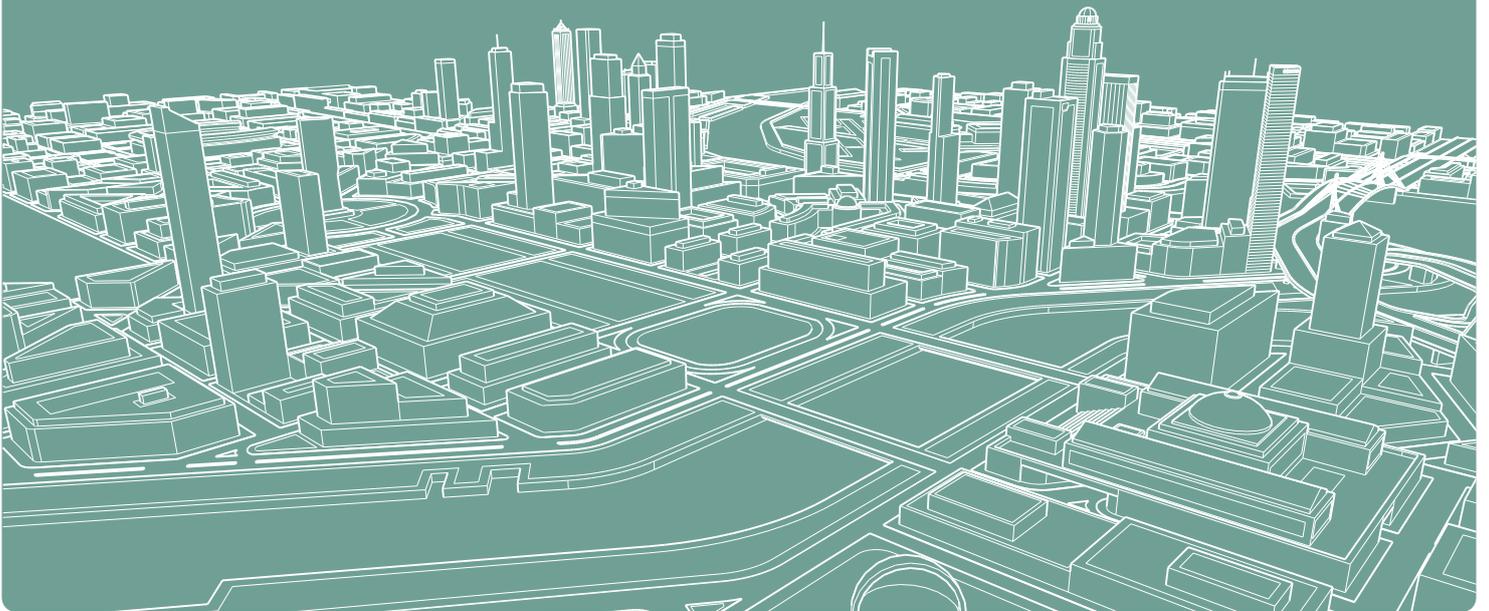




Tech Cities Job Watch

Q2 2015



Cloud



Mobile



Security



Big Data



Web Development

About Experis and Tech Cities Job Watch

As technology continues to creep into all aspects of business, companies in cities across the UK vie for the top tech talent in order to build their capabilities to innovate and cater to the demand.

The Experis Tech Cities Job Watch report sets out to provide employers with a barometer of these changing trends within the technology sector. By combining the latest market intelligence with Experis insights and expertise, this report indicates where the exciting new job opportunities are across the UK.

A general shortage of skilled IT professionals across the country has resulted in sharp competition across five key technology disciplines in particular: IT Security, Cloud, Mobile, Big Data and Web Development.

For this report, Experis selected 10 UK cities that are rapidly developing reputations as technology cluster hubs: London, Birmingham, Brighton, Bristol, Cambridge, Edinburgh, Glasgow, Manchester, Newcastle-Upon-Tyne and a new addition – Leeds.

Experis is the largest IT recruitment specialist in Europe and has been at the forefront of the search for the best in it talent for over 25 years, placing tens of thousands of candidates in IT positions.

Experis has the deep industry knowledge to understand the challenges organisations face and the access to highly skilled professionals to help companies seize opportunities.

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Foreword

We launched the previous Tech Cities Job Watch [01,2015] during what was the first 'tech aware election' in UK history.

During this time, there was a strong air of pre-election trepidation which saw businesses hold back from making long-term decisions around hiring. In what is traditionally one of the busiest quarters of the year, the number of roles advertised notably slowed-down.

We have since seen post-election confidence return, with hiring demand quickly springing back to life. The new Conservative government promises to 'bring Britain a brighter future' backed by an ambitious digital agenda. All that remains to be seen now, is how the new government delivers the 'British technology revolution' they have promised.

In this quarter, while fewer roles were advertised overall, demand for IT professionals in tech cities outside the Capital grew. This is a confident sign tech Britain is flourishing - constantly challenging the Capital in a war on talent to appeal to the very best, and keep them with attractive pay rates.

To reflect the developing digital landscape of Britain and provide businesses with a continuing barometer of the trends shaping IT recruitment across the country, we are delighted to introduce Leeds as the latest tech city to be featured in the report.

Leeds, a thriving city with a strong digital economy, is quickly becoming a major centre for large corporates who are investing heavily in digital programmes and large scale IT projects in the area. Also benefitting from a strong startup community, a leading University and excellent transport links, Leeds is a tech city to watch.

Outside of the Capital, Leeds joins Manchester and Bristol, as the tech cities presenting skilled IT professionals with the largest opportunities.

As we progress through the second half of 2015, we look forward to detailing the hiring trends shaping the evolution of digital Britain, home to an impressive range of Tech Cities.

If you have any thoughts on the content of the report, or are interested in discussing your own experiences in sourcing IT talent across the UK's Tech Cities, please do feel encouraged to visit our website, or contact us directly.

Geoff Smith
Managing Director, Experis Europe
www.experis.co.uk





Executive Summary

The Experis Tech Cities Job Watch (TCJW) report for Q2, 2015 shows an unseasonal slowdown in IT hiring, influenced by the anticipation surrounding the General Election. A contrasting recruitment landscape compared to the previous report.

This quarter saw the total number of roles advertised across the five disciplines of technology fall by 6%.

While seven out of ten roles advertised are still based in London, the other tech cities experienced a 3% increase in the number of roles advertised. Manchester continues to maintain its position as the city with the second highest number of IT roles advertised, but is closely challenged by Leeds and Bristol, who both outpace Birmingham - the UK's second largest city.

Scottish cities Edinburgh and Glasgow emerge as the two highest paying cities outside of London for permanent salaries, while Bristol and Newcastle paid some of the highest contractor day rates in Q2. These tech cities continued to advertise a number of senior level positions, offering higher than average city pay rates, in a bid to attract the very best talent away from the Capital.

Reflective also of wider UK employment trends, the number of permanent roles advertised across all cities fell by 11%. Conversely, the number of contract roles advertised increased by 3%.

There is a sustained high demand for professionals with Web Development and Mobile skills across all cities, with these disciplines accounting for almost two thirds [63%] of all roles advertised.

A strong hiring trend in tech cities outside of London was also reflected in the increased demand for IT professionals with skills in Cloud and Big Data technologies. The number of roles advertised across these two disciplines outside of the Capital increased by 13% and 18% respectively.

IT Security was the biggest riser in the previous report, but noted a 16% drop in the number of roles advertised in this quarter. While the Capital remains to be the number one city for IT Security roles, the other tech cities collectively experienced a 5% increase in demand – accounting for 28% of all IT Security roles advertised.

Furthermore, in the report, we note how the UK tech agenda is fuelling fierce competition between cities for IT talent who can work with new and emerging technologies.

**The five technology disciplines chosen for this report are based upon those in highest demand according to Experis' industry experience*



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

This section summarises the key trends in hiring demand across the five key disciplines of technology: Big Data, Cloud, IT Security, Mobile and Web Development. The analysis covers the period of Q2 2015.

Tech City: Hiring Demand

Q2, 2015 was set against the backdrop of one of the most unpredictable General Elections in decades.

The number of roles advertised peaked in mid April, before pre-Election market trepidation saw levels drop in the immediate weeks leading up to the 7th May. Post-Election confidence saw hiring demand activity return to steadier levels for the remainder of the quarter, noting an uplift in June.

Across the five disciplines, while London saw 10% fewer roles advertised, the tech cities outside of the Capital saw an overall increase of 3%. In line with wider employment trends this period, Leeds, the most recent tech city to be introduced to the report, saw a 12% fall in hiring demand. However, it ranks in the top three cities outside of the Capital, outpacing Birmingham - the UK's second largest city.

Share of hiring demand across the five technology disciplines



Cloud

Hiring demand for Cloud professionals saw 7% fewer roles advertised during this period. Seven out of ten Cloud roles were advertised in the Capital, despite a 12% drop in the number advertised in the city.

Conversely, hiring demand for Cloud-based roles outside of the Capital saw a 13% increase - to 1913 roles.

Bristol recorded the second highest levels of Cloud roles advertised - accounting for 20% of all Cloud roles advertised across non-London cities [390 roles].

IT Security

In the previous quarter, IT Security was the biggest riser. However, in Q2, the number of roles advertised decreased by 16% [equivalent to 1307 fewer roles], with London experiencing a 22% drop.

While the Capital still remains the number one city for IT Security roles advertised by quite some margin, the other cities collectively experienced a 5% increase, and now account for 28% of all IT Security roles advertised. This growth was largely due to strong demand in Manchester, Leeds and Glasgow - each advertising more than 300 roles.



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

Tech City: Hiring Demand



Web Development

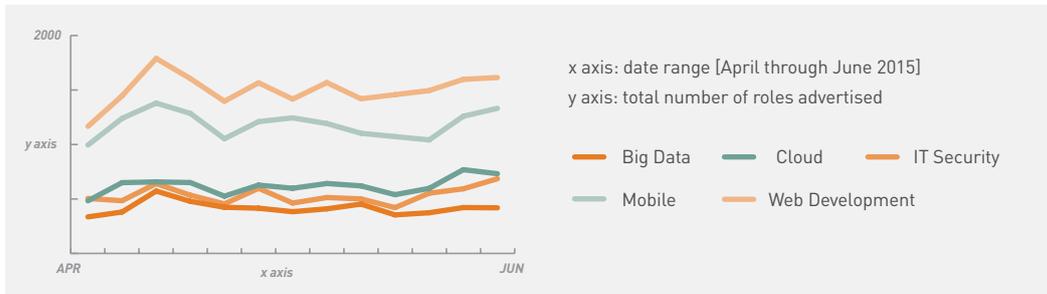
The demand for Web Development professionals still remains high. While the number of Web Development roles advertised fell by 5% in this period, this discipline still accounts for over a third [35%] of overall hiring demand.

Remaining unchanged, 63% of these roles were advertised in the Capital – but the period saw a decrease of 6% in the city compared to the previous quarter [to 12252 roles].

In Edinburgh and Glasgow, Web Development roles saw the highest levels of recruitment activity compared to other tech disciplines in these cities [accounting for 41% of overall demand in Edinburgh and 32% in Glasgow]. These trends are driven largely by the Financial Services sector in the region investing heavily in the development of their front, middle and back office platforms as part of wider digital transformation projects.

Leeds ranks in the top three cities outside of the Capital, with hiring demand levels outpacing Birmingham – the UK's second largest city.

Total number of roles advertised in Q2 2015



Mobile

Demand for professionals with skills in Mobile technologies shows no signs of slowing down, as businesses continue to develop their mobile strategies to keep apace with consumer demand.

In this period, the number of Mobile roles advertised accounted for 28% of total hiring demand across the five disciplines. Almost a third [31%] of the Mobile roles advertised were in tech cities outside of the Capital – an increase of 6% [to 4813 roles].

Leeds replaced Cambridge in third place this period with 890 roles advertised – representative of 18% of the total number of Mobile roles advertised outside of the Capital.



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

Tech City: Hiring Demand

Almost a third [30%], of all roles advertised were based outside of the Capital, demonstrating how the digital landscape across the UK is beginning to flourish.



Big Data

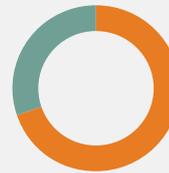
While the overall number of Big Data roles fell by 2% in this period [to 5417], hiring demand in this discipline accounted for 10% of all roles advertised.

The Capital saw a 5% decrease in the number of Big Data roles advertised [to 4616 roles]. This drop was offset by an increase in the number of roles advertised across the tech cities outside of London. Here, demand grew by 18%, equivalent to an extra 121 roles advertised.



Summary

Share of London based roles and non-London based roles advertised across the five disciplines of technology in Q2 2015



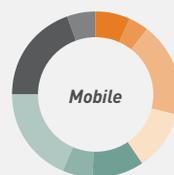
London based roles - 38,637
Non-London based roles - 16,760

While demand across all five disciplines fell by 6% in this period, in tech cities outside of London the number of roles advertised increased by 3% [to 16,760].

Almost a third [30%], of all roles advertised were based outside of the Capital, demonstrating how the digital landscape across the UK is beginning to flourish.

The tech cities outside of London showing the strongest hiring demand across the five disciplines were Manchester, Leeds and Bristol.

Non-London based Tech City hiring demand showing the volume of jobs across every discipline



Birmingham Brighton Bristol Cambridge
Edinburgh Glasgow Leeds Manchester Newcastle upon Tyne



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

This section reveals where the 'Tech Cities' rank in terms of average salaries for the following five disciplines of technology: Big Data, Cloud, IT Security, Mobile and Web Development. The analysis covers the period of Q2 2015.

Salary Watch

Average permanent salaries

City	Big data	Cloud	IT Security	Mobile	Web Development	City Average
London	£63,853	£56,184	£57,328	£53,437	£46,113	£53,107
Glasgow	£44,622	£44,964	£47,206	£41,481	£37,171	£42,318
Cambridge	£50,447	£45,520	£48,734	£40,513	£38,065	£42,004
Edinburgh	£43,528	£39,907	£46,306	£46,825	£41,146	£43,615
Bristol	£52,091	£48,810	£37,042	£38,783	£35,355	£39,001
Manchester	£43,268	£38,630	£46,092	£35,558	£34,441	£36,790
Leeds	£48,147	£48,118	£40,773	£40,648	£33,927	£37,979
Birmingham	£41,000	£46,553	£49,123	£36,496	£32,062	£37,581
Brighton	£45,250	£43,269	£54,409	£35,161	£34,136	£36,930
Newcastle upon Tyne	£41,296	£42,698	£38,677	£36,640	£33,384	£35,587
Average	£60,938	£53,395	£53,733	£48,957	£41,983	£48,722

* Shading to indicate the top three cities, salary-wise for each discipline

Large companies in tech cities outside of the Capital continue to invest in digital and IT projects, driving demand for experienced, senior level, skilled professionals who command higher salaries.

The average perm salaries paid across the ten cities decreased marginally by less than 0.5%, to £48,722 [equivalent to a £98 drop]. However, the Capital saw a marginal increase to its overall average salary of less than 0.5% [equivalent to £125].

Big data professionals continued to earn the highest overall average salary of £60,938 [a 2% increase].

Interestingly, Birmingham, regarded as the UK's second largest city, paid the lowest average to permanent Big Data professionals in this period [at £41,000]. Conversely, Big Data roles advertised in Bristol saw an increase of 10% to £52,091 - the highest outside the Capital.

Web Development professionals in Edinburgh commanded the highest average permanent salaries outside of the Capital at £41,146, with Birmingham paying the lowest.

IT Security average permanent salaries experienced a 4% drop - to £53,733. In this period, Birmingham and Brighton paid some of the highest average permanent salaries for this discipline.

Edinburgh and Glasgow, came in the top three cities for average salaries advertised. IT roles in Edinburgh saw a 9% increase on the average salary advertised [a rise of £3488 to £43,615], outranking Glasgow as the second highest paying tech city outside of London.



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

Salary Watch

High day rates offered in Scotland can be seen as a way to attract the best senior level talent from cities such as London and Manchester.

Average contractor day rates

City	Big data	Cloud	IT Security	Mobile	Web Development	City Average
London	£536	£433	£431	£426	£360	£418
Manchester	£381	£423	£342	£343	£267	£322
Edinburgh	£445	£408	£500	£328	£286	£316
Brighton	£675	£294	£575	£300	£266	£288
Bristol	^	£406	£423	£360	£331	£365
Cambridge	£438	£389	£329	£353	£312	£341
Birmingham	£675	£480	£363	£323	£183	£261
Glasgow	^	£423	£431	£454	£249	£323
Newcastle upon Tyne	^	£545	£415	£419	£282	£463
Leeds	£464	£355	£550	£292	£273	£299
Average	£526	£432	£422	£401	£331	£395

* Shading to indicate the top three cities, salary-wise for each discipline ^ Data Not Available

The average day rates paid across the 10 tech cities saw a marginal increase of 1% compared to the previous quarter, to £395 per day. London continues to rank as the top city for overall city perm salaries, however it does not appear to pay the highest city average for contractor day rates in this period.

Bristol continues to be among the top three cities for overall day rates paid, despite a 2% decrease compared to the previous quarter. IT Security professionals in this city commanded the highest average day rates paid [£423 per day].

Newcastle appears to pay the highest average contractor day rates outside of London at £463 per day [an increase of 42%]. However, these figures have been influenced by a small number of senior-level positions advertised – and are not indicative of trends usually found in this city. This is also the case in Birmingham and Brighton, where average day rates paid for Big Data professionals appear inflated.

In Scotland, while Edinburgh and Glasgow fall outside of the top three cities for overall average contractor day rates, Edinburgh paid the third highest average day rate for IT Security professionals [a 1% increase to £500 per day]. Glasgow paid the highest average day rate for Mobile roles [a 50% increase to £454 per day].

Web Development day rates remained the lowest out of the five tech disciplines [£331 per day].



Hiring Demand



Salary Watch



Employer Demands

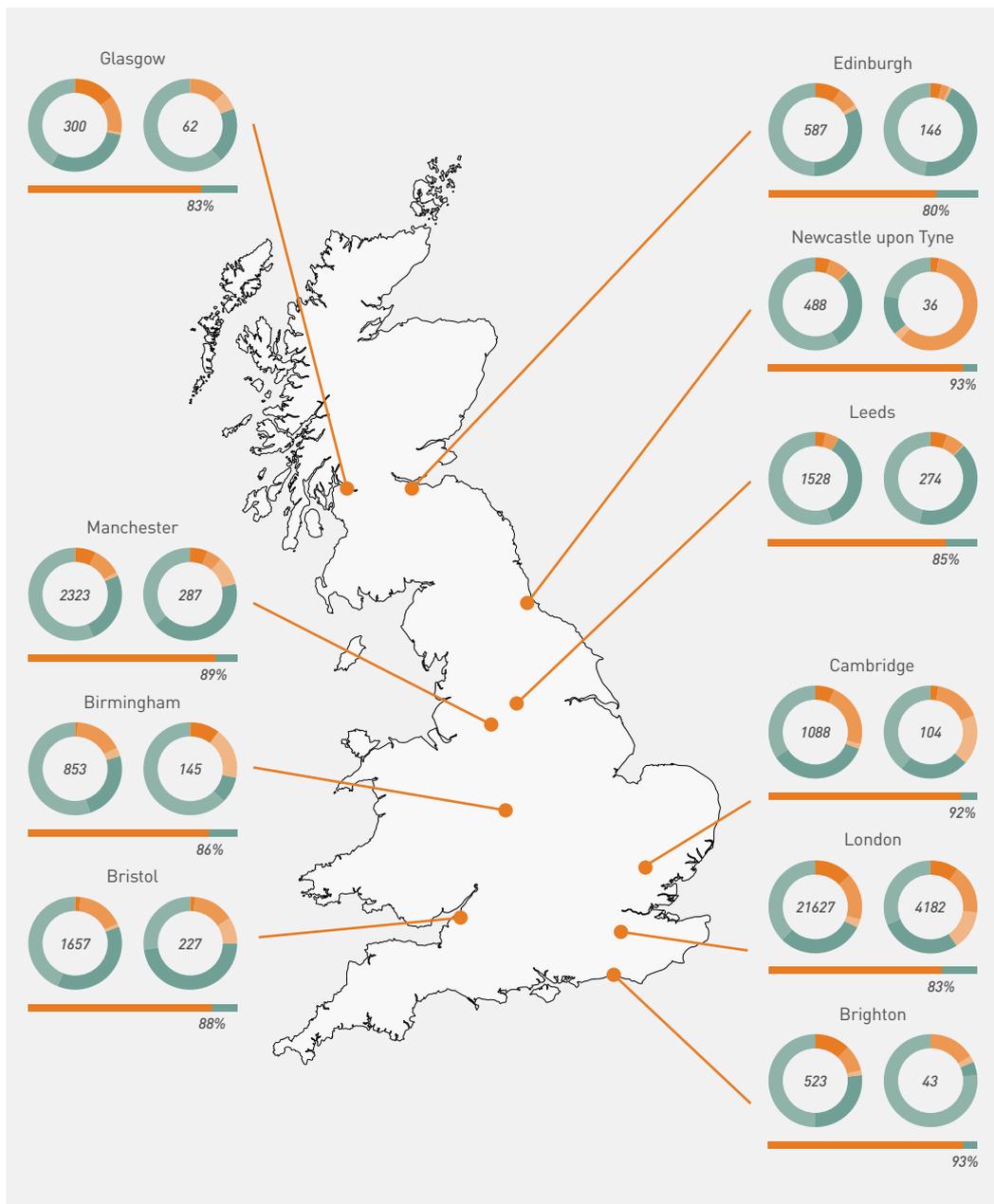


Skills Crunch

A national comparison of permanent versus contract roles for hiring demand across the five key disciplines of technology: Big Data, Cloud, IT Security, Mobile and Web Development. The analysis covers the period of Q2 2015, in the Tech City hubs of London, Birmingham, Brighton, Bristol, Cambridge, Edinburgh, Glasgow, Leeds, Manchester and Newcastle upon Tyne.

Employer Demand Trends

Employer Demand - Permanent vs Contract roles advertised



- Big Data
- Cloud
- IT Security
- Mobile
- Web Development

Permanent Contract

— % of permanent roles advertised
— % of contract roles advertised
† Number of roles advertised



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

Employer Demand Trends

The overall number of permanent roles advertised across all cities fell by 11% to 30,974. This fall in hiring activity may have been influenced by the uncertainty around the General Election.



Perm roles

The overall number of permanent roles advertised across all cities fell by 11% to 30,974. This trend is not typical of Q2 seasonal hiring activity, but is unsurprising given businesses appeared to hold back from making longer-term hiring decisions until the new government was announced.

The Capital is where seven out of 10 permanent roles were advertised. However, the number of permanent roles advertised in this city, were down by 14% to 21,627 compared to the previous quarter.

Outside of London, Manchester maintained its position as the top hiring city with 2323 roles advertised. This is despite a 13% decrease in the number of roles advertised across the period.

Leeds also fell into the top three cities outside of the Capital with 1,528 roles advertised.

In Scotland, when comparing permanent hiring levels between neighbours Glasgow and Edinburgh, Edinburgh saw 11.5% more permanent roles advertised this quarter, while conversely, Glasgow saw a 56% drop in the number of roles advertised [equivalent to 391 fewer roles].



Contract roles

The overall number of contract roles advertised increased by 3% to 5506 roles.

Even with 31% fewer contractor roles advertised this period, Manchester maintained its position as the top city outside of London followed closely by Leeds, who saw 274 roles advertised.

The number of contractor roles advertised doubled in Newcastle Upon Tyne [to 36 roles], with a similar trend being seen in Edinburgh.

The Capital demonstrated a stable contractor market, with the number of roles advertised down only slightly [less than 1%].



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

This section summarises the top three skills in demand for each discipline of technology for the period of this report.

< Skills Crunch >



Mobile

IT professionals with skills in Mobile programming languages such as **Objective-C, Java** and **C#/C++**, remain in demand due to the increasing requirement for companies to develop mobile platforms to increase their eCommerce capabilities.

There is also a rise in demand for emerging Mobile skills such as Apple's newest programming language '**Swift**' for **iOS**, and for IT professionals with skills in cross-platform development programs such as **Xamarin**.



Web Development

Back-end Development – The sustained need for organisations to develop software applications on powerful back-ends, continues the demand for IT professionals with skills in core programming languages such as **Java, C#** and **.Net**. Because of the universal nature of these programming languages, IT professionals with these skills remain highly employable.

Front-end Development – Demand remains constant for Web Developers with skills in **Ruby on Rails** - a web application development framework designed to make front end design and programming web applications easier.



IT Security

Organisations in both the private and public sector continue to demand cyber security experts to ensure their in-house security systems are resilient. As a result, **SIEM [Systems Intrusion and Event Management], IDAM [Identity Access Management], Biometrics** and **Ethical Hackers** are amongst the top skills required in this technology discipline.

There is also a notable rise in demand for verified cyber security experts holding the **CISSP [Certified Information Systems Security Professional]** qualification.

Skilled workers are at a premium and this competition for talent is no more pronounced than in the technology sector.



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

< Skills Crunch >

The key to winning the war on talent is to have an intricate understanding of IT trends and the impact they have on the industry's labour force.



Big Data

As quantities of captured data increases within companies of all sizes, investment into managing and analysing these growing data sets continues to be a key focus for many businesses. This has driven demand for IT professionals with skills in **Apache Hadoop** - an open source framework and set of tools used for identifying trends and providing intelligent insight in to captured data sets.

There is also a notable rise in demand for newer skills in Big Data analytics and Business Intelligence tools such as **Splice Machine, Tableau** and **SAP HANA**.



Cloud

As businesses continue to embrace Cloud technologies to migrate their data centre technologies for cost and time efficiencies, there is an on-going demand for IT professionals with skills in hybrid cloud platform technologies such as **Microsoft Azure** and **Amazon Web Services [AWS]**.

As it is no longer mandatory to physically host and maintain expensive suites of software, demand has increased for IT professionals with skills in Cloud software platforms such as **MS Office365**.



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

< Methodology >

The statistics referenced in this report were obtained via an entity extractor provided by Innovantage, which scans and logs IT jobs postings across over 180 global job boards and in excess of half a million employer websites. This information was then put through a normalisation process, where the data was matched to defined regions and types. Where roles were unsortable due to vague or foreign language job titles, they have been omitted. This data was further sorted into disciplines, job types, sectors, and other categories to provide a detailed analysis of the current recruitment market. Instances where data was minimal or for regions where information was unavailable were not included. Experis drew upon its years of IT talent industry experience to compile the detailed analysis of the recruitment market found in this report.

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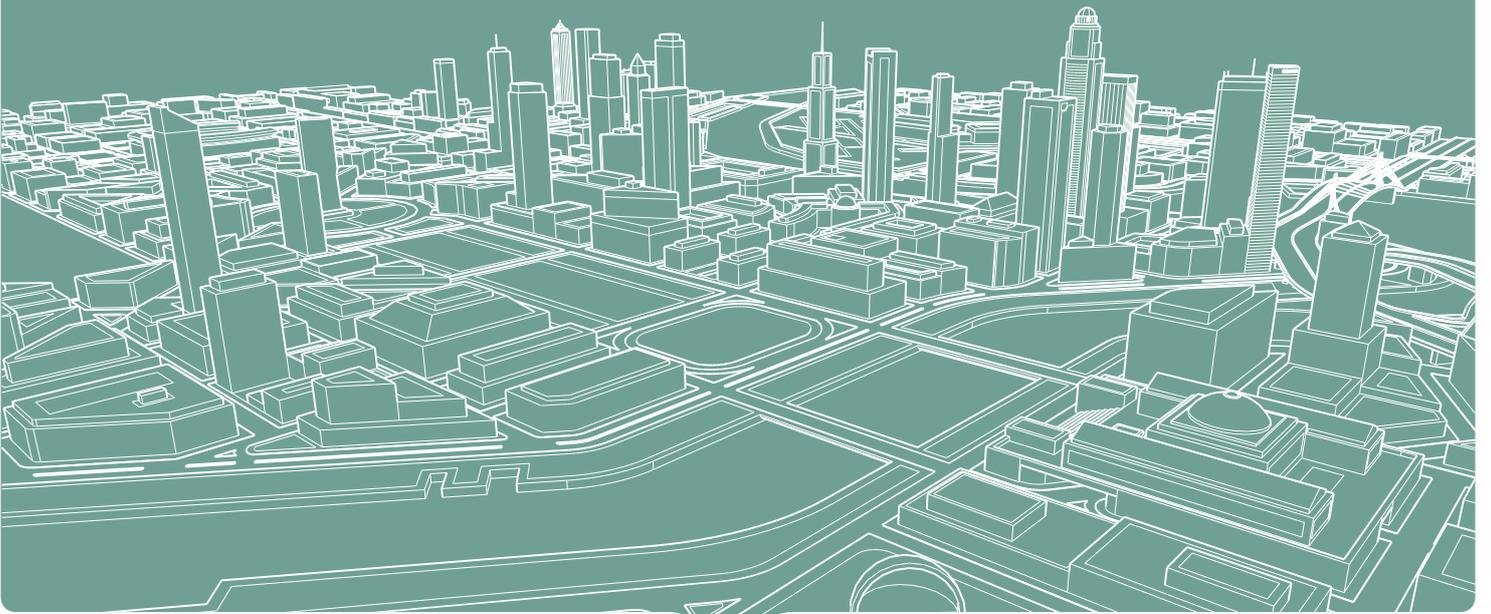
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