FOR IMMEDIATE RELEASE

Contact: Ted Lane **tlane@footepartners.com**
Tel: 772-234-2787

FOOTE IT NEWS ANALYSIS – Technology employment trends in the November 2015 Bureau of Labor Statistics – U.S. Employment Report

Only 11,300 IT jobs added to U.S. payrolls in November, down from 16,300 in October.

With the addition of 211,000 jobs, the national unemployment rate stays steady at 5.0 percent, lowest since 2008.

Vero Beach, FL – Friday, December 4, 2015. An analysis of Friday's release of November 2015 U.S. employment numbers by the Bureau of Labor Statistics (BLS) reveals a **net increase of 11,300 IT jobs** across four industry job segments commonly associated with technology professionals.

November job growth was significantly lower than October's 16,300 IT jobs but on par with the average for the last six months (11,550). With an average of 12,533 IT jobs added to U.S. payrolls in the last twelve months, November results are mildly disappointing, the sixth worst month of IT job creation since January 2014 [***see Figs. 1 and 6***].

Two IT segments that have been responsible for 93 percent of all IT jobs added to US payrolls in the past twelve months were responsible for 87 percent of IT jobs added to U.S. payrolls in November. [***see Fig. 7***]. ***Management and Technical Consulting Services*** added 5,000 new jobs, 2,000 fewer than the prior month but still beating the 4,317 monthly average over the past twelve months. The other job segment, ***Computer Systems Design/Related Services***, gained 4,800 jobs in November, well below both October's results (9,990 jobs) twelve month average for this segment (7,275).

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

The remaining two job segments relating to IT hiring, ***Telecommunications*** and ***Data Processing, Hosting and Related Services*** together gaining 1,500 jobs, an improve over October's net loss of 600 jobs in the segment. These segments have averaged growth of only 1,327 jobs so far in 2015.

"IT job growth in 2015 has really been up and down on a month by month basis and November was one of the 'down' months", notes Foote Partners' chief analyst David Foote.[***see Figs. 5 and 6***] "Still, it's been a very solid year with 2015 jobs growth averaging 7 percent above 2014 and nearly 17 percent higher than 2013. This is very good news overall for IT professionals."

Labor Department data paints a picture of an economy that is growing steadily and creating jobs at a healthy pace, even as wage gains remain subdued and many Americans are still stuck on the sidelines of the recovery. Not so much for IT professionals however: Foote Partners IT compensation benchmark data is showing salaries and demand for skills in many areas are very strong: cloud and mobile platforms, database and data analytics, security, applications development and a variety of methodology and process skills.

Industry Highlights – November 2015

- Total nonfarm payroll employment rose by 211,000 in November, about in line with the average monthly gain of 237,000 over the prior 12 months. In November, job growth occurred in construction, professional and technical services, and health care. Employment in mining and information declined over the month. (See table B-1.)

- Employment in construction rose by 46,000 in November, with much of the increase occurring in residential specialty trade contractors (+26,000). Over the past year, construction employment has grown by 259,000.

- In November, professional and technical services added 28,000 jobs. Job gains occurred in accounting and bookkeeping services (+11,000), and employment in computer systems design and related services continued to trend up (+5,000). Over the year, professional and technical services has added 298,000 jobs.

- Health care employment increased by 24,000 over the month, following a large gain in October (+51,000). In November, hospitals added 13,000 jobs. Health care employment has grown by 470,000 over the year.

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

- Employment in food services and drinking places continued to trend up in November (+32,000) and has risen by 374,000 over the year.

- Retail trade employment continued to trend up in November (+31,000) and has increased by 284,000 over the year. In November, job gains occurred in general merchandise stores (+12,000) and motor vehicle and parts dealers (+9,000). Over the past 12 months, these industries have added 85,000 jobs and 71,000 jobs, respectively.

- Employment in mining continued to decline in November (-11,000), with losses concentrated in support activities for mining (-7,000). Since a recent peak in December 2014, employment in mining has declined by 123,000.

- Information lost 12,000 jobs over the month. Within the industry, employment in motion pictures and sound recording decreased by 13,000 in November but has shown little net change over the year.

- Employment in other major industries, including manufacturing, wholesale trade, transportation and warehousing, financial activities, and government, changed little over the month.

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

Hiring Trend Charts – IT Employment Segments

November 2015 Employment Situation Summary Report

(U.S. Department of Labor/Bureau of Labor Statistics)

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

FIGURE 1 – U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (January 2014 to November 2015)

MONTHLY JOB SITUATION TRENDS – IT Professional Job Segments

(Highlights for four bellwether IT jobs segments)

	2014												2015										
	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov
Nonfarm job loss/gain (month)	144,000	222,000	203,000	304,000	229,000	267,000	243,000	203,000	256,000	261,000	423,000	329,000	201,000	266,000	119,000	221,000	254,000	245,000	223,000	153,000	145,000	298,000	211,000
National unemployment rate	**6.6%**	**6.7%**	**6.7%**	**6.3%**	**6.3%**	**6.1%**	**6.2%**	**6.1%**	**5.9%**	**5.8%**	**5.8%**	**5.6%**	**5.7%**	**5.5%**	**5.5%**	**5.4%**	**5.5%**	**5.3%**	**5.3%**	**5.1%**	**5.1%**	**5.0%**	**5.0%**
Professional/Technical Services	20,400	35,400	10,400	25,100	24,700	31,000	24,900	16,800	21,100	20,000	37,500	12,600	32,500	31,800	23,700	20,700	18,800	23,900	26,600	14,500	17,700	26,900	28,400
Segment 5: Management/Technical Consulting Services	600	5,300	3,500	5,000	6,800	8,200	2,700	3,000	11,500	4,000	7,300	3,200	3,600	7,100	3,800	6,000	7,000	-1,200	3,300	6,100	900	7,000	5,000
Segment 4: Computer Systems Design/Related Services	4,700	5,000	6,100	8,900	6,600	6,900	3,900	1,500	4,900	6,800	6,500	9,000	8,000	5,200	3,900	9,100	10,300	4,400	8,700	7,000	7,000	9,900	4,800
Information	0	-16,000	2,000	-3,000	-5,000	9,000	2,000	-3,000	12,000	-4,000	4,000	2,000	6,000	7,000	2,000	3,000	-3,000	7,000	2,000	-7,000	12,000	-1,000	-12,000
Segment 4: Telecommunications	-10,200	800	2,200	2,900	3,200	200	800	-1,800	4,600	800	2,300	-300	-400	-100	1,400	-1,700	-100	400	1,600	-3,500	600	-400	500
Segment 5: Data Processing/Hosting/ Related Services	1,800	-900	-900	100	-1,000	1,600	3,700	1,000	1,700	1,300	1,200	-3,000	3,300	1,500	1,500	100	2,700	2,200	1,300	1,600	1,300	-200	1,000
Net gain/loss-ALL IT SEGMENTS	-3,100	10,200	10,900	16,900	15,600	16,900	11,100	3,700	22,700	12,900	17,300	8,900	14,500	13,700	10,600	13,500	19,900	5,800	14,900	11,200	9,800	16,300	11,300
Net gain/loss-ONLY IT SERVICES SEGMENTS	5,300	10,300	9,600	13,900	13,400	15,100	6,600	4,500	16,400	10,800	13,800	12,200	11,600	12,300	7,700	15,100	17,300	3,200	12,000	13,100	7,900	16,900	9,800
Net gain/loss-OTHER IT JOB SEGMENTS	-8,400	-100	1,300	3,000	2,200	1,800	4,500	-800	6,300	2,100	3,500	-3,300	2,900	1,400	2,900	-1,600	2,600	2,600	2,900	-1,900	1,900	-600	1,500

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

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

FIGURE 2 – U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (January 2012 to December 2013)

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

(Highlights for four bellwether IT jobs segments)

	2012												2013											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Nonfarm job loss/gain (month)	284,000	227,000	143,000	68,000	87,000	64,000	181,000	192,000	132,000	137,000	247,000	219,000	148,000	332,000	138,000	199,000	176,000	172,000	89,000	193,000	175,000	200,000	274,000	84,000
National unemployment rate	**8.3%**	**8.3%**	**8.2%**	**8.1%**	**8.2%**	**8.2%**	**8.3%**	**8.1%**	**7.8%**	**7.8%**	**7.7%**	**7.8%**	**7.9%**	**7.7%**	**7.6%**	**7.5%**	**7.6%**	**7.6%**	**7.4%**	**7.4%**	**7.2%**	**7.2%**	**7.0%**	**6.7%**
Professional/Technical Services	30,300	34,200	13,800	27,500	-4,000	18,200	17,900	26,800	4,900	15,500	15,300	16,900	14,800	26,800	24,600	22,800	18,200	9,800	21,100	10,900	6,300	21,400	17,500	-11,700
Segment 5: Management/Technical Consulting Services	3,000	7,400	5,300	6,400	2,200	8,900	6,300	8,700	-1,800	4,500	0	5,800	11,500	4,400	6,200	5,700	3,200	8,400	6,900	1,700	1,500	7,700	600	3,900
Segment 4: Computer Systems Design/Related Services	1,700	10,200	3,900	7,400	5,300	6,600	7,000	10,600	2,900	6,600	7,100	5,600	4,600	5,800	3,900	3,300	6,000	7,300	4,300	2,400	4,500	3,200	2,700	1,400
Information	13,000	-1,000	-900	-2,000	-2,000	-8,000	11,000	3,000	3,000	1,000	12,000	-9,000	9,000	20,000	5,000	-9,000	3,000	-5,000	9,000	-18,000	4,000	5,000	-1,000	-12,000
Segment 4: Telecommunications	-300	-6,400	-3,600	-3,500	-2,000	-2,100	2,800	-2,300	-400	1,400	300	-1,800	4,900	400	1,800	1,200	1,000	700	3,600	2,700	-2,700	-300	-2,100	1,700
Segment 5: Data Processing/Hosting/ Related Services	-1300	1900	-600	-500	-300	0	2,100	1,100	-2,400	0	-600	200	1,100	-800	-500	-500	-400	1,800	3,600	-100	200	-200	-200	500
Net gain/loss-ALL IT SEGMENTS	3,100	13,100	5,000	9,800	5,200	13,400	18,200	18,100	-1,700	12,500	6,800	9,800	22,100	9,800	11,400	9,700	9,800	18,200	18,400	6,700	3,500	10,400	1,000	7,500
Net gain/loss-ONLY IT SERVICES SEGMENTS	4,700	17,600	9,200	13,800	7,500	15,500	13,300	19,300	1,100	11,100	7,100	11,400	16,100	10,200	10,100	9,000	9,200	15,700	11,200	4,100	6,000	10,900	3,300	5,300
Net gain/loss-OTHER IT JOB SEGMENTS	-1,600	-4,500	-4,200	-4,000	-2,300	-2,100	4,900	-1,200	-2,800	1,400	-300	-1,600	6,000	-400	1,300	700	600	2,500	7,200	2,600	-2,500	-500	-2,300	2,200

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

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

FIGURE 3 – U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (Through November 2015)

CUMULATIVE JOB SITUATION TRENDS – IT PROFESSIONALS

Highlights for four bellwether IT jobs segments)

U.S. LABOR DEPT CUMULATIVE NET JOB GAINS/DECLINES: through November 2015								
JOBS SEGMENT	36 mos.	24 mos.	12 mos.	8 mos.	6 mos.	4 mos.	3 mos.	2 mos.
	Dec'12 - Nov'15	Dec'13 - Nov'15	Dec'14 - Nov'15	Apr'14 - Nov'15	Jun'14 - Nov'15	Aug'15 -Nov'15	Sep'15 -Nov'15	Oct'15 - Nov'15
Professional and Technical Services	744,800	533,700	278,100	177,500	138,000	87,500	73,000	55,300
Segment 5: Management/Technical Consulting Services	177,200	113,600	51,800	34,100	21,100	19,000	12,900	12,000
Segment 4: Computer Systems Design/Related Services	204,100	150,500	87,300	61,200	41,800	28,700	21,700	14,700
Information	17,000	4,000	18,000	1,000	1,000	-8,000	-1,000	-13,000
Segment 4: Telecommunications	14,900	5,500	-2,000	-2,600	-800	-2,800	700	100
Segment 5: Data Processing/Hosting/ Related Services	27,600	23,400	13,300	10,000	7,200	3,700	2,100	800
TOTAL - ALL 4 IT SEGMENTS	423,800	293,000	150,400	102,700	69,300	48,600	56,800	27,600
IT Services segments	381,300	264,100	139,100	95,300	62,900	47,700	34,600	26,700
Tech Information segments	42,500	28,900	11,300	7,400	6,400	900	2,800	900

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

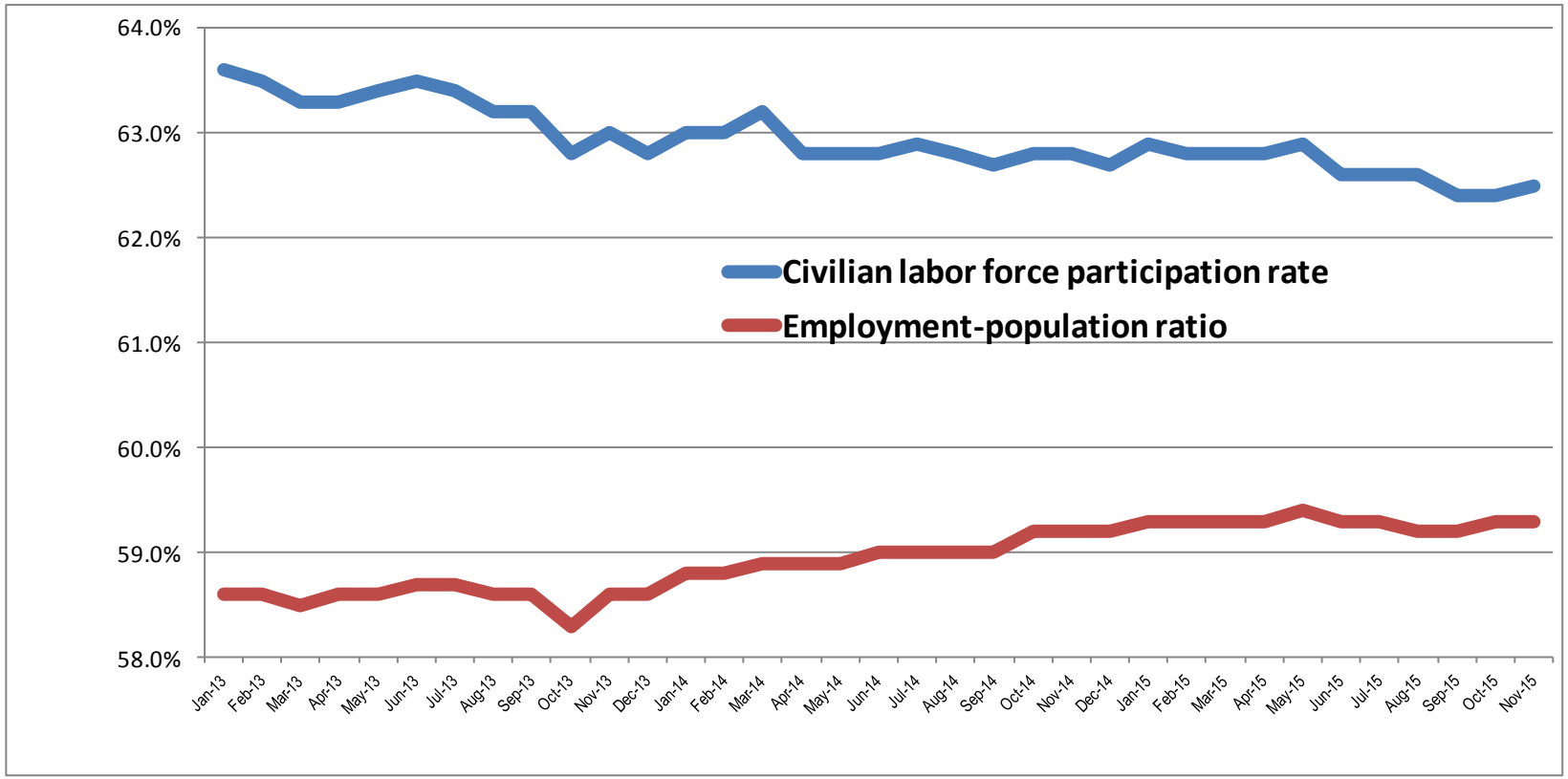
Source: US Department of Labor/Bureau of Labor Statistics.
Data chart and analysis by Foote Partners LLC

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

FIGURE 4 – U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (February 2008 to November 2015)

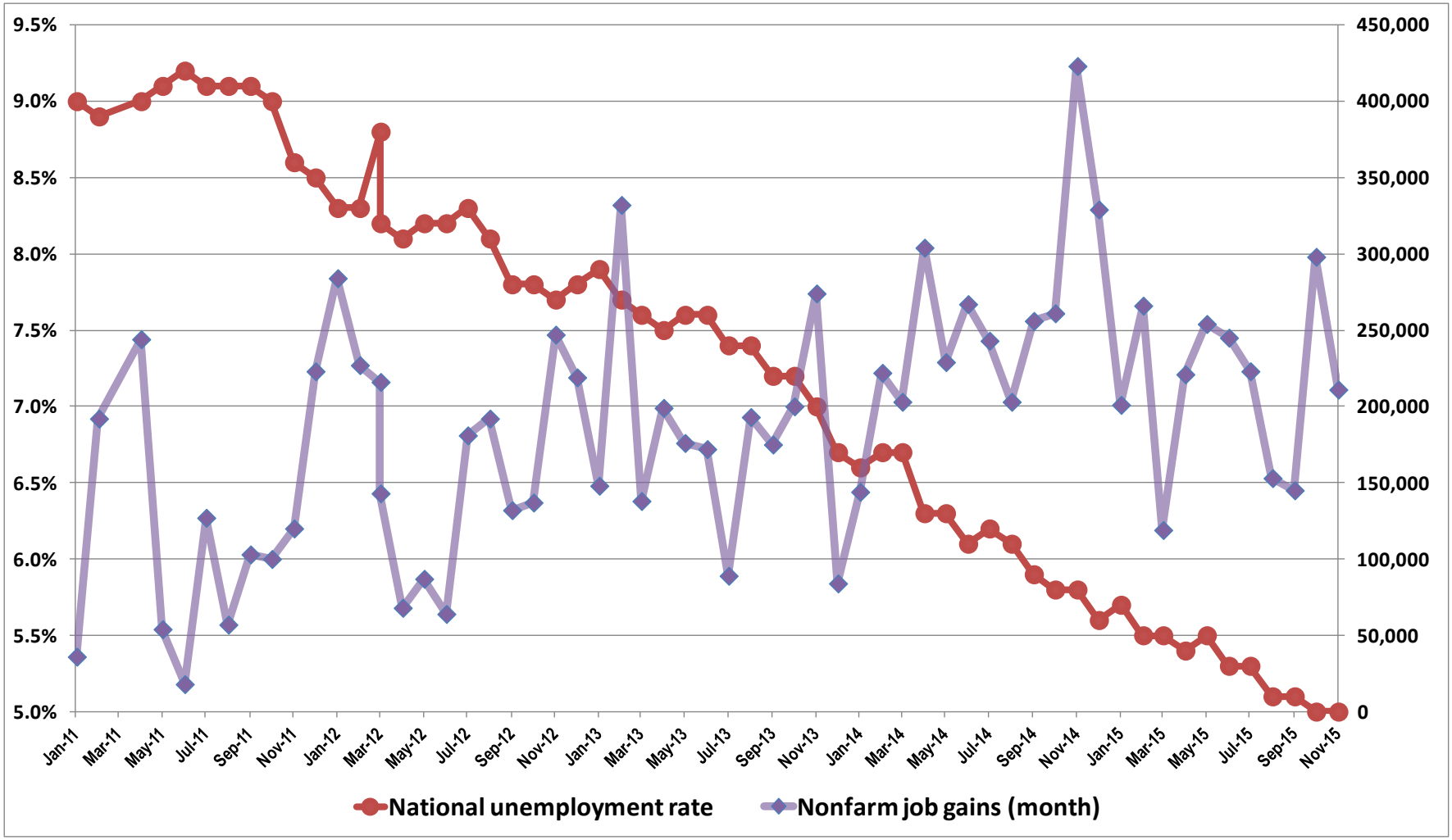
Only two years ago, the November unemployment rate was more than two percentage points higher. The fall has been faster than most economists expected, though part of the reason has been a drop in the labor force participation rate as people retire, go back to school or just give up.

The labor force participation rate measures the number of people who are working or look for a job.



©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

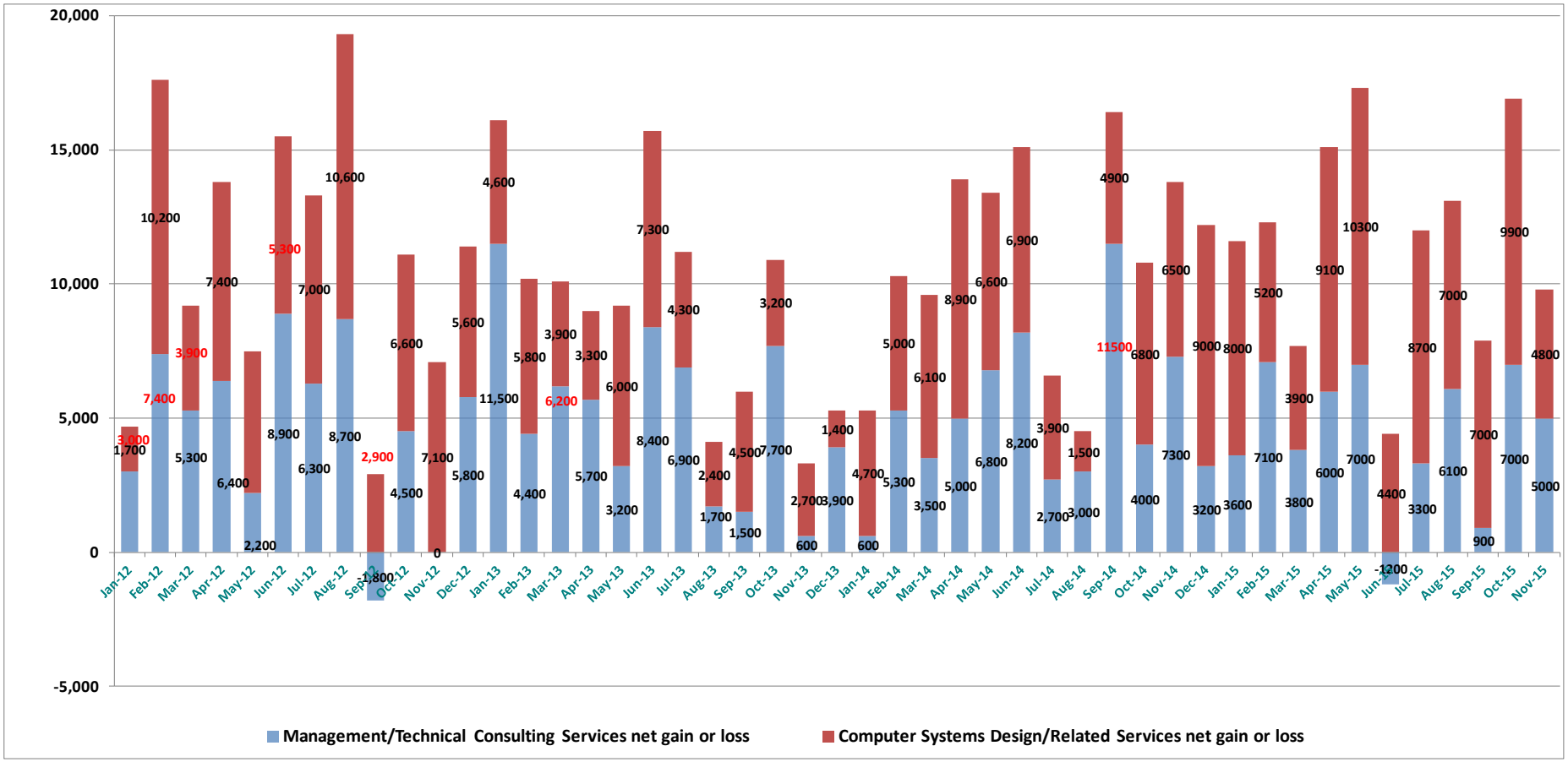
FIGURE 5 – JOB GROWTH/DECLINE - Management/Technical Consulting jobs vs. Computer Systems Design/Related services jobs
- Net job gains/losses from January 2010 through November 2015



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

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

FIGURE 6

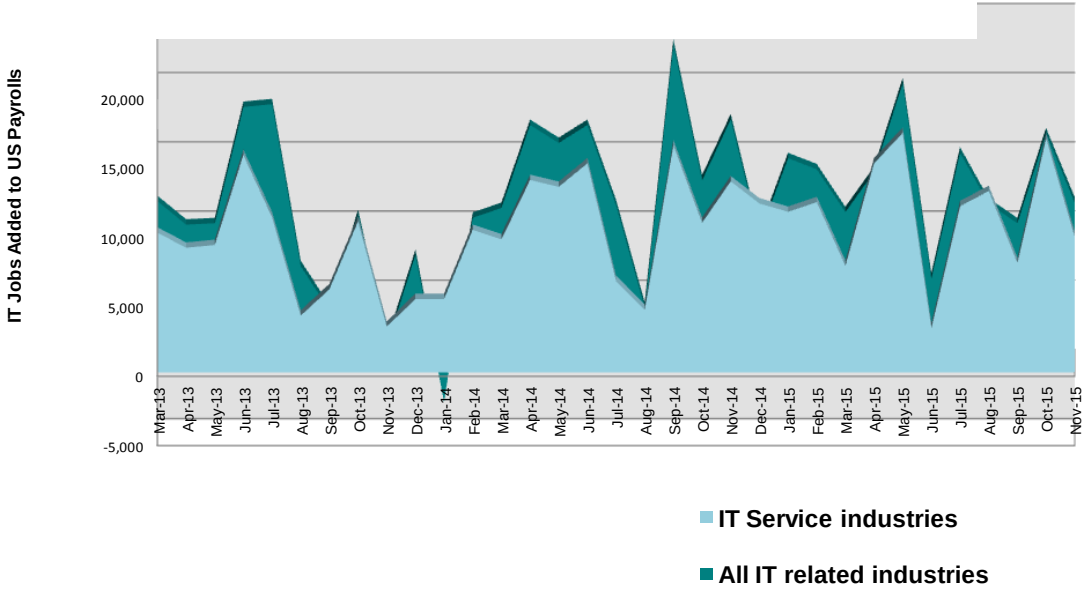


Source: US Department of Labor/Bureau of Labor Statistics. Data chart and analysis by Foote Partners LLC

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

FIGURE 7

More than 90% of IT Job Creation in last 12 months has been in the IT Services Industries



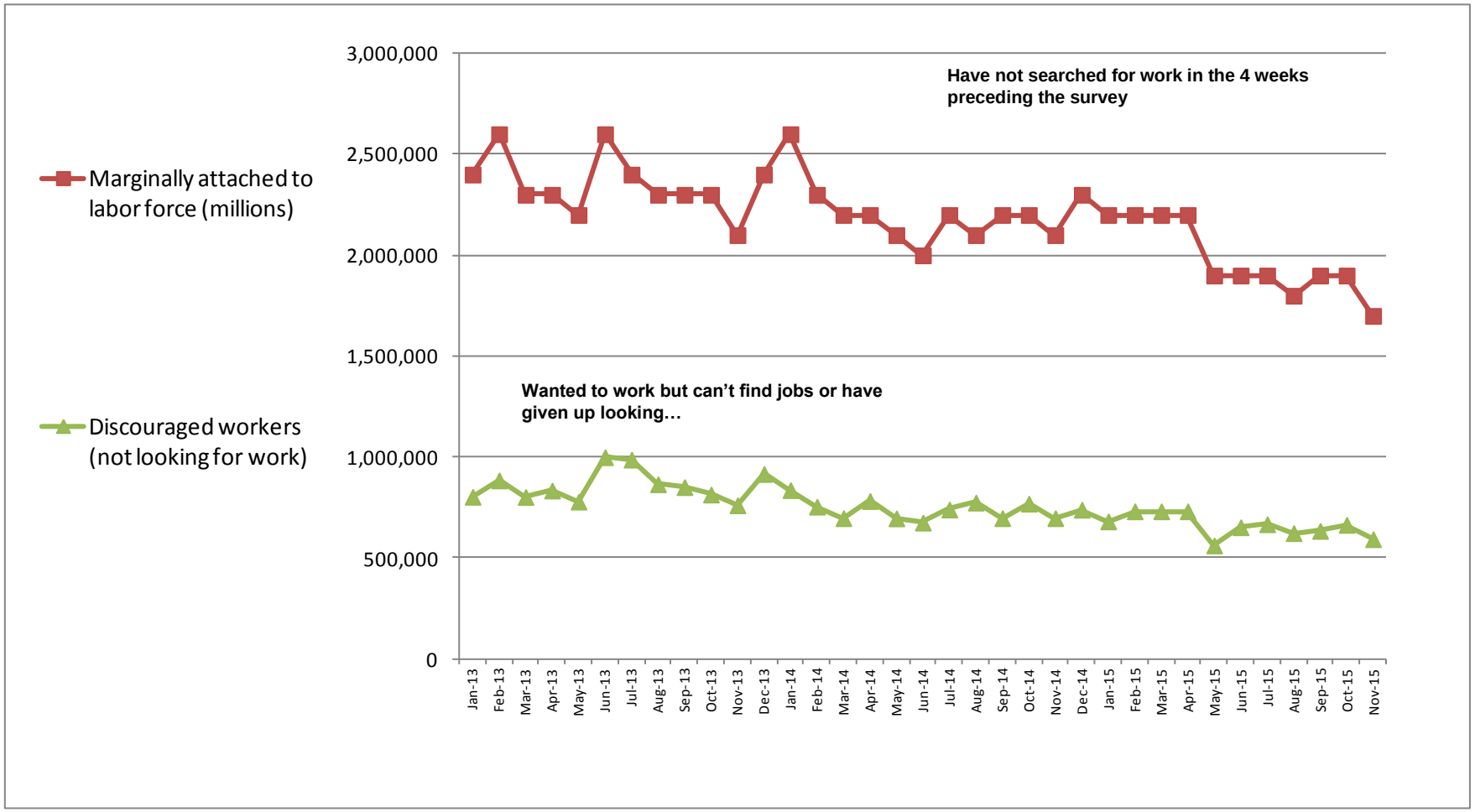
***Management and Technical Consulting Services* and *Computer Systems Design and Related Services* segments added 139,100 net jobs in last 12 mos.**

Telecommunications and Data Processing, Hosting and Related Services added only 11,300 net jobs in the same period..

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

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

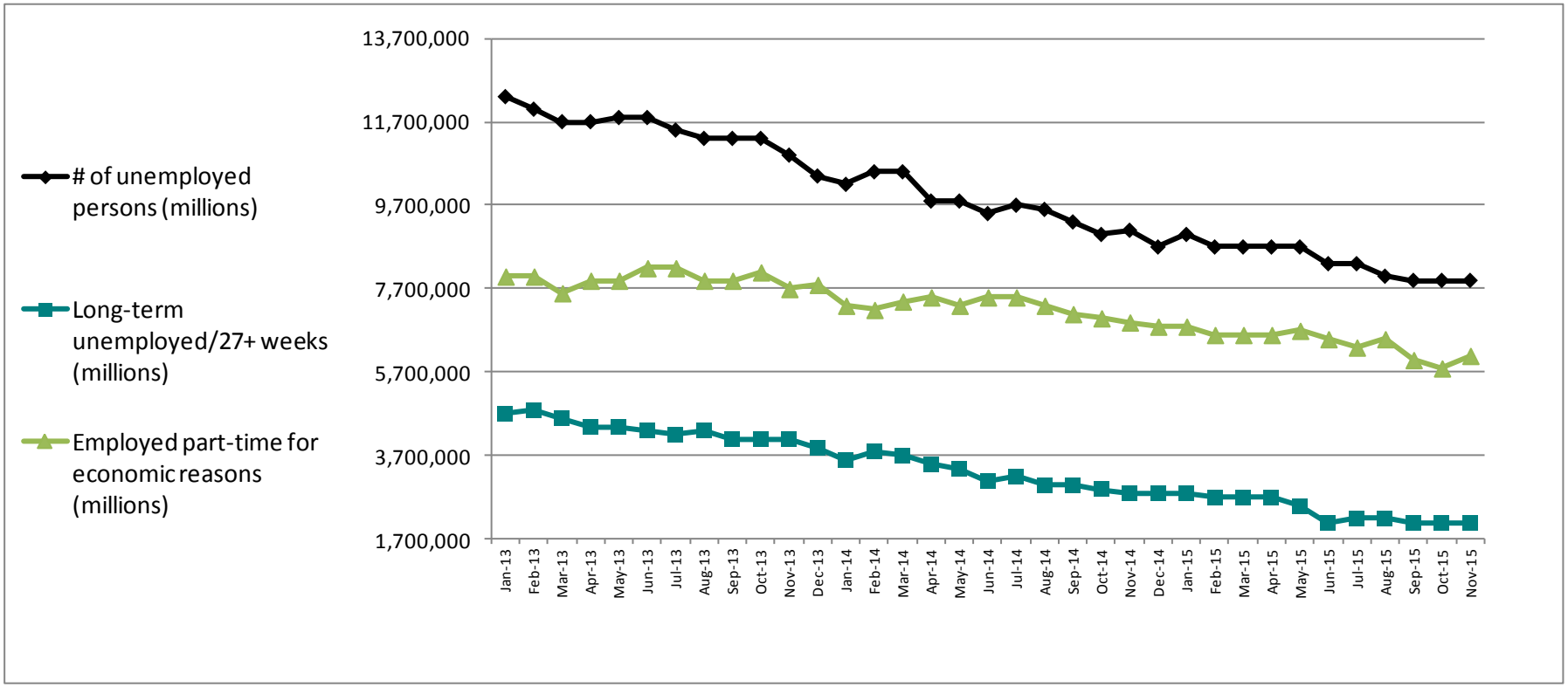
FIGURE 8– LABOR FORCE COMPOSITION: Marginally attached vs. Discouraged - 2012 to 2015



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

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

FIGURE 9 – UNEMPLOYED AND UNDEREMPLOYED PERSONS: Total vs. Long-Term vs. Part-timers - 2013 to 2015



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

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

FIGURE 10 - U.S. Department of Labor/Bureau of Labor Statistics – Job Situation Report (Through November 2015)

KEY EMPLOYMENT STATISTICS – Last 20 Months

	Mar-14 (22 mo. ago)	Apr-14 (21 mo. ago)	Oct-14 (14 mo. ago)	Nov-14 (13 mo. ago)	Dec-14 (10 mo. ago)	Jan-15 (9 mo. ago)	Feb-15 (9 mo. ago)	Mar-15 (8 mo. ago)	Apr-15 (7 mo. ago)	May-15 (6 mo. ago)	Jun-15 (5 mo. ago)	Jul-15 (4 mo. ago)	Aug-15 (3 mo. ago)	Sep-15 (2 mo. ago)	Oct-15 (1 mo. ago)	Nov-15 (Now)
Unemployment rate	6.7%	6.3%	5.8%	5.8%	5.6%	5.7%	5.5%	5.5%	5.5%	5.5%	5.3%	5.3%	5.1%	5.1%	5.0%	5.0%
# of unemployed persons	10.5 million	9.8 million	9.0 million	9.1 million	8.7 million	9.0 million	8.7 million	8.7 million	8.7 million	8.7 million	8.3 million	8.3 million	8.0 million	7.9 million	7.9 million	7.9 million
Long-term unemployed--27+ weeks	3.7 million	3.5 million	2.90 million	2.80 million	2.80 million	2.80 million	2.70 million	2.70 million	2.70 million	2.5 million	2.1 million	2.2 million	2.2 million	2.1 million	2.1 million	2.1 million
(% of total unemployed persons)	35.8%	35.3%	32.0%	30.7%	31.9%	31.5%	31.1%	31.1%	31.1%	28.6%	25.8%	26.9%	27.7%	26.6%	26.8%	25.7%
Civilian labor force participation rate	63.2%	62.8%	62.8%	62.9%	62.7%	62.9%	62.8%	62.8%	62.8%	62.9%	62.6%	62.6%	62.6%	62.4%	62.4%	62.5%
Employment-population ratio	58.9%	58.9%	59.2%	59.2%	59.2%	59.3%	59.3%	59.3%	59.3%	59.4%	59.3%	59.3%	59.2%	59.2%	59.3%	59.3%
Employed part-time for economic reasons	7.4 million	7.5 million	7.0 million	6.9 million	6.8 million	6.8 million	6.6 million	6.6 million	6.6 million	6.7 million	6.5 million	6.3 million	6.5 million	6.0 million	5.8 million	6.1 million
Marginally attached to labor force	2.2 million	2.2 million	2.2 million	2.1 million	2.3 million	2.2 million	2.2 million	2.2 million	2.2 million	1.9 million	1.9 million	1.9 million	1.8 million	1.9 million	1.9 million	1.7 million
Discouraged workers (not looking for work)	698,000	783,000	770,000	698,000	740,000	682,000	732,000	732,000	732,000	563,000	653,000	668,000	624,000	635,000	665,000	594,000

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

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.

ABOUT FOOTE PARTNERS

Foote Partners LLC is a Vero Beach, FL based IT analyst firm and independent benchmark research organization focusing on the human capital aspects and execution (i.e. 'user' versus 'vendor) side of managing technology and IT value creation. A thought leader and trusted advisor to more than 3,600 employers on six continents, the firm provides pragmatic and forward-thinking benchmark research and analysis about managing the modern business/IT hybrid professional workforce. Our research is deeply grounded in specialized proprietary benchmark research, surveys, and empirical intelligence collected from 2,745 U.S. and Canadian employers representing 210,000 IT professionals with whom the firm as forged long term research partnerships.

Founded in 1997 and comprised of former Gartner and META Group industry analysts, McKinsey & Company, Towers Watson, and Mercer senior consultants, and former corporate HR, IT, and business executives, the firm's research division publishes more than 130 quarterly-updated IT decision support benchmark research products that help employers benchmark their IT professional compensation, solve difficult information technology management and workforce problems, and strengthen their ability to execute complex solutions to increasing revenues, improving profitability, and building customer satisfaction.

Foote Partners' respected ***IT Insider* research series** features comprehensive and up-to-date IT salary/bonus and technical skills premium pay benchmark surveys, and IT organization and workforce trends research. Included in the quarterly ***IT Insider*** series are the following:

- *IT Professional Salary Survey*
- *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*

Headquarters: 4445 North A1A, Suite 200
Vero Beach, FL 32963
Tel: 772-234-2787
Web: www.footepartners.com
Twitter blog: @FPview

©2015 Copyright Foote Partners LLC (www.footepartners.com). 772-234-2787. All Rights Reserved.
Copying, reproducing, or publishing graphic content from this release prohibited with permission of author.