15,000
Information	-5,900	4,000	-32,000	-21,000	-30,000	-17,000	-17,000	-1,000
<i>Segment 4:</i> Telecommunications	-36,000	4,500	300	-7,700	-4,700	-4,300	5,900	5,100
<i>Segment 5:</i> Data Processing/Hosting/Related Services	3,200	4,700	5,300	400	400	100	-1,700	-800
TOTAL - ALL 4 IT SEGMENTS	327,800	245,700	110,400	57,300	43,400	34,900	56,800	27,800
IT Services segments	360,600	236,500	104,800	64,600	47,700	39,100	33,800	23,500
Tech Information segments	-32,800	9,200	5,600	-7,300	-4,300	-4,200	4,200	4,300

Key: Job gains in green
Job losses in red

Source: US Department of Labor/Bureau of Labor Statistics.
Data chart and analysis by Foote Partners LLC

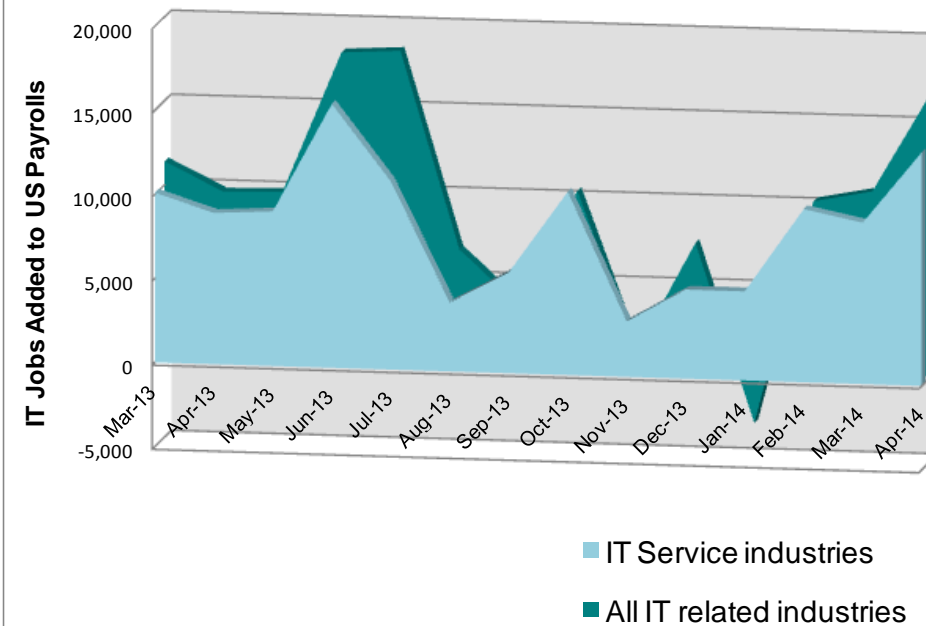
FIGURE 4 – JOB GROWTH/DECLINE - Management/Technical Consulting jobs vs. Computer Systems Design/Related services jobs
- Net job gains/losses from January 2010 through April 2014



Source: US Department of Labor/Bureau of Labor Statistics. Data chart and analysis by Footo Partners LLC

FIGURE 5

95% of Net IT Job Creation in last 12 months has been in the IT Services Industries



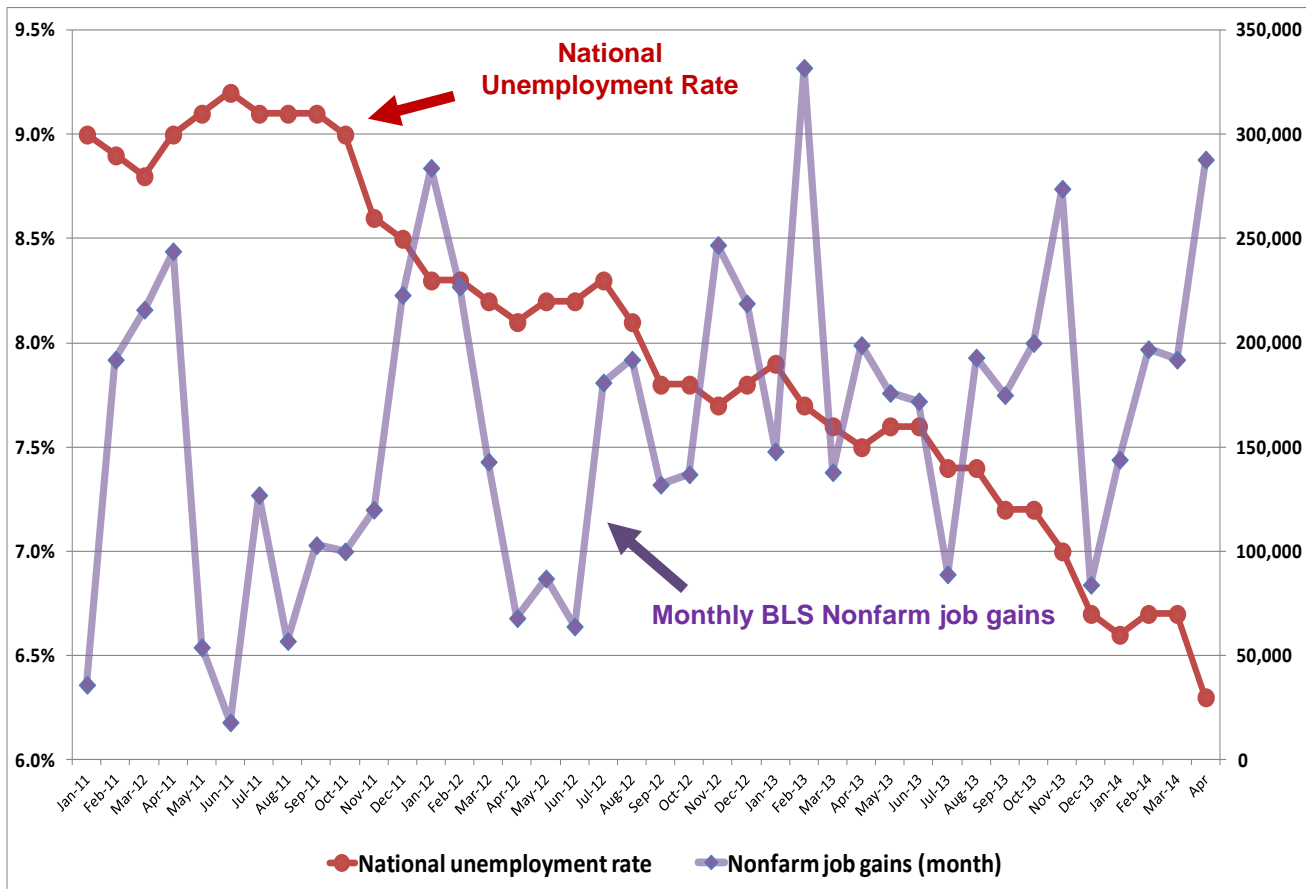
Management and Technical Consulting Services and Computer Systems Design and Related Services segments added **104,800 net jobs.**

Telecommunications and Data Processing, Hosting and Related Services added **5,600 net jobs.**

Source: US Department of Labor/Bureau of Labor Statistics. Data chart and analysis by Foote Partners LLC

FIGURE 6 – UNEMPLOYMENT RATE vs. MONTHLY JOB GROWTH – U.S, Bureau of Labor Statistics

- January 2010 through April 2014

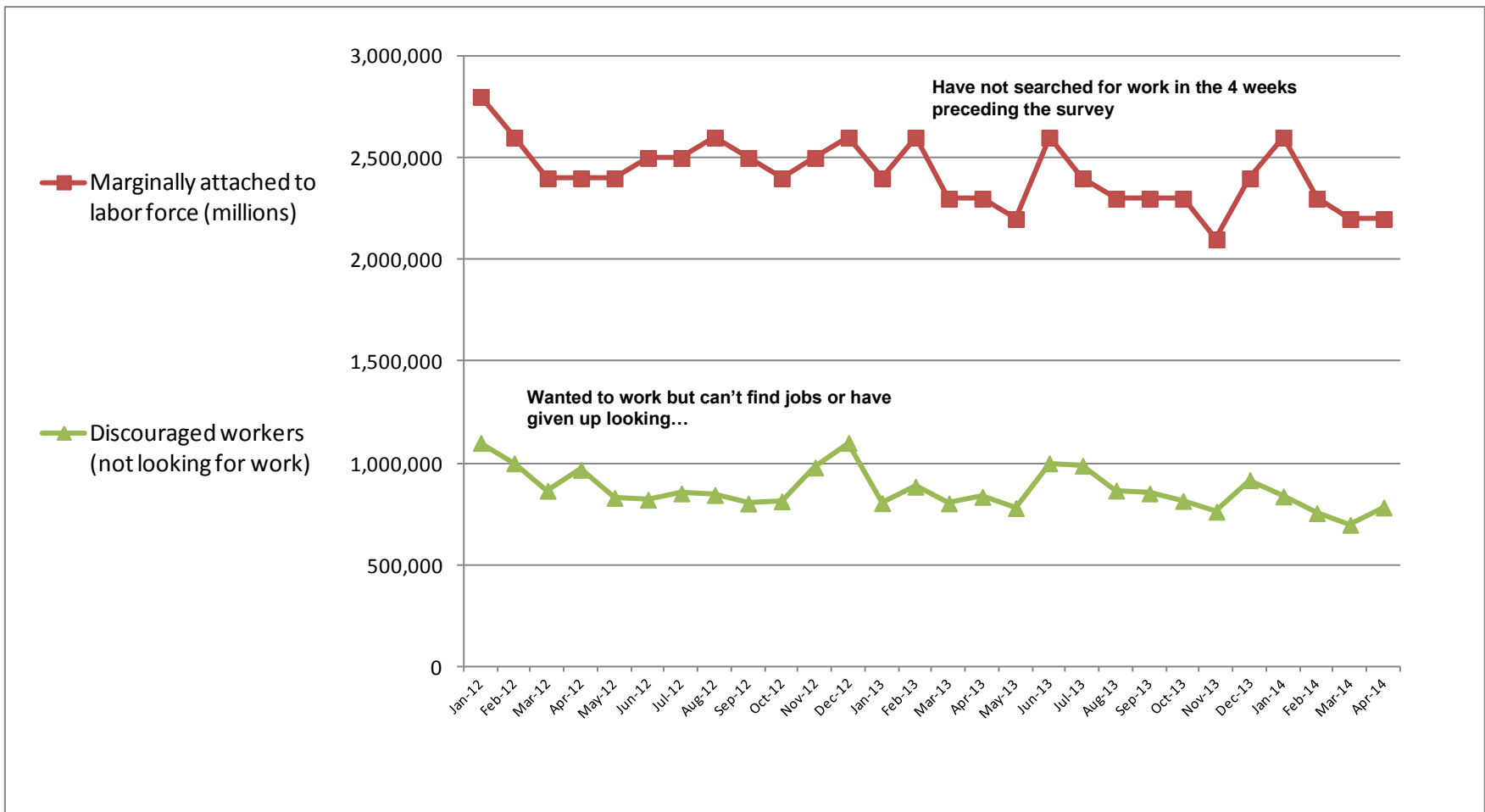


Steep job growth in April compared to March (+85,000 jobs) and the most jobs created in one month since February 2013 as the national unemployment rate moved from 6.7% to 6.3%.

Among these workers now looking for work who were not, as recently as last month, technically defined as unemployed are:

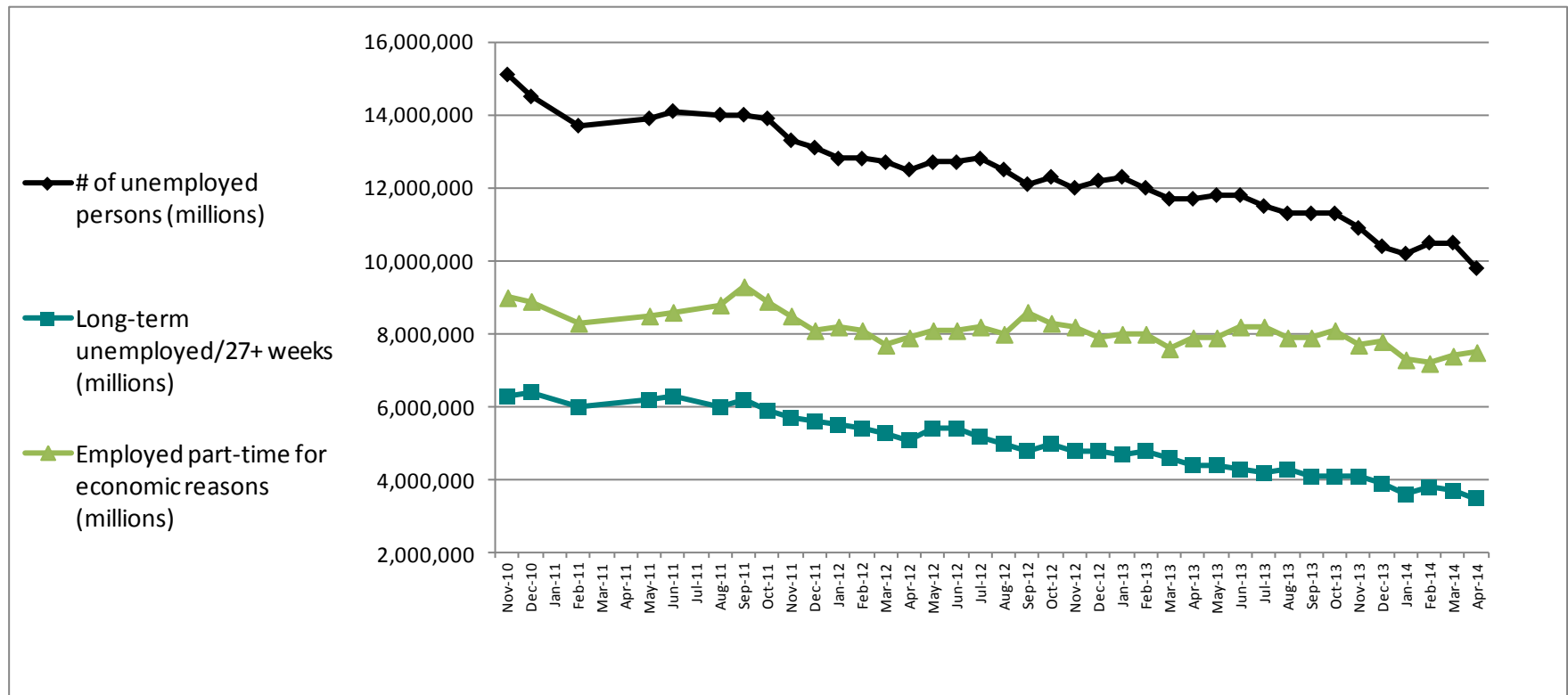
- *Marginally attached workers* (have looked for work in the prior 12 months but not in the 4 weeks preceding the monthly jobs report)
- *Discouraged workers* (have stopped looking for work altogether because they believe no jobs are available for them)

FIGURE 7– LABOR FORCE COMPOSITION: Marginally attached vs. Discouraged - 2012 to 2014



Source: US Department of Labor/Bureau of Labor Statistics. Data chart and analysis by Foote Partners LLC

FIGURE 8 – UNEMPLOYED AND UNDEREMPLOYED PERSONS: Total vs. Long-Term vs. Part-timers - 2010 to 2014



Source: US Department of Labor/Bureau of Labor Statistics. Data chart and analysis by Foote Partners LLC

FIGURE 9 - U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (Through April 2014)

KEY EMPLOYMENT STATISTICS – Last 32 Months

	Aug-11 (32 mos. ago)	Jan-13 (15 mo. ago)	Feb-13 (14 mo. ago)	Mar-13 (13 mo. ago)	Apr-13 (12 mo. ago)	May-13 (11 mo. ago)	Jun-13 (10 mo. ago)	Jul-13 (9 mo. ago)	Aug-13 (8 mo. ago)	Sep-13 (7 mo. ago)	Oct-13 (6 mo. ago)	Nov-13 (5 mo. ago)	Dec-13 (4 mo. ago)	Jan-14 (3 mo. ago)	Feb-14 (2 mo. ago)	Mar-14 (1 mo. ago)	Apr-14 (Now)
Unemployment rate	9.1%	7.9%	7.7%	7.6%	7.5%	7.6%	7.6%	7.4%	7.3%	7.2%	7.3%	7.0%	6.7%	6.6%	6.7%	6.7%	6.3%
# of unemployed persons	14.0 million	12.3 million	12.0 million	11.7 million	11.7 million	11.8 million	11.8 million	11.5 million	11.3 million	11.3 million	11.3 million	10.9 million	10.4 million	10.2 million	10.5 million	10.5 million	9.8 million
Long-term unemployed–27+ weeks (% of total unemployed persons)	6.0 million 42.9%	4.7 million 38.1%	4.8 million 40.2%	4.6 million 39.6%	4.4 million 37.4%	4.4 million 37.3%	4.3 million 36.7%	4.2 million 37.0%	4.3 million 37.9%	4.1 million 36.9%	4.1 million 36.1%	4.1 million 37.3%	3.9 million 37.7%	3.6 million 35.8%	3.8 million 37.0%	3.7 million 35.8%	3.5 million 35.3%
Civilian labor force participation rate	64.0%	63.6%	63.5%	63.3%	63.3%	63.4%	63.5%	63.4%	63.2%	63.2%	62.8%	63.0%	62.8%	63.0%	63.0%	63.2%	62.8%
Employment-population ratio	58.2%	58.6%	58.6%	58.5%	58.6%	58.6%	58.7%	58.7%	58.6%	58.6%	58.3%	58.6%	58.6%	58.8%	58.8%	58.9%	58.9%
Employed part-time for economic reasons	8.8 million	8.0 million	8.0 million	7.6 million	7.9 million	7.9 million	8.2 million	8.2 million	7.9 million	7.9 million	8.1 million	7.7 million	7.8 million	7.3 million	7.2 million	7.4 million	7.5 million
Marginally attached to labor force	2.6 million	2.4 million	2.6 million	2.3 million	2.3 million	2.2 million	2.6 million	2.4 million	2.3 million	2.3 million	2.3 million	2.1 million	2.4 million	2.6 million	2.3 million	2.2 million	2.2 million
Discouraged workers (not looking for work)	977,000	804,000	885,000	803,000	835,000	780,000	1,000,000	988,000	866,000	852,000	815,000	762,000	917,000	837,000	755,000	698,000	783,000

Source: US Department of Labor/Bureau of Labor Statistics. Data chart and analysis by Foote Partners LLC

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- *IT Skills and Certifications Pay Index™*
- *IT Salary+Skills Pay Survey Reports™*
- *IT Professional Job Descriptions*
- *IT Insider Workforce Trends Series™ reports*
- *IT Skills Demand and Pay Trends Report™*
- *IT Skills and Certifications HOT LIST Forecast*
- *IT Skills & Certifications Volatility Index*

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