

SALARY SURVEY 2018
CANADA

“

FOR OVER 32 YEARS, BUSINESSES
ACROSS THE GLOBE HAVE RELIED
ON US TO FIND THE VERY BEST
SPECIALIST PROFESSIONALS AND WE
ARE TRUSTED TO HELP BUILD THE
CAREERS OF THE WORLD'S LEADING
EXECUTIVES, JOB MOVE AFTER JOB
MOVE.

”

WELCOME TO ROBERT WALTERS

SPECIALIST PROFESSIONAL RECRUITMENT



**ROBERT WALTERS,
CHIEF EXECUTIVE OFFICER**

MARKET LEADING GLOBAL BRAND

Our story begins in 1985 when the Group opened its first office in central London. Since then we have developed into a global specialist professional recruitment group, operating in a diverse range of markets worldwide.

For over 32 years, businesses across the globe have relied on us to find the very best specialist professionals, talented executives have trusted us to help build their careers, and companies have outsourced their recruitment processes to us. It's a success story we're proud of and one that's built on the strength and passion of our people.

As the business continues to expand, we operate with the same commitment to service and quality. Every candidate is treated as an individual with a focus on advising and consulting. It means we continually have the best candidates on the market to offer you.

At the heart of the Group's culture and business is our team-based profit share model which means that unlike the majority of our competition we do not pay individual commission. This ensures the needs of our clients and candidates always come first.

Although our reach is global we remain committed to hiring local talent so our people have a deep understanding of the local market and culture. It's what makes us unique and helps us remain a trusted recruitment partner of the world's leading firms.

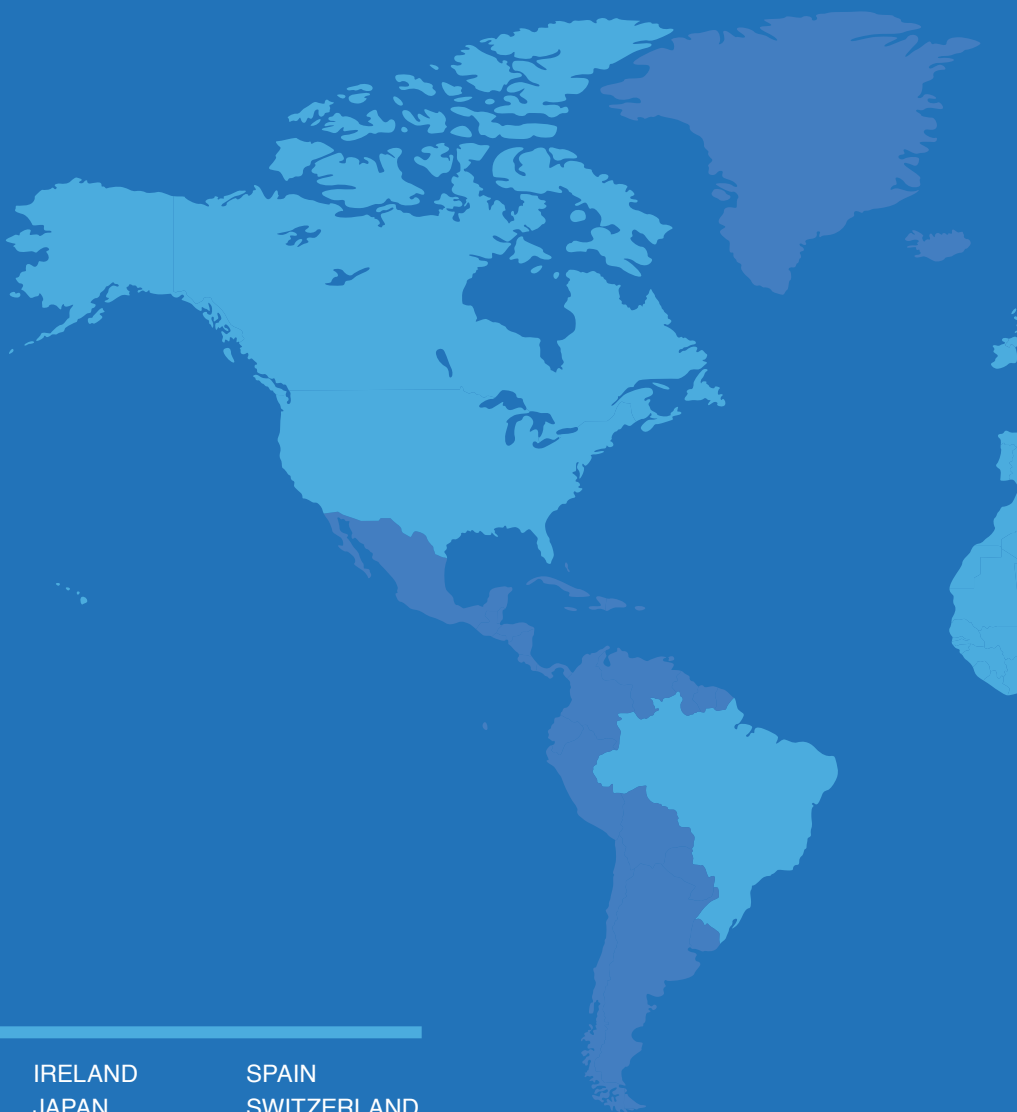
69%

OF OUR BUSINESS
IS FOCUSED ON
PERMANENT
RECRUITMENT, 31%
ON CONTRACT

Robert Walters,
CEO,
Robert Walters Plc

GLOBAL REACH, LOCAL EXPERTISE

 Countries we operate in



28

WE RECRUIT
ACROSS 28
COUNTRIES
GLOBALLY

-
- | | | |
|-----------|--------------|-------------|
| AUSTRALIA | IRELAND | SPAIN |
| BELGIUM | JAPAN | SWITZERLAND |
| BRAZIL | KOREA | TAIWAN |
| CANADA | LUXEMBOURG | THAILAND |
| CHINA | MALAYSIA | NETHERLANDS |
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| INDONESIA | SOUTH AFRICA | |



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To discover hiring and salary trends across the world, read our Global Trends on page 8 or download our books covering:

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- Japan
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OUR SERVICE

Our business is built on the quality of our people. The majority of our recruiters have direct industry experience so they truly understand the disciplines they are recruiting for and the challenges facing hiring managers.

OUR CORE DISCIPLINES INCLUDE:

- Accounting & Finance
- Banking & Financial Services
- Engineering
- Human Resources
- Information Technology
- Legal
- Marketing
- Sales
- Supply Chain & Procurement

WHAT MAKES US DIFFERENT

Bespoke, consultative service

1. Commitment to quality

We focus on building long-term, high-quality relationships with clients and candidates. We consult and advise, helping our candidates make the right career move. This builds trust and loyalty and ensures we continually have the industry's top talent for our clients.

2. Specialists

We hire from industry to ensure our consultants are specialists in the disciplines they recruit for. They also bring with them strong personal relationships and industry networks, enabling them to find hard to reach talent with niche skill sets.

“ I’ve been impressed with the service received by Robert Walters. They listened to our needs and managed to balance accommodating what we wanted with their obvious experience in the recruitment process.

Matt Earle, Regional Director ASEAN, First 4 Farming, Australia ”

“ Robert Walters has always been our preferred recruitment consultancy. Their regional presence and in-depth industry knowledge enables us to successfully hire high quality candidates across multiple locations.

Hagen Ong, APJ Head of Talent Acquisition & Talent Management, Schaeffler (Singapore) Pte Ltd, Singapore ”

“ Robert Walters has placed a number of finance professionals with us, developing a good understanding of our business needs, culture and talent profile.

Sue Mir, EMEA Business Analysis Director, Kimberly-Clark, UK ”

3. No individual commission

We operate a team-based profit share system which, we believe, sets us apart from the vast majority of our competitors as it ensures the interests of both the client and candidate remain our number one priority. There is also no ownership of candidates, ensuring clients always see the best talent we have available.

4. Our people and culture

We promote long-term, international careers, helping us to retain our top people, which provides continuity for our clients. We’re proud to say our senior management team is home-grown with an average tenure of 13 years.

5. Innovation

We were the first recruiter to launch a recruitment process outsourcing business and we continue to lead the way with industry first sponsorships and brand development such as our sponsorship of the British and Irish Lions.

6. Long-term outlook

Our strategy is one of organic growth through international expansion and discipline diversification. We invest in markets for the long-term and maintain our presence, even in tough times.

7. Tailored solutions

We provide a bespoke, consultative service to our clients, from the largest corporates, through to SMEs and start-ups. This can include tailored premium advertising packages, enabling clients to access difficult to reach talent.

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- Korea
- Middle East & Africa
- USA data is available in our app

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“ WELCOME TO THE 19TH
EDITION OF THE SALARY
SURVEY, PROVIDING
CREDIBLE INSIGHT INTO
HIRING AND SALARY TRENDS
WORLDWIDE.

”

ABOUT THE SALARY SURVEY

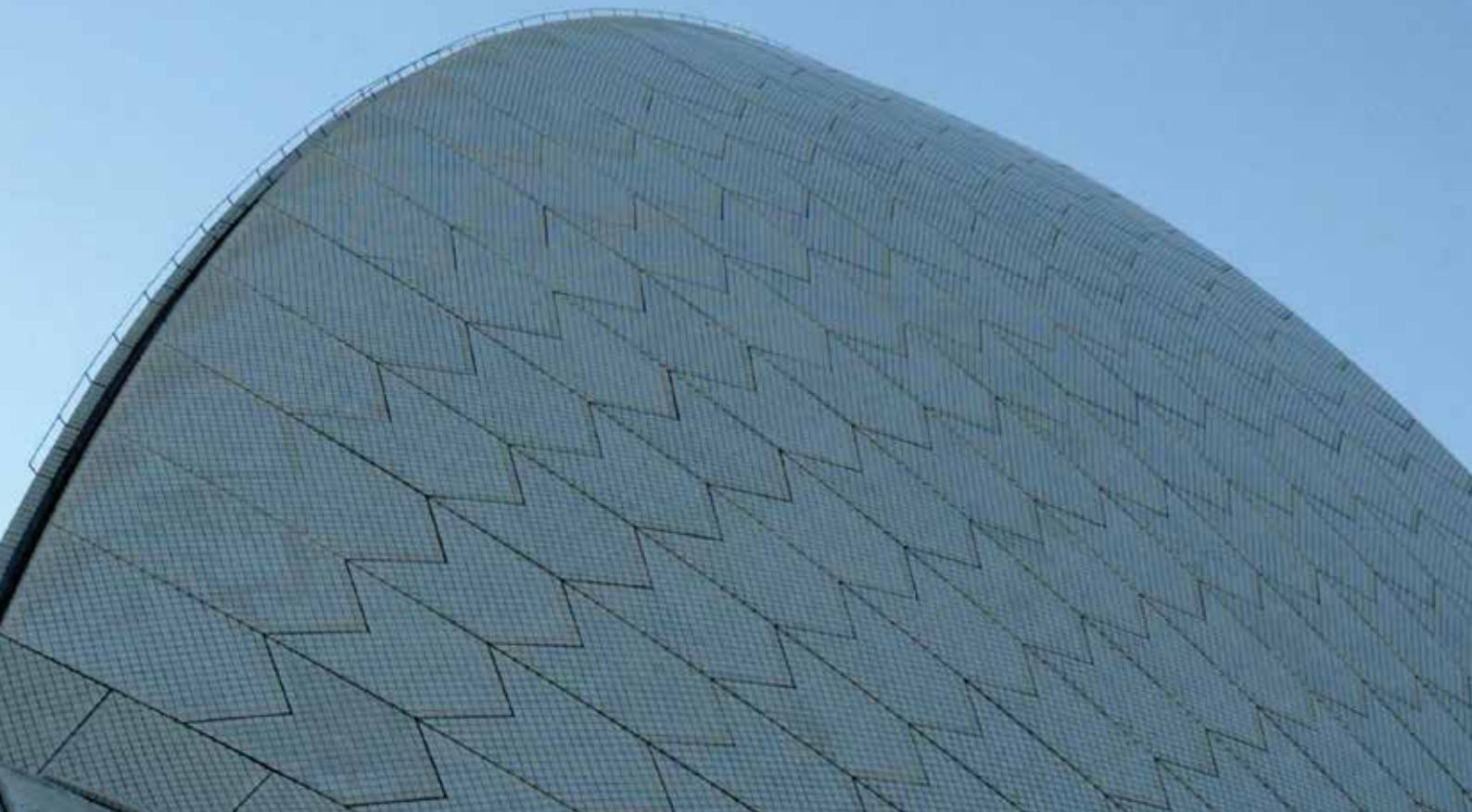
Welcome to the nineteenth edition of the Robert Walters annual Salary Survey.

As the first recruitment company to produce a comprehensive overview of global salaries and recruitment trends across the world, we are pleased to share the latest edition with you.

Our Salary Survey is based on the analysis of permanent, interim and contract placements made across each of our geographies and recruitment disciplines during 2017, and our predictions for the year ahead.

GET IN TOUCH

If you would like to find out more about salaries and recruitment trends in your industry, call one of our specialist consultants today. Contact details can be found at the back of this book.



GLOBAL TRENDS



**GILES DAUBENEY, DEPUTY
CHIEF EXECUTIVE OFFICER**

INTRODUCTION

While economic conditions varied in 2017, most markets experienced at least modest growth, which boosted hiring and led to candidate shortages in certain sectors.

The most significant change was in Europe, as the continent's economy and job market began to grow again following 10 years of stagnation. Strong business confidence and the onset of employment

market deregulation spurred job growth as companies were freed up to hire different types of interim and contract roles, whilst the permanent market also recovered.

Belgian businesses entered a period of expansion and there was job growth across France. The Spanish economy was buoyant and unemployment fell in Portugal as opportunities arose in the IT, manufacturing and engineering sectors across both countries. The Netherlands and Germany both saw strong hiring levels, especially in the financial services sector.

In the UK, despite uncertainty surrounding Brexit and the General Election, many sectors hired extensively – although there was a shift towards contract roles as businesses sought to build agile workforces able to quickly adapt to changing economic conditions.

In the Middle East, the total number of jobs declined but demand remained for highly skilled professionals. Both Africa and the Middle East saw a focus on nationalisation programmes as governments promoted hiring

local talent. Returning nationals with international business experience were therefore highly sought after.

The job market in South East Asia remained active, due largely to new companies entering the market and the expansion of existing businesses, despite variable economic conditions.

Vietnam and the Philippines faced ongoing talent shortages with many companies reaching out to overseas nationals to attract them back home with lucrative opportunities. Meanwhile in Indonesia businesses competed to hire high-potential, local bilingual candidates.

Japan also continued to face talent shortages as the government announced a record high in the job opening to

“

As candidate shortages grow across the world we advise companies to be flexible and open to hiring professionals with transferable skills.

”

applicants ratio, leading to strong competition for specialists across many sectors. In particular, professionals with artificial intelligence (AI) and Internet of Things skills and experience were highly sought after.

Despite some global economic uncertainty, China continued its growth momentum bolstering confidence and hiring activity.

Digital, IT, fintech and e-commerce skill sets will continue to be in demand due to the national 'Internet Plus' strategy and companies' digital transformation projects. We also expect to see 12-18% pay rises for technology professionals in China in 2018.

Australia and New Zealand's job markets were generally healthy and this looks set to continue in 2018. Of particular note were the booming infrastructure and technology sectors, leading to demand for project managers and engineers as well as cyber security and AI specialists. Although both countries are relatively close to full employment, we expect salary growth to be marginal in New Zealand and flat in Australia in 2018.

KEY TRENDS

As in previous years the trend towards digitalisation meant that professionals with digital expertise were in high demand across the globe.

Cyber security and fintech were noticeable growth sectors and demand for big data specialists continued at pace as companies sought to implement new systems to benefit from the insights afforded by big data. Tech start-ups

were active recruiters in, for example, London, San Francisco and Dublin, often competing against larger, more traditional companies by offering candidates equity stakes in the business.

Banks and financial services firms continued to bear the brunt of heavier regulation. This resulted in strong demand for regulatory and compliance skill sets along with risk, audit and legal. In 2018 we expect to see sustained demand for regulatory and compliance professionals, along with salary increases for these sought-after professionals.

For those facing candidate shortages our advice is to be flexible and consider hiring professionals with transferable skills, even if they are not an exact fit for the job description. It's also vital for companies to streamline their recruitment processes, making them efficient and timely to avoid losing top talent to competitors. Employers should also be aware that salary alone will not attract high-calibre candidates as they are increasingly motivated by work-life balance, company culture, structured career progression and flexible working.



**CYBER SECURITY
AND FINTECH
WERE NOTICEABLE
GROWTH SECTORS
AND DEMAND FOR
BIG DATA SPECIALISTS
CONTINUED AT PACE.**

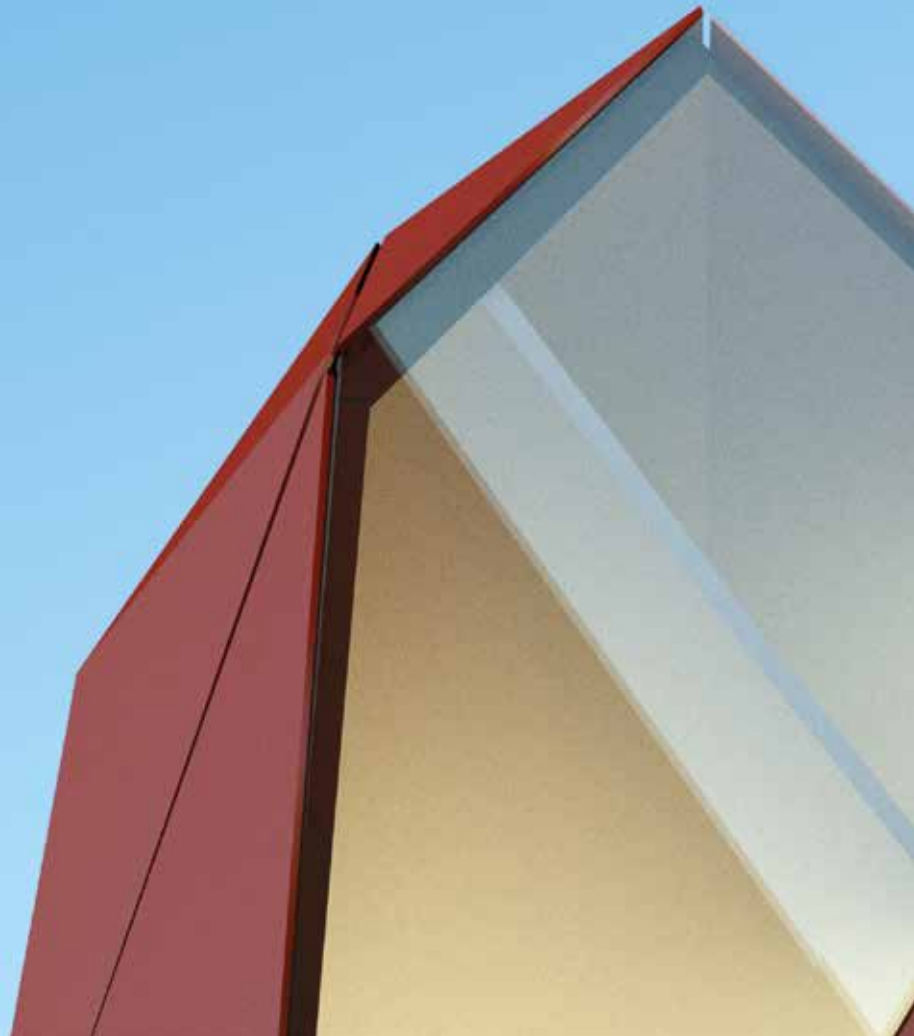


REGIONAL TRENDS

With our presence spanning 28 countries across six continents, our specialist teams offer in-depth knowledge of the sectors they recruit for. In this section our regional managing directors share their insights on hiring and salary trends in 2017 and their predictions for the year ahead.

Our regional overviews include:

- Australia & New Zealand
- Europe
- Greater China
- South East Asia
- United Kingdom
- USA
- Middle East
- Africa





THE GROUP'S INTERNATIONAL NETWORK
OF OFFICES SPANS 28 COUNTRIES AND SIX
CONTINENTS, ENABLING US TO MEET THE
DEMANDS OF CLIENTS AND CANDIDATES
WHOSE NEEDS EXTEND BEYOND LOCAL
MARKETS



AUSTRALIA & NEW ZEALAND

INTRODUCTION

"There is a sense of cautious optimism across many regions and sectors in Australia and New Zealand. Overall, the job market is robust and this looks set to continue in 2018.

While the outlook for the Australia and New Zealand job markets remains healthy, this doesn't tell the whole story. There are pockets of the Australian and New Zealand economies that are absolutely booming, however there are also some areas that are in decline.

GROWTH IN CONSTRUCTION

Numerous infrastructure projects are planned or already under way in Australia and New Zealand, fuelling demand and wage growth in many areas of the public sector. Construction of new roads, airports and hospitals in 2018 means employers will continue to be on the hunt for project managers, engineers and project finance experts.

Our presence in Australia & New Zealand:

- Adelaide
- Auckland
- Brisbane
- Chatswood
- Melbourne
- Parramatta
- Perth
- Sydney
- Wellington

“

The Australia and New Zealand job markets are set to remain positive in 2018.

”

TECH SKILLS IN DEMAND

Specific areas of technology are also taking off right now. These include cyber security, robotic process automation, and artificial intelligence. Professionals with expertise in these areas will be much sought after in 2018. Conversely, lower-level tech roles such as manual testing and helpdesk are in decline, as they are increasingly outsourced to cheaper labour markets overseas.

BANKS SEEK COMPLIANCE PROFESSIONALS

In the wake of recent scandals in the banking and financial services sector in Australia, centered on misconduct within the banks, the pressure is on for financial institutions to be more transparent and report on their remediation projects. We therefore expect demand to remain high, and salaries to increase for professionals with a background in compliance, regulation and risk management.

DRIVING EFFICIENCIES

That sense of caution and vigilance extends beyond financial services though. Regardless of sector, Australian and New Zealand organisations are increasingly focusing on cost efficiencies and leaner ways of working. The net result is that salary growth is only marginal in New Zealand overall, and flat in Australia.

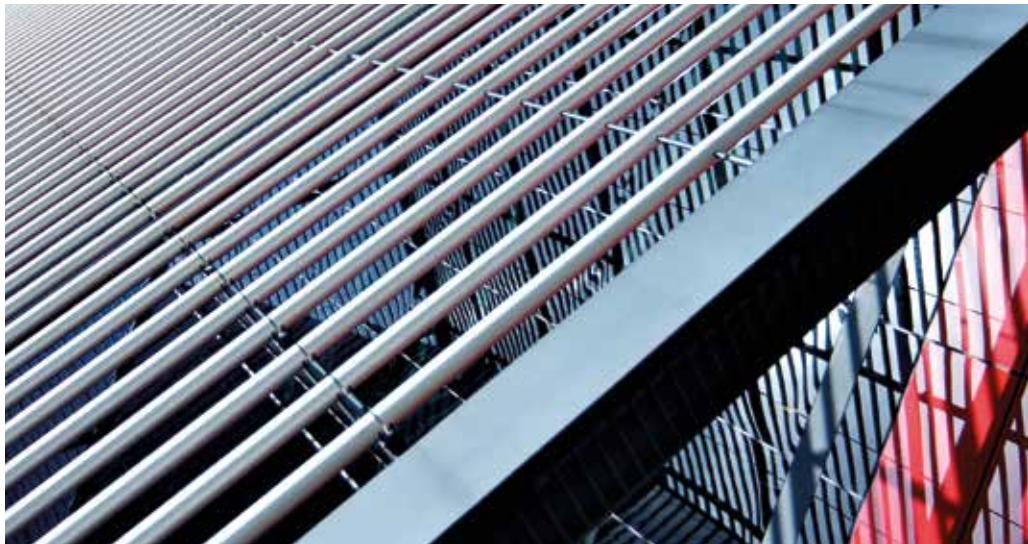
Meanwhile, both countries are relatively close to full employment, which means that future economic growth may rely upon importing offshore talent. Fresh from the 2017 election, New Zealand's government will continue to actively encourage New Zealand professionals living overseas to relocate home. Australia's government is tightening its grip on 457 skilled working visas, making it harder for employers to recruit outside Australia. It remains to be seen whether, during a time of uncertainty at federal government level in Australia, that decision can be reversed in 2018.

JOBSEEKER MOTIVATIONS

In Australia and New Zealand, the primary reasons for professionals to begin active job searches are salary increases and career progression. Employers who can offer both will be most likely to attract and retain star performers in 2018.

All in all, we expect the Australia and New Zealand job markets to remain generally positive in 2018, with some regions set to enjoy modest growth. At a time of global economic uncertainty, Australia and New Zealand appear stable and secure.”

James Nicholson,
Managing Director,
Australia & New Zealand





EUROPE

INTRODUCTION

“After 10 years of stagnation, economic conditions improved across Europe in 2017. As a result, recruitment levels were high as strong business confidence spurred companies to increase headcount. The onset of de-regulation across many of Europe’s major employment markets generated further job growth as businesses began to have the freedom to offer new types of interim and contract roles to candidates.

Continued employment law de-regulation will cause candidate shortages to increase across Europe as businesses race to compete for the best talent. This will also result in an upward trend in salaries for both specialist and generalist professionals.

2017

In France, the IT, real estate, construction, engineering, healthcare and consulting sectors were all extremely active recruiters. The multiplication of national and European regulatory requirements and the increase in consequent checks led to a greater number of control and monitoring jobs, following on from the recent growth in compliance jobs. Greater hiring activity was particularly notable outside the Paris region, with job growth across the whole of France.

In Belgium, businesses entered a period of expansion, following a minor lull at the outset of 2017. Nearshoring continued to shape recruitment activities, with a growing number of roles opening up outside of urban centres. Demand was high for qualified accountants,

Our presence in Europe:

- Belgium
- France
- Germany
- Ireland
- Luxembourg
- Netherlands
- Portugal
- Spain
- Switzerland

chief accountants, business/financial controllers, internal audit professionals and treasurers.

Germany enjoyed a buoyant year, with hiring levels up among financial services employers, where middle office professionals such as specialists in

finance, audit, legal regulatory, compliance and risk were in high demand, driven by the positive economic situation and the potential for some functions within banks relocating to Germany following Brexit.

Recruitment activity in Ireland was high, with financial services firms creating opportunities for compliance and regulatory professionals, and a growing tech start-up community driving demand for IT specialists. With high levels of candidate movement, counter-offers became a popular strategy to retain staff, though many professionals were influenced by company culture and brand rather than salary alone.

In the Netherlands recruitment levels were buoyant, despite sluggish interim hiring early in the year as employers prepared for the introduction of the DBA Act establishing new rules for hiring contractors. Mid to senior finance professionals became more mobile, looking for roles that could offer significant career progression, while interim compliance specialists were sought to oversee projects relating to regulatory change.

The Spanish economy was buoyant, influenced by growing tourism revenues driving recruitment activity. Digitalisation projects in many businesses also helped stimulate hiring for a range of professionals. The construction, automotive and manufacturing sectors were also active, helping to create high demand for engineers despite the slump in the oil industry.

In Switzerland, demand continued for professionals with regulatory and

compliance experience as businesses prepared for upcoming regulatory change. Across the wider market, candidates with a local market skill set who were fluent in Swiss German were highly sought after.

2018

Europe is expected to enjoy another strong year, with confidence remaining high among professionals and employers due to continued de-regulation and economic growth.

In France, demand will be highest for senior level professionals who can help businesses overhaul their operating model and embrace digitalisation to expand. Employers may struggle to retain talent if they do not review and embrace new working models, with many professionals looking for businesses which offer flexible working options.

Similarly, in Belgium, sales professionals who can help businesses expand will be highly sought after, with foreign language skills in high demand. Activity in Belgium will be influenced by the wider European recovery and salaries are expected to grow ahead of inflation.

In the Netherlands, front office hiring in financial services may be limited, though specialists in data, IT and interim compliance will remain highly sought after. When the DBA Act comes into force, we expect to see a temporary slump in interim hiring as employers assess the full impact of the Act.

In Germany, skills shortages will remain acute as the economic situation remains positive and employers continue to look to expand. Professionals who can support digitalisation projects and experts with good IT skills will be in particularly short supply.

Demand will remain high in Spain for finance, control, HR and IT professionals, who can demonstrate commercial acumen as well as technical skill. The improving economy will lead many businesses to look to expand internationally, creating strong demand for professionals with foreign language skills and international experience."

Antoine Morgaut,
CEO,
Europe & South America





GREATER CHINA

“Despite general global economic uncertainty, the world economy’s eastward shift continues. The Greater China region has maintained its growth momentum, led by the sustained performance of China, now the world’s second-largest economy.

DEMAND FOR TECHNOLOGY TALENT

China, Hong Kong and Taiwan all experienced an increase in demand for digital innovation and technology expertise. Automation, cloud technology, e-commerce, big data and cyber security were some of the key growth areas, with many companies in the region undertaking digital transformation projects for their future development.

CHINA

A major drive by Chinese companies to internationalise their businesses led to heightened competition among hiring managers for bilingual professionals and those with experience working in international companies.

The Chinese government also rolled out a series of initiatives and policies, such as ‘Internet Plus’ and ‘Made in China 2025’ strategies designed to sustain business confidence and support various industries, including technology and manufacturing.

In addition, with the continuing shift towards a service-led, consumption-based and innovation-driven economy,

Our presence in Greater China:

- Beijing
- Shanghai
- Suzhou
- Southern China
- Hong Kong
- Taiwan

we saw more research and development centres being established, international service firms entering the market and affordable luxury brands expanding into second-tier cities, resulting in an increase in overall recruitment activity.

HONG KONG

Hong Kong began 2017 with more conservative hiring levels, predominantly focused on replacement-based recruitment. There were still key pockets of specialist professional hiring, for both permanent and contract positions. Given its deepening economic integration with China, Hong Kong is well-positioned to capitalise on the nation's rapid economic rise. Alongside its financial services prowess, Hong Kong has a deep pool of world-class professionals in accounting, technology, legal, management, communications, logistics and many other sectors.

The city showed an unexpectedly strong growth rate through 2017, and it continues to be the fund-raising hub for the 'Belt & Road' initiative. This is a development strategy proposed by the Chinese government which focuses on connectivity and cooperation between Eurasian countries and on underlining China's push to take a larger role in global affairs.

With this in mind we expect demand in 2018 for high-calibre professionals to support the development of commercial services, infrastructure, operations and management.

TAIWAN

Economic conditions improved in Taiwan with an increase in global export demand. The crucial semiconductor and engineering sectors remained strong, whereas retail and FMCG

experienced pressure on margin generation because of a slowdown in tourism.

Investment in the technology sector continues to evolve, supported by the 'Asian Silicon Valley' plan. We are also seeing an increase in professionals with regional experience and multilingual skills to support business restructuring, in particular in the supply chain and logistics industry. In general, Taiwan is still very much a candidate driven market, and we have noticed a flow of talent between China and Taiwan.

“

With ongoing digitalisation of businesses creating widespread demand, the Greater China recruitment market will remain competitive and we expect to see healthy demand for top-tier professionals and specialists.

”

HIRING ADVICE

To attract the best talent, we advise companies to be flexible and not to focus only on direct financial benefits such as salaries and bonuses.

Companies are recommended to consider the non-monetary rewards and intangible benefits they can offer, such as career development opportunities, training schemes, employee-friendly working environments and good corporate cultures. These can play an important role in long-term staff engagement and retention.”

Matthew Bennett,
Managing Director,
Greater China





SOUTH EAST ASIA

INTRODUCTION

“Despite variable economic conditions across South East Asia in 2017, the job market remained active. This was largely due to the region’s dominance in attracting new market entrants and supporting the expansion of existing businesses.

The ease of doing business in Malaysia, for example, increasingly led to the growth of the shared services sector, producing higher demand for finance and accounting talent. Similarly, against a backdrop of stable economic and political growth in Indonesia, there was strong growth across most sectors in 2017. Banking and financial services, insurance, manufacturing and FMCG in particular performed well, and the fastest expansion was seen in professional

services. Companies operating in these growing sectors were active in seeking quality candidates.

Likewise, an influx of multinational firms and continued growth of local and fast-emerging businesses resulted in strong demand for high-potential talent in the Philippines. Businesses establishing themselves in the country were keen to gain greater market share, resulting in back office talent in HR and finance being in high demand.

A similar trend was observed in Thailand. As a more stable economy developed, multiple foreign investments led to the growth of the supply chain and engineering sectors in particular. The e-commerce, chemical and building materials industries were able to

Our presence in South East Asia:

- Indonesia
- Malaysia
- Philippines
- Singapore
- Thailand
- Vietnam

offer top-tier talent substantial salary increases. Additionally, the growing healthcare sector saw a rise in demand for technical healthcare professionals.

2017 also saw the expansion of Vietnam’s industrial sector, with a higher number of multinational corporations investing in the manufacturing market. The job market was also particularly

active for legal and corporate governance professionals. Firms in the FMCG, tech and pharmaceutical industries increasingly demanded in-house legal counsels to boost internal efficiency.

Singapore saw more conservative hiring levels, due mainly to increased offshoring, nearshoring and cost-cutting initiatives, specifically within the banking sector. However, there were still key pockets of active hiring within the information technology and sales and marketing sectors, along with a growing contract market.

KEY TRENDS

Regardless of economic conditions, every market sharpened its focus on developing a more localised workforce and prioritised the hiring and development of locals for key strategic positions. Firms also sought nationals returning from overseas to overcome talent shortages. This was especially true in countries like Singapore, Vietnam and the Philippines. However, Indonesia struggled with an imbalance between the demand for high-potential, local bilingual candidates, and the available supply.

Digitalisation also continued to be a key priority across most markets in South East Asia, due especially to a rapidly growing younger population and increasing consumerism. There was a growth in demand for professionals with digital expertise, across both marketing and IT. As more business moved to online or mobile platforms, there was a rise in demand for IT experts proficient in running back office digital infrastructure or those with niche technology skills such

as UX designers. Cloud, cyber security and big data were key growth areas. This is expected to continue in 2018.

This focus on business transformation also helped to trigger demand for HR professionals with change management experience. Those with proven ability in cultural transformation will be sought after in 2018 as companies undergo further cultural and structural change.

“

A strong economic outlook and ongoing digitalisation, as well as steady market expansion, are set to drive salaries in 2018.

”

However, talent attraction and retention remained a challenge across the region, as talent shortages and turnover rates remained high. We advise hiring managers to simplify and streamline their recruitment processes to ensure timely hires. Those who focus on hiring candidates for their potential and

learning ability, rather than purely for their technical skills will make successful hires in 2018.

Modest economic growth led to continual upward pressure on salaries across most countries in South East Asia, although the salary increments offered were minimal. Candidates with in-demand and niche skill sets naturally received the highest increments as part of their annual salary reviews, with some also receiving pay rises throughout the year. However, salaries mostly remained flat in Singapore, owing to low inflation rates.

2018 EXPECTATIONS

A strong economic outlook and ongoing digitalisation, as well as steady market expansion, are set to drive salaries in 2018. Local candidates with strong technical skills and international backgrounds are set to be highly sought after.”

Toby Fowlston,
Managing Director,
South East Asia





UNITED KINGDOM

2017

“Despite uncertainty surrounding Brexit and the General Election, many businesses recruited extensively with a notable shift towards contract hiring as businesses looked to build an agile workforce that could adapt to shifting economic conditions.

Banking and financial services firms took a relatively cautious approach to recruitment, with most demand representing replacement hiring. Compliance, risk, audit and legal were exceptions, with professionals in these fields highly sought after in light of ongoing pressure from regulators. Overall, the financial services sector had a stronger year than anticipated, with healthy hiring activity on the

buy-side at the junior level owing to natural candidate churn.

The technology sector enjoyed strong growth, with specialists in cyber security and fintech highly sought after. Demand for IT professionals came from large multinationals looking to build more robust data protection systems, as well as a growing community of small start-up tech firms in London and other regional hubs. While opportunities were available for senior professionals, most hiring was focused on junior talent, as firms looked to train up their own staff.

Businesses in the FMCG and manufacturing sectors prepared for Brexit by hiring procurement and supply chain professionals who could build

Our presence in the UK:

- London
- Birmingham
- Guildford
- Manchester
- Milton Keynes
- St Albans

and adapt supply chains in preparation for Britain developing new trading relationships outside the European Union.

Regulatory pressure also shaped demand for projects professionals. Tier one banks sought candidates with experience of MiFID II, GDPR, Structural Reform and BCBS 239. Mid-level to senior machine

learning specialists were in demand as businesses increasingly recognised the importance of data science in driving growth and increasing productivity.

Pressure from regulators also drove demand from financial services firms for legal professionals specialising in risk and compliance. Among private practice firms, demand was highest for lawyers with 2-5 years' PQE, with specialists in real estate, finance, construction and private equity highly sought after due to the continued growth in these sectors.

Employers in Birmingham and Manchester actively recruited throughout the year, with several sectors seeing particularly good growth. Manufacturing and FMCG businesses benefited from the weakened pound by increasing exports, leading to demand for procurement and supply chain professionals to oversee projects related to this growth. Tech companies were also active in recruiting, with small start-up firms actively looking to grow. The presence of shared service centres in the regions also provided a steady stream of roles for mid and back office professionals such as legal, IT and compliance specialists.

Salaries were largely stable, though exceptions were possible in high growth industries such as tech or for compliance specialists within financial services. The UK remained a 'two-speed economy' with salaries growing faster in London than the rest of the UK. However, the continuing trend for nearshoring created well compensated roles across the UK regions.

2018

Demand for professionals is likely to continue in 2018 despite uncertainty concerning the onset of Brexit. Businesses will have to implement new projects to adapt to the changing economic circumstances, develop new supply chains and consider expanding into new international markets. All of these changes will continue to drive hiring.

We anticipate that regulatory specialists will continue to be sought after by banks and financial services firms in light of ongoing pressure from regulators. As demand outstrips supply for compliance, legal and risk professionals, employers will struggle to secure top talent in this area.

Manchester and Birmingham should continue to see high levels of hiring activity in 2018, with the tech sector in particular expected to expand in both regions. Manufacturing and FMCG firms may experience a more restrained period as Brexit approaches and new supply chains need to be established. However, this should also create demand for

procurement and supply chain specialists with experience in international markets.

We also anticipate that salary growth will be limited across most roles, however, the technology sector will be an exception with professionals specialising in cyber security and business intelligence demanding significant pay rises when moving roles. Regulatory specialists will also receive significant increases due to the widespread shortage of these professionals.

Employers will need to emphasise the potential for career progression a role can offer when looking to secure top talent, offering clear timescales and tangible goals required for promotion. Businesses should also consider embracing agile and remote working models, as professionals increasingly prioritise work-life balance when choosing a role. In light of ongoing skills shortages, operating rapid hiring processes will be vital to avoid losing desirable professionals to competitors."

Chris Hickey,
CEO,
UK, Middle East & Africa





USA - NEW YORK

2017

"New York experienced steady demand for professionals throughout 2017, with specific sectors such as hedge funds, fintech companies, media firms and the buy-side of asset management offering a high volume of opportunities.

The flow of jobs was limited in the first quarter of the year as employers delayed hiring decisions in light of the surprise outcome of the presidential election. However, as we moved into quarter two and the second half of the year, employers showed a measured confidence, with the volume of available roles increasing.

2018

In 2018 we anticipate steady and sustainable rises in demand across all sectors, as political and economic uncertainties become clearer and employers become more confident in making hiring decisions. However, we still expect hiring managers to maintain a stringent approach to recruitment processes, only considering candidates

with the exact experience required for the role.

We expect to see demand for professionals with a background in big data and data science. Specialists at the mid and senior level who can implement new systems to allow employers to benefit from the insights afforded by big data will be in highest demand. In addition, we expect ongoing demand for regulatory specialists in banking and financial services, as well as technical accountants who can ensure firms are compliant with new financial regulations.

Software engineers will also be in high demand in light of the ongoing growth of e-commerce firms and digitalisation projects among established businesses. The growth of digitalisation will also be a key driver in spurring demand for advertising technology specialists across all sectors.

With top calibre professionals in these fields in short supply, employers have had to contend with skills shortages

throughout 2017, and this situation is likely to persist in 2018. In part, this has been driven by the trend towards nearshoring, with large firms relocating certain mid and back office functions outside the New York area, further shrinking the pool of available talent.

In light of this, firms looking to fill business critical roles may need to adapt their approach to hiring, considering professionals with transferable skills who may not be a precise fit for the position.

Overall, we expect 2018 to be a year characterised by modest but sustainable growth, with employers being forced to offer more competitive salaries to secure top talent among a small pool of available professionals. Candidates who are prepared to take a flexible approach and consider roles in new growth areas such as fintech, will be more likely to realise their ambitions in terms of securing a role which can offer a strong salary and career progression."

Kurt Kraeger,
Managing Director, New York



USA - SAN FRANCISCO

2017

"The recruitment market in San Francisco was generally busy in 2017, with most firms looking to expand and increase headcount, building on growth seen over the past five years. The first quarter represented an exception to this trend, with some businesses delaying hiring decisions and candidates being more reluctant to move jobs due to the political uncertainty following the president's inauguration.

Hiring levels increased significantly throughout the year, with high levels of investment from venture capital firms spurring recruitment activity. Machine learning and AI were both major growth areas in 2017, creating high demand for specialists in these areas. Tech professionals specialising in robotics were sought after, and businesses focusing on drone development were particularly active. Cyber security specialists also saw high demand for their skills, as did professionals with a background in health technology.

The bulk of demand was for mid to senior-level professionals, with many firms looking to take on candidates for their first management positions.

The widespread growth in demand for professionals led to many hiring managers facing skills shortages in key disciplines. Demand for both product designers and data scientists outstripped supply. Outside of tech specialisms, financial controllers were highly sought after, along with life-cycle marketers, product marketers and demand generators.

Despite the high demand for professionals in 2017, salaries saw little movement due to remuneration levels already being high. Instead, employers used flexible working and a positive company culture to attract staff, while smaller firms also offered equity agreements.

2018

We expect another strong year for recruitment, with demand for candidates continuing to outstrip supply. While areas of specific demand may shift as new

technologies emerge, AI and machine learning will remain major areas of development. In terms of skill sets, we anticipate product designers and data scientists will be highly sought after.

Hiring managers will face a challenging candidate short market. Moving quickly through hiring processes will be important, with highly sought-after candidates likely to receive multiple offers simultaneously. Employers who have clearly identified the qualities and skills they are looking for, along with an efficient and coordinated recruitment strategy, will be in the strongest position to hire.

Professionals may struggle to secure pay rises, except for those with the most in-demand skills where increases of 5-10% are possible. For smaller firms equity offers will remain a popular strategy for attracting talent."

Simon Bromwell,
Managing Director, San Francisco



MIDDLE EAST

2017

"2017 was a challenging year in the Middle East, with conflict in the region creating economic and political instability, leaving many employers hesitant to pursue growth. The slump in the oil price impacted various industries, stalling construction and infrastructure projects and slowing recruitment.

However, employers in the region took steps to adapt, pursuing economic diversification and placing an emphasis on business services and tourism. In the UAE, the decision to simplify visa rules for Indian and Chinese citizens provided a boost to tourism, bolstering the hospitality and retail sectors.

The announcement of Saudi Aramco's 5% share float, the 2022 Qatar World Cup, and Expo 2020 in Dubai all helped to shore up confidence and offset the economic challenges the region faced, while the announcement of VAT introduction created opportunities for tax specialists, as employers adapted to the legislation.

While the total number of jobs declined, demand remained for highly skilled professionals. Salaries remained static within professional services, with bonuses more modest than in previous years. IT remained a growth sector throughout the year, with employers looking to secure professionals with backgrounds in cyber security and web development.

Employers focused on recruiting candidates with local market knowledge which led to fewer relocations by international candidates lacking Middle East experience.

2018

With ongoing political and economic uncertainty and the slump in the oil price, the Middle East will continue to face a challenging period.

Bank consolidations are likely, impacting on demand for professionals in these sectors but creating opportunities for legal professionals specialising in mergers and acquisitions.

Fintech and manufacturing will remain growth sectors, spurred by government incentives to diversify industries in the region.

Nationalisation programmes will create opportunities for UAE and Saudi nationals, particularly those who have experience working overseas, combined with an understanding of local business culture. Sales professionals will remain in demand as businesses expand their markets to overcome the challenging economic conditions.

When recruiting, employers should consider that the recent slump in salary growth is likely to make compensation packages a key priority for many professionals.

Despite 2017 being a challenging year, there is an atmosphere of cautious optimism and we anticipate highly skilled professionals will be able to find lucrative opportunities in 2018."

Jason Grundy,
Country Head, Middle East



AFRICA

2017

“South Africa enjoyed a growing sense of confidence in 2017, with increased recruitment activity despite a somewhat sluggish economy. Finance and legal professionals were highly sought after across financial services and other industries, while technology and FMCG firms were active in hiring IT specialists.

Securing employment equity candidates was a high priority. Businesses targeted nationals working overseas encouraging them to return home. In addition, employers were active in sourcing mid to senior-level professionals with strong industry experience and technical skills.

Businesses in North Africa struggled in 2017. Muted oil prices and stagnation in the Mediterranean economies led to a slow recruitment market.

In Central Africa, despite political and economic instability, governments continued to attract international investment, particularly in the agricultural, manufacturing and FMCG

sectors. To help build these industries, employers sourced professionals from overseas who could pass on their skills to local workers.

In East Africa, growth was strong, due largely to heavy government investment in infrastructure and support for national citizens in securing professional roles. International investment was also forthcoming, with foreign money injected into the technology, FMCG and financial sectors in Kenya and Uganda.

West Africa also struggled with the decline in oil prices, but heavy investment in infrastructure helped to offset the impact, as did healthy levels of foreign investment.

2018

South Africa is expected to enjoy a buoyant 2018, with rising confidence among employers and high levels of recruitment, with finance and legal professionals enjoying rising demand for their skills. However, political instability may present a challenge to securing

foreign investment. Due to talent shortages, highly desirable candidates will be able to secure strong salary increases of 12-15%.

Across the rest of the continent, expect employers to maintain a sense of measured confidence, with developments contingent on how the political situation develops in many countries.

Cote d'Ivoire and other French speaking West African countries are expected to attract significant foreign investment, helping to spur growth across all sectors. Investment in infrastructure is likely to be widespread, creating demand for engineering professionals, while the growth of financial services firms will lead to an increase in demand for candidates with international experience.”

Nic Sephton-Poultney,
Country Manager, South Africa



CANADA

In this section we delve deeper into the hiring and salary trends we expect to see across our local market in 2018.



CANADA

2017

Canada enjoyed a buoyant year for recruitment in 2017, with the technology sector being particularly active. The political situation in the United States made Toronto an attractive location for foreign nationals, creating a rich pool of tech and IT graduates. The lower overhead costs of operating in Canada versus the US also led many firms to relocate here.

Outside the tech sector, real estate and construction companies recruited heavily as they looked to expand in response to the demand for more affordable housing in the Greater Toronto Area. Recruitment in the traditional retail sector was slower as businesses struggled in the face of online competition.

In financial services, regulatory pressure shaped many firms' recruitment strategies, with compliance and risk professionals highly sought after. Investment management was the most active sector, with pressure from IIROC, the OSC and OSFI driving firms to increase mid and back office headcount. Among the banks, accounting policy and advisory teams grew faster as firms prepared to adapt to impending regulations such as IFRS 9.

94%

OF CANADIAN FINANCE
PROFESSIONALS ARE EXPECTING A
SALARY INCREASE IN 2018

“

Canada will enjoy another positive year throughout 2018, with Toronto experiencing ongoing growth.

”



MARTIN FOX,
MANAGING DIRECTOR,
CANADA

2018

Canada will enjoy another positive year throughout 2018, with Toronto experiencing ongoing growth. In particular, the Federal Government's Express Entry visa system will encourage the migration of skilled workers to the region, creating a rich and highly qualified talent pool for employers to access.

The CETA (comprehensive economic and trade agreement) between Canada and the European Union which came into effect in 2017 will encourage increased investment by European firms. The agreement also ensures that European qualifications are recognized in Canada, encouraging bilateral labor mobility.

Banking and financial services firms will continue generating demand for CPAs with a 'Big 4' background and experience in auditing financial institutions, such as private equity and real estate investment trusts (REITs). Securing top calibre professionals will be challenging, as competition from tech firms put pressure on talent pools.

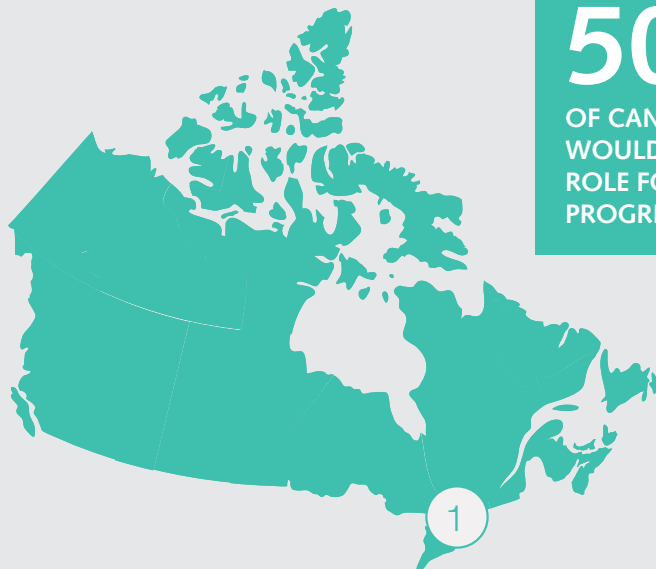
The Ontario elections in June 2018 are expected to end in a progressive conservative victory, which in turn is likely to lead to a business-friendly tax environment and continued investment in attracting new businesses to the greater Toronto area. This should lead to continued hiring activity.



Of Canadian professionals received a pay rise of more than 5% last year

1

58% of professionals in Toronto plan to change jobs in the next 6 months



50%

OF CANADIAN PROFESSIONALS
WOULD TAKE ON A NEW
ROLE FOR BETTER CAREER
PROGRESSION

OVERVIEW



65%

OF CANADIAN PROFESSIONALS
WANT THE OPTION TO WORK
REMOTELY

COMMERCE & INDUSTRY

Demand for accounting professionals from employers in commerce & industry was high throughout 2017 as large companies continued to replace leavers while also growing strategic functions such as cost accounting and financial planning and analysis. Information technology,

property development/construction and manufacturing were all extremely active sectors.

Large firms also focused on upskilling current staff in the areas of accounting policy and advisory in response to pressure to meet regulatory reporting standards. Skills gaps were particularly notable around IFRS 15 and IFRS 16 on top of ongoing general demand for accountants with experience solving issues that arise surrounding IFRS requirements. As a result, CPAs with 1-4 years of post-designation experience from accounting advisory teams within the 'Big 4' were highly sought after.

Salaries saw modest growth ahead of inflation for professionals remaining with the same employer. By changing employers, accountants could secure increases of 7-10% but many were motivated to seek roles which could offer more diverse and challenging work, an improved work-life balance or better opportunities for promotion in the future.

Accountants with a regulatory background will remain in high demand throughout 2018, as companies continue to upskill in their group financial reporting, accounting policy and FP&A divisions. The growing private equity/venture capital sector in Toronto will drive demand for controller-level candidates with experience working for private-equity backed businesses who can manage organizations going through takeovers and change projects while also managing demanding investors.

CPAs will be difficult to source, with candidates reluctant to leave public accounting firms to move into traditional financial reporting and internal audit positions, favoring

“

In 2018, recruitment levels are expected to remain buoyant with the largest financial institutions returning to active recruiting after several years of cost cutting.

”

roles which are more analytical and strategically focused such as FP&A or corporate development. The rapidly expanding fintech sector will remain popular with younger finance professionals who are attracted to the work-life balance and innovative workplace environments these employers can offer.

Salaries are expected to remain stable, with minor changes in line with inflation. Candidates will continue to regard bonus, benefits, the nature of the work and work-life balance as higher priorities than straightforward salary.

FINANCIAL SERVICES

In 2017, investment management was the most active sector for accounting recruitment, with regulatory pressure from IIROC, the OSC and OSFI driving demand for middle and back office staff. CPAs with a 'Big 4' background were highly sought after to fill roles in fund and corporate accounting.

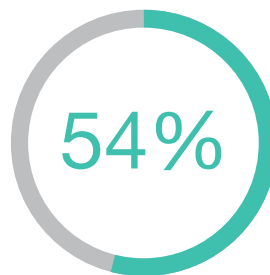
Within the private equity market both independent firms and the private equity divisions of large asset management and pension funds saw the largest levels of growth as investors continued to favor safer investments.

Among the banks, accounting policy and advisory teams expanded as firms prepared to adapt to upcoming regulatory frameworks such as IFRS 9. Many firms faced skills shortages when looking to secure candidates with a strong regulatory background due to high demand and limited talent pools.

Demand for senior tax and internal audit professionals was more limited, owing to a lack of movement among candidates in this group and the creation of few new positions at this level.

Salary growth was healthy in the banking and financial services sector, with remuneration increasing slightly ahead of inflation. Professionals staying with the same employer were able to secure salary increases of up to 4% while those who changed roles were typically able to obtain raises of up to 9%.

In 2018, recruitment levels are expected to remain buoyant with the largest financial institutions returning to active recruiting after several years of cost cutting. CPAs with a 'Big 4' background and experience in the private equity sector will be in high demand, as will those possessing accounting policy and advisory skills.



Of Canadian professionals would consider a counter offer from their current employer, if offered a new job



90%

OF CANADIAN PROFESSIONALS
ARE OPEN TO A JOB APPROACH
WHEN NOT ACTIVELY LOOKING

Increasingly, banks and financial services firms will find themselves competing to secure highly desirable junior candidates, with many millennial professionals favoring a move to the growing community of tech start-ups in the region.

Competitive salaries will be vital for employers looking to secure top talent, with 10% increases expected for professionals moving into a new role.

ROLE	PERMANENT BASIC SALARY PER ANNUM CAD (\$)	
	2017	2018
Financial Control/Reporting/FP&A		
Chief Financial Officer/EVP (18+ yrs' PDE*)	180 - 300k	180 - 305k
Finance Director/SVP (12 - 18 yrs' PDE)	150 - 205k	155 - 210k
Corporate Controller/VP (8 - 12 yrs' PDE)	135 - 165k	135 - 166k
Senior Manager/AVP (5 - 8 yrs' PDE)	105 - 140k	107 - 140k
Manager (3 - 5 yrs' PDE)	86 - 107k	88 - 110k
Senior Financial Analyst (1 - 3 yrs' PDE)	75 - 85k	75 - 87k
Newly Designated Accountant/Analyst	70 - 75k	70 - 75k
Internal Audit		
VP/SVP (10 - 15+ yrs' PDE)	160 - 230k	165 - 232k
Manager/Senior Manager/Director (5 - 10 yrs' PDE)	100 - 155k	105 - 160k
Analyst/Associate (0 - 5 yrs' PDE)	70 - 95k	72 - 98k
Tax		
VP/SVP (10 - 15+ yrs' PDE)	180 - 232k	180 - 235k
Manager/Senior Manager/Director (5 - 10 yrs' PDE)	100 - 175k	105 - 178k
Analyst/Associate (0 - 5 yrs' PDE)	75 - 95k	75 - 96k

* post-designation experience

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

ROLE	PERMANENT BASIC SALARY PER ANNUM CAD (\$)	
	2017	2018
Financial Control/Reporting/FP&A		
Chief Financial Officer/EVP (18+ yrs' PDE*)	190 - 312k	190 - 315k
Finance Director/SVP (12 - 18 yrs' PDE)	172 - 250k	175 - 250k
Corporate Controller/VP (8 - 12 yrs' PDE)	141 - 188k	140 - 188k
Senior Manager/AVP (5 - 8 yrs' PDE)	108 - 148k	110 - 148k
Manager (3 - 5 yrs' PDE)	86 - 107k	88 - 110k
Senior Financial Analyst (1 - 3 yrs' PDE)	78 - 88k	78 - 87k
Newly Designated Accountant/Analyst	73 - 78k	75 - 78k
Fund/Investment Accounting		
Fund Controller/Director (10 - 15 yrs' PDE)	134 - 160k	135 - 162k
Senior Manager/AVP (5 - 10 yrs' PDE)	111 - 130k	110 - 132k
Manager (3 - 5 yrs' PDE)	86 - 107k	88 - 110k
Senior Fund Accountant (1 - 3 yrs' PDE)	77 - 87k	78 - 87k
Newly Designated Fund Accountant	72 - 76k	72 - 77k
Internal Audit		
VP/SVP (10 - 15+ yrs' PDE)	175 - 253k	175 - 253k
Manager/Senior Manager/Director (5 - 10 yrs' PDE)	104 - 170k	105 - 170k
Analyst/Associate (0 - 5 yrs' PDE)	80 - 108k	82 - 107k
Tax		
VP/SVP (10 - 15+ yrs' PDE)	180 - 260k	180 - 260k
Manager/Senior Manager/Director (5 - 10 yrs' PDE)	107 - 180k	105 - 180k
Analyst/Associate (0 - 5 yrs' PDE)	82 - 110k	83 - 112k

* post-designation experience

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

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