

2017 South Florida Tech Leadership Survey

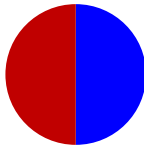
15th Annual Survey – Conducted February 2017
 Target – 990 IT Directors to CIO level IT Executives
 Response rate – 14% (138 participants)

KEY FINDINGS:

- IT budgets increased an average 15%, highest rate reported in a decade
- Hiring a bit slower than last year, but no staff decreases reported
 - IT Industry and economic outlook overall very positive

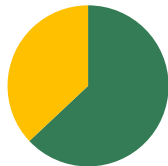
ECONOMIC OUTLOOK

How do you perceive the current health of the overall economy going into 2017?



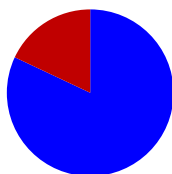
- Getting stronger: 2017-50% 2016-48%
- About the same: 2017-50% 2016-32%
- Getting weaker: 2017-0% 2016-20%
- Recessionary: 2016-0%

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



- Very strong: 2017-63% 2016-50%
- Neutral: 2017-37% 2016-50%
- In decline: 2017-0% 2016-0%

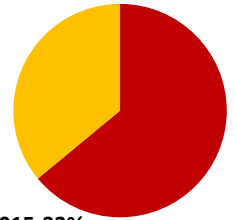
How do you perceive the current health of the IT industry in terms of hiring activity?



- Very strong: 2017-82% 2016-80%
- Neutral: 2017-18% 2016-20%
- In decline: 2017-0% 2016-0%

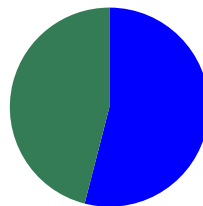
WORKFORCE

What are your hiring plans for 2017?



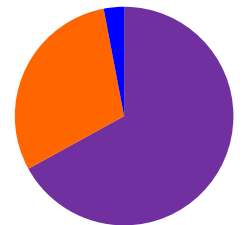
- Will increase staff: 2017-64% 2016-68% 2015-67%
- Staff levels will remain the same: 2017-36% 2016-32% 2015-33%
- Will decrease staff: 2017-0% 2016-0% 2015-0%

Are you concerned about losing talented IT Staff this year?



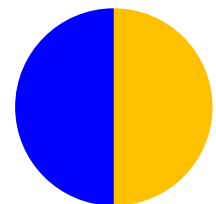
- Yes: 54%
- No: 46%

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



- Increased: 67%
- Remained the same: 30%
- Decreased: 3%

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

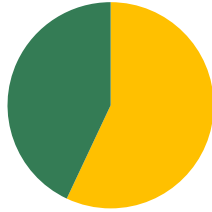


- Compensation: 2017-50% 2016-73% 2015-71%
- Lack of Career Path: 2017-50% 2016-17% 2015-19%
- Benefits: 2017-0% 2016-6% 2015-6%
- Work Environment/Company Culture: 2017-0% 2016-4% 2015-4% 2014-9% 2013-3%

BUDGETS & PRIORITIES

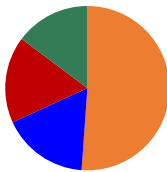
ORGANIZATIONAL

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



■ Yes: 57%
■ No: 43%

What are your non-technology related priorities this year?



■ Employee Training/Retention: 45%
■ Reorganization: 15%
■ Marketing and Branding: 15%
■ Streamline Operations: 13%
■ Product Innovation: 12%

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

2017
Average Increase: 15%

2016
Average Increase: 12%

2015
Average Increase: 10%

2014
Average Increase: 9%

2013
Average Increase: 11%

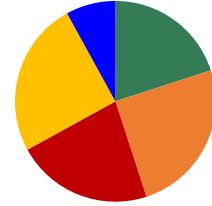
2012
Average Increase: 10.2%

2011
Average Increase: 8.5%

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

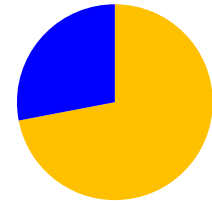
1. Create incentives to educate more professionals in the IT industry.
2. Create incentives for IT companies to invest in South Florida.

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



■ Under 25: 20% ■ 25-50: 25%
■ 51-100: 22% ■ 101-250: 25%
■ 251+: 8%

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



■ Direct Employees: 2017-72% 2016-77%
■ Contract/Temp: 2017-28% 2016-23%

What are your technology related priorities this year?

■ Redesign current website: 31%

■ New large applications development endeavor: 24%

■ ERP upgrade: 15%

■ Infrastructure upgrade: 15%

■ Add mobile functionality to applications: 15%

