

2018 South Florida Tech Leadership Survey

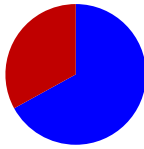
16th Annual Survey – Conducted February-March 2018
 Target – 1103 IT Directors to CIO level IT Executives
 Response rate – 12% (131 participants)

KEY FINDINGS:

- Tech hiring plans most robust in 16 years
- Economic outlook strongest ever for 2018
- IT budgets average increase flat, but strong at 15%

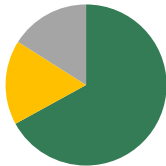
ECONOMIC OUTLOOK

How do you perceive the current health of the overall economy going into 2018?



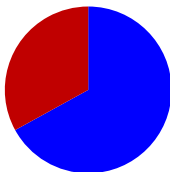
- Getting stronger: 2018-67% 2017-50%
- About the same: 2018-33% 2017-50%
- Getting weaker: 2018-0% 2017-0%
- Recessionary: 2018-0% 2017-0%

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



- Very strong: 2018-67% 2017-63%
- Neutral: 2018-17% 2017-37%
- In decline: 2018-16% 2017-0%

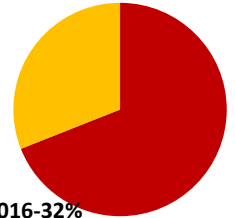
How do you perceive the current health of the IT industry in terms of hiring activity?



- Very strong: 2018-67% 2017-82%
- Neutral: 2018-33% 2017-18%
- In decline: 2018-0% 2017-0%

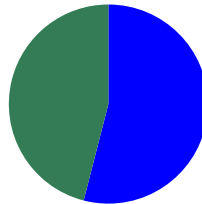
WORKFORCE

What are your hiring plans for 2018?



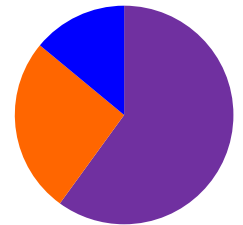
- Will increase staff: 2018-69% 2017-64% 2016-68%
- Staff levels will remain the same: 2018-31% 2017-36% 2016-32%
- Will decrease staff: 2018-0% 2017-0% 2016-0%

Are you concerned about losing talented IT Staff this year?



- Yes: 54%
- No: 46%

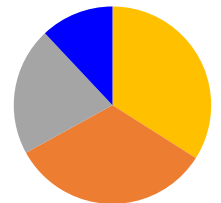
Last year, how did your total workforce (including direct employees and contractors) change?



- Increased: 60%
- Remained the same: 26%
- Decreased: 14%

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

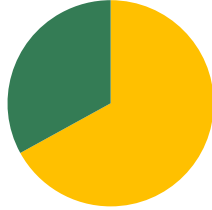
- Compensation: 2018-34% 2017-50% 2016-73%
- Work-life balance/long work hours: 2018-33% 2017-0% 2016-0%
- Lack of career path: 2018-21% 2017-50% 2016-17%
- Company Culture/work environment: 2018-12% 2017-0% 2016-4%



BUDGETS & PRIORITIES

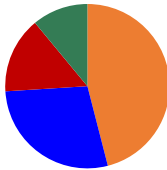
ORGANIZATIONAL

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



■ Yes: 67%
■ No: 33%

What are your non-technology related priorities this year?



■ Employee Training/Retention: 46%
■ Product Innovation: 28%
■ Reorganization: 15%
■ Expansion: 11%

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

2018
Average Increase: 15%

2017
Average Increase: 15%

2016
Average Increase: 12%

2015
Average Increase: 10%

2014
Average Increase: 9%

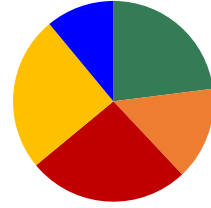
2013
Average Increase: 11%

2012
Average Increase: 10.2%

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

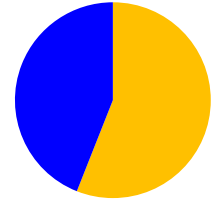
1. Invest in continuous global marketing and branding of South Florida as a welcoming, resource-rich, talent-rich, accessible, tax-friendly, great-life-style region where tech business grows and flourishes.
2. Invest in education
3. Find ways to retain talented people in state

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



■ Under 25: 23% ■ 25-50: 15%
■ 51-100: 26% ■ 101-250: 25%
■ 251+: 11%

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



■ Direct Employees: 2018-56% 2017-72%
■ Contract/Temp: 2018-44% 2017-28%

What are your technology related priorities this year?

■ New large applications development endeavor: 36%
■ ERP upgrade: 29%
■ Infrastructure upgrade: 25%
■ Add mobile functionality to applications: 10%

