



North Carolina IT Workforce Market Analysis



September 2011 Issue

TEKsystems is a leading provider of Technology Staffing and Services. We specialize in Applications, Network Infrastructure, End-User Support and Communications technologies with a strong presence in: Financial Services, Healthcare Insurance, IT, Communications and Government verticals.

Our expertise spans a wide range of services including Staffing, Global and Workforce Management Services. We are also able to customize our offerings to provide our customers with the most valuable solutions.

	Non-farm Payroll Employment (Jul 11)	Labor Force (Jul 11)	State Unemployment Rate (Jul 11)	National Unemployment Rate ¹ (August 11)	National IT Unemployment Rate ¹ (Q2 2011)
Employment²	3,816,100	4,556,400	10.1%	9.1%	3.6%
YOY Change	11,200	25,700	(0.2%)	(0.5%)	(1.7%)

IT & Communications Employees (K) Statewide ³	Total	Permanent IT Workers	Temporary IT Workers	YOY Growth
		108,990	92,642	16,349

³ Gartner Research applied to develop permanent / temporary estimates from BLS Total (standard ratio of 85:15 applied to all skills)

Skills Statewide ³	Employment	Permanent IT Workers	Temporary IT Workers	National Unemployment ¹ (Q2 2011)		Median Hourly Wage		MSA 90th Percentile Hourly Wage ^{**}
				Rate	YOY Δ	State	National	
Computer & Information Systems Managers	11,040	9,384	1,656	2.4%	(2.5%)	\$53.85	\$54.67	\$68.42
Database Administrators	3,070	2,610	461	1.9%	(0.6%)	\$36.30	\$34.40	\$54.02
Computer Systems Analysts	17,620	14,977	2,643	1.6%	(4.3%)	\$36.62	\$37.06	\$55.44
Computer Programmers	11,360	9,656	1,704	3.6%	(2.8%)	\$35.48	\$34.10	\$54.18
Applications Software Engineers	13,180	11,203	1,977	3.8%	(1.3%)	\$41.29	\$42.06	\$59.95
Technical Writers	1,030	876	155	3.5%	(7.3%)	\$30.34	\$30.16	\$43.68
Systems Software Engineers	11,540	9,809	1,731	3.8%	(1.3%)	\$44.83	\$44.94	\$64.23
Computer Operators	2,170	1,845	326	8.5%	1.5%	\$16.88	\$17.36	\$25.71
Computer, Automated Teller and Office Machine Repairers	3,850	3,273	578	5.9%	(3.7%)	\$17.94	\$18.09	\$26.82
Computer Support Specialists	16,770	14,255	2,516	8.4%	2.3%	\$20.91	\$21.30	\$32.51
Network & Computer Systems Administrators	7,990	6,792	1,199	1.5%	(0.4%)	\$31.78	\$32.55	\$49.26
T-Comm Equipment Installers & Repairers*	6,110	5,194	917	6.5%	(3.4%)	\$25.80	\$26.71	\$32.18
T-Comm Line Installers & Repairers	3,260	2,771	489	4.0%	(6.3%)	\$21.71	\$23.61	\$30.36
Web Developers	-	-	-	4.8%	-	-	-	-

* Except line installers

** Average of MSA Wage Data

Metropolitan Statistical Area	Payroll Employment (Jul 11)	Local Unemployment (Jul 11)	Total IT Workers	YOY Growth	IT Talent Density within US
Asheville, NC	164,500	8.1%	2,250	(6.3%)	Average
Burlington, NC	54,500	10.9%	990	3.1%	Average
Charlotte-Gastonia-Concord, NC-SC	787,000	11.2%	32,760	8.0%	Strong
Durham, NC	274,100	7.9%	22,300	(2.3%)	Strong
Fayetteville, NC	127,900	10.2%	1,990	0.5%	Average
Goldsboro, NC	41,500	9.2%	90	-	Weak
Greensboro-High Point, NC	336,800	10.8%	8,270	2.4%	Above Average
Greenville, NC	73,700	10.8%	920	(12.0%)	Average
Hickory-Lenoir-Morganton, NC	139,000	12.4%	1,340	9.8%	Below Average
Jacksonville, NC	45,900	9.4%	480	2.1%	Below Average
Raleigh-Cary, NC	505,200	8.4%	25,230	6.0%	Strong
Rocky Mount, NC	59,300	13.8%	600	(15.5%)	Below Average
Wilmington, NC	137,500	10.2%	1,910	(1.5%)	Average
Winston-Salem, NC	204,400	9.8%	4,780	(2.4%)	Above Average
Non-Metro Areas Estimate	864,800	N/A	91,960	N/A	N/A

¹National employment data collected from the BLS through 09/2011

²State and local employment data collected from the BLS through 09/2011 - State Labor Force from LAUS Table 1

³Skill set data collected from the BLS (OES) through 5/2011

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SHORT TERM IT JOB TRENDS

- North Carolina ○
- Raleigh ○
- Charlotte ○
- National ▼

There are a number of signs that the general job market is weakening – and so the IT job market. In North Carolina employers reduced the number of job openings for IT

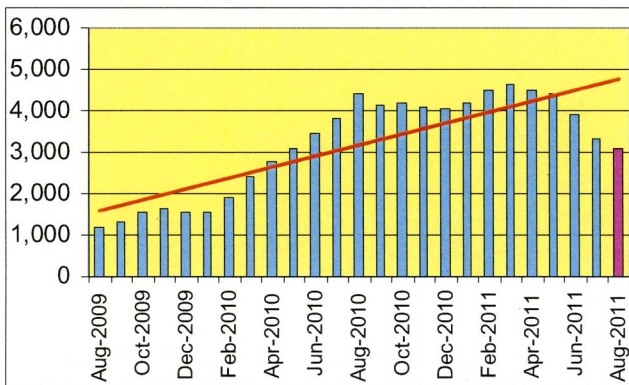
professionals by 6.5% in August as compared to July. This is the fifth consecutive month of decline leaving little hope for any job market expansion for the rest of the year. The last chance will be the development in September. Year-over-Year the IT job market in North Carolina has lost 24.6%, a clear sign that the IT economy is going into the wrong direction.

Table 1: IT Job Openings, North Carolina*

Aug 11	Jul 11	Jun 11	Aug 10	Aug 09
3,440	3,680	4,090	4,560	1,130

The national average turned south in August dropping 2.2% as compared to July. The national job market is still 15.0% above the level of August 2010 which means that nationwide the situation has improve somewhat over the last 12 months. The worry is that nationwide demand begins to slide.

Fig.1: IT Open Positions, North Carolina



In August, the only positive news for IT professionals in North Carolina came for specialists in IT Architecture/Consulting. The demand for their skills slightly improved (up 1.9%).

*) Estimated monthly averages are based on actual count of job openings.

Table 2: IT Job Opening Estimates by Category*

	Aug 11	Aug 10
Total IT Job Market	3440	4560
Systems Eng./Support	1010	1400
Software Development	570	650
IT Architects/Consultants	530	900
IT Management	500	680
IT Sales and Marketing	260	470
Hardware Engineering	190	50
Systems Administration	150	250
Business/Process Design	110	110
Training/Tech Writing	30	40
Misc.IT Job Categories	90	30

Table 3: Top 15 Needed Skills (Job Openings*)

	Aug 11	Aug 10
SQL	590	600
Windows OS	550	960
Oracle DBMS	520	830
Java	500	640
C++/VC++	440	330
Unix	410	530
Linux	410	430
Large system technologies	370	570
Microsoft SQL Server	350	340
Business Analysis	320	710
XML	230	250
Perl	230	200
Web Services	210	170
Virtualization Technology	200	220
Mainframe	190	230



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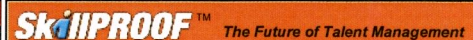


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METHODOLOGY

SkillPROOF surveys the inventories of job openings at large, regional and nationwide direct employers. Job openings are counted and verified every 24 hours. All data sources have been verified for timely removal of filled or closed positions. No data from job boards or search firms are included.

For this report SkillPROOF estimates the counts of job openings. Estimates are calculated directly from SkillPROOF's actual daily counts of job openings. As a base for its calculations, SkillPROOF uses data and findings from reports of the Bureau of Labor Statistics (BLS) <http://www.bls.gov>.



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