

Q1 MARKET
ANALYSIS
REPORT

PULSE

IT | IQ
TECH RECRUITERS

CONTENTS

A long-exposure photograph of a multi-lane bridge at night. The bridge's structure is illuminated with white lights. Streaks of light from cars moving across the bridge create vibrant blue and red trails that lead towards the bridge's towers in the distance. The surrounding area is dark, with some trees visible on the sides.

2 IT/IQ IN 2018

3 REQUISITION DATA

5 INDUSTRY PERFORMANCE

7 REQUISITION COMPOSITION

9 KEY INSIGHTS

12 RATES

IT/IQ IN 2018

2018 was a year of growth for IT/IQ, with demand increasing across several industries and skillsets. Throughout the year, we noticed certain trends, which included increased recruitment demand in the Project Management Office (PMO), Healthcare and Infrastructure specialty areas, with Development recruitment remaining steady and constant. This increased demand from our clients, and our commitment to growing nationally and internationally, meant that we too, spent a lot of our year focused on hiring.

Much of the 2018 growth in PMO and Infrastructure can be attributed to greater demand from our clients in Healthcare, Natural Resources, and Education. Demand in these three verticals grew by a combined 208% this past year! The demand from our traditional clients in Tech, Retail/Distribution, Finance/Insurance and Crown Corporations diminished or remained constant.

We will see increased Healthcare recruiting demand in Infrastructure and PMO continue into 2019 due to our regional health authority clients completing multiple major facility renovations. Demand will also continue to increase in the Natural Resources and Education verticals as our clients invest in IT to improve operational efficiencies and plan for ERP implementations and upgrades.

2019 is going to be a very exciting year for IT/IQ! We've always "believed" in our vision of becoming a national and international recruiting firm, and 2019 is the year this happens. We are eagerly anticipating expansions into new markets in Q2, Q3, and hopefully Q4 – stay tuned to future Pulse publications for the details!



DEMAND VOLUME

DEMAND VOLUME

Following is an analysis of year-over-year changes in demand, determined by the volume of roles into each of our four specialty recruitment practiceareas. These specialization areas are

- ERP/CRM/BI
- Development
- Infrastructure
- PMO

*The greatest volume of roles come from Development and PMO.

The Agile methodology and cloud-based initiatives are impacting the diversity of recruitment in the Project Management Office (PMO), Development and Infrastructure practice areas, with focus on DevOps, Scrum, and developers with cloud experience.



Agile Demand



Healthcare Demand

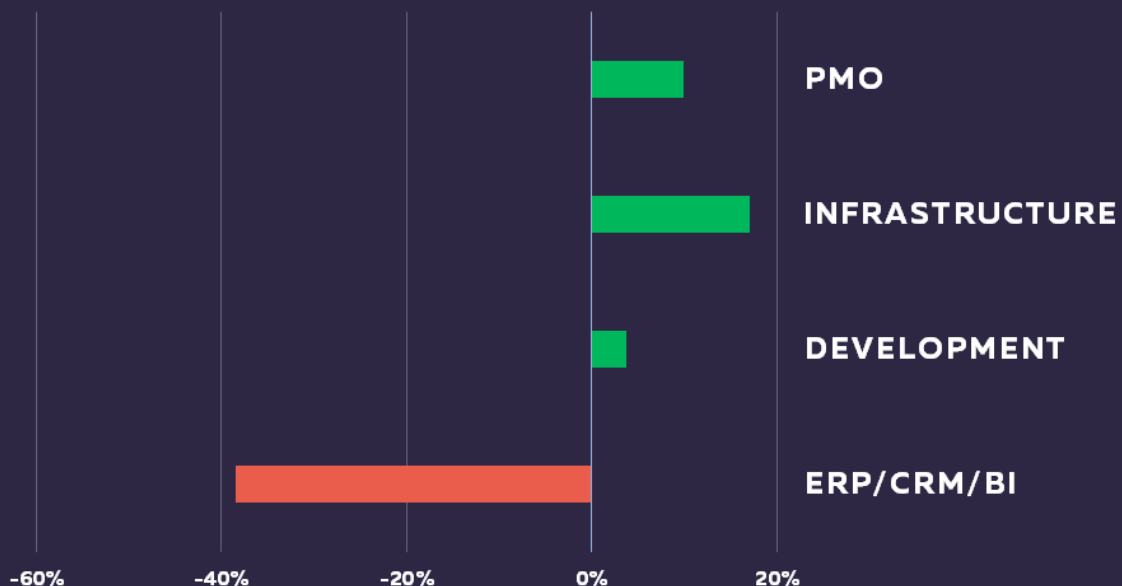


Development
Consistent

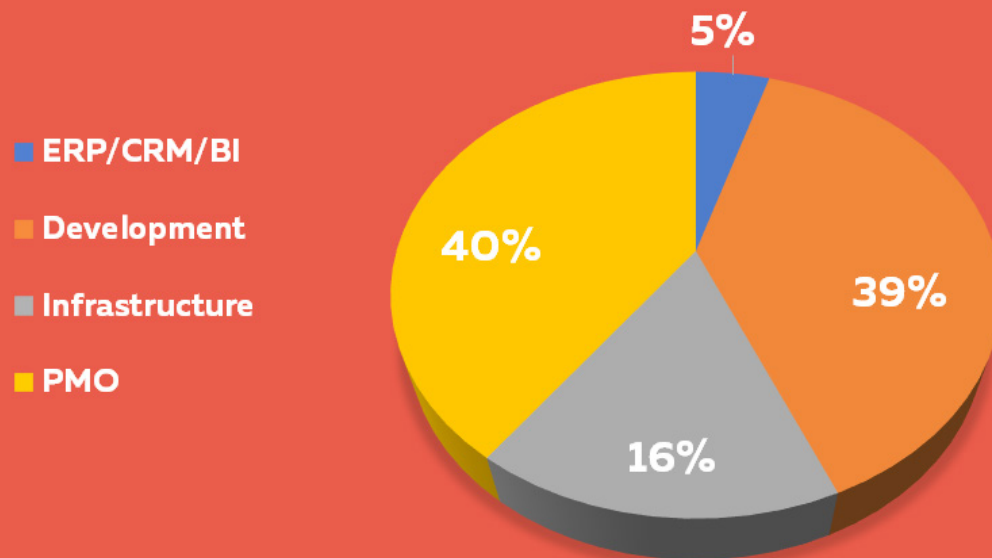


ERP/CRM/BI
Reduction

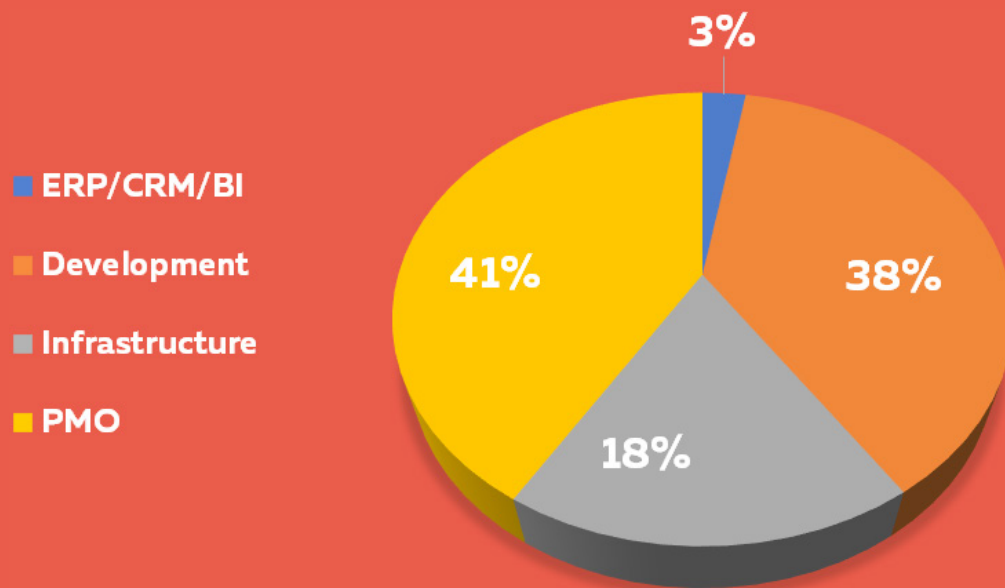
PERCENT CHANGE IN DEMAND VOLUME BY SPECIALIZATION 2017-2018



REQUISITION BY SPECIALIZATION - 2017



REQUISITION BY SPECIALIZATION - 2018



- The general composition of IT/IQ's four specialty areas stayed relatively consistent from 2017 to year-end of 2018
- ERP/CRM/BI continued to decrease in proportion in 2018.
- Although several of IT/IQ's clients are undergoing ERP transformations, there was a relatively small demand for roles concerned with CRM and BI.



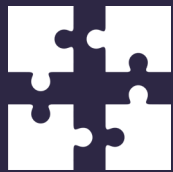
INDUSTRY PERFORMANCE

INDUSTRY PERFORMANCE

Out of the seven key industries IT/IQ recruits for, Tech, Retail/Distribution, and Finance/Insurance showed lessened demand in 2018. Clients within these sectors hired less, compared to 2017.

Conversely, recruitment demand in Natural Resources, Healthcare, and Education all increased significantly. ERP planning and implementation in the Education sector, redevelopments in Health care and increasing operational efficiencies in Natural Resources, all led to this increased demand.

Demand from crown corporations is expected to grow as the need for moving operations to the cloud becomes greater. Up until this year, Crown Corporations were prevented from leveraging the full potential of the cloud due to a pending security analysis by BC's Privacy Commission, which has since concluded. This demand is expected to be comprised of infrastructure and security roles with a cloud specialization involved.



ERP Transformations



Cloud Migrations

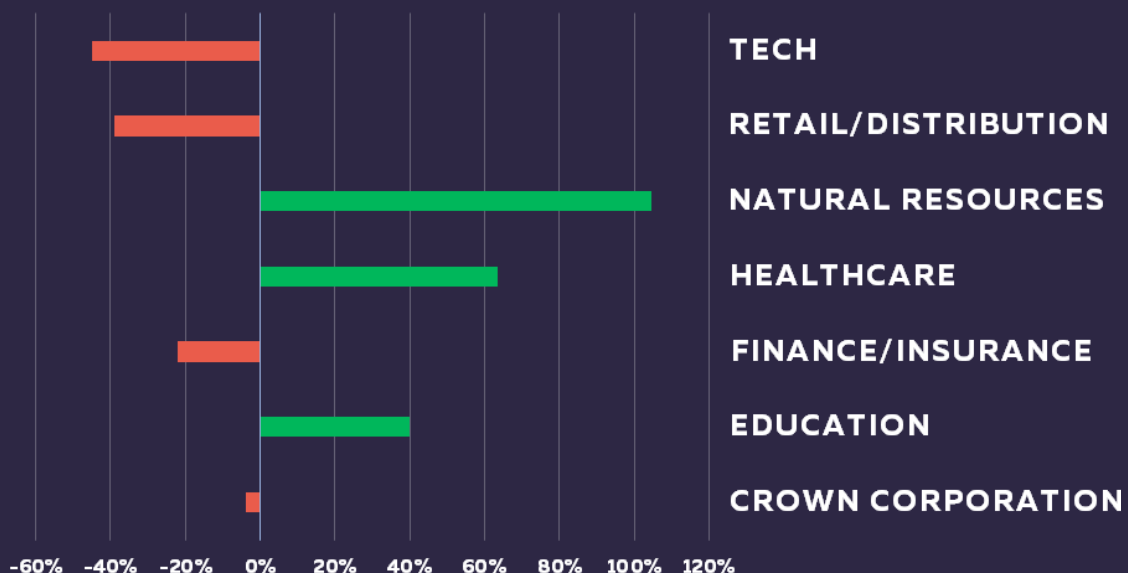


Redevelopments

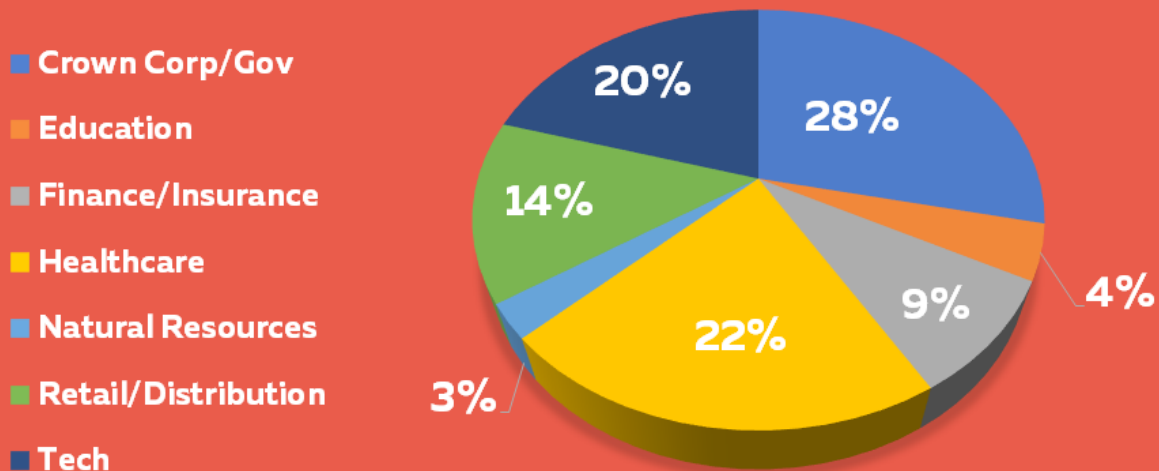


Security Demand

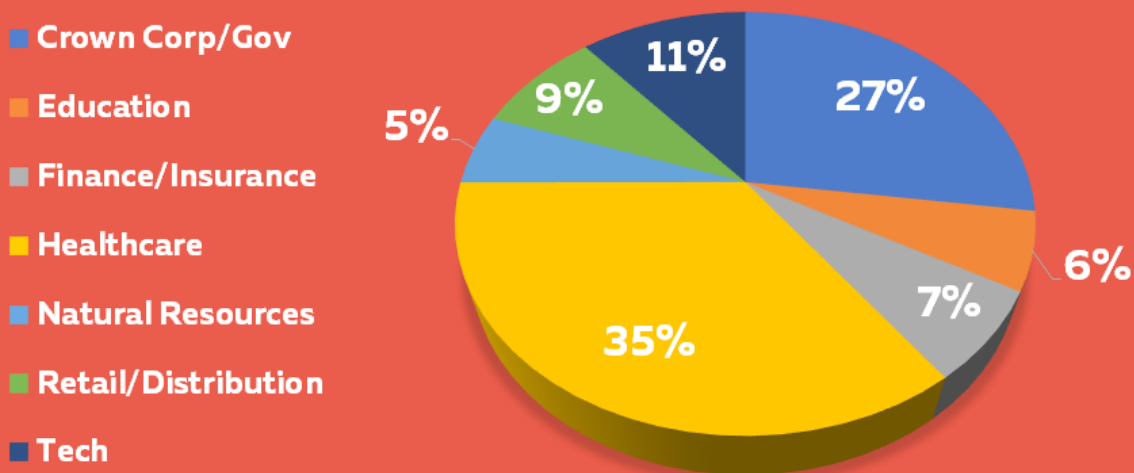
INDUSTRY PERFORMANCE BY # OF REQUIREMENTS 2017-2018



2017 CLIENT INDUSTRY COMPOSITION BY # OF REQUIREMENTS



2018 CLIENT INDUSTRY COMPOSITION BY # OF REQUIREMENTS

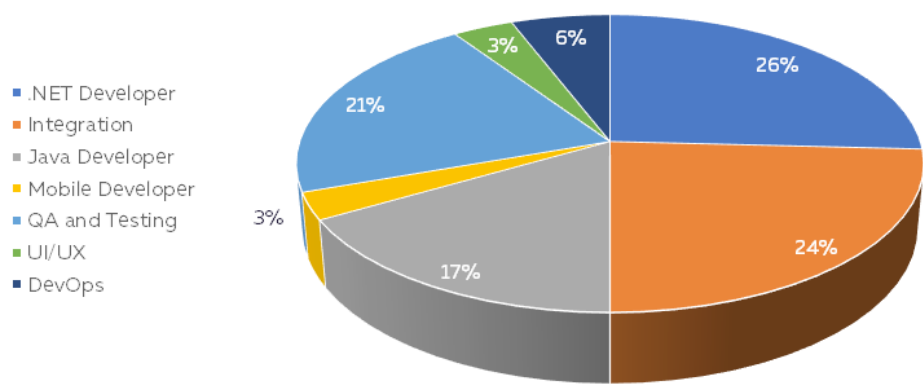


- The pie charts above represent the composition of IT/IQ's business, determined by number of requirements
- In 2018 the pie increased by 10% in size, therefore percent changes from one chart to the other do not necessarily reflect a decrease or increase in demand, simply a shift in composition
- Although Tech now comprises only 11% of IT/IQ's recruitment demand, roles within Tech are increasing in demand
- Healthcare comprised a larger portion of the pie in 2018 due to multiple redevelopments
- Recruitment demand for Healthcare is expected to remain steady in 2019

An aerial photograph of a city skyline at sunset. The sky is a deep orange-red, and the city lights are beginning to glow. In the background, there are mountains and a body of water. The text "DEMAND COMPOSITION" is overlaid in large, white, sans-serif capital letters.

DEMAND COMPOSITION

DEVELOPMENT - DEMAND COMPOSITION



16% ↑
.NET Developer

20% ↓
Integration

25% ↑
Mobile Developer

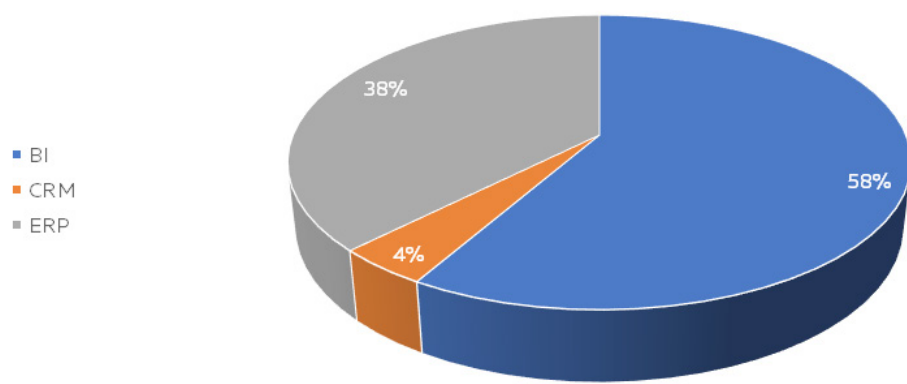
25% ↓
QA & Testing

27% ↓
UI/UX

9% ↓
Java Developer

25% ↑
Mobile Developer

ERP/CRM/BI - DEMAND COMPOSITION

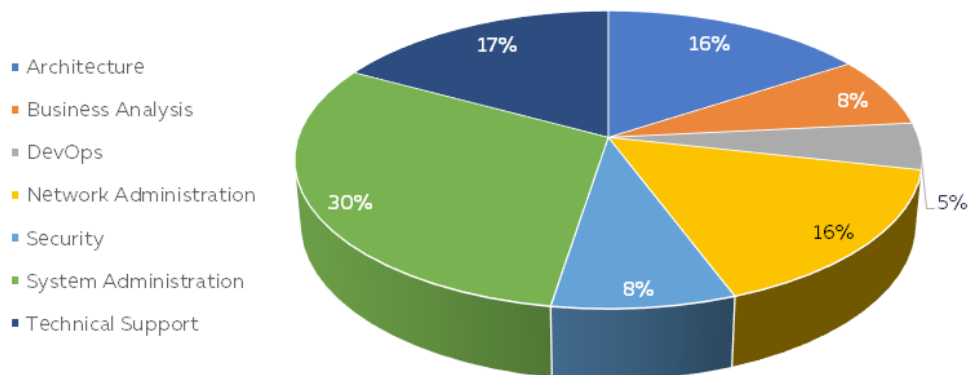


7% ↓
BI

0%
CRM

61% ↓
ERP

INFRASTRUCTURE - DEMAND COMPOSITION



24% ↓
Architecture

33% ↑
Business Analysis

23% ↑
DevOps

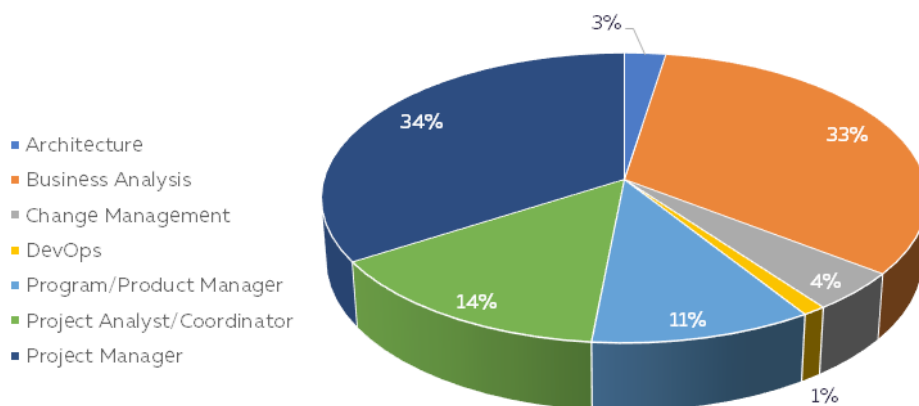
55% ↑
Network Admin

13% ↓
Security

50% ↑
System Admin

23% ↑
Tech Support

PMO - DEMAND COMPOSITION



125% ↑
Architecture

3% ↑
Business Analysis

41% ↓
Change Management

27% ↑
Prog/Prod Manager

49% ↑
Proj Analyst/Coordinator

15% ↑
Project Manager



KEY INSIGHTS

KEY INSIGHTS

Increases in Infrastructure and PMO roles (17% and 10% respectively)

17% Increase in
Infrastructure

10% Increase in
PMO

Previous increases in Infrastructure and PMO were due to increases in requirements from Healthcare, Natural Resources, and Education industries.

105% ↑
Natural
Resources

63% ↑
Healthcare

40% ↑
Education

Growing demand for roles in Infrastructure and PMO consisted of Business Analysts, Project Managers, Business Architects, Network Administrators and DevOps

125% ↑
Architects

58% ↑
Network
Administration

23% ↑
DevOps

15% ↑
Project
Managers

6% ↑
Business
Analysts

A scenic coastal road, likely the Scenic Route 1 in British Columbia, Canada. The road is a two-lane asphalt highway with a white guardrail, curving along a steep, forested cliffside. The cliff is covered in dense evergreen trees. In the foreground, a small white lighthouse with a red band is visible on the left side of the road. The road continues to curve along the coast, with the ocean visible on the right. The sky is clear and blue. The word "RATES" is overlaid in large white letters in the center of the image.

RATES

RATES

The rate changes provided below are based on our analysis of requisition data from the Vancouver market as well as external sources.

Skill Set/Resource Type	Year-over-year Perm % Change	Year-over-year Contract % Change
Business Analyst	- 11%	- 10%
Business Architect	18% +	- 3%
Developer	4% +	10% +
DevOps Engineer	- 5%	42% +
Project Manager	- 5%	- 2%
QA Tester	10% +	10% +

As always, it is our goal to provide you with the most relevant information possible to help you make informed resourcing decisions. Data referenced in this document is the result of extensive research and analysis of local, regional and national studies, but is prepared for the local Vancouver market. Please speak with any of our specialists to learn more or to provide feedback that might help us improve future editions of the Pulse Market Analysis Report.



TECH RECRUITERS

**WE HELP SMART
PEOPLE FIND
EACH OTHER**



877.294.1222



contact@it-iq.com



680-1111 West Georgia Street
Vancouver, BC, V6G 4M3



linkedin.com/company/it-iq/



facebook.com/ITIQTechRecruiters/



@ITIQTech



@ITIQTechRecruiters

Whilst every precaution has been taken in the preparation of this literature, and it is believed to be correct at the time of issue, IT/IQ assumes no liability for errors or omissions or for any damages resulting from the use of this information.