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FOOTE IT NEWS ANALYSIS – Technology employment trends in the

IT employment roars back in October: 12,500 new jobs last month following
September’s unexpected net loss of 1,700.

IT services industry adds 11,100, up 10,000 from month earlier.

Unemployment rate dips remains below 8 percent as 171,000 more jobs added to payrolls.

Vero Beach, FL – Friday, November 2, 2012. An analysis of Friday’s release of October 2012 U.S.
employment numbers by the Bureau of Labor Statistics reveals a net gain of 12,500 jobs across four
industry job segments commonly associated with IT professionals. This follows September’s loss of 1,700
jobs, the first monthly decline since August 2010 (25 months) that was not associated with a labor strike or
similar temporary market anomaly (see Figures 1 and 2)

11,100 new jobs were added in segments most commonly associated with the IT services
industries, Management and Technical Consulting Services (+4,500 jobs) and Computer Systems
Design/Related Services (+6,600 jobs), the 29th consecutive month of job growth in these two segments
representing 291,200 new jobs in the period. (Figures 1, 2 and 3)
In the Information industry job category, *Telecommunications* and *Data Processing, Hosting and Related Services* segments gained a total of 1,400 jobs in October---only the second monthly gain recorded in these two segments in the past 23 consecutive quarters going back to December 2010 that was not associated with a labor strike or similar temporary market anomaly. All of these gains were attributed to the Telecommunications segment which has seen job growth in only two months so far in 2012. (Figures 1 and 2)

**Overall U.S. Employment Report** (see Figures 5, 6 and 7)

The U.S. unemployment decreased 0.3 percentage points to 7.8 percent in October as total **nonfarm payroll employment** rose by 114,000 according to the Bureau of Labor Statistics. The number of **unemployed persons**, at 12.1 million, decreased by 456,000 in September.

The number of persons **unemployed for less than 5 weeks** declined by 302,000 over the month to 2.5 million. The number of **long-term unemployed** (those jobless for 27 weeks or more) declined from 5.0 million in August to 4.8 million in September and accounted for 40.1 percent of the unemployed.

Total **employment** rose by 873,000 in September, following 3 months of little change. The **employment-population ratio** increased by 0.4 percentage point to 58.7 percent, after edging down in the prior 2 months. The overall trend in the employment-population ratio for this year has been flat. The **civilian labor force** rose by 418,000 to 155.1 million in September, while the **labor force participation rate** was little changed at 63.6 percent.

Those employed **part-time for economic reasons** (sometimes referred to as involuntary part-time workers) rose from 8.0 million in August to 8.6 million in September. 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 September, 2.5 million persons were **marginally attached to the labor force**, essentially unchanged from a year earlier, declining by 100,000 in September compared to August. 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 802,000 discouraged workers in September, down from 844,000 in the month prior and a decline of 235,000 from a year earlier. Discouraged workers are persons not currently looking for work because they believe no jobs are available for them. The remaining 1.7 million persons marginally attached to the labor force in September had not searched for work in the 4 weeks preceding the survey for reasons such as school attendance or family responsibilities.

Health care added 44,000 jobs in September. Job gains continued in ambulatory health care services (+30,000) and hospitals (+8,000). Over the past year, employment in health care has risen by 295,000.

In September, employment increased by 17,000 in transportation and warehousing. Within the industry, there were job gains in transit and ground passenger transportation (+9,000) and in warehousing and storage (+4,000).

Employment in financial activities edged up in September (+13,000), reflecting modest job growth in credit intermediation (+6,000) and real estate (+7,000).

Manufacturing employment edged down in September (-16,000). On net, manufacturing employment has been unchanged since April. In September, job losses occurred in computer and electronic products (-6,000) and in printing and related activities (-3,000).

Employment in other major industries, including mining and logging, construction, wholesale trade, retail trade, information, professional and business services, leisure and hospitality, and government, showed little change over the month.
Discussion

“I couldn’t help but expect the reaction to this month’s BLS employment report would be mainly political, with the presidential election just 31 days away. And sure enough that is what is dominating the news cycle. But for me it was the stunning sudden reversal in IT job expansion. Overall national employment numbers were disappointing July and August but for IT they were spectacular, the greatest monthly job gains in five years,” says David Foote, CEO at IT analyst firm Foote Partners which has been tracking and reporting on IT and business labor trends since 1997, including monthly analyses of the Department of Labor’s employment reports.

“Although this latest development was unanticipated, the tech industry has in fact been exceptionally volatile at the skills supply and demand level for some time which we track closely in our quarterly IT Skills and Certifications Pay Index™ benchmark research. At the jobs level I wouldn’t be surprised if this turned back around soon because the truth is that the many of the IT job segments in the government jobs reports, in particular those in IT services, have been on strong and sustained growth runs for nearly two years. There is absolutely no structural shift taking place to account for these September job losses; if it were structural you would see it playing out slowly over many months, not in one sudden market burp. The fact is that companies are actively searching for talent and hiring for the future, though with considerable selectivity. They are making investments in new people not simply filling gaps at the project level: They’re building for the future, putting a premium on versatility and multi-dimensionally skilled individuals who can grow and develop within the company culture.

“As for this latest blip, I see a few factors at play,” says Foote. “First, the election year news cycles have been injecting a lot of nervousness into the markets with almost daily hyping of the so-called ‘fiscal cliff’ in January which refers to the ending of the Bush era tax cuts and resumption of higher payroll tax rates at the beginning of 2013. This drumbeat has been pretty aggressive and discussed almost daily in the news. S

“Second, nearly three quarters of U.S. businesses are on a calendar fiscal year and they just entered into their 4th quarter starting October 1st. It’s perfectly normal for them to step back in September and recheck their budgets and hiring plans for the final quarter and the beginning of the next fiscal year.
This year we are noting two important differences from our interviews with CIOs and others responsible for IT hiring: employers were feeling the nervousness just described and consequently acting more deliberately, including placing temporarily freezes on IT job requisitions in September while they reviewed their plans. We are now hearing that most have just lifted those freezes and they’re back to active searches on all requisitions.

“So it appears this September decline in IT job expansion may have been a result of a brief suspension of hiring during the customary ‘step back and recheck our thinking’ phase. Foote Partners expects that in the next few months there will be a resumption of the overall robust hiring trend for IT professionals that we have been tracking in the BLS reports for two years running.”

Notes Foote, “The popularity of cloud computing, managed services, mobile platforms, business analytics and big data, applications development and information security concerns is driving a lot of hiring and investments in skills. So too are aggressive efforts to innovate new products and services. The fact is that preceding this jobs report there were other continuing signs of growing economic strength, including a jump in consumer confidence, the strongest auto sales in four years, rallying stock prices and a stabilization of housing prices. IT is helping to deliver and support everything in business; smart investments in technology and especially in the people who can deliver tech-infused business solutions continues to be key success factors. This has made a wide variety of IT professionals very hot commodities.

“Companies continue to aggressively pursue workers with multiple talents-- a mix of technology, business, and people skills that many who are not working simply do not have. Or a unique combination of pure tech skills: for example, cloud administrators who are adept at automating the configuration and operations in a cloud environment by combining a variety of different skill sets around systems administration, virtualization, storage and network administration. It’s not about just running a server. Or cloud developers who have mastered new sets of APIs, new frameworks, and non-relational databases like NoSQL to develop elastic and scalable apps in the cloud.

“What many people don’t understand is that things like cloud computing have the byproduct of forging better relationships between technology workers and their customers and ultimately frees up IT
human resources for other purposes. By offloading services to the cloud, you increase the amount of budget available for new projects and initiatives, which are the things that truly lead to new business revenues," insists Foote.

“If I may comment on the politicizing of the latest jobs report for a second. The Bureau of Labor Statistics is a highly respected government agency that is in fact not run by political appointments or operatives but instead respected economists who are lifetime bureaucrats and also statistics geeks. The agency has always been populated by extremely talented and dedicated nonpartisan functionaries who see it as their mission to use rigorous research methodologies to produce the most accurate data possible. To suggest otherwise is simply ignorance. You can accuse the BLS of a lot of things but being susceptible to political bias by a particular party or faction is not one of them.”
MONTHLY JOB SITUATION TRENDS – IT Professional Job Segments
(Highlights for four bellwether IT jobs segments)

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<tr>
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<td>Net gain/loss - ALL IT SEGMENTS</td>
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<tr>
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</table>

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

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.

Data chart and analysis by Foote Partners LLC

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

(Highlights for four bellwether IT jobs segments)

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Key: Job losses in red
Job gains in green

Data chart and analysis by Foote Partners LLC

**CUMULATIVE JOB SITUATION TRENDS – IT PROFESSIONALS**

Highlights for four bellwether IT jobs segments)

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<td>Oct'11 - Sep'12</td>
<td>Dec'11 - Sep'12</td>
<td>Mar'12 - Sep'12</td>
<td>Apr'12 - Sep'12</td>
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**Key:** Net job declines in red
Net job gains in green

**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 August 2012

Source: US Department of Labor/Bureau of Labor Statistics. Data chart and analysis by Foote Partners LLC
FIGURE 5  – UNEMPLOYED AND UNDEREMPLOYED PERSONS: Total vs. Long-Term vs. Part-timers

Source: US Department of Labor/Bureau of Labor Statistics. Data chart and analysis by Foote Partners LLC
**FIGURE 6 – LABOR FORCE COMPOSITION: Marginally attached vs. Discouraged**

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

**KEY EMPLOYMENT STATISTICS – Last 25 Months**

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<th>January-12</th>
<th>February-12</th>
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<td>8.9%</td>
<td>9.1%</td>
<td>8.3%</td>
<td>8.3%</td>
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<td>8.3%</td>
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<td><strong># of unemployed persons</strong></td>
<td>14.6 million</td>
<td>13.7 million</td>
<td>13.9 million</td>
<td>12.8 million</td>
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<td>12.7 million</td>
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<td><strong>Civilian labor force participation rate</strong></td>
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<td>63.8%</td>
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<td><strong>Employment-population ratio</strong></td>
<td>58.5%</td>
<td>58.4%</td>
<td>58.4%</td>
<td>58.9%</td>
<td>58.6%</td>
<td>58.5%</td>
<td>58.4%</td>
<td>58.6%</td>
<td>58.6%</td>
<td>58.6%</td>
<td>58.3%</td>
<td>58.7%</td>
</tr>
<tr>
<td><strong>Employed part-time for economic reasons</strong></td>
<td>8.6 million</td>
<td>8.3 million</td>
<td>8.5 million</td>
<td>8.2 million</td>
<td>8.1 million</td>
<td>7.7 million</td>
<td>7.9 million</td>
<td>8.1 million</td>
<td>8.2 million</td>
<td>8.2 million</td>
<td>8.0 million</td>
<td>8.6 million</td>
</tr>
<tr>
<td><strong>Marginally attached to labor force</strong></td>
<td>2.6 million</td>
<td>2.7 million</td>
<td>2.2 million</td>
<td>2.8 million</td>
<td>2.6 million</td>
<td>2.4 million</td>
<td>2.4 million</td>
<td>2.5 million</td>
<td>2.5 million</td>
<td>2.6 million</td>
<td>2.5 million</td>
<td></td>
</tr>
<tr>
<td><strong>Discouraged workers (not looking for work)</strong></td>
<td>1,200,000</td>
<td>1,000,000</td>
<td>822,000</td>
<td>1,100,000</td>
<td>1,000,000</td>
<td>865,000</td>
<td>968,000</td>
<td>830,000</td>
<td>821,000</td>
<td>852,000</td>
<td>844,000</td>
<td>802,000</td>
</tr>
</tbody>
</table>

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

**Foote Partners LLC** Foote Partners, LLC is a Vero Beach, FL based independent IT benchmarking research and advisory firm that targets the human factors of IT value creation and ‘execution’ (or user) side of managing IT organizations and capabilities. A thought leader and trusted advisor to more than 2,000 employers on six continents, the firm provides pragmatic and forward-thinking analysis and advice about managing the modern business/IT hybrid professional workforce that is deeply grounded in specialized proprietary benchmark research, surveys, and empirical intelligence collected from 2,405 North American employers representing 138,555 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 140 quarterly-updated IT and HR 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.

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