PROTECH

2015 South Florida Tech Leadership Survey

13th Annual Survey - Conducted February-March 2015
Target – 898 Director to CIO level IT Executives
Response rate – 12% (109 participants)

KEY FINDINGS:
- Positive perception of economic conditions and hiring activity at all-time high
- Strong increase in total IT workforce with strong hiring continuing into 2015
- Employee training and retention cited as top priority

ECONOMIC OUTLOOK

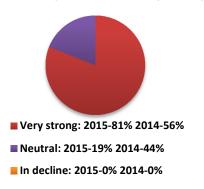### How do you perceive the current health of the overall economy going into 2015?

- ■ Getting stronger: 2015-73% 2014-47%
- ■ About the same: 2015-27% 2014-47%
- ■ Getting weaker: 2015-0% 2014-5%
- ■ Recessionary: 2015-0% 2014-1%

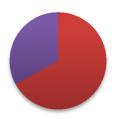### How do you perceive the current health of the IT industry in terms of product purchases?

- ■ Very Strong: 2015-34% 2014-35%
- ■ Neutral: 2015-66% 2014-65%
- ■ In Decline: 2015-0% 2014-0%

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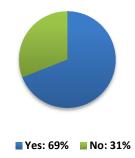

- ■ Very strong: 2015-81% 2014-56%
- ■ Neutral: 2015-19% 2014-44%
- ■ In decline: 2015-0% 2014-0%

WORKFORCE
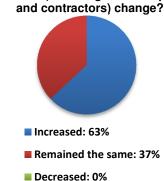
What are your hiring plans for 2015?

- ■ Will increase staff: 2015-67% 2014-65% 2013-64%
- ■ Staff levels will remain the same: 2015-33% 2014-34% 2013-36%
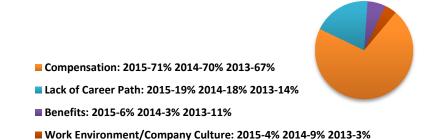- ■ Will decrease staff: 2015-0% 2014-1% 2013-0%

Are you concerned about losing talented IT staff this year?

- ■ Yes: 69%   ■ No: 31%

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

- ■ Increased: 63%
- ■ Remained the same: 37%
- ■ Decreased: 0%

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

- ■ Compensation: 2015-71% 2014-70% 2013-67%
- ■ Lack of Career Path: 2015-19% 2014-18% 2013-14%
- ■ Benefits: 2015-6% 2014-3% 2013-11%
- ■ Work Environment/Company Culture: 2015-4% 2014-9% 2013-3%

PROTECH

BUDGETS & PRIORITIES

ORGANIZATIONAL

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

■ Yes: 42% ■ No: 58%

What are your non-technology related priorities this year?

■ **Employee Training/Retention: 33%**

■ **Streamline Operations: 26%**

■ **Marketing and branding: 21%**

■ **Product Innovation: 20%**

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

2015
Average increase: 10%

2014
Average increase: 9%

2013
Average increase: 11%

2012
Average increase: 10.2%

2011
Average increase: 8.5%

2010
Average increase: 6%

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

1. Get more incubators, accelerators and vc/pe companies to invest in South Florida.

2. Invest in education and improve the status of local universities to develop stronger IT professionals.

3. Salaries vs. cost of living must improve compared to other areas.

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

■ Under 25: 54%　■ 25 - 50: 6%
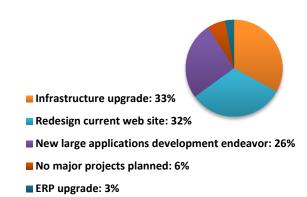
■ 51 - 100: 18%　■ 101 - 250: 16%

■ 251+: 6%

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

■ **Direct Employees: 2015-87% 2014-92%**

■ **Contract/Temp: 2015-13% 2014-8%**

What are your technology related priorities this year?

■ **Infrastructure upgrade: 33%**

■ **Redesign current web site: 32%**

■ **New large applications development endeavor: 26%**

■ **No major projects planned: 6%**

■ **ERP upgrade: 3%**

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