

Survey Conducted March 2020
 Target 2833 IT Directors to CIO level IT Executives
 Response rate – 6% 170 participants

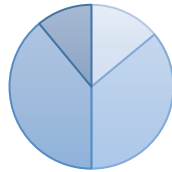
2020 KEY FINDINGS:

- **Hiring plans and economic outlook deteriorating**
- **72% of IT leaders concerned over losing staff**
- **Compensation and lack of career path are top concerns for losing staff**
- **Average IT budget increase at 13%**

ECONOMIC OUTLOOK

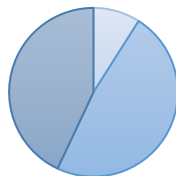
How do you perceive the current health of the overall economy going into 2020?

- Getting stronger: 2020-14% 2019-45%
- About the same: 2020-36% 2019-35%
- Getting weaker: 2020-39% 2019-10%
- Recessionary: 2020-11% 2019-10%



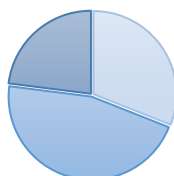
How do you perceive the current health of the IT industry in terms of product purchases?

- Very strong: 2020-9% 2019-50%
- Neutral: 2020-48% 2019-50%
- In decline: 2020-43% 2019-0%



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

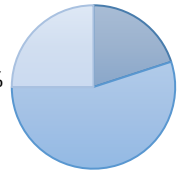
- Very strong: 2020-31% 2019-60%
- Neutral: 2020-46% 2019-40%
- In decline: 2020-23% 2019-0%



WORKFORCE

What are your hiring plans for 2020?

- Will increase staff: 2020-20% 2019-45% 2018-69%
- Staff levels will remain the same: 2020-55% 2019-51% 2018-31%
- Will decrease staff: 2020-25% 2019-4% 2018-0%



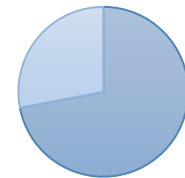
Last year, how much did your total workforce (including direct employees and contractors) change?

- Increased: 42%
- Remained the same: 54%
- Decreased: 4%



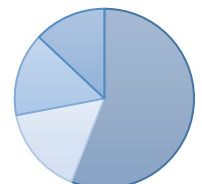
Are you concerned about losing talented IT staff this year?

- Yes: 72%
- No: 28%



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

- Compensation: 2020-56% 2019-58% 2018-34%
- Lack of career path: 2020-16% 2019-14% 2018-21%
- Company Culture/work environment: 2020-15% 2019-14% 2018-12%
- Work-life balance/long work hours: 2020-13% 2019-14% 2018-33%



BUDGETS & PRIORITIES

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

2020 Average Increase: 13%

2019 Average Increase: 15%

2018 Average Increase: 15%

2017 Average Increase: 15%

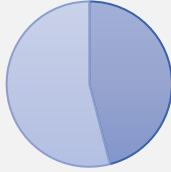
2016 Average Increase: 12%

2015 Average Increase: 10%

2014 Average Increase: 9%

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

■ Yes: 46% ■ No: 54%



What are your non-technology related priorities this year?

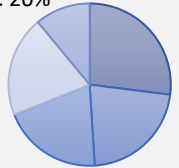
■ Team building/staff alignment: 27%

■ Employee training/retention: 22%

■ Getting through Coronavirus Screening: 20%

■ Streamline operations: 20%

■ Improve customer satisfaction: 11%



What are your technology related priorities this year?

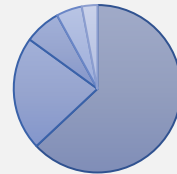
■ Infrastructure upgrade: 63%

■ Modernization of existing software/applications: 22%

■ New large applications development endeavor: 7%

■ Redesign website: 5%

■ Add mobile functionality to applications: 3%



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

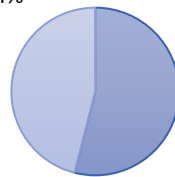
1. Provide better tax incentives for companies to open new offices or expand
2. Create tax incentive plans to attract new high-tech companies to the state
3. Take all measures to protect FL from impact of Coronavirus
4. Stronger partnering between Tech companies and local universities with incentives for graduates to stay in Florida.

ORGANIZATIONAL

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

■ Direct employees: 2020-54%
2019-56%

■ Contract/temp: 2020-46%
2019-44%



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

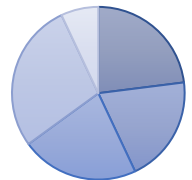
■ Under 25: 23%

■ 25-50: 20%

■ 51-100: 22%

■ 101-250: 28%

■ 251+: 7%



Special note from PROTECH CEO on 2020 surveys

The 2020 responses for both the tech workforce and leadership surveys were very mixed this year. The surveys were conducted during a rapidly declining situation due to the COVID-19 Virus. This year we elected not to issue a press release, but to release the results, nonetheless. If you have any questions, please do not hesitate to contact us. We wish you and your families good health during these challenging times.

6750 N. Andrews Avenue Suite 200, Fort Lauderdale, FL 33309
Main: 561-953-8800 Toll Free: 1-866-584-5955 www.protechtjobs.com