

## 2014 South Florida Tech Leadership Survey

12<sup>th</sup> Annual Survey - Conducted February-March 2014

Target – 841 Director to CIO level IT Executives

Response rate – 13% (112)

### KEY FINDINGS:

- Compensation top reason for losing IT talent
- 65% will increase IT staff this year with shift continuing towards direct employment
- Budget increases lower than last year

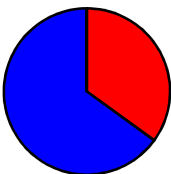
### ECONOMIC OUTLOOK

How do you perceive the current health of the overall economy going into 2014?



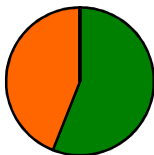
- Getting stronger: 2014-47% 2013-60%
- About the same: 2014-47% 2013-32%
- Getting weaker: 2014-5% 2013-8%
- Recessionary: 2014-1% 2013-6%

How do you perceive the current health of the IT industry in terms of product purchases?



- Very Strong: 2014-35% 2013-60%
- Neutral: 2014-65% 2013-40%
- In Decline: 2014-0% 2013-0%

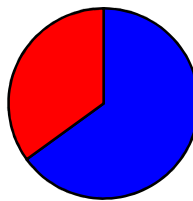
How do you perceive the current health of the IT industry in terms of hiring activity?



- Very strong: 2014-56% 2013-53%
- Neutral: 2014-44% 2013-47%
- In decline: 2014-0% 2013-0%

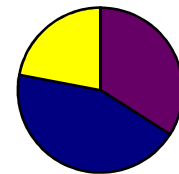
### WORKFORCE

Are you concerned about losing talented IT staff this year?



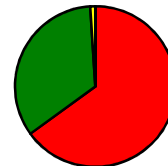
- Yes: 65%
- No: 35%

Last year, how did your total workforce (including direct employees and contractors) change?



- Increased: 34%
- Remained the same: 44%
- Decreased: 22%

What are your hiring plans for 2014?



- Will increase staff: 2014-65% 2013-64% 2012-42%
- Staff levels will remain the same: 2014-34% 2013-36% 2012-55%
- Will decrease staff: 2014-1% 2013-0% 2012-3%

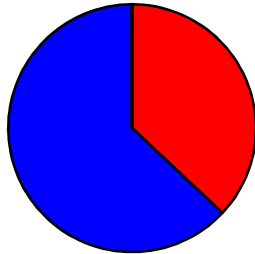
When you lose talented IT staff members, what is the primary reason?



- Compensation: 2014-70% 2013-67% 2012-58%
- Lack of Career Path: 2014-18% 2013-14% 2012-8%
- Work Environment/Company Culture: 2014-9% 2013-3% 2012-17%
- Benefits: 2014-3% 2013-11% 2012-0%
- Work Stimulation: 2014-0% 2013-0% 2012-8%

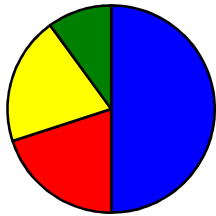
## BUDGETS & PRIORITIES

Is your current IT budget adequate in relation to actual need?



■ Yes: 37% ■ No: 63%

What are your non-technology related priorities this year?



■ Streamline Operations: 50%

■ Product Innovation: 20%

■ Employee Training: 20%

■ Acquisition: 10%

By how much did your IT budget increase or decrease year-over-year?

2014  
Average increase: 9%

2013  
Average increase: 11%

2012  
Average increase: 10.2%

2011  
Average increase: 8.5%

2010  
Average increase: 6%

2009  
Average increase: 2%

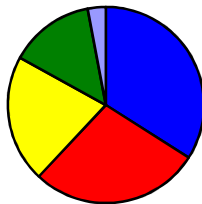
2008

Top two recommendations cited to the government to increase the success of the IT industry in South Florida:

1. Provide incentives to bring additional high tech companies and large employers to South Florida.

2. Invest in education and increase profile of local universities.

What are your technology related priorities this year?



■ Infrastructure upgrade: 34%

■ New large applications development endeavor: 28%

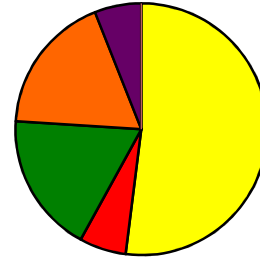
■ ERP upgrade: 21%

■ Redesign current web site: 14%

■ No major projects planned: 3%

## ORGANIZATIONAL

What is the total size of IT staff in your organization (including contractors)?



■ Under 25: 52%

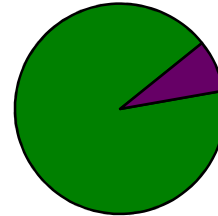
■ 25 - 50: 6%

■ 51 - 100: 18%

■ 101 - 250: 18%

■ 251+: 6%

What is the balance of direct employees and contracted staff in your IT operations?



■ Direct Employees: 2014-92% 2013-89%

■ Contract/Temp: 2014-8% 2013-11%