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

A fourth consecutive month of strong job growth for IT professionals as 15,600 more IT jobs are added to U.S. payrolls in May, well above the 9,683 monthly average for the last twelve months.

Overall national workforce numbers---217,000 new jobs---and decline of 200,000 part-time positions underscores confidence that employers are hiring more full timers.

Vero Beach, FL – Monday, June 8, 2014. An analysis of Friday's release of U.S. employment numbers for May 2014 by the Bureau of Labor Statistics (BLS) reveals a **net increase of 15,600 IT jobs** across four industry job segments commonly associated with technology professionals. This gain is a continuation of strong February/March/April numbers (+38,100 total new IT jobs) and a vast improvement over the three months prior to this four month surge when a total of only 5,400 IT jobs were added to US payrolls. *(see Fig. 1)*

Last month's results are markedly higher than 9,683 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. In fact monthly job growth would need to average more than 11,200 jobs for the remainder of the year to surpass last year.

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Two IT segments that have been responsible for more than 95 percent of all IT jobs added to US payrolls in the past two years continue to very strong performances (Figure 5). ***Computer Systems Design/Related Services*** produced 6,600 new jobs last month, an increase compared to much lower monthly gains in November (+2.700), December (+1,400), January (+4,700), February (+5,000), and March (+6,100) but less than April (+8,900).

The second job segment, ***Management and Technical Consulting Services*** grew by 6,800 jobs last month, up from 5,000 in April and 3,500 in March. May's gain is nearly 2,500 more jobs than the monthly average in this segment for the past twelve months (4,325).

The other two job segments relating to IT hiring, ***Telecommunications*** and ***Data Processing, Hosting and Related Services*** together posted a net gain of 2,200 jobs in May following gains of 3,000 jobs in April and 1,300 jobs in March. Both segments have displayed significant month-to-month volatility going back to mid-2012, averaging monthly gains of only 600 jobs in the twelve months ending May 2014.

ANALYSIS

"The jobs scene in May seems to be more proof that while the economy is still not producing enough full-time jobs to employ a reported 12.6 million out of work Americans – the unfiltered number is much larger – the pace of job creation is really very -healthy and encouraging. The last time employers added more than 200,000 jobs in four consecutive months was 14 years ago," notes David Foote, chief analyst at Foote Partners which has been tracking and reporting on IT labor trends since 1997. " It's important to note that the working age population has risen by almost 15 million since the economic downturn and these include recent graduates with IT skills as well as those in other disciplines. And that IT professionals are doing better than most from entry levels to management levels. Unemployment rates for IT have been historically less than half of unemployment nationally.

"Sure there are a lot of unemployed IT workers with skills that are not considered in alignment with the demands of companies adopting cloud and mobile computing, advanced analytics, information security, and many other hot areas. Or they lack the multidimensionality of business, technical, domain, and process

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skills increasingly more coveted by employers expanding the role of technology across the enterprise—many of these companies are consuming as much as 40 percent of total technology spending outside of the traditional IT organization. But the facts are that IT job creation in each of the last four 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 15,000 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. There still remains a lot of volatility even in the IT employment marketplace which for some time 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. 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?'

"The good news is that lately we've noticed more IT hiring across many industries not just the IT services firms. There has also been more focused internal development of high impact IT skills as companies looking more towards the future. I think employers are becoming more confident about the role of technology and the people who design, build and manage tech enabled business solutions. There is probably more optimism out there about IT jobs going forward than most employment segments. It's a lot of positivism mixed with a certain about of caution that there remains a certain amount of volatility in the marketplace due to global economics and the pace of change. These are wild cards we will have to live with for the foreseeable future. Jobs will grow with that premise but also the key role of technology and how it is embedded in nearly everything we purchase and use and how it is delivered to us."

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

- Total **nonfarm payroll employment** rose by 217,000 and the **unemployment rate** was unchanged at 6.3 percent in May. Employment increased in professional and business services, health care and social assistance, food services and drinking places, and transportation and warehousing

- The **unemployment rate** held at 6.3 percent in May, following a decline of 0.4 percentage point in April. The number of **unemployed persons** was unchanged in May at 9.8 million. 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**, the unemployment rates for adult men (5.9 percent), adult women (5.7 percent), teenagers (19.2 percent), whites (5.4 percent), blacks (11.5 percent), and Hispanics (7.7 percent) showed little or no change in May. The jobless rate for Asians was 5.3 percent (not seasonally adjusted), little changed from a year earlier.

- Among the unemployed, the number of **job losers and persons who completed temporary jobs** declined by 218,000 in May. The number of unemployed **reentrants** increased by 237,000 over the month, partially offsetting a large decrease in April. (Reentrants are persons who previously worked but were not in the labor force prior to beginning their current job search.)

- The number of **long-term unemployed** (those jobless for 27 weeks or more) was essentially unchanged at 3.4 million in May. These individuals accounted for 34.6 percent of the unemployed. Over the past 12 months, the number of long-term unemployed has declined by 979,000.

- The **civilian labor force participation rate** was unchanged in May, at 62.8 percent. The participation rate has shown no clear trend since this past October but is down by 0.6 percentage point over the year. The **employment-population ratio**, at 58.9 percent, was also unchanged in May 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), at 7.3 million, changed little in May. These individuals were working part time because their hours had been cut back or because they were unable to find a full-time job.

- In May, 2.1 million persons were **marginally attached to the labor force**, essentially unchanged from 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.

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- Among the marginally attached, there were 697,000 **discouraged workers** in May, little different 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 May had not searched for work for reasons such as school attendance or family responsibilities.

Industry Highlights – May 2014

- **Professional and business services** added 55,000 jobs in May, the same as its average monthly job gain over the prior 12 months. In May, the industry added 7,000 jobs each in computer systems design and related services and in management and technical consulting. Employment in temporary help services continued to trend up (+14,000) and has grown by 224,000 over the past year.

- In May, **health care and social assistance** added 55,000 jobs. The health care industry added 34,000 jobs over the month, twice its average monthly gain for the prior 12 months. Within health care, employment rose in May by 23,000 in ambulatory health care services (which includes offices of physicians, outpatient care centers, and home health care services) and by 7,000 in hospitals. Employment rose by 21,000 in social assistance, compared with an average gain of 7,000 per month over the prior 12 months.

- Within leisure and hospitality, employment in **food services and drinking places** continued to grow, increasing by 32,000 in May and by 311,000 over the past year.

- **Transportation and warehousing** employment rose by 16,000 in May. Over the prior 12 months, the industry had added an average of 9,000 jobs per month. In May, employment growth occurred in support activities for transportation (+6,000) and couriers and messengers (+4,000).

- **Manufacturing** employment changed little over the month but has added 105,000 jobs over the past year. Within the industry, durable goods added 17,000 jobs in May and has accounted for the net job gain in manufacturing over the past 12 months.

- Employment in other major industries, including **mining and logging**, **construction**, **wholesale trade**, **retail trade**, **information**, **financial activities**, and **government**, showed little change over the month.

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Hiring Trend Charts – IT Employment Segments

May 2014 Employment Situation Summary Report

Department of Labor/Bureau of Labor Statistics

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FIGURE 1 – U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (January 2013 to May 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	May
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	222,000	203,000	282,000	217,000
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%**	**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	24,700
Segment 5: 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	6,800
Segment 4: 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	6,600
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	-5,000
Segment 4: 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	3,200
Segment 5: 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	-1,000
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	15,600
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	13,400

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

Source: US Department of Labor/Bureau of Labor Statistics.
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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	-1900	-700	-500	-400	700	-300	-200	100	-600	400	-900	-200	-1300	1900	-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.
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FIGURE 3 – U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (Through May 2014)

CUMULATIVE JOB SITUATION TRENDS – IT PROFESSIONALS

Highlights for four bellwether IT jobs segments)

U.S. LABOR DEPT CUMULATIVE NET JOB GAINS/DECLINES: through May 2014								
JOBS SEGMENT	36 mos.	24 mos.	12 mos.	8 mos.	6 mos.	4 mos.	3 mos.	2 mos.
	Jun'11 - May'14	Jun'12 - May'14	Jun'13 - May'14	Oct'13 - May'14	Dec'13 - May'14	Feb'14 -May'14	Mar'14 -May'14	Apr'14 - May'14
Professional and Technical Services	615,520	414,000	191,300	143,200	104,300	95,600	60,200	49,800
Segment 5: Management/Technical Consulting Services	170,300	115,300	51,900	33,400	25,100	20,600	15,300	11,800
Segment 4: Computer Systems Design/Related Services	190,300	127,100	57,100	38,600	32,700	26,600	21,600	15,500
Information	-9,900	1,000	-40,000	-30,000	-34,000	-22,000	-6,000	-8,000
Segment 4: Telecommunications	-29,400	9,700	2,500	-1,800	600	9,100	8,300	6,100
Segment 5: Data Processing/Hosting/ Related Services	1,500	4,000	4,700	-800	-400	-2,700	-1,800	-900
TOTAL - ALL 4 IT SEGMENTS	332,700	256,100	116,200	69,400	58,000	53,600	56,800	32,500
IT Services segments	360,600	242,400	109,000	72,000	57,800	47,200	36,900	27,300
Tech Information segments	-27,900	13,700	7,200	-2,600	200	6,400	6,500	5,200

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

Source: US Department of Labor/Bureau of Labor Statistics.
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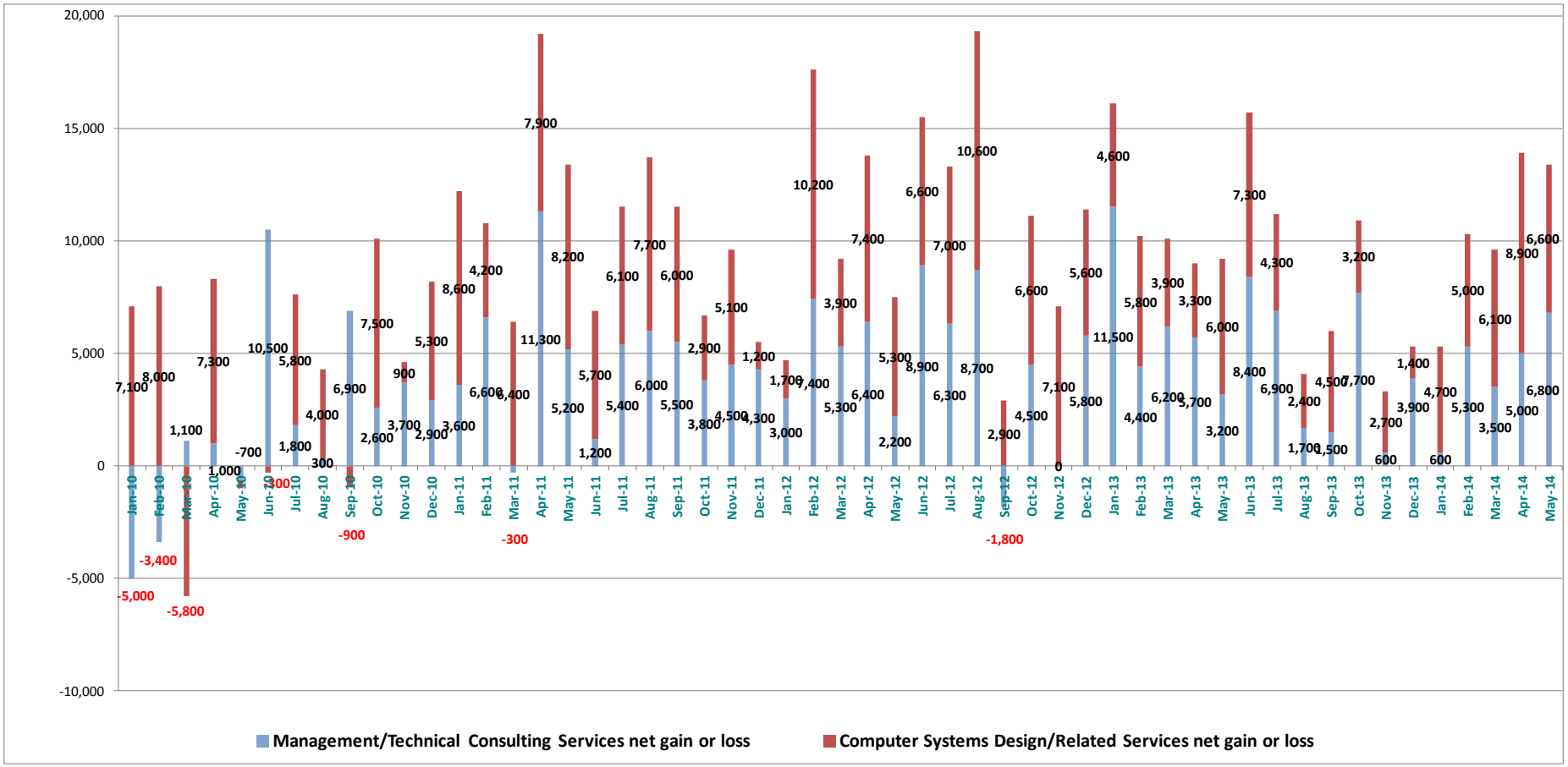
FIGURE 4 – JOB GROWTH/DECLINE - Management/Technical Consulting jobs vs. Computer Systems Design/Related services jobs

- Net job gains/losses from January 2010 through May 2014



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

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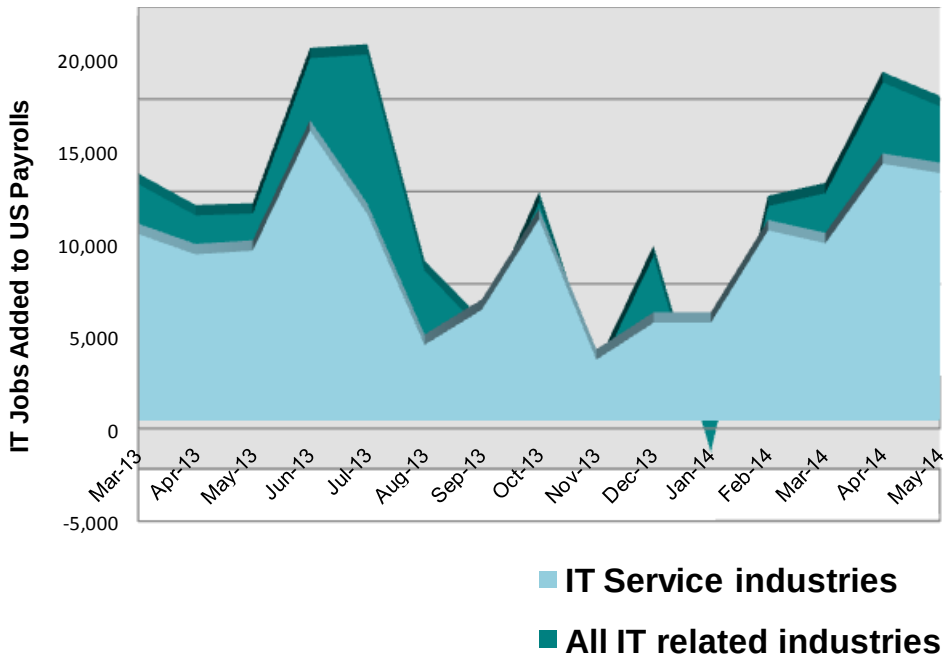
FIGURE 5

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

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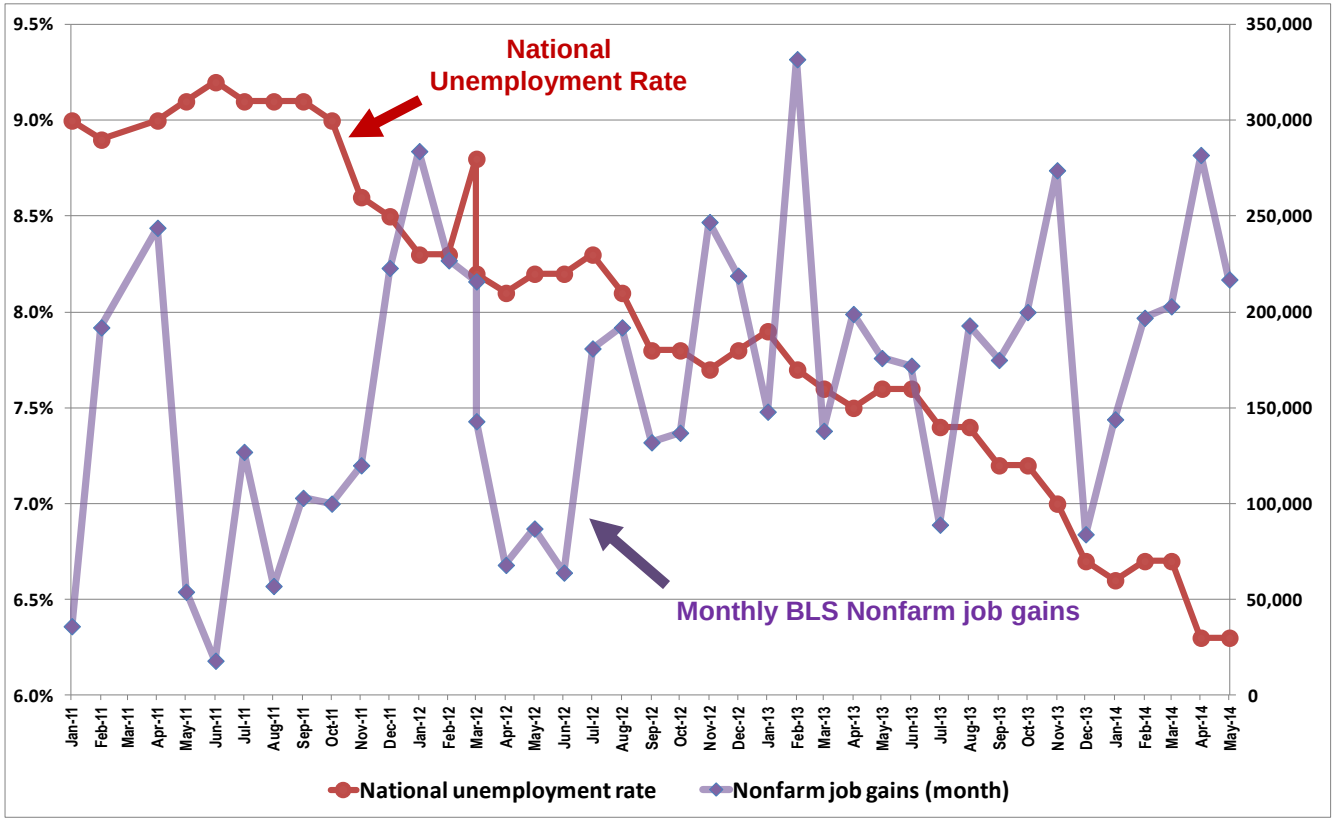
FIGURE 6 – UNEMPLOYMENT RATE vs. MONTHLY JOB GROWTH – U.S, Bureau of Labor Statistics

- January 2010 through May 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)

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

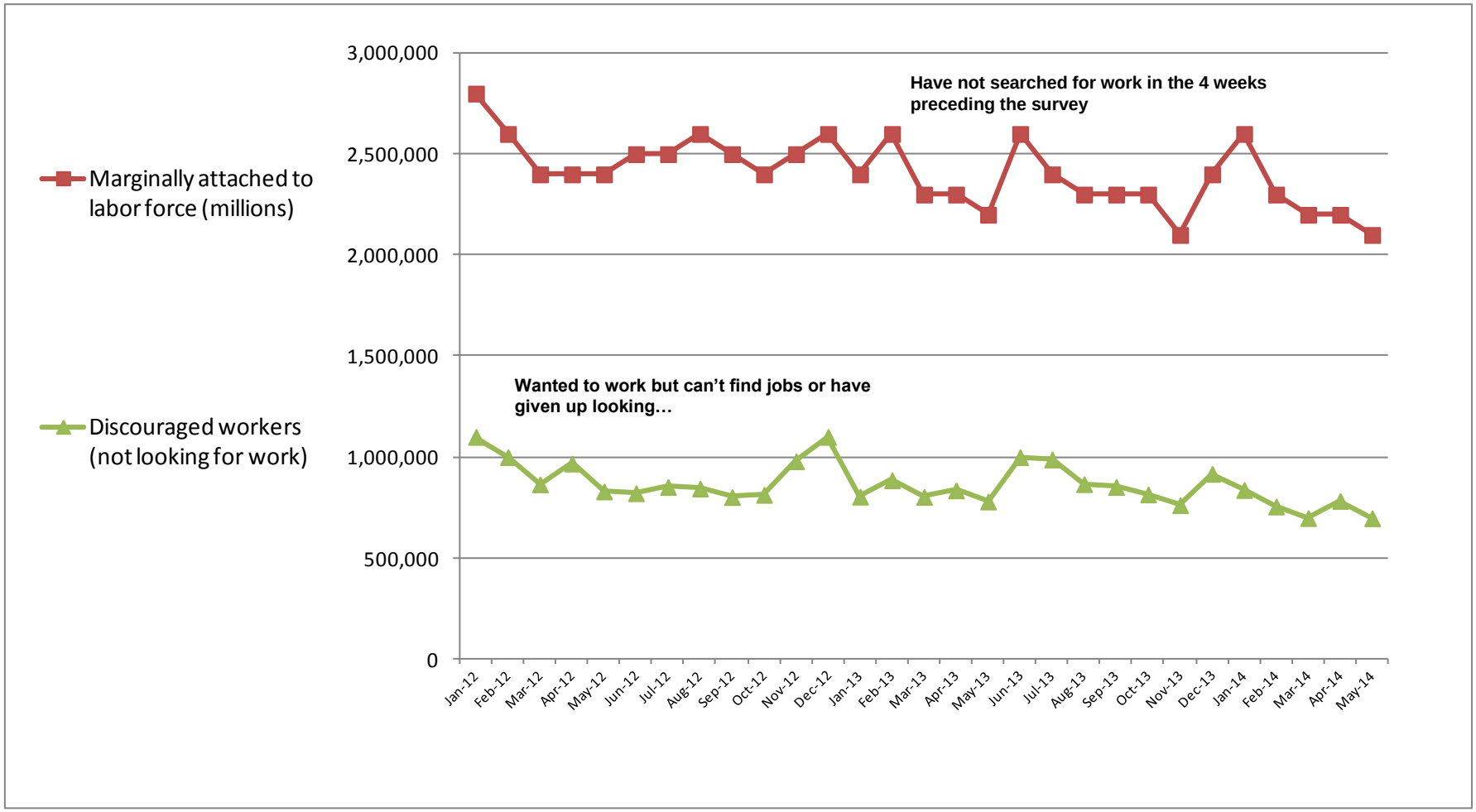

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FIGURE 8 – UNEMPLOYED AND UNDEREMPLOYED PERSONS: Total vs. Long-Term vs. Part-timers - 2010 to 2014

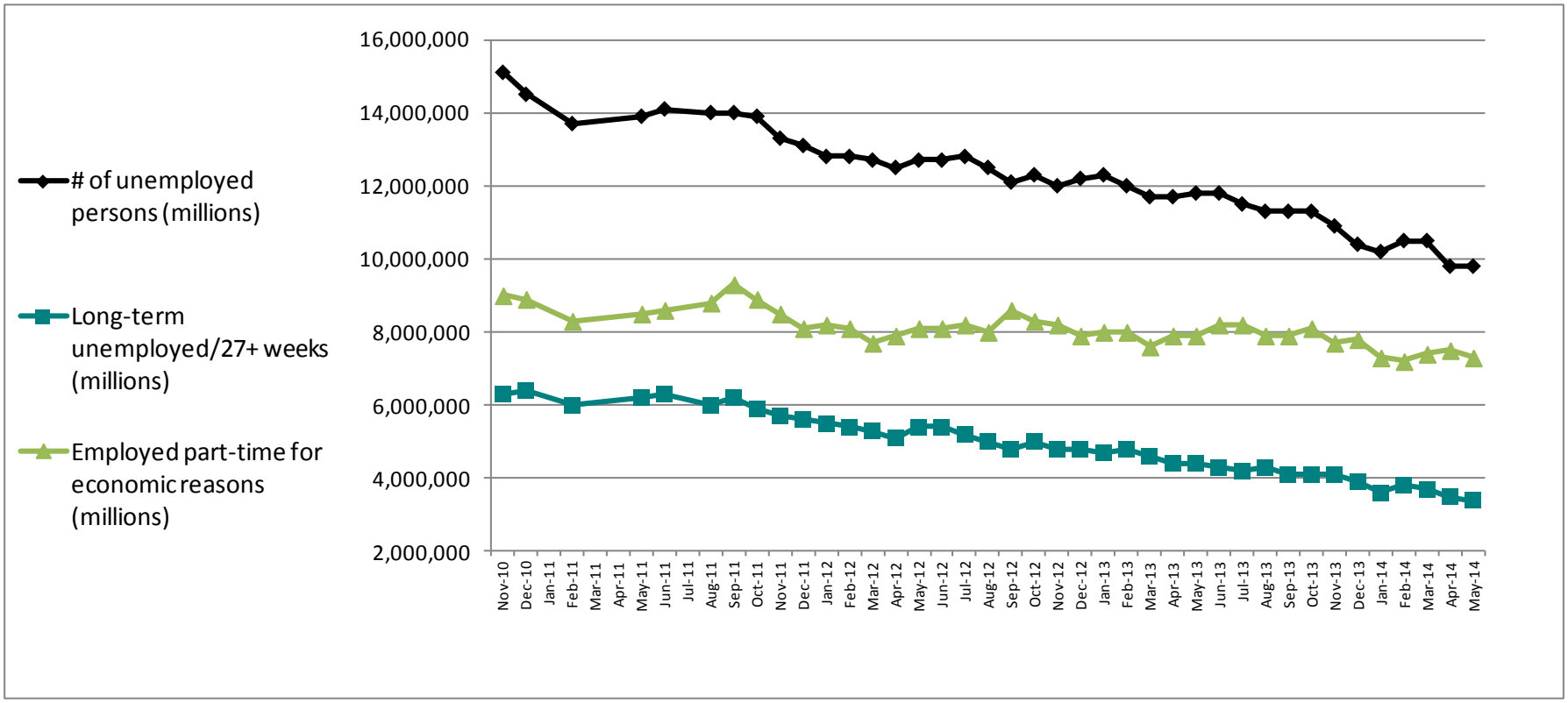

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FIGURE 9 - U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (Through May 2014)

KEY EMPLOYMENT STATISTICS – Last 32 Months

	Aug-11 (33 mos. ago)	Jan-13 (16 mo. ago)	May-13 (12 mo. ago)	Jun-13 (11 mo. ago)	Jul-13 (10 mo. ago)	Aug-13 (9 mo. ago)	Sep-13 (8 mo. ago)	Oct-13 (7 mo. ago)	Nov-13 (6 mo. ago)	Dec-13 (5 mo. ago)	Jan-14 (4 mo. ago)	Feb-14 (3 mo. ago)	Mar-14 (2 mo. ago)	Apr-14 (1 mo. ago)	May-14 (Now)
Unemployment rate	**9.1%**	**7.9%**	**7.6%**	**7.6%**	**7.4%**	**7.3%**	**7.2%**	**7.3%**	**7.0%**	**6.7%**	**6.6%**	**6.7%**	**6.7%**	**6.3%**	**6.3%**
# of unemployed persons	**14.0 million**	**12.3 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**	**9.8 million**
Long-term unemployed--27+ weeks	6.0 million	4.7 million	4.4 million	4.3 million	4.2 million	4.3 million	4.1 million	4.1 million	4.1 million	3.9 million	3.6 million	3.8 million	3.7 million	3.5 million	3.4 million
(% of total unemployed persons)	42.9%	38.1%	37.3%	36.7%	37.0%	37.9%	36.9%	36.1%	37.3%	37.7%	35.8%	37.0%	35.8%	35.3%	35.3%
Civilian labor force participation rate	64.0%	63.6%	63.4%	63.5%	63.4%	63.2%	63.2%	62.8%	63.0%	62.8%	63.0%	63.0%	63.2%	62.8%	62.8%
Employment-population ratio	58.2%	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%	58.9%
Employed part-time for economic reasons	8.8 million	8.0 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	7.3 million
Marginally attached to labor force	2.6 million	2.4 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	2.1 million
Discouraged workers (not looking for work)	977,000	804,000	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	697,000

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

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