



Tech Cities Job Watch

Q3 2015



Cloud



Mobile



Security



Big Data



Web Development

About Experis and Tech Cities Job Watch

As technology continues to significantly impact all aspects of business, companies in cities across the UK vie for top tech talent in order to build their capabilities to innovate and cater to 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 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 launch the fourth Tech Cities Job Watch with the final quarter of 2015 well underway.

While the traditional summer slowdown was far less than predicted, the marginal fall in the number of roles advertised does not completely reflect the true story of how the development of our tech nation continues to take shape.

To get a more realistic picture, we need to look at the hiring and pay trends shaping each individual tech city, and what is fuelling their growth.

As the Capital, London remains the dominant technology hub. However, the soaring cost of living in the city is a key factor contributing to the migration of talent away from London. Improving cross country transport links and an increase in companies basing their core functions in other cities, are presenting IT professionals with more employment opportunities, and may be behind the rise in the number of roles advertised outside of the Capital. Higher pay levels (in some cases, higher than in London) are being offered as a tactic to attract and retain talent from other cities.

The Government's powerful agenda to establish the North as an economic powerhouse illustrates this very well. For example, stand-out tech hubs Manchester and Leeds have seen big company investment come into the region, carrying out ferocious recruitment drives to resource critical technology projects. Combined with a growing tech startup community, these cities now offer IT professionals a plethora of exciting and well paid job opportunities.

Across the country, the rapid evolution and adoption of technology by businesses, combined with a growing skills shortage, has caused a boom in the number of contract roles, with higher day rates advertised.

On a technology front, as companies continue to invest in mobile commerce and adopt Cloud technologies to house their IT infrastructure, demand has increased for these skills.

The year so far has been exceptional for tech hiring. Even with fluctuating hiring trends across our four reports, it is quite apparent the digitalisation of our nation remains in positive momentum as we approach 2016.

If you would like to discuss any of the findings in the report, or would like advice on how to tackle the challenges you face in sourcing IT talent, please visit our website, or contact us directly.



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



Executive Summary

As the digitalisation of our nation forges ahead, the Experis Tech Cities Job Watch (TCJW) report for Q3 2015 shows a contrasting landscape of hiring and pay trends emerging across the 10 tech cities.

Hiring trends reveal how the intensifying demand, and immediate need, for skilled IT talent fuelled a 6% increase in the number of contract roles advertised - with a 4% rise in the average day rates offered. The overall number of permanent roles advertised fell by 4%, with average salaries falling by 1%.

In terms of overall hiring demand, the traditional summer slowdown saw the total number of roles advertised across the five technology disciplines fall by just 6% - less than predicted. Conversely, tech cities outside of London demonstrated more stable hiring demand, reporting a marginal 1% overall decrease, compared to the Capital's 8% fall.

When we peel back the covers to look at how each tech city has been performing, our data reveals that six 'Tech Cities' [Birmingham, Brighton, Glasgow, Leeds, Manchester and Newcastle upon Tyne] in fact reported a quarterly rise in the overall number of roles advertised.

In terms of the volume of roles advertised, Leeds, Manchester and Bristol continue to present IT professionals with the greatest overall number of opportunities outside of London.

Glasgow and Newcastle upon Tyne recorded the strongest quarterly increases in perm and contract roles advertised, 49% and 41% respectively. This is, in part, due to a surge in recruitment activity in the Financial Services sectors of both cities.

When we look at how individual technology disciplines are performing, the biggest riser this period was Mobile - reporting a 6% increase in the number of roles advertised across all 10 cities. Cloud roles advertised increased by 4% - making Cloud the fastest growing discipline since Q1.

Big Data remains a rare discipline - accounting for just 9% of roles advertised this period. However, professionals possessing Big Data skills continued to command the highest pay.

The rapid evolution of technology we are witnessing puts an even greater emphasis on the skills our IT professionals are required to have, subsequently fanning the flames of what is already an over-heated war on talent.

**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 Q3 2015.

Tech City: Hiring Demand

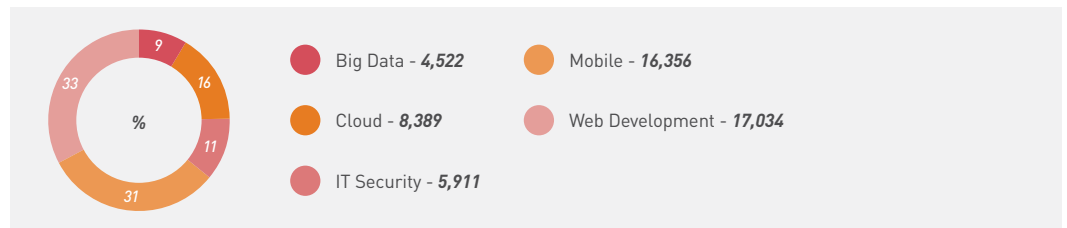
Outside of the Capital, Tech Cities Birmingham, Brighton, Glasgow, Leeds, Manchester and Newcastle upon Tyne saw an increase in the number of roles advertised.

Hiring demand levels saw a strong start to the quarter across all technology disciplines, before dropping between mid July to late August – influenced by the seasonal summer holiday slow down.

As expected, September saw an uplift in hiring activity – despite a slight drop off mid-month.

Across the five disciplines, the overall number of roles advertised fell in this period. Despite the seasonal variances seen, tech cities outside of London demonstrated more stable hiring demand, reporting a marginal 1% decrease overall, compared to the Capital's 8% fall [down 3,027 roles].

Share of hiring demand and number of roles advertised across the five technology disciplines



Cloud

Increasing necessity for organisations to consolidate and move their infrastructure to the Cloud, continues to give rise to a growing demand for Cloud professionals. Accounting for 16% of hiring demand across the five disciplines, Cloud experienced a further 4% increase in the number of roles advertised [to 8,389]. Manchester outpaced Bristol in this period, accounting for 24% [572 roles] of all Cloud roles advertised outside of London.

Interestingly, the tech cities showing the highest spikes in hiring demand since Q3 include Edinburgh [up 102% to 256 roles] and Leeds [up 129% to 362 roles].

Mobile

As businesses continue to develop their mobile platforms to keep pace with consumer demand and business adoption of mobile, the demand for professionals with skills in this technology increased by 6% [to 16,356 roles advertised].

London saw a 9% increase in the number of roles advertised [to 11,500]. In tech cities outside of the Capital, increased demand was seen in Brighton [up 25% to 234 roles] and Manchester [up 19% to 1,117 roles]. In Glasgow demand rose by 75% [to 501 roles] - the most significant increase this period.



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

Tech City: Hiring Demand



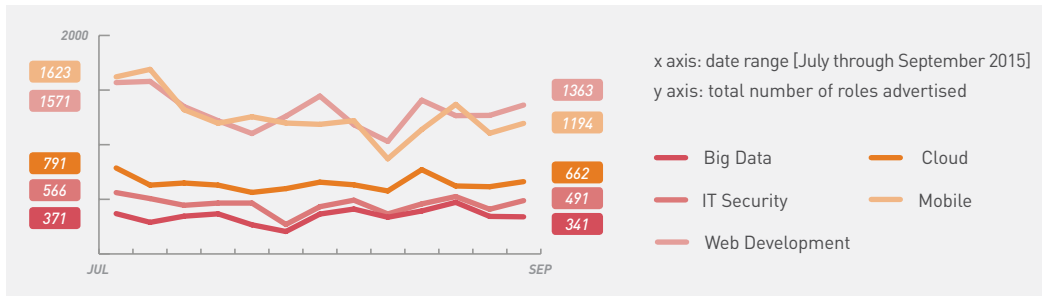
Web Development

Companies continue to invest in business critical digital transformation projects, which include developing cutting edge applications and integrating their websites with internal systems and databases. The continued demand for professionals with sought after front and back-end skills shows no signs of slowing down. Despite 13% fewer roles advertised compared to Q2 [falling to 17,034], professionals with these skills were still in highest demand overall.

Across the tech cities, varying levels of demand were seen. London saw 17% fewer roles advertised [10,195 roles], Bristol saw a 28% fall [to 705 roles] and demand in Leeds fell by 16% [to 1,067 roles].

Conversely, the most significant increases in demand were seen in Birmingham up 7% [to 800 roles], Glasgow up 13% to [454 roles] and Newcastle upon Tyne up 40% [to 644 roles].

Total number of roles advertised in Q3 2015



As businesses continue to adopt Mobile and Cloud based technologies and methods of working, pressure is building to ensure their organisations are secure.



IT Security

As businesses continue to adopt Cloud based technologies and embrace Mobile working trends, pressure is building to ensure their infrastructure is secure and resilient to any potential security compromises. However, hiring demand accounted for just 11% of all roles advertised - remaining one of the lowest of the five technology disciplines in this report. In this period, the overall number of roles advertised fell by 15% [to 5,911].

Demand fell in London by 18% [to 4079], whilst the remaining Tech Cities experienced an overall 6% fall [to 1,832]. Despite this overall downward trend, positive demand was seen in certain tech cities. For example, noting a 17% increase, Leeds outpaced Manchester, recording the highest number of roles advertised outside of the Capital [379 roles], whilst Bristol saw a 42% increase [to 312 roles].



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

Tech City: Hiring Demand

While 68% of all roles are based in the Capital, hiring trends seen across the other tech cities demonstrate how these developing tech hubs remain attractive alternatives for companies to base their IT functions, while still appealing to sought after talent.



Big Data

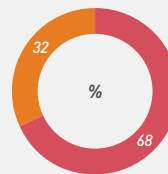
While there is an increasing reliance on businesses using big data to understand customer purchasing behaviours to gain a competitive advantage, the summer hiring slowdown saw Big Data experience a 16% fall in the number of roles advertised [to 4,522 roles].

More than eight out of ten roles advertised were based in London - despite a 16% fall in demand [to 3,865 roles]. In Edinburgh and Glasgow, both cities experienced a fall in demand of over 40% [to 49 roles and 69 roles respectively]. Conversely, Bristol saw a 74% increase in the number of Big Data roles advertised [to 89].



Summary

Share of London based roles and non-London based roles advertised across the five disciplines of technology in Q3 2015

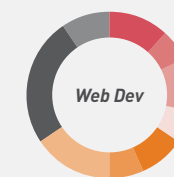
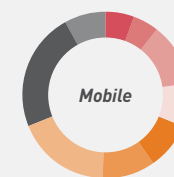
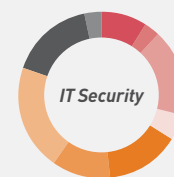
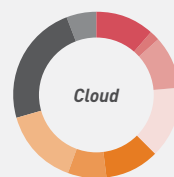
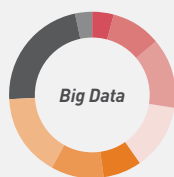


London based roles - 35,610
Non-London based roles - 16,602

Hiring demand in this period across all five technology disciplines fell by just 6% [to 52,212] – far less than predicted. Outside of the Capital, six tech cities witnessed an increase in the number of roles advertised compared to the previous quarter – demonstrating how the gap is narrowing against London's dominance. In particular, Newcastle upon Tyne and Brighton noted the strongest quarterly increases of 36% and 14% respectively, followed closely by Glasgow [up 13%].

Tech cities outside of London with the strongest levels of hiring demand this period 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 Q3 2015.

Salary Watch

Average permanent salaries

City	Big data	Cloud	IT Security	Mobile	Web Development	City Average
London	£65,682	£57,001	£56,514	£52,493	£44,656	£52,649
Glasgow	£52,885	£35,449	£42,524	£40,386	£34,047	£38,491
Cambridge	£47,310	£47,598	£52,696	£47,514	£37,444	£44,821
Edinburgh	£69,733	£42,533	£53,688	£35,139	£32,337	£38,762
Bristol	£40,621	£43,188	£40,797	£36,373	£34,062	£37,163
Manchester	£52,363	£43,327	£50,617	£37,293	£35,278	£38,474
Leeds	£46,949	£47,417	£41,523	£42,550	£32,628	£38,900
Birmingham	£66,667	£43,942	£50,992	£39,453	£29,731	£36,535
Brighton	£28,622	£37,718	£46,803	£34,016	£35,892	£35,671
Newcastle upon Tyne	£60,012	£55,821	£45,791	£33,806	£31,911	£35,049
Average	£62,809	£53,430	£53,012	£48,551	£40,168	£48,053

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

Big Data professionals continued to earn the highest average salaries overall – a trend we have witnessed over the past three quarters.

In this period, the average permanent salary in our tech cities decreased marginally by just over 1% to £48,053 [equivalent to a £669 drop]. Unsurprisingly, London paid the highest average salary at £52,469 [down 1%]. However, it did not pay the highest in every technology discipline.

The highest average salaries outside of London were advertised in Cambridge [£44,821] and Leeds [£38,900] - where they increased by 7% and 2%, respectively. In these cities, Cloud professionals earned the highest average salaries, specifically in Cambridge, where the average salary for Cloud roles increased by 5% [to £47,598].

Overall Cloud remained the second highest paying technology discipline [with an average salary of £53,430]. In Newcastle upon Tyne, a small number of senior Cloud roles have abnormally inflated the average salary usually paid in this city. Large public sector digital transformation projects underway in the region have led to an uplift in demand for skilled IT professionals.

Big Data professionals continued to earn the highest average salaries overall – a trend we have witnessed over the past three quarters. In this period, Big Data salaries saw a further 3% increase [to £62,809].

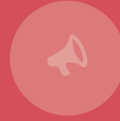
Edinburgh offered the highest average salary for Big Data [£69,733], and the second highest for IT Security [£53,688]. Ongoing recruitment drives underway in the Financial Services sector are fuelling demand for more senior roles and contributing to these higher average salaries.



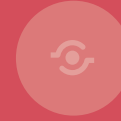
Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

Salary Watch

The average day rates paid across the 10 tech cities saw a 4% increase to £410 per day - reflecting a strengthening quarter on quarter increase.

Average contractor day rates

City	Big data	Cloud	IT Security	Mobile	Web Development	City Average
London	£553	£462	£446	£421	£357	£433
Manchester	£441	£425	£366	£360	£272	£345
Edinburgh	^	£408	£416	£315	£294	£320
Brighton	^	£337	£0	£286	£304	£306
Bristol	£500	£475	£207	£373	£254	£317
Cambridge	£137	£340	^	£323	£322	£324
Birmingham	£299	£418	£415	£254	£260	£313
Glasgow	^	^	£386	£400	£246	£337
Newcastle upon Tyne	£450	£437	£400	£426	£319	£409
Leeds	£413	£441	£416	£359	£321	£373
Average	£539	£453	£433	£405	£331	£410

* 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 4% increase to £410 per day - a strengthening quarter on quarter increase.

Again, London continues to offer the highest average day rates overall, but does not pay the highest in every discipline.

When we look at the highest day rates paid outside of the Capital, Mobile professionals in Newcastle upon Tyne were paid £426 per day [up 2%], while in Bristol, Cloud professionals were paid £475 per day [up 17%].

Tech city Leeds ranked in the top three for Cloud and Web Development day rates after significant increases of 24% [to £441], and 18% [to £321] respectively.

Leeds also joins Edinburgh in paying the second highest day rates for IT Security professionals, at £416 per day [down 24% and 15% respectively].

The uplift in demand for IT professionals, a number of them senior roles, in the Newcastle upon Tyne region has resulted in inflated overall city average day rates paid. Subsequently, the city ranks as the second highest paying city overall in this period.



Hiring Demand



Salary Watch



Employer Demands

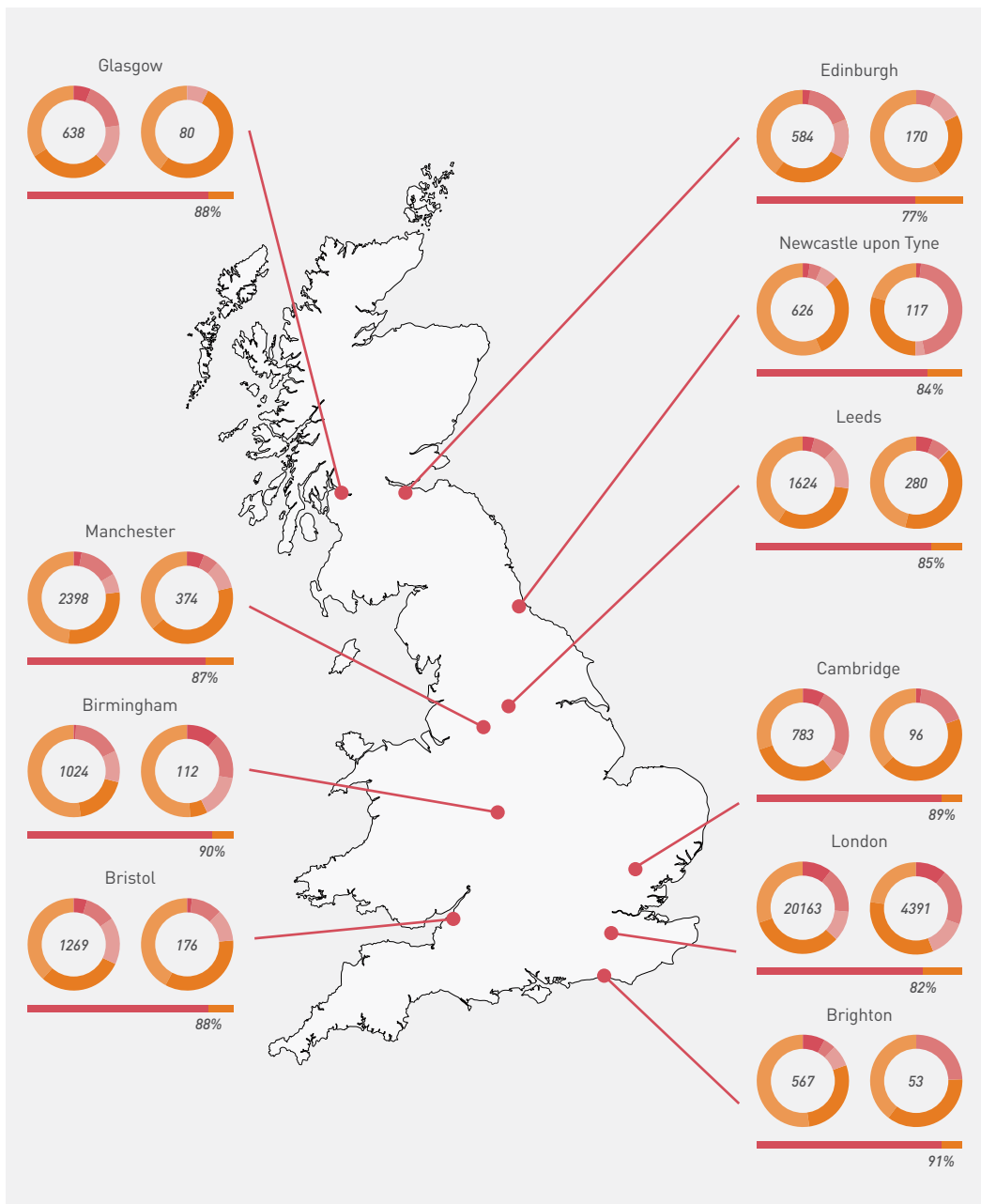


Skills Crunch

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 Q3 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

Hiring demand has been impacted by heavy recruitment drives by both public and private sector Financial Services companies in Scotland and the North East.



Perm roles

The overall number of permanent roles advertised across all tech cities fell by 4% to 29,676 - continuing a negative quarter on quarter hiring trend.

Despite a 7% decrease [to 20,163], London continued to account for almost seven out of ten [68%] permanent roles advertised. Conversely, permanent hiring across the other nine tech cities experienced an overall increase of 2% [to 9,513 roles].

Manchester remained as the top hiring city outside of the Capital, with a 3% increase [to 2,398 roles] advertised, followed by Leeds which outranked Bristol with a 6% increase [to 1,624 roles].

While Glasgow ranked in sixth place for permanent hiring demand outside of London, the city experienced the highest increase in the number of roles advertised [up 113% to 638]. Neighbouring city, Edinburgh, saw a marginal 1% increase [to 584 roles].

Conversely, Cambridge experienced the biggest fall in the number of permanent roles advertised [down 28% to 783 roles].



Contract roles

The number of contract roles advertised across all cities increased by 6% to 5,849.

In this period London experienced a 5% increase in the number of contract roles advertised [to 4,391].

Tech cities outside of the Capital enjoyed an overall 10% increase in the number of roles advertised [to 1,458], accounting for a quarter [25%] of overall contractor hiring demand.

The highest increases in the number of roles advertised were seen in Newcastle upon Tyne [up 225% to 117 roles], followed by Manchester [up 30% to 374 roles]. In this period, Edinburgh saw a 16% increase [to 170 roles], and Glasgow saw a 29% increase [to 80 roles]. The surge in recruitment, driven largely by the Financial Services industry in Scotland has influenced contractor hiring numbers.

Tech cities outside of London demonstrating significant increases in the overall number of both permanent and contract roles advertised, include Glasgow [up 98% to 718 roles] and Newcastle upon Tyne [up 37% to 743 roles].



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

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

< Skills Crunch >



Mobile

The retail sector is a prime example where heavy investment is being made in the development of mobile platforms, to ensure a sophisticated and aligned online and in-app customer shopping experience to drive sales. While in-store, mobile payment technology, such as Apple Pay and Android Pay, has taken off in record speed.

Mobile skills in demand are based heavily around key programming languages such as **Objective-C, Java, C#/C++** and **'Swift'** for **iOS**. There is also a continuing demand for IT professionals with skills in **cross-platform development programs** such as **Xamarin**.



Web Development

As the vast quantity of web content consumed every day continues to grow, companies must invest heavily in building and maintaining cutting-edge applications, and developing their legacy systems to meet demand.

The most in demand skills in **back-end development** include core programming languages such as **Java, C#** and **.Net**, while the most popular skills in front-end development continue to be **HTML5, CSS3, JavaScript, AngularJS** and **NodeJS**.



IT Security

With cybercrime set to become the UK's most common offence, with no 'silver-bullet' for cybersecurity, companies have shifted their focus to seek methods to respond to, and develop resilience against, hacks and breaches.

Skills in demand this quarter continue to include: **SIEM** [Systems Intrusion and Event Management] **IDAM** [Identity Access Management], **Biometrics** and **Penetration Testers**. Professionals holding the **CISSP** [Certified Information Systems Security Professional] qualification are also in demand.

With cybercrime set to become the UK's most common offence with no 'silver-bullet' for cybersecurity, companies have shifted their focus to seek methods to respond to, and develop resilience against, hacks and breaches.



Hiring Demand



Salary Watch



Employer Demands



Skills Crunch

< Skills Crunch >

Consumer demand remains the key driving force behind the unstoppable rise of Mobile eCommerce, creating a surge in demand for professionals with in demand skills.



Big Data

Big Data continues to enable business to gain an in-depth understanding of their customers' purchasing habits to build effective business models and realise avenues for innovation. The growth of eCommerce combined with the emergence of new mobile technologies such as Beacon, is giving businesses greater opportunities to gather valuable insights to engage more profitably with their customers.

Popular Big Data skills in demand include **Apache Hadoop, Spark** (for data processing) and tools such as **Splice Machine, Tableau** and **SAP HANA** (Big Data analytics and Business Intelligence tools).



Cloud

Cloud computing continues to revolutionise the way companies host their infrastructure and efficiently scale their IT requirements according to their business demands. Subsequently, there is an on-going requirement for professionals with key skills in **Hybrid Cloud Platform technologies**, such as **Microsoft Azure** and **Amazon Web Services [AWS]**, and 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.

Contact Information

 Tel: +44 (0) 203 122 0200

 info@experis.co.uk

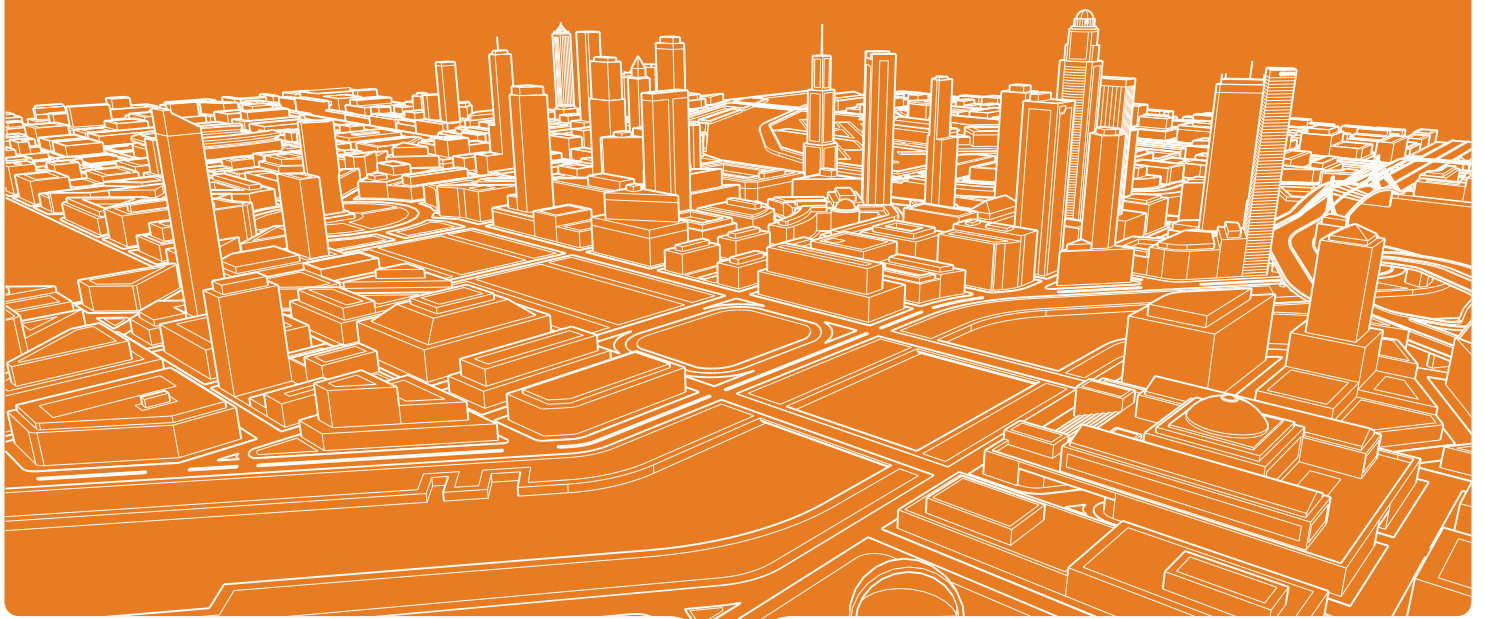
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