

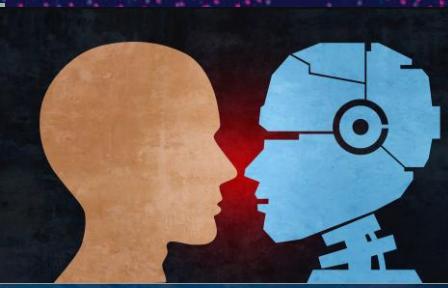
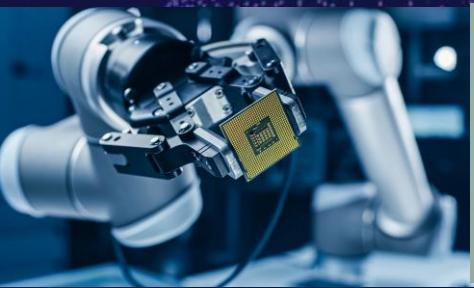


2026
**OUTLOOK
FOR TECH**

2026 PREDICTIONS STATE OF THE INDUSTRY TECH TRENDS

21212026

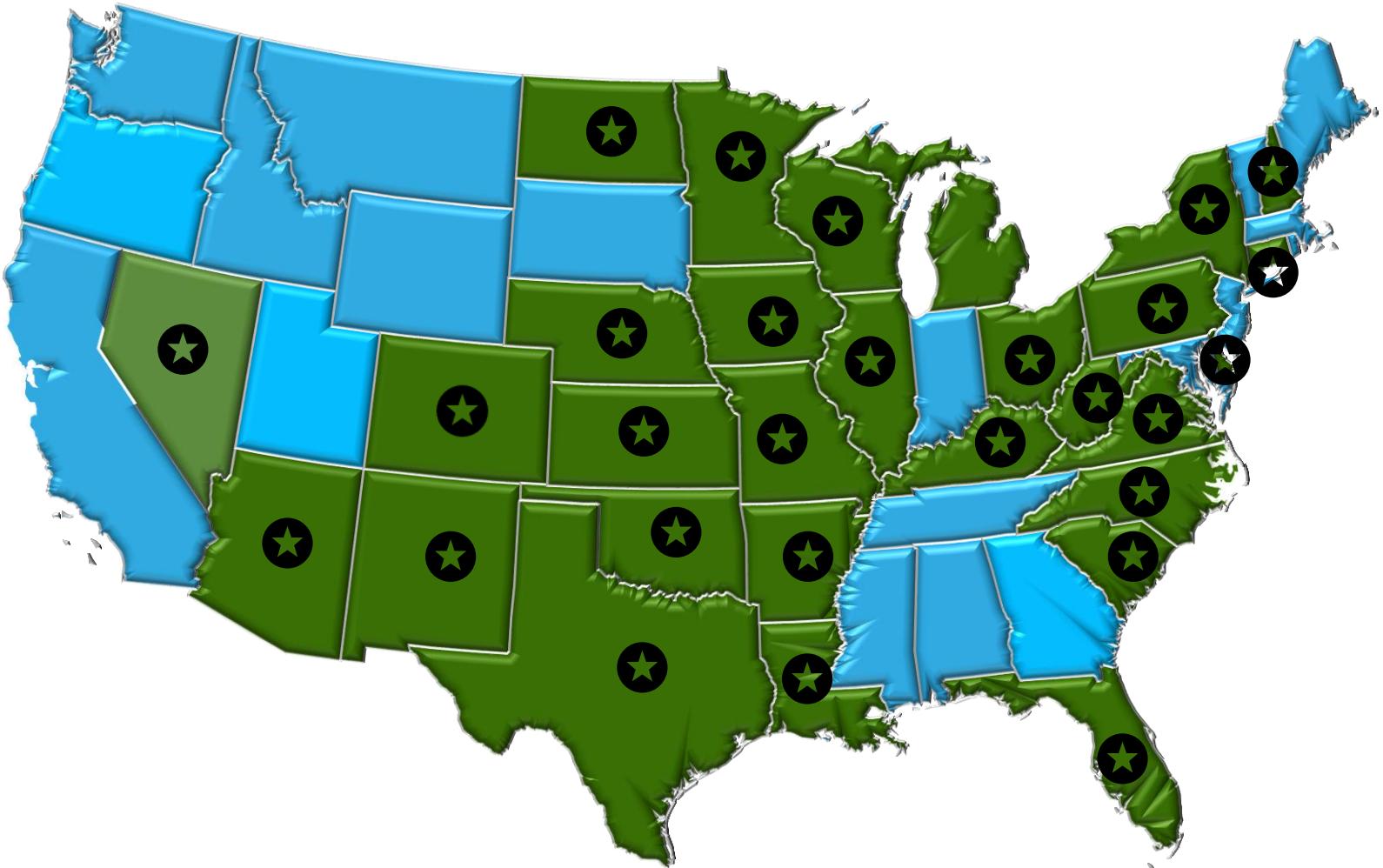
THE REVELRY NORTH END
CHARLOTTE, NC



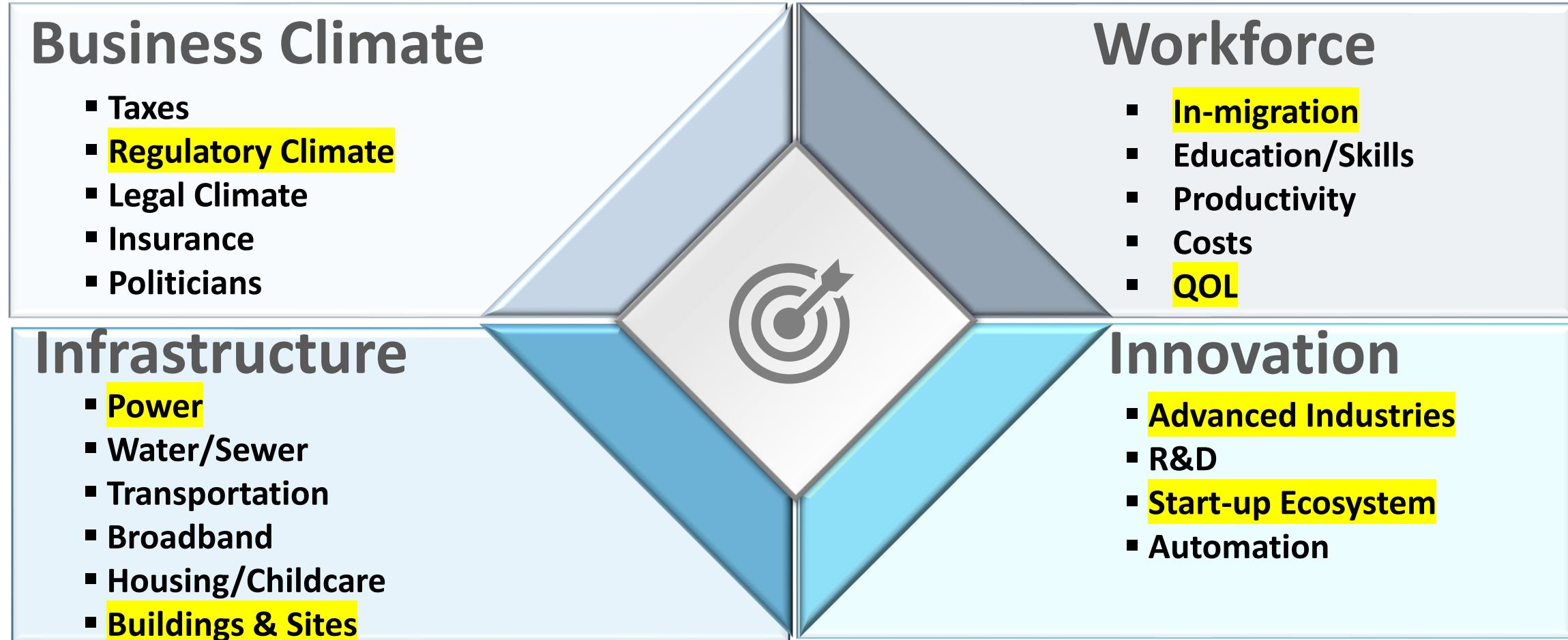
Presented by Ted Abernathy, February 2026

- Founded in 2013
- Working in 28 states for 64 Clients
- Statewide & Regional Competitiveness Strategies
- Locational Analysis
- Corporate Communications
- Trendspotting & Strategy

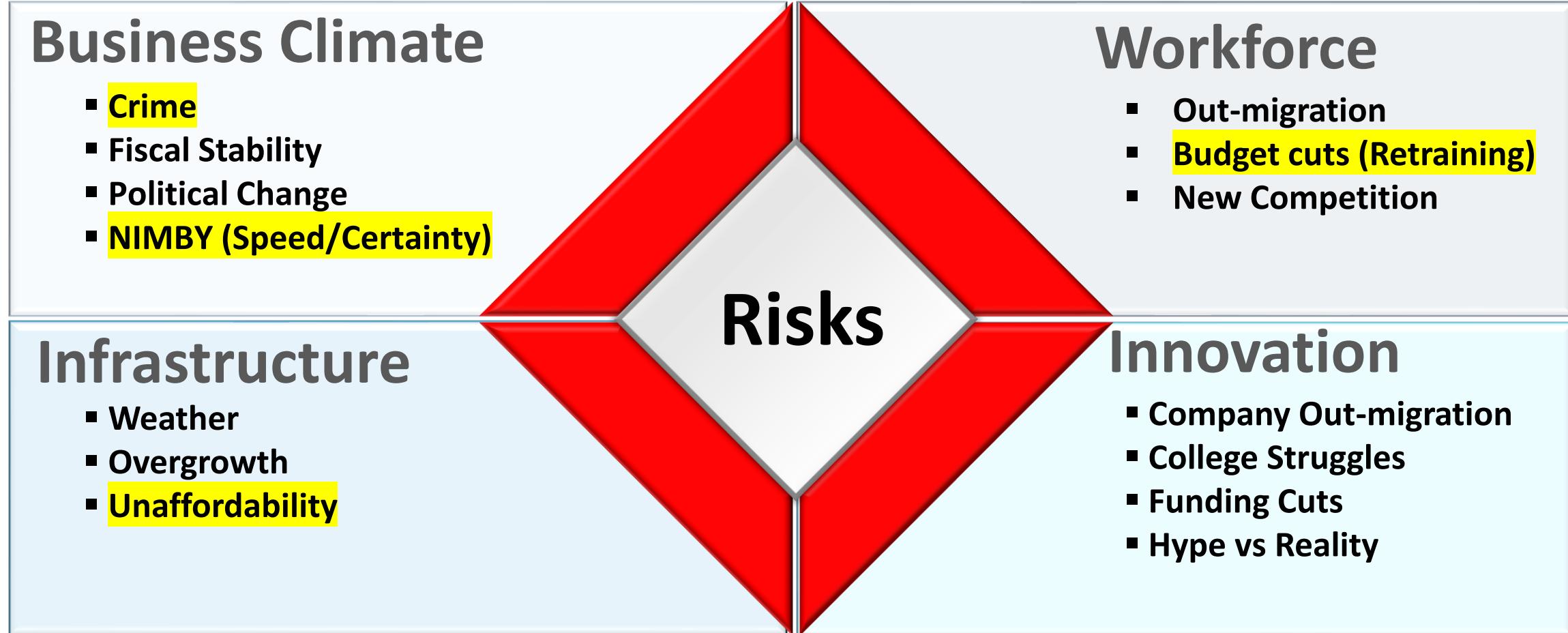
Economic Leadership



Place Based Competitiveness



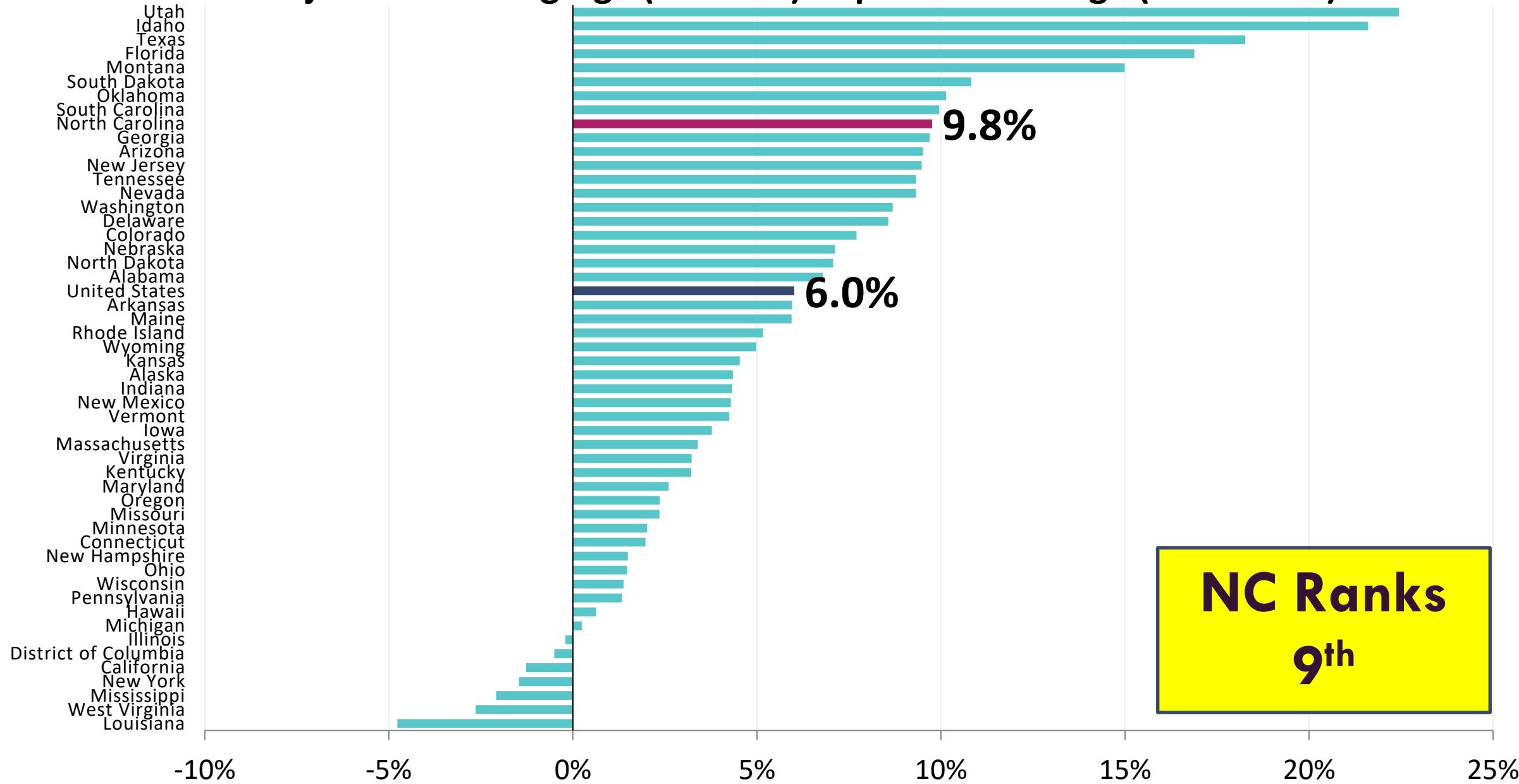
Place Based Competitiveness-(Hot Topics)



2025 Best States for Business Rankings

	Site Selection	CNBC	CEO Magazine	Business Facilities
1	Texas	North Carolina	Texas	Texas
2	North Carolina	Texas	Florida	Virginia
3	Georgia	Florida	Tennessee	North Carolina
4	Virginia	Virginia	North Carolina	Florida
5	Florida	Ohio	Georgia	Tennessee
6	Ohio	Michigan	Indiana	Georgia
7	Illinois	Georgia	Utah	Indiana
8	Indiana	Tennessee	Nevada	Utah
9	Arizona	Indiana	Virginia	Arizona
10	Colorado	Minnesota	Arizona	South Carolina

Projected Working Age (25 to 64) Population Change (2025-2035)



NC Ranks
9th



North Carolina

STATE OF TECHNOLOGY

2025 Industry Report + State Rankings

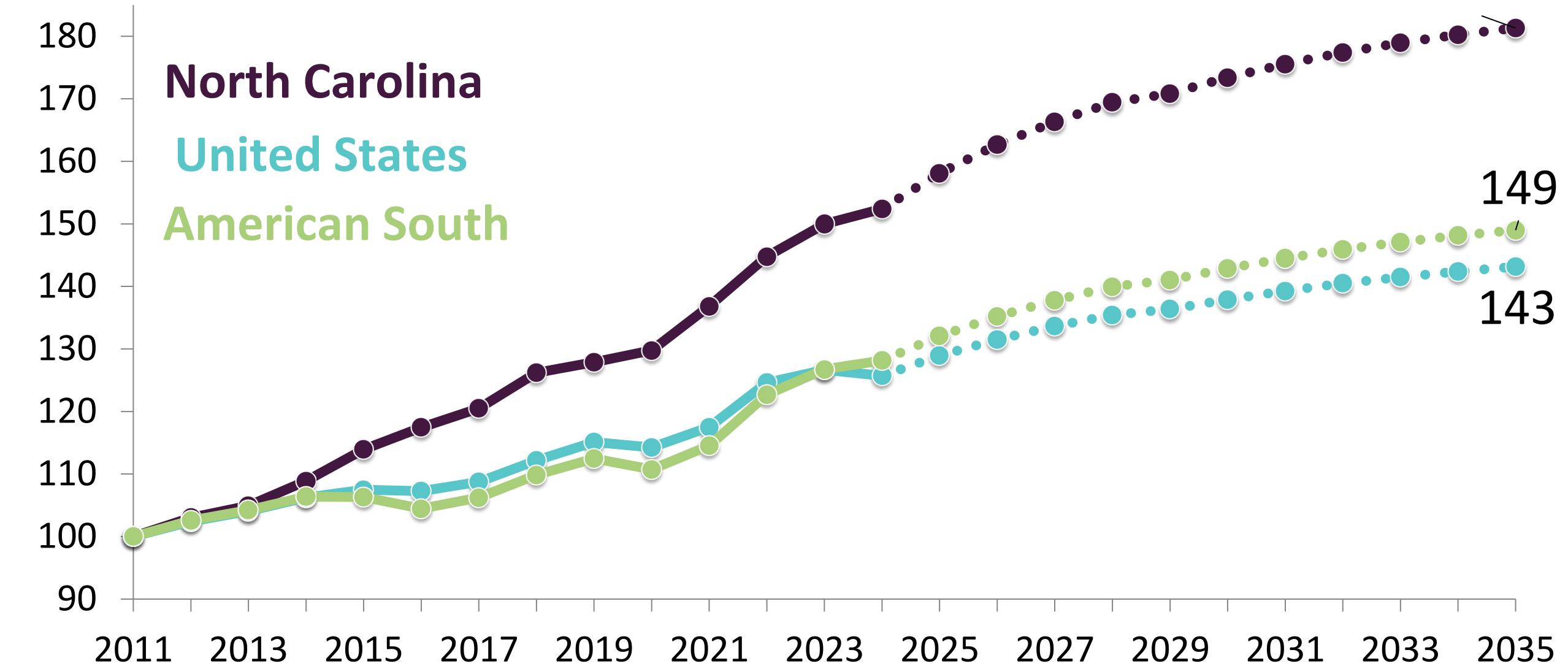


Measuring the Tech Sector Methodology

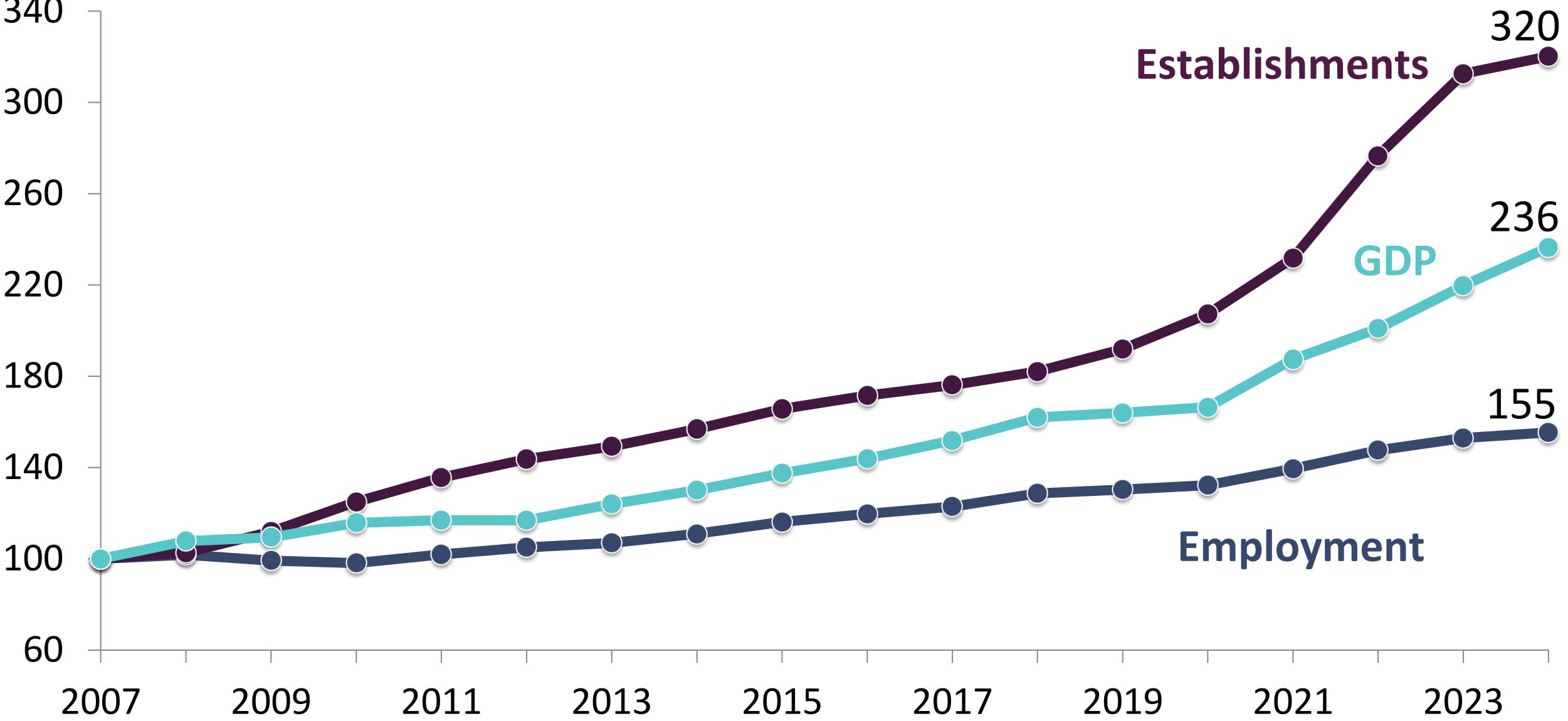
- Data from Lightcast, based on Bureau of Labor Statistics (BLS) Quarterly Census of Employment and Wages
- 86 separate 6-digit NAICS code sectors to characterize the Total Technology Sector
- Total Technology Sector further broken down into four sub-categories:
 - Energy Technology
 - Environmental Technology
 - Life Sciences
 - IT, Telecomms, Hardware, and Software (Tech Core)
- 85 distinct 5-digit SOC codes grouped to form Tech Occupations



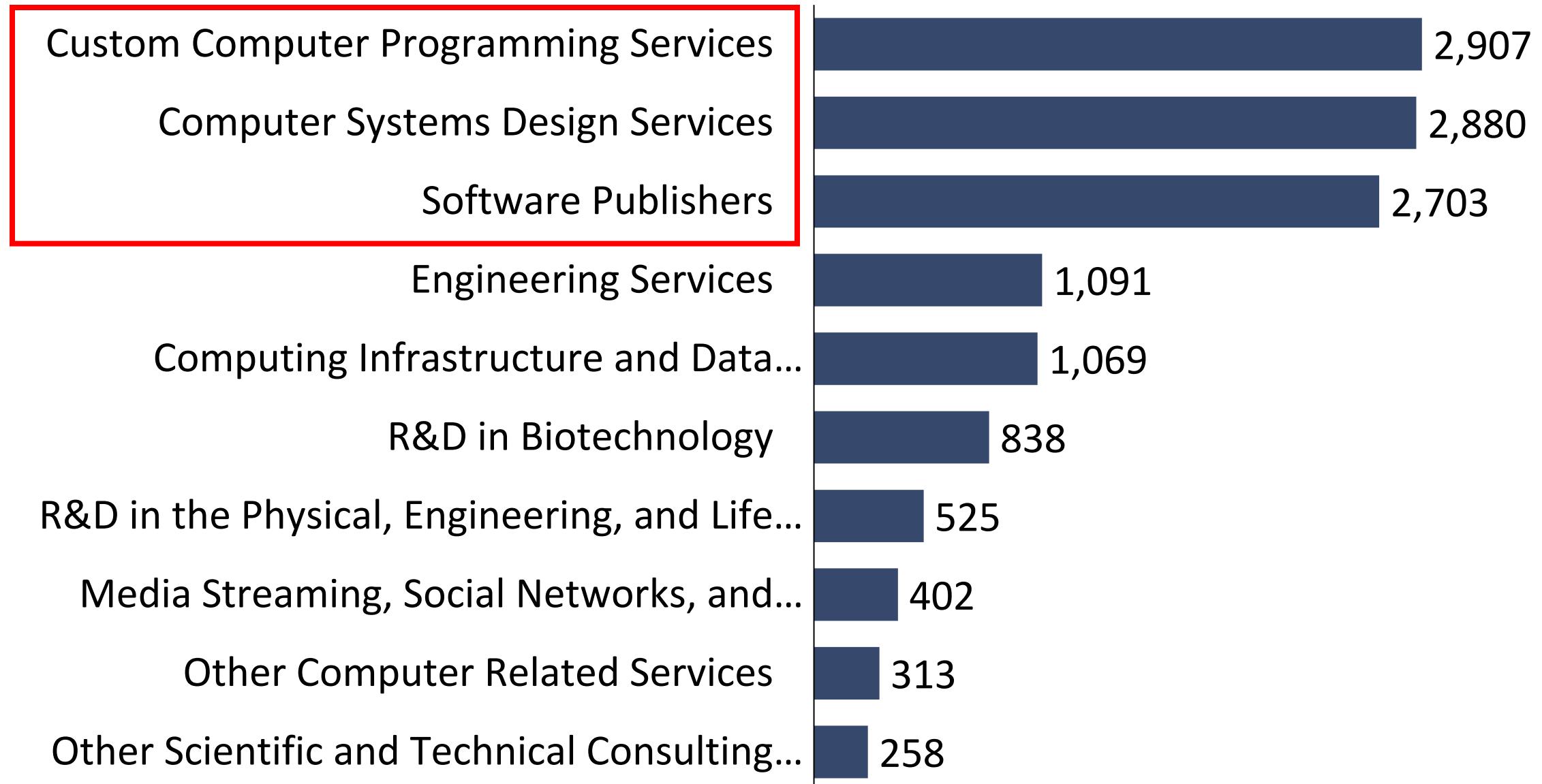
Tech Industry Employment Trends



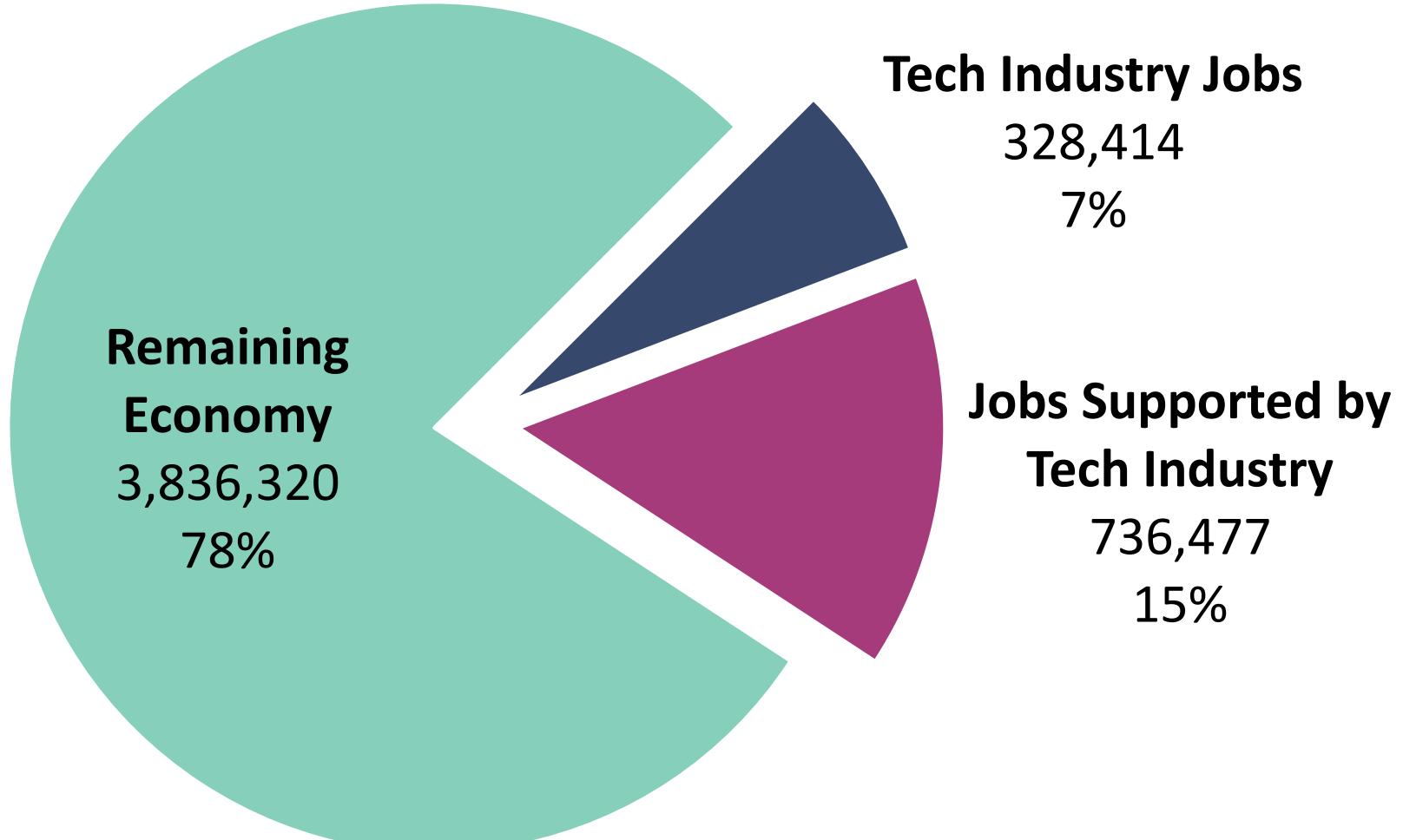
North Carolina Tech Industry Growth Metrics



NC Tech Industry Top Establishment Change, 2019 -2024



Tech's Contribution to North Carolina's Economy- 22%



12 Years Ago, Tech was 18%

North Carolina Tech Industry Summary Statistics

Indicator	Technology Industry	State Total	State Total Percentage
Employees	328,410	4,901,210	6.7%
Establishments	35,170	376,580	9.3%
Wages (millions)	\$44,840	\$371,790	12.1%

12 Years Ago, There were 220,700 Tech Industry Workers

Source: EL calculations based on Lightcast 2025.4

North Carolina Tech Industry by Sub-Categories

Technology Categories	Employment, 2024	Employment Change, 2023-2024	Employment Change, 2019-2024
Energy Tech	14,756	0.4%	10.7%
Enviro Tech	24,879	6.7%	-4.7%
Life Sciences	112,690	2.2%	25.3%
IT	176,089	0.7%	20.5%
TOTAL TECH	328,414	1.6%	19.2%

Source: EL calculations based on Lightcast 2025.4

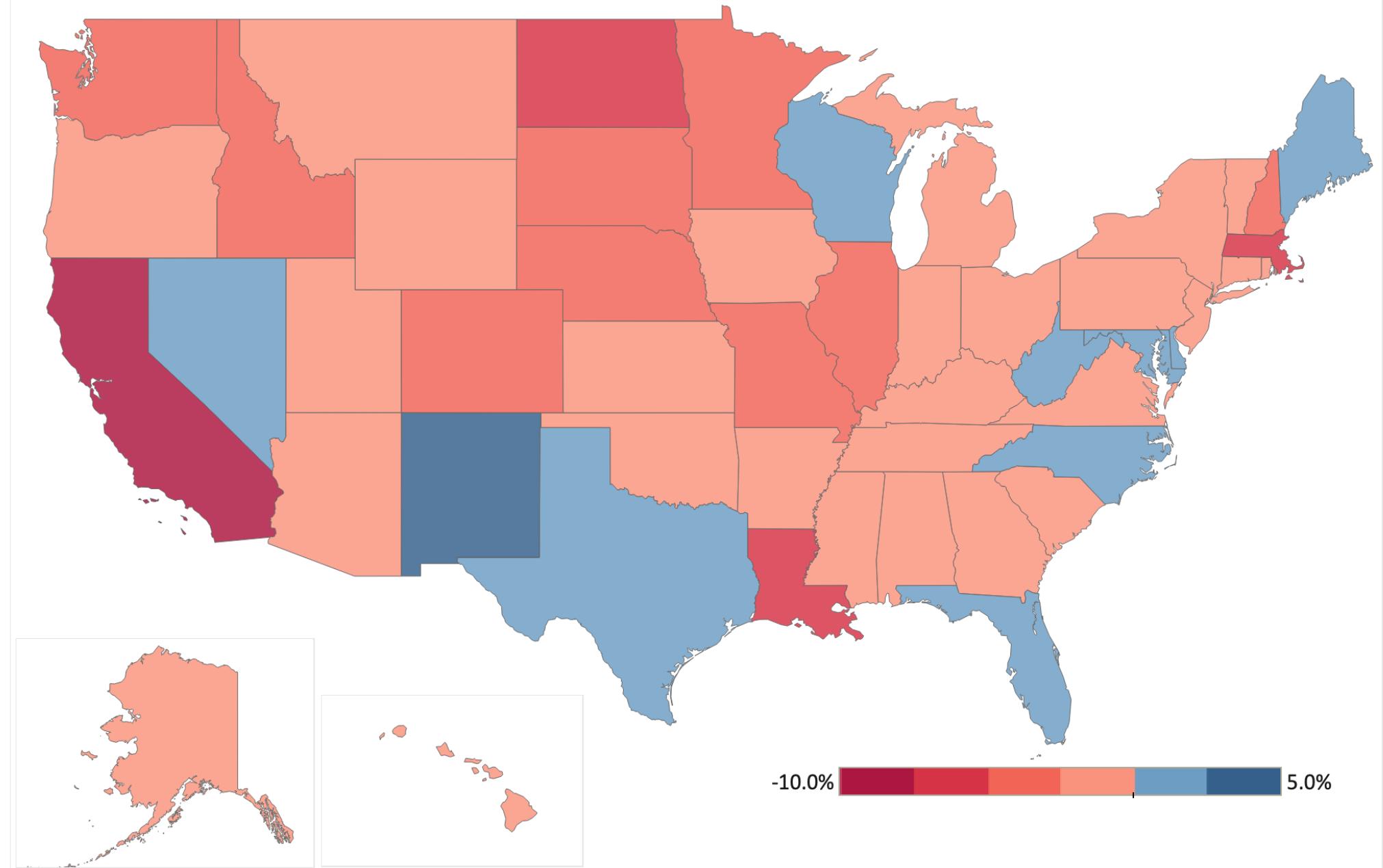
North Carolina Tech Industry by Sub-Categories

Technology Categories	Employment, 2024	Employment Change, 2023-2024	Employment Change, 2019-2024
Energy Tech	14,756	0.4%	10.7%
Enviro Tech	24,879	6.7%	-4.7%
Life Sciences	112,690	2.2%	25.3%
IT	176,089	0.7%	20.5%
TOTAL TECH	328,414	1.6%	19.2%

Source: EL calculations based on Lightcast 2025.4

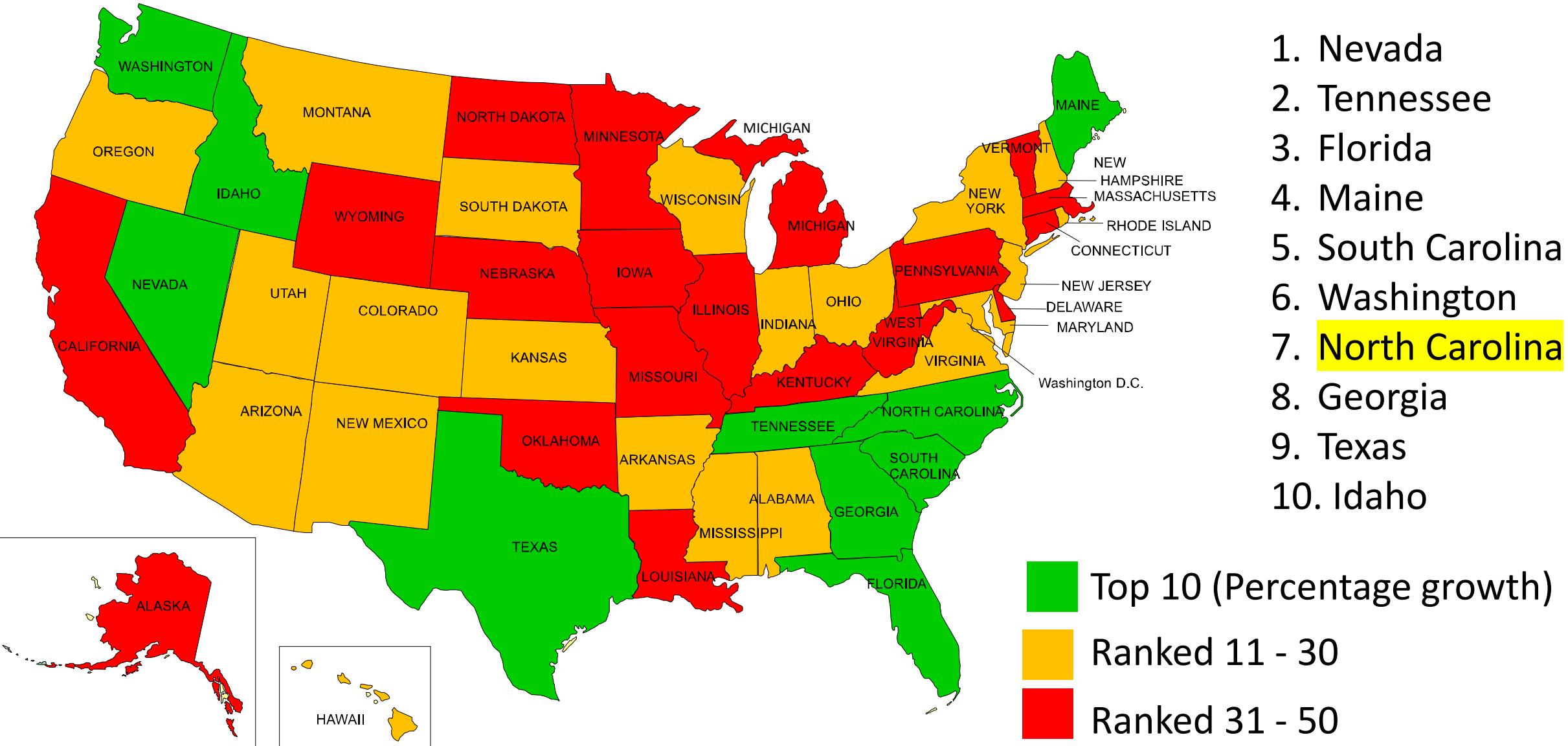


IT Employment Change, 2023-2024



Source: EL calculations based on Lightcast 2025.4

Tech Industry Employment Change, 2019 - 2024



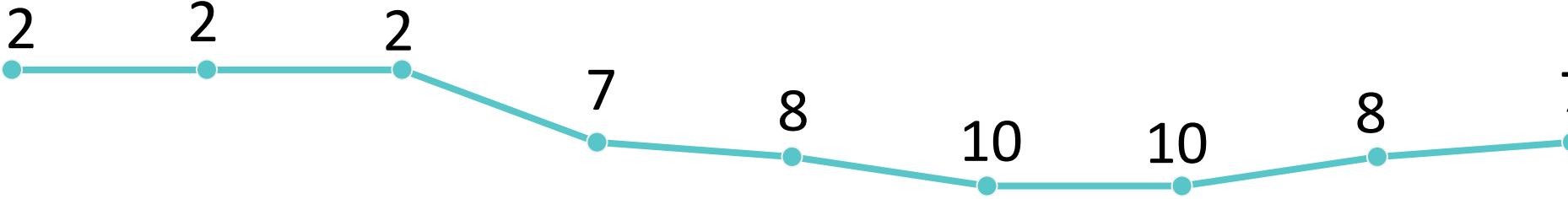
Total Tech 5-Year Job Change by Percentage and State Ranking

5-Year Job Change

30%
25%
20%
15%
10%
5%
0%

2011-2016
2012-2017
2013-2018
2014-2019
2015-2020
2016-2021
2017-2022
2018-2023
2019-2024

0
10
20
30
40
50



North Carolina Tech Industry by Output Groups

Output Group	Employment, 2024	Employment Change, 2023-2024	Employment Change, 2019-2024
Tech Services	262,269	2.0%	25.3%
Tech Manufacturing	66,145	0.0%	-0.1%
TOTAL TECH	328,414	1.6%	19.2%

12 Years Ago, There were 64,585 Tech Manufacturing Workers

North Carolina Average Annual Earnings by Subgroups

Sub-Categories	North Carolina	North Carolina (Purchasing Power)	National Average
Energy Tech	\$154,400	\$164,000	\$184,700
Environmental Tech	\$91,400	\$97,100	\$101,700
Life Sciences	\$142,800	\$151,700	\$161,900
IT	\$159,000	\$168,900	\$205,000
Output Group	North Carolina	North Carolina (Purchasing Power)	National Average
Tech Services	\$148,100	\$157,400	\$183,900
Tech Manufacturing	\$148,100	\$157,300	\$169,900
TOTAL TECH INDUSTRY	\$148,100	\$157,400	\$181,600

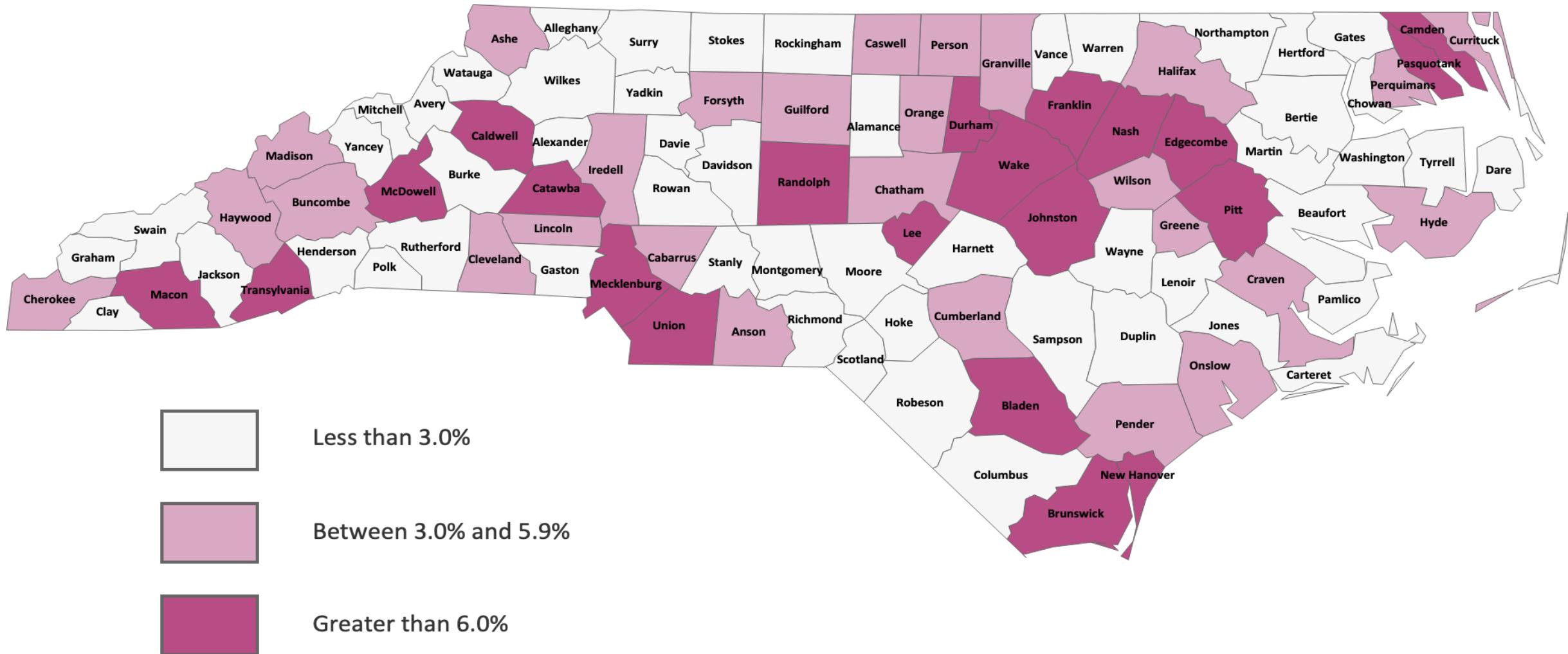
Source: EL calculations based on Lightcast 2025.4 and BEA (2025)

Tech Industry Super Sub-Industries

Sub-Industries	2024 Employment	Employment Change (2019-2024)	Concentration
Software	106,228	37%	1.09
Engineering, Environmental, & Clean Tech	46,795	14%	0.99
Internet, Social Media, & Telecom	44,188	4%	0.94
R&D and Testing	42,323	30%	1.07
Life Sciences Manufacturing	34,510	14%	1.48
Electronics Hardware	25,674	-3%	0.97
Remediation and Waste Management	13,941	14%	0.86
Other Energy and Power Generation	13,750	7%	0.44
Renewable Energy	1,006	87%	0.87
TOTAL TECH SECTOR	328,414	19%	1.00

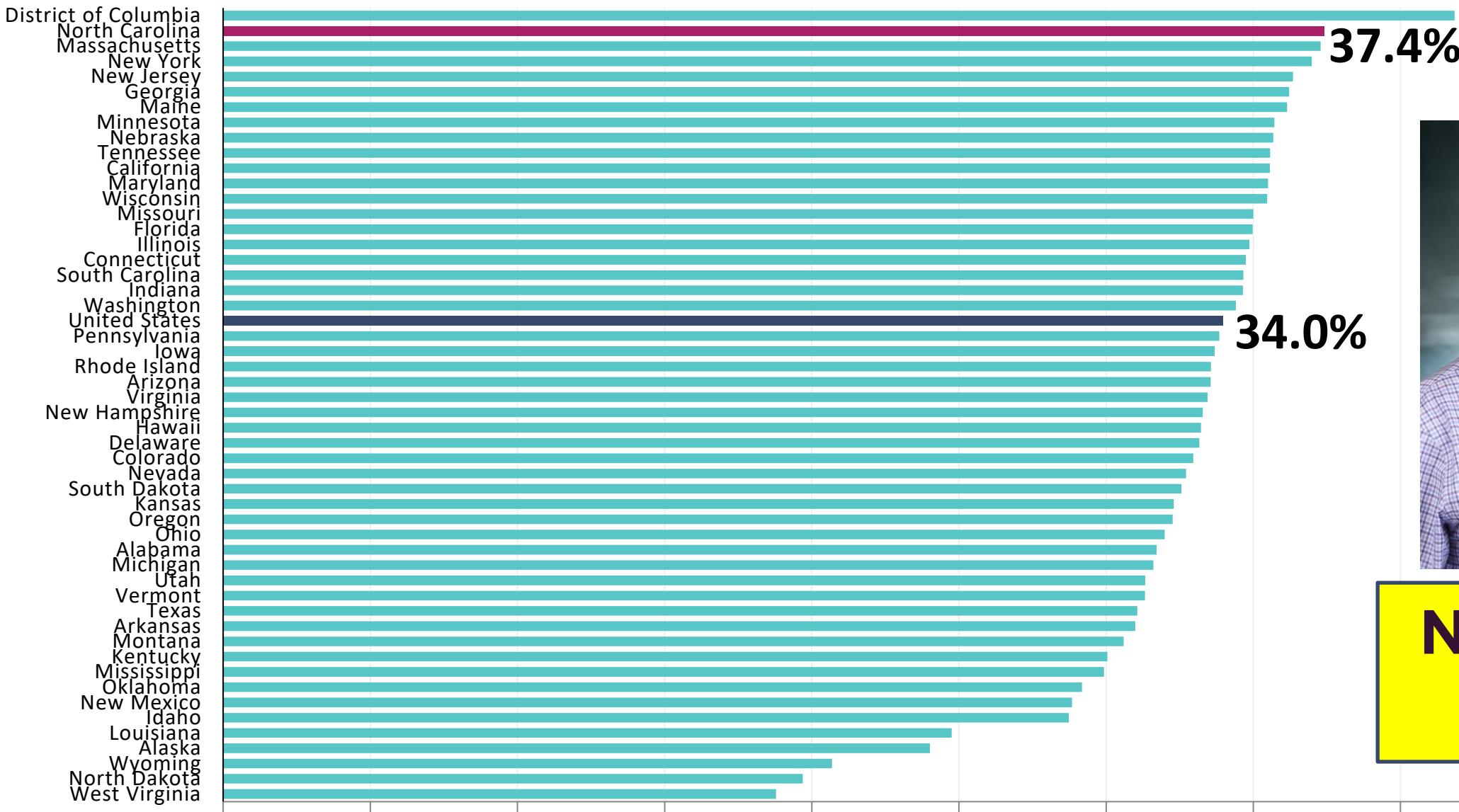
Source: EL calculations based on Lightcast 2025.4

Tech Industry Jobs as a Percentage of Total Jobs, 2024



Source: EL calculations based on Lightcast 2025.4

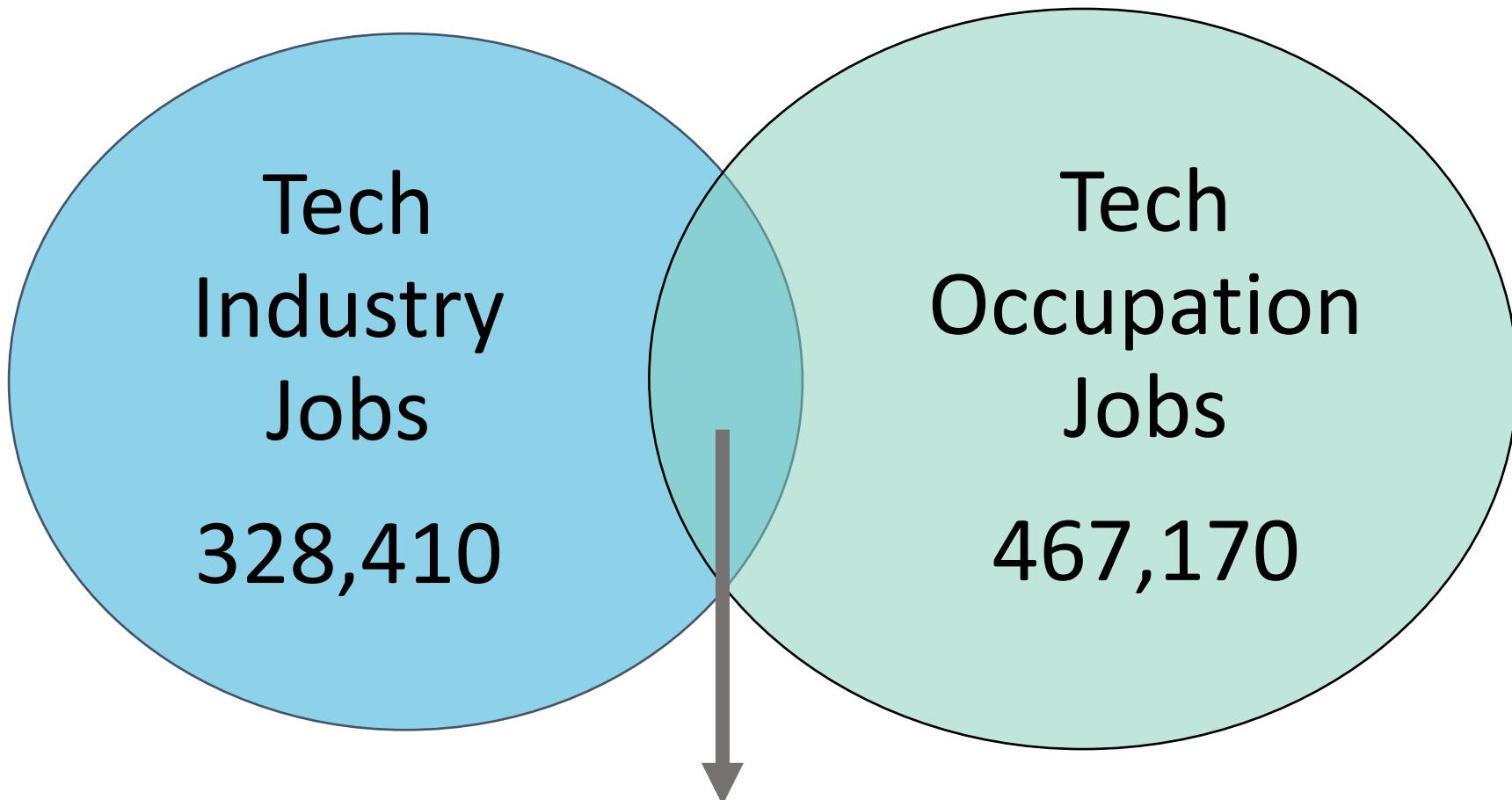
Percentage of Women in the Tech Industry Workforce, 2024



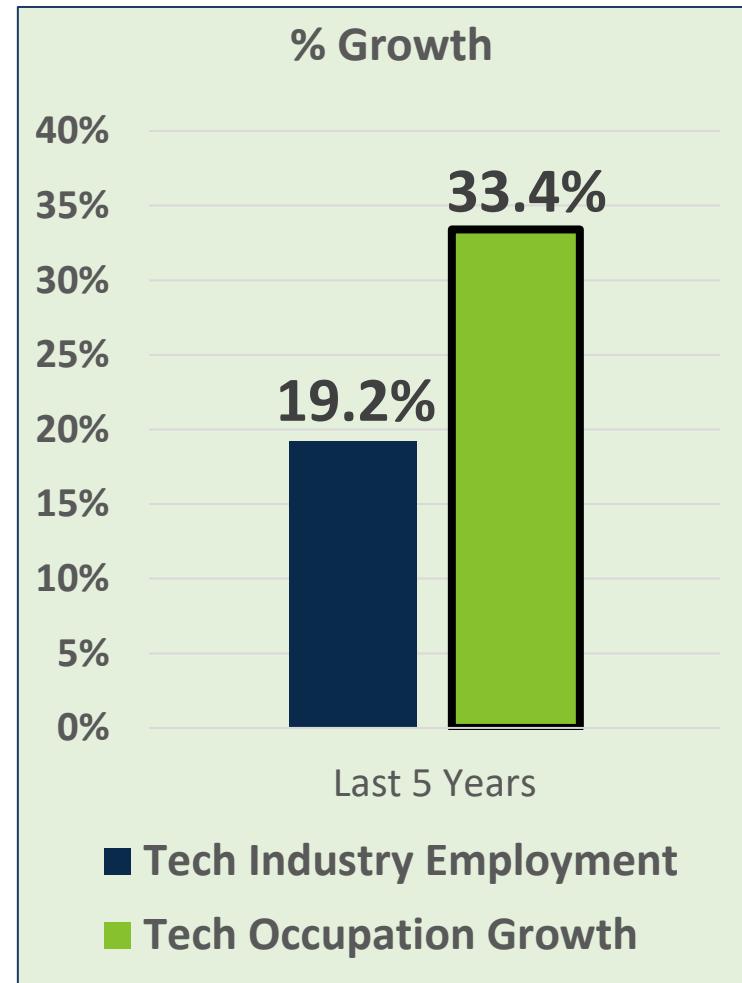
North Carolina Tech Industry State Rankings

Metric	Value	Rank
Total Tech Industry Employment Concentration (2024)	1.00	17
Total Tech Industry Job Change (2019-2024)	19.2%	7
Expected Total Tech Industry Job Change (2025-2030)	9.7%	9
Avg Earnings for Total Tech Industry with Purchasing Power (2024)	\$157,356	18
Percentage of Women in the Total Tech Industry Workforce (2024)	37.4%	1

Staffing Patterns of Tech Industries and Tech Occupations

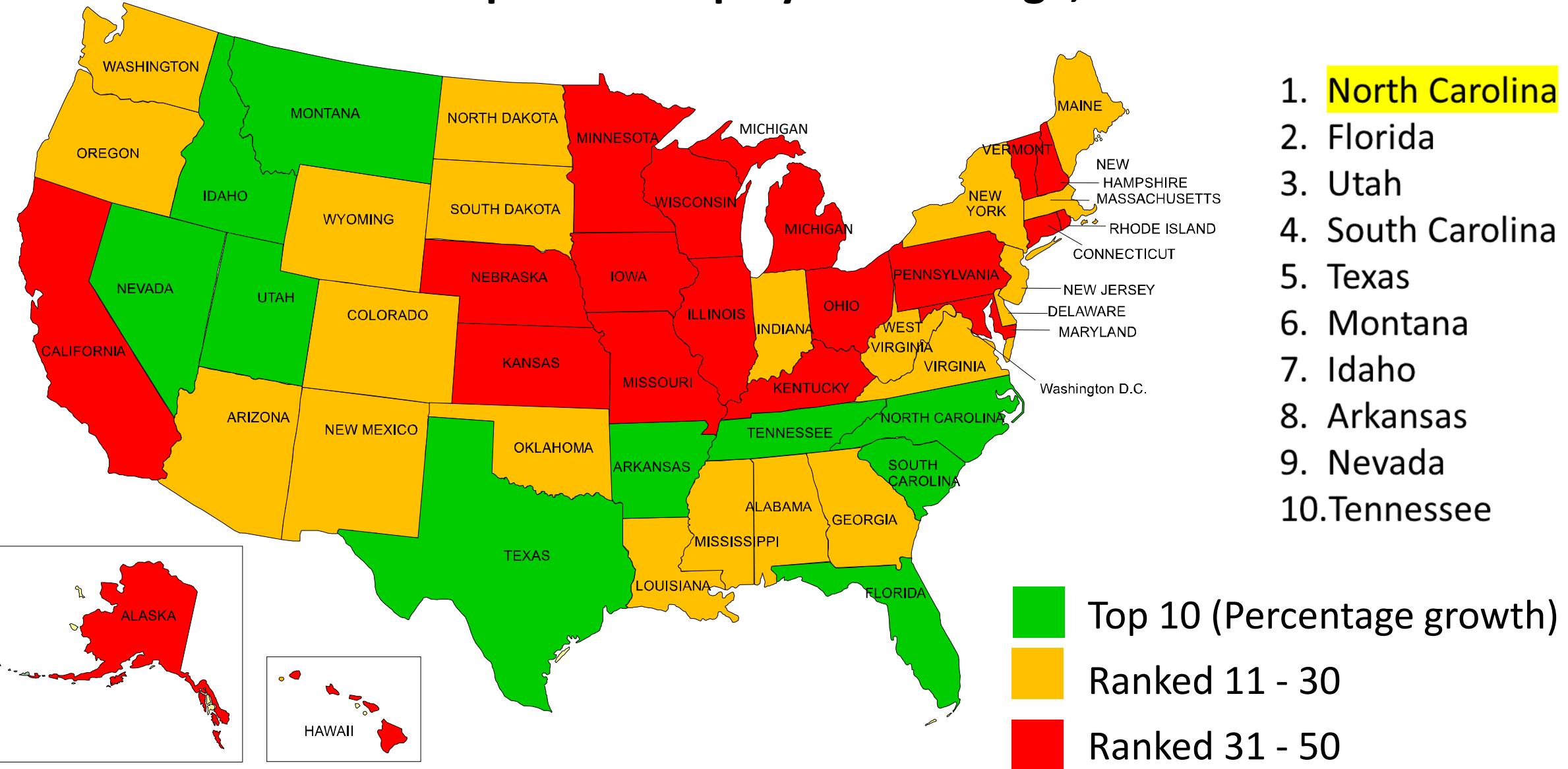


Only 34% of tech occupation jobs are employed in tech industries.



Source: EL calculations based on Lightcast 2025.4

Tech Occupations Employment Change, 2019 - 2024



Tech Occupations 5-Year Job Change by Percentage and State Ranking

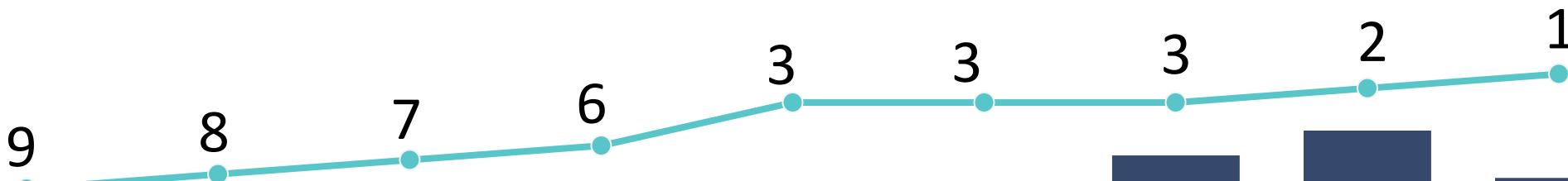
5-Year Job Change

40%
35%
30%
25%
20%
15%
10%
5%
0%

2011-2016
2012-2017
2013-2018
2014-2019
2015-2020
2016-2021
2017-2022
2018-2023
2019-2024

0
10
20
30
40
50

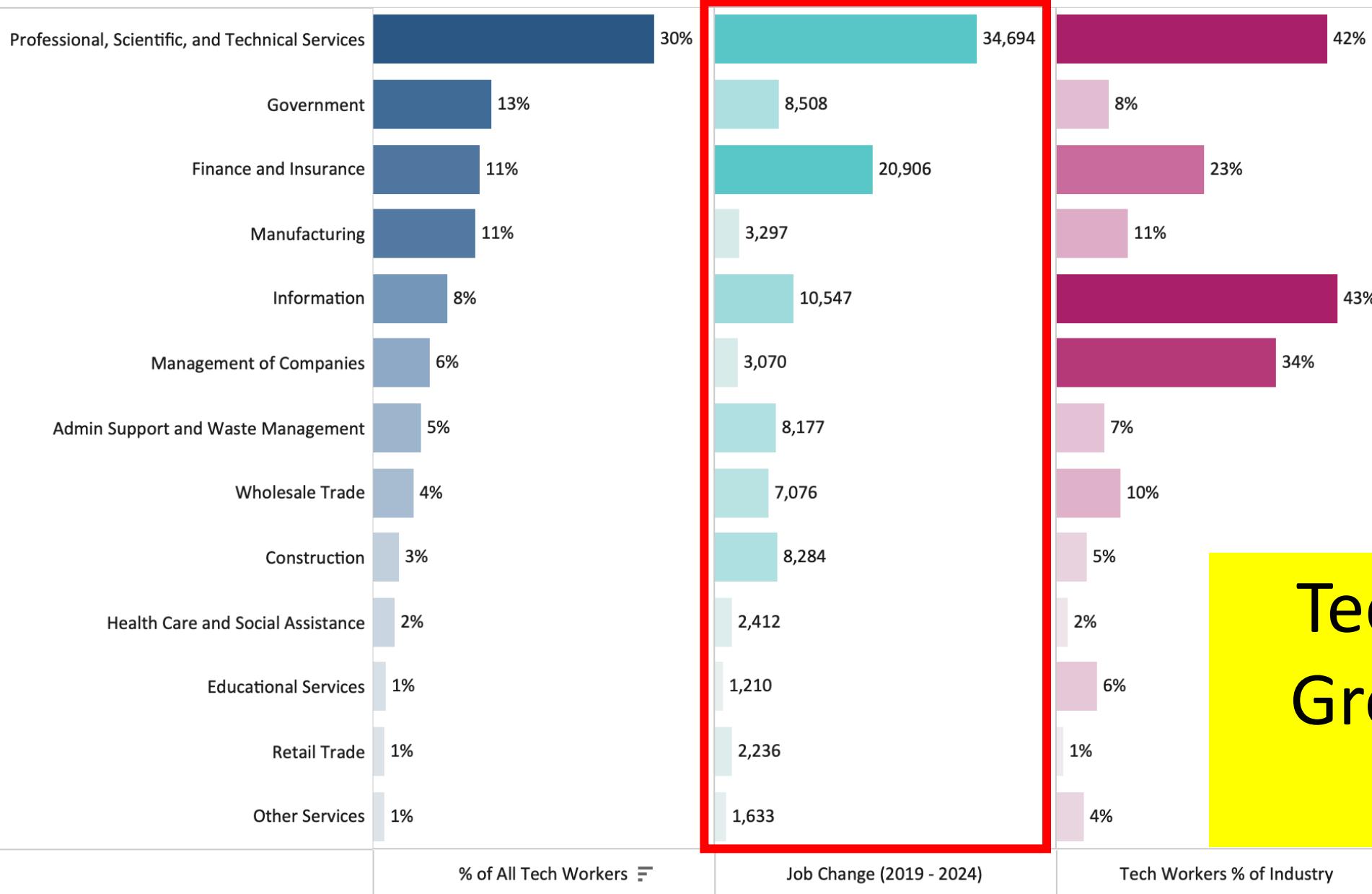
State Ranking



Top Tech Occupations

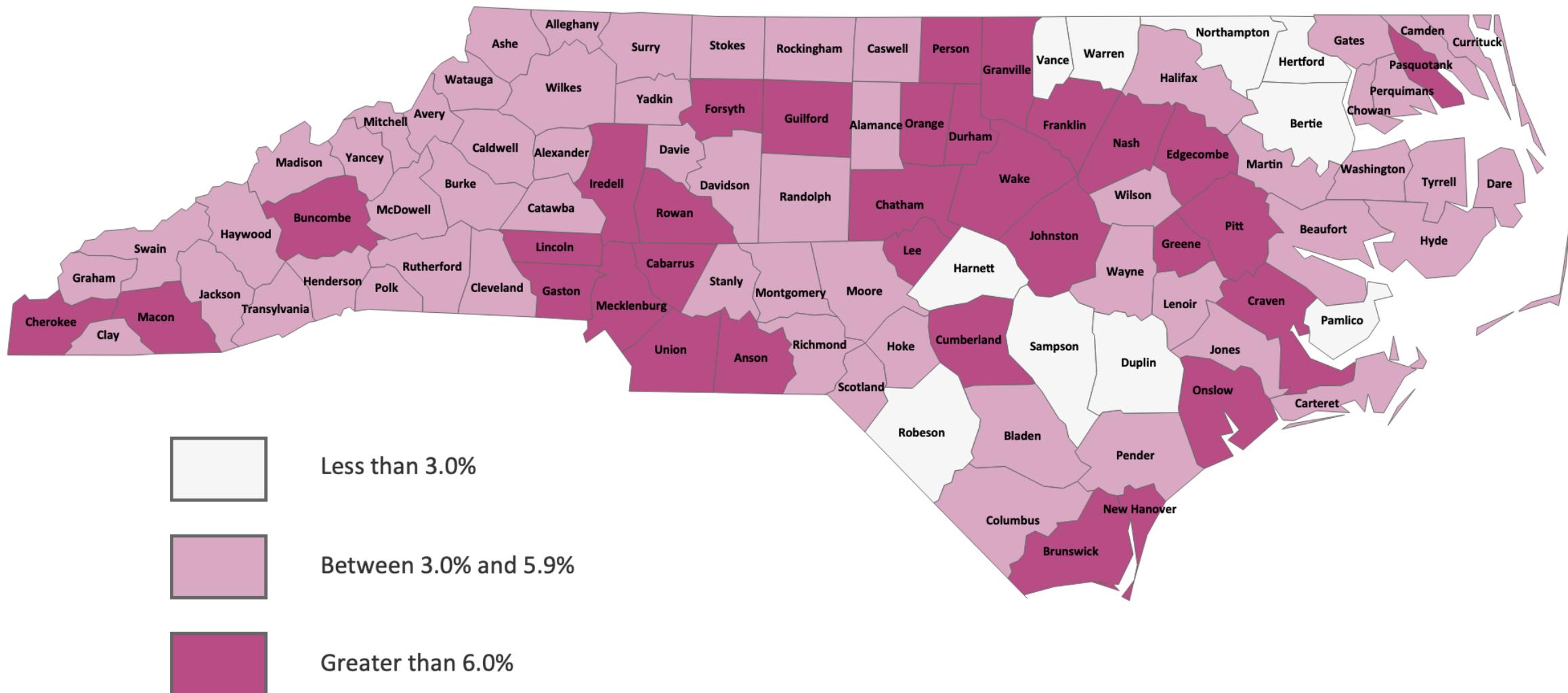
Occupation	2024 Employment	Employment Change (2019-2024)	Median Annual Wage
Software Developers	57,540	+49%	\$131,000
Market Research Analysts	29,980	+60%	\$77,360
Computer Systems Analysts	24,680	-6%	\$104,940
Computer and Information Systems Managers	24,020	+79%	\$167,540
Management Analysts	21,840	+18%	\$98,700
Computer User Support Specialists	21,260	-2%	\$58,660
Computer Occupations, All Other	13,570	+113%	\$106,250
Network and Computer Systems Administrators	12,570	+22%	\$97,590
Industrial Engineers	11,440	+26%	\$97,160
Financial and Investment Analysts	10,380	+17%	\$102,210

North Carolina's Top Industries Employing Tech Occupations, 2024



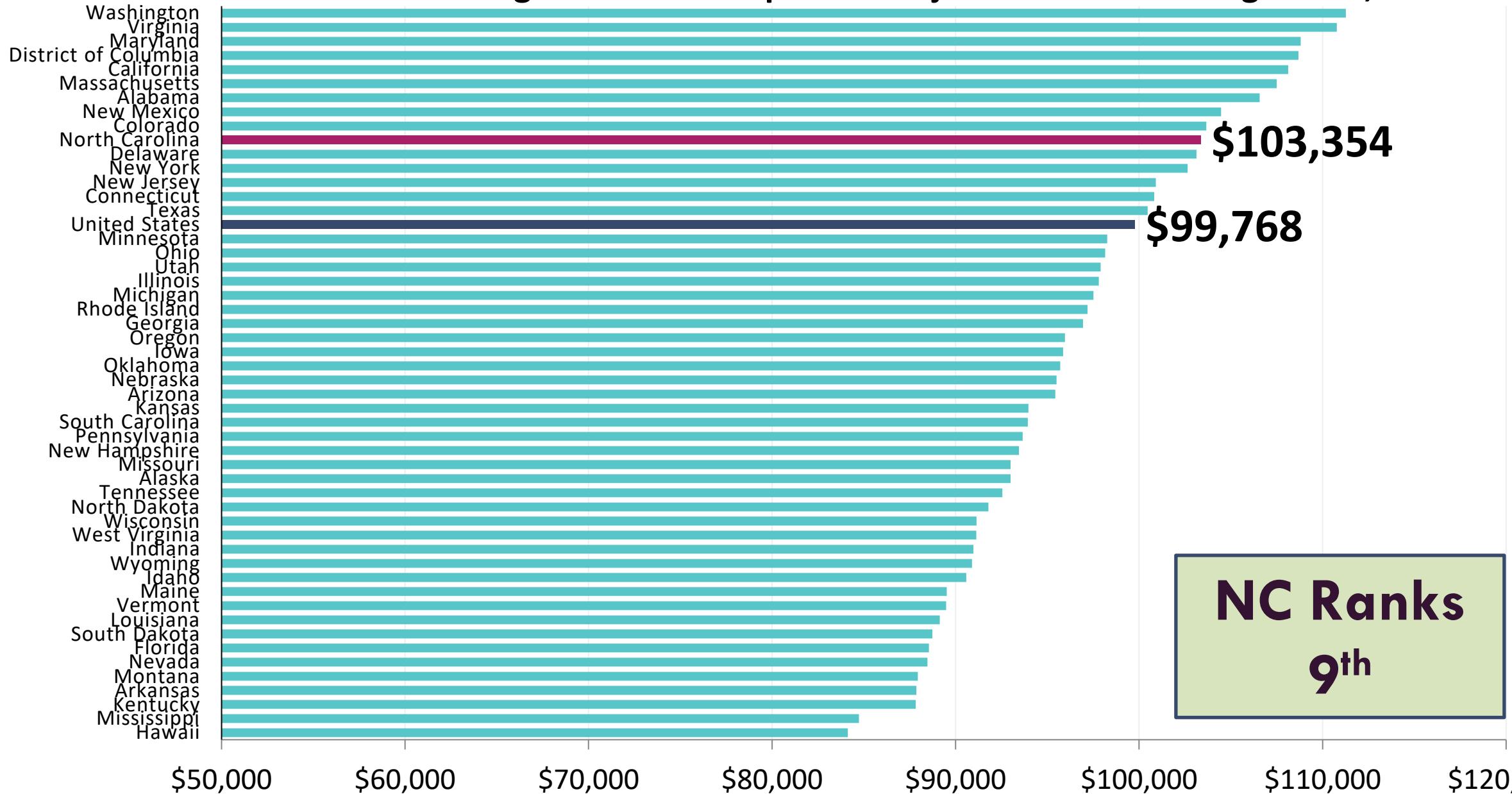
Tech Workers
Grew in Every
Industry

Tech Occupations as a Percentage of Total Jobs, 2024



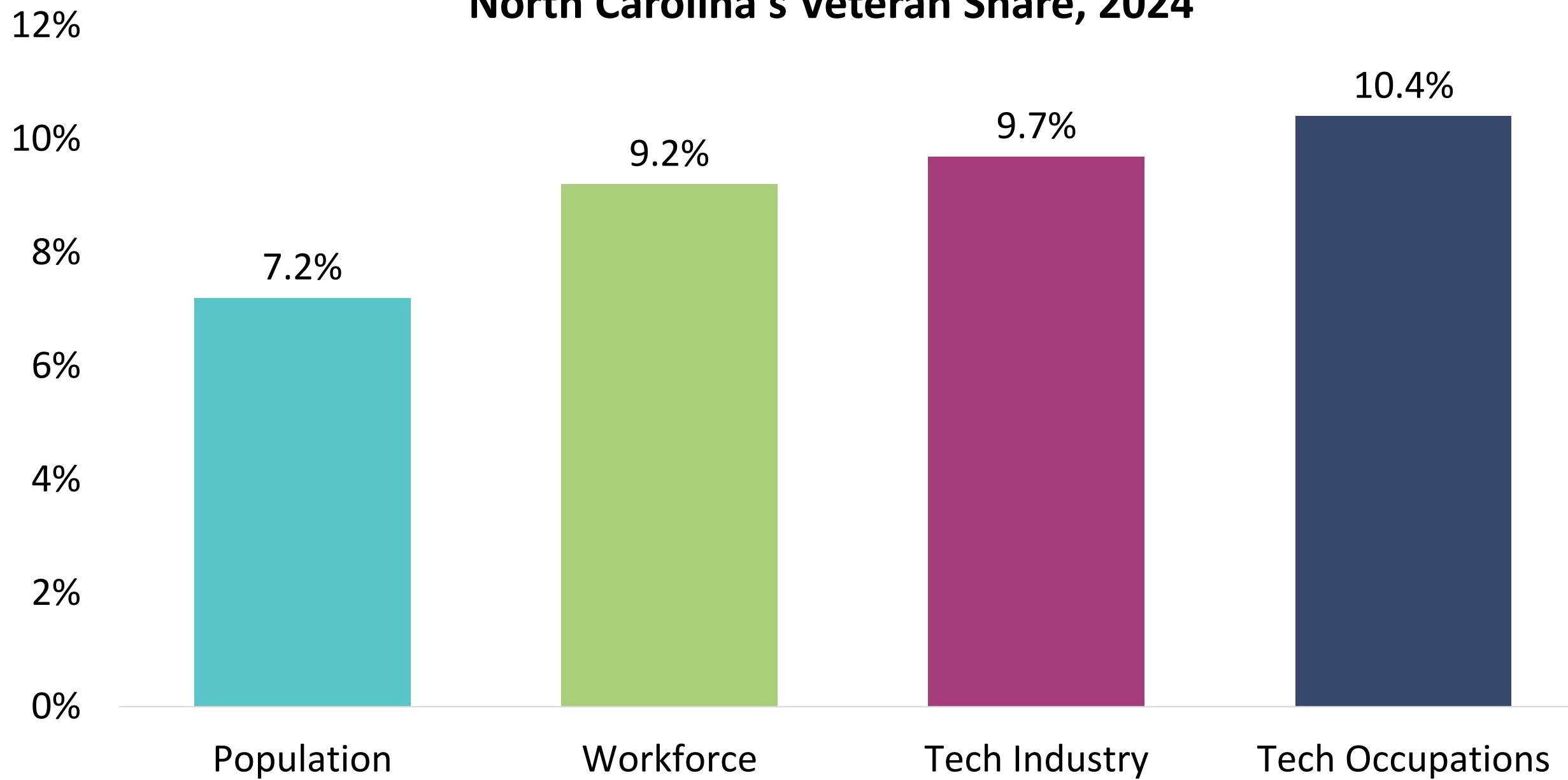
Source: EL calculations based on Lightcast 2025.4

Median Annual Earnings for Tech Occupations Adjusted for Purchasing Power, 2024

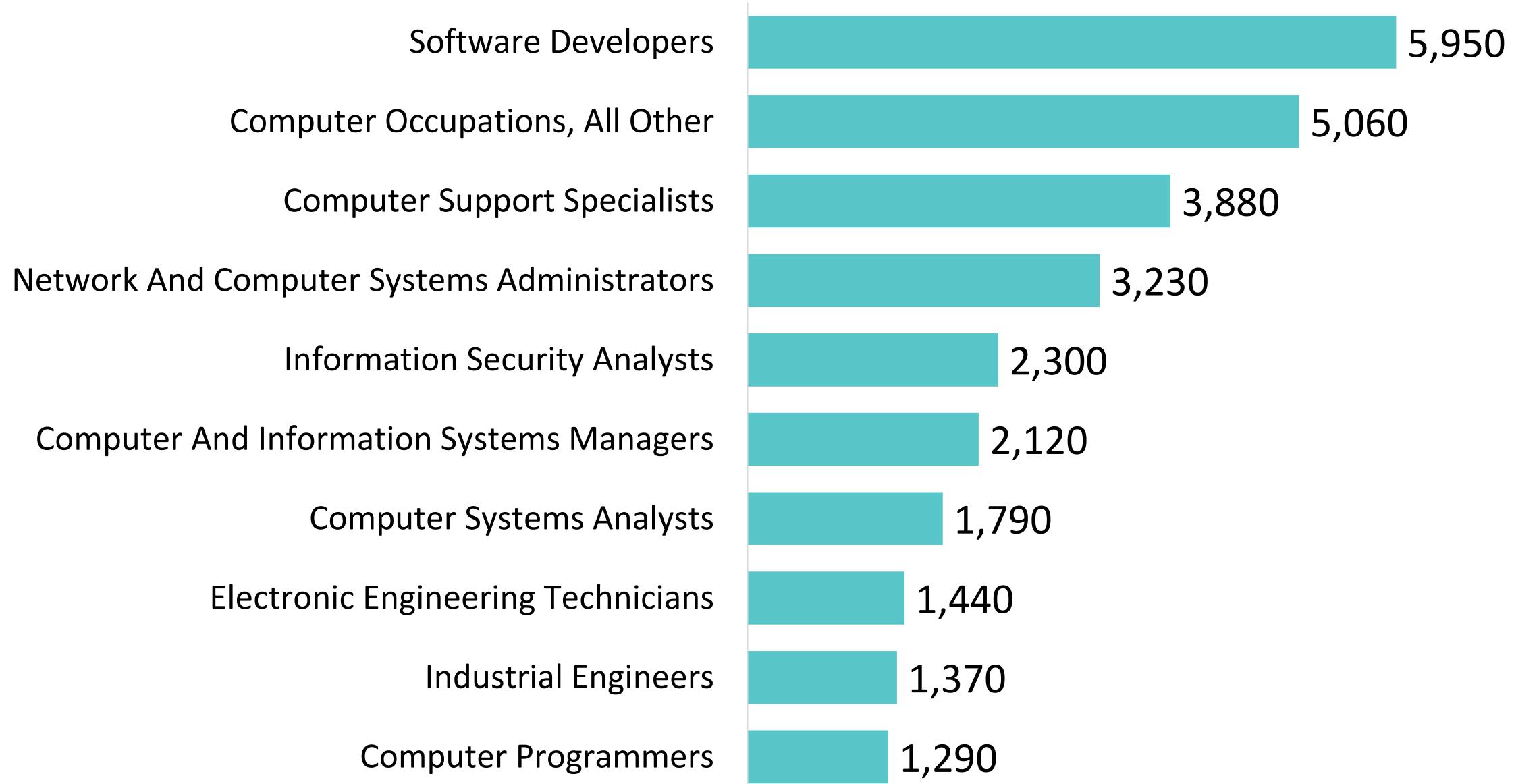


NC Ranks
9th

North Carolina's Veteran Share, 2024



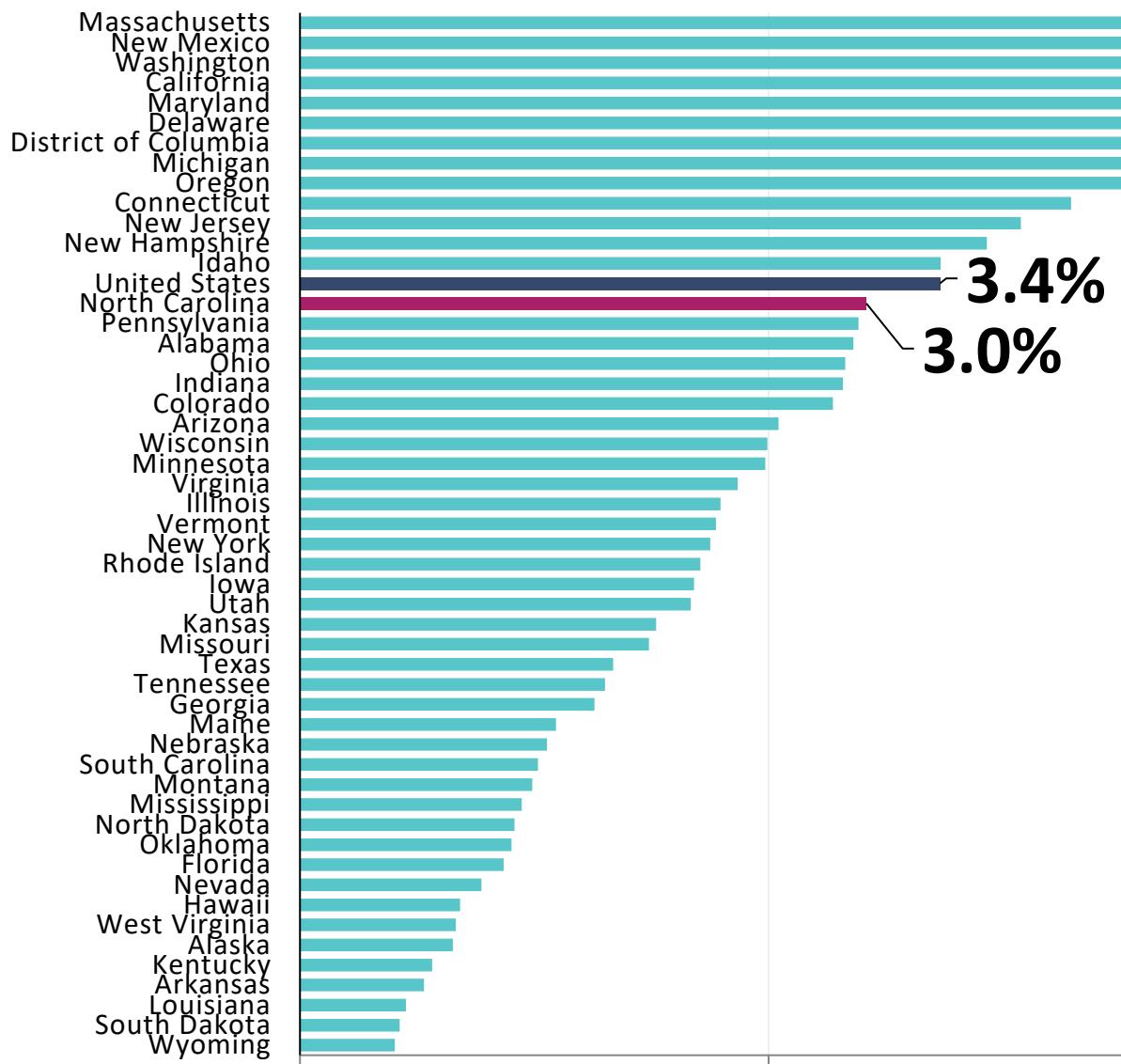
Veterans in Key Tech Occupations in North Carolina, 2024



THINGS TO CONSIDER!



Total R&D as a Percentage of GDP (2022)



Funding Source	NC Ranking
Federal	31 st
Business	15 th
Academic	6 th
Nonprofit	8 th
State	16 th
TOTAL R&D	13th

12 years ago NC was ranked 26th

0%

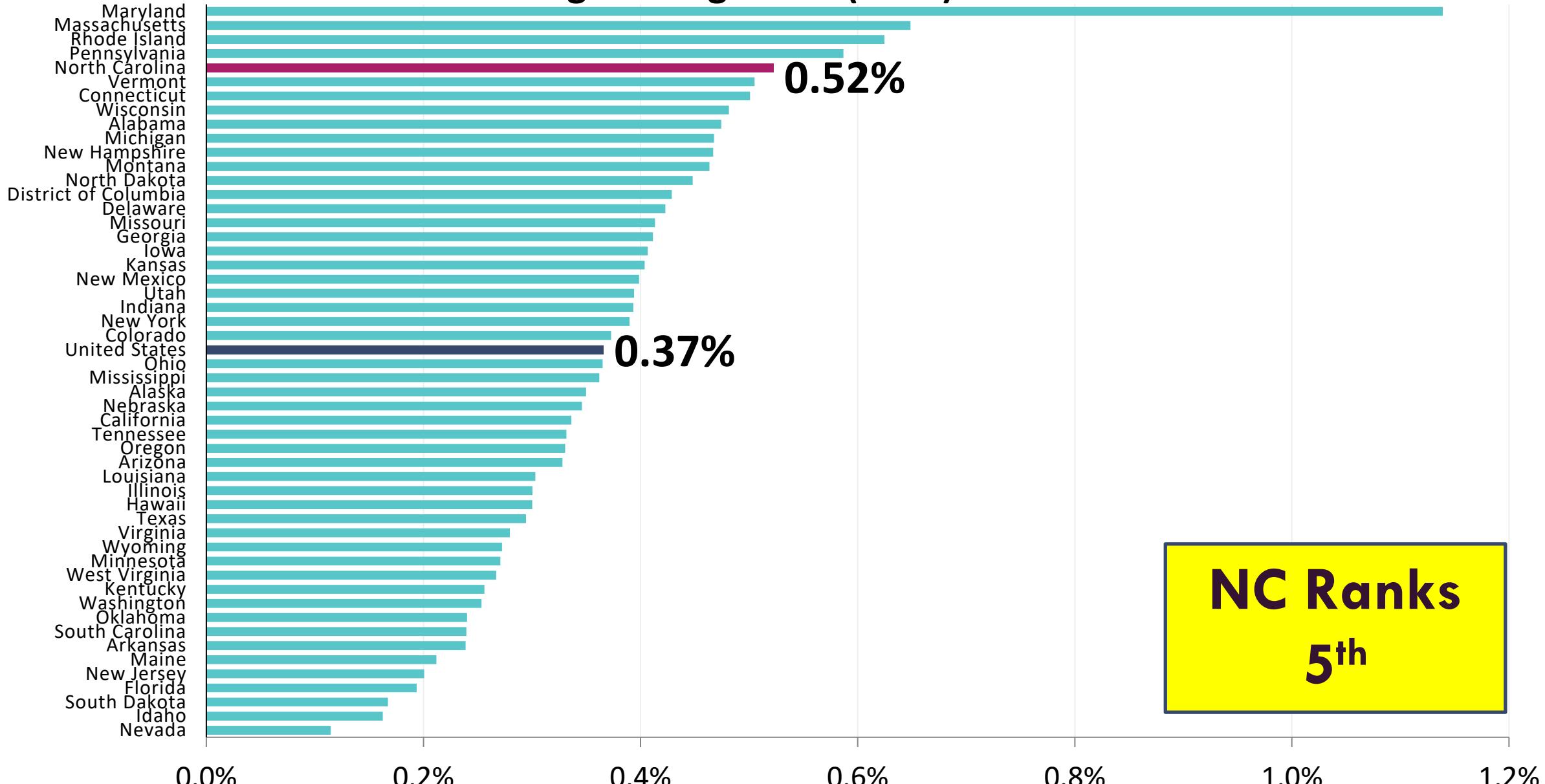
3%

5%

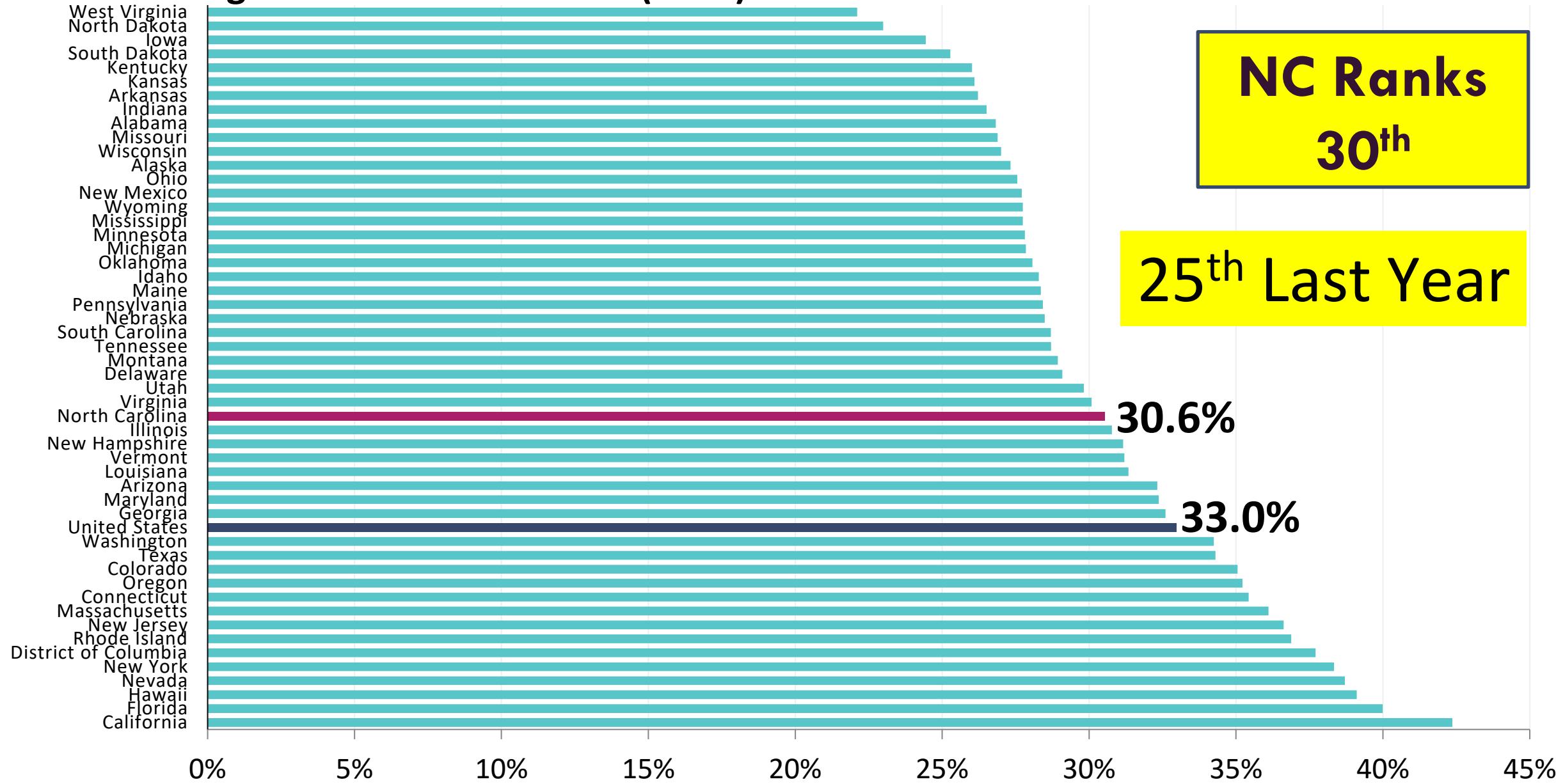
8%

10%

Higher Education R&D in Science & Engineering Fields (2023)



Share of Housing Burdened Households (2024)



NC Ranks
30th

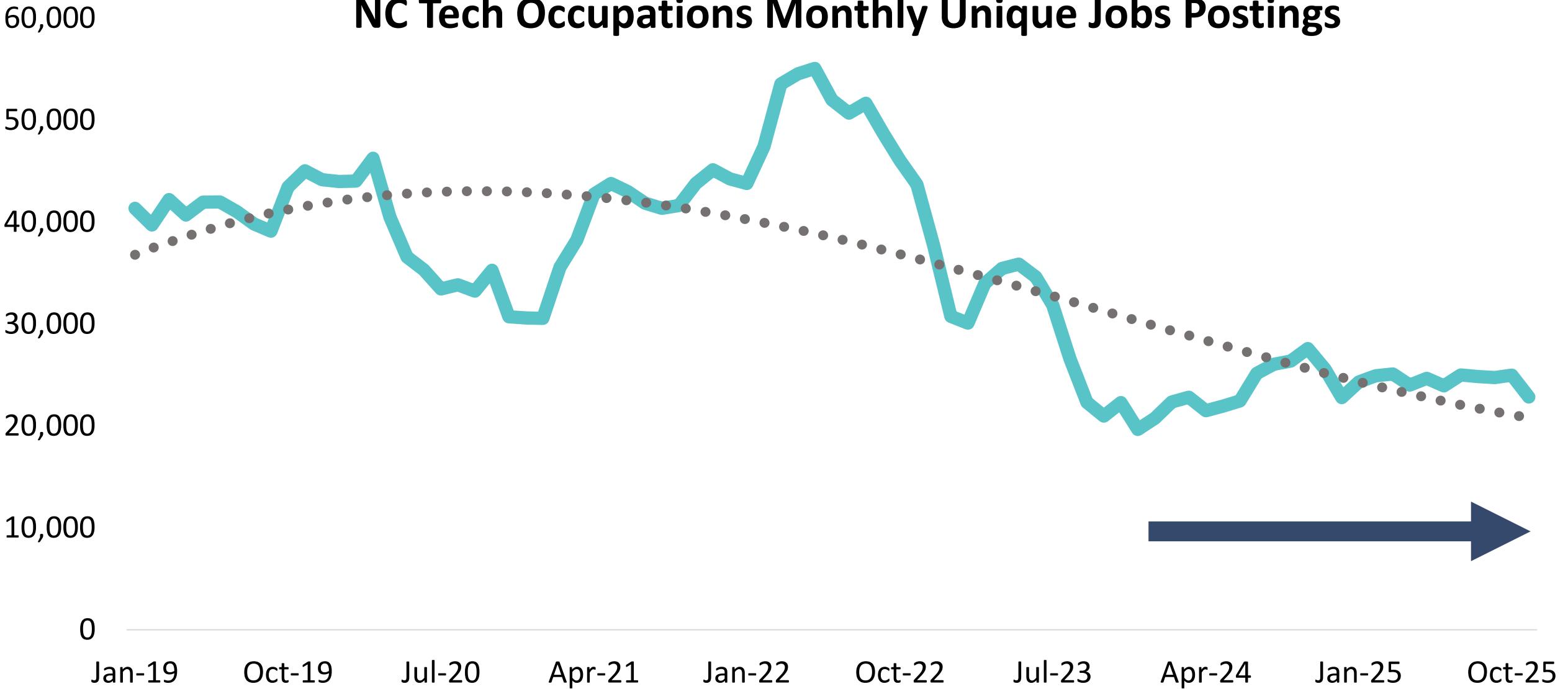
25th Last Year

30.6%

33.0%

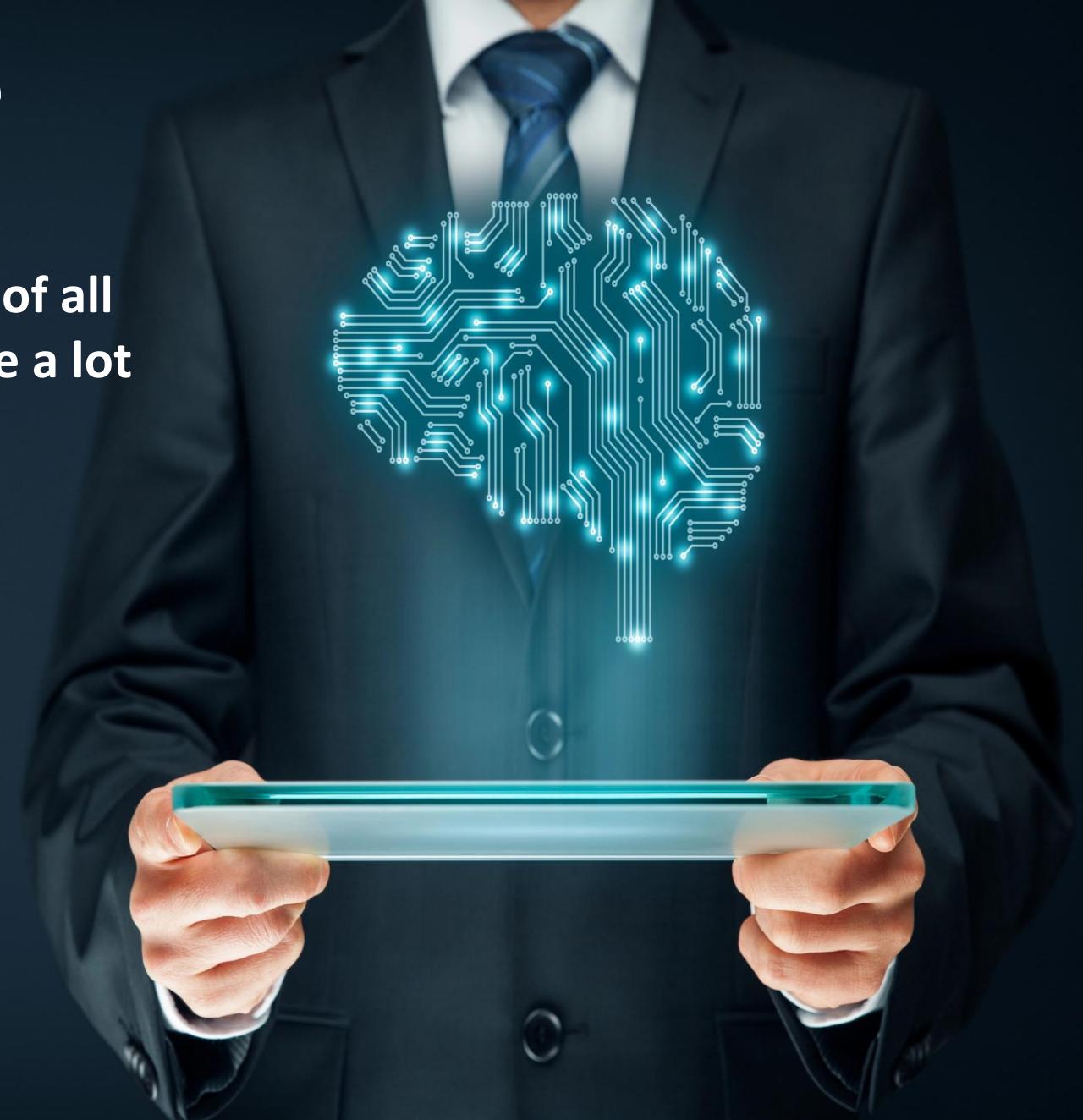
The future...

NC Tech Occupations Monthly Unique Jobs Postings



Artificial Intelligence

Ford CEO Jim Farley declared, “Artificial intelligence is going to replace literally half of all white-collar workers in the U.S. AI will leave a lot of white-collar people behind.”



Virginia **AI** Landscape Assessment

DECEMBER 2025

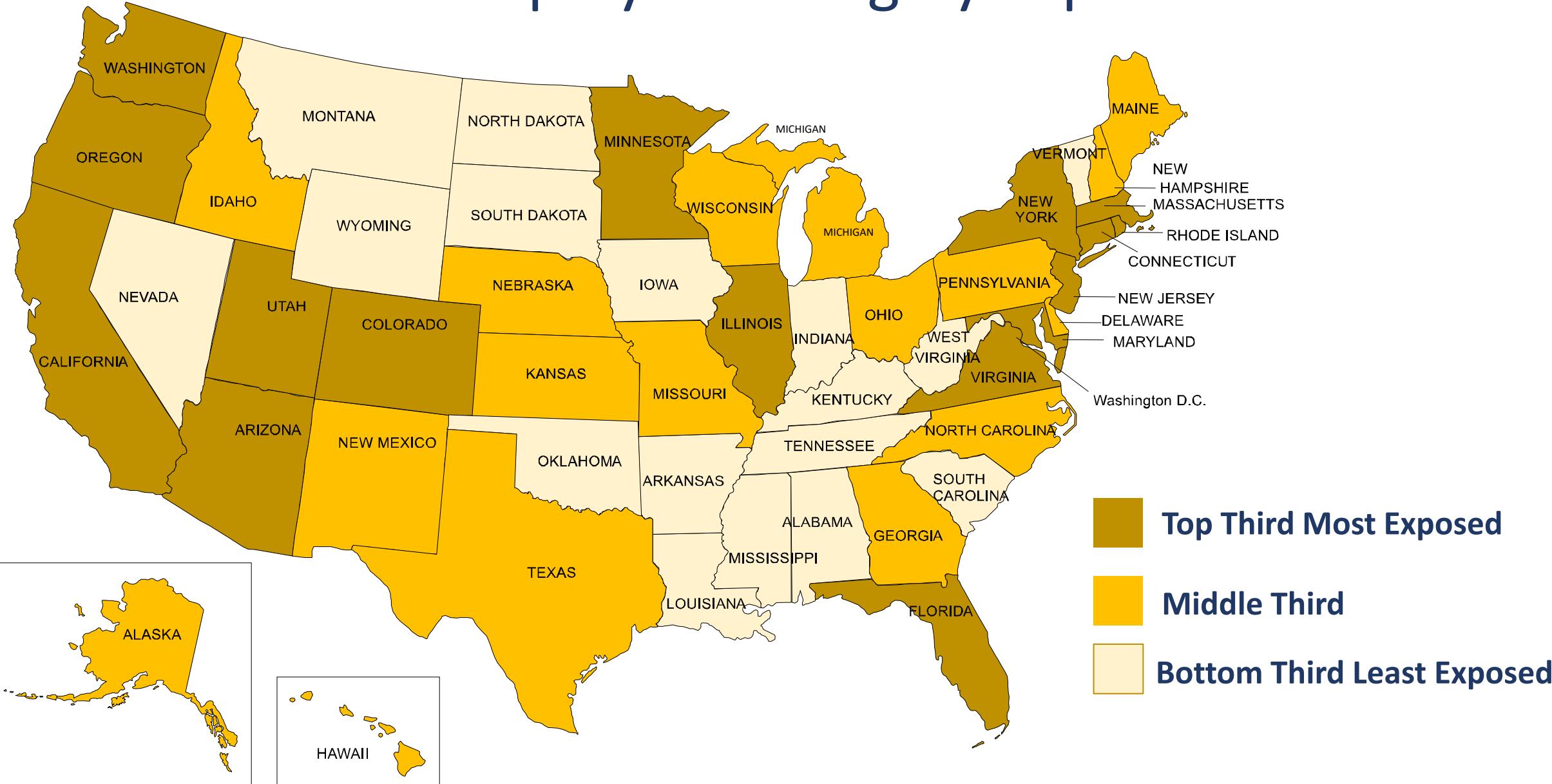
VA CHAMBER
FOUNDATION

ECONOMIC
LEADERSHIP



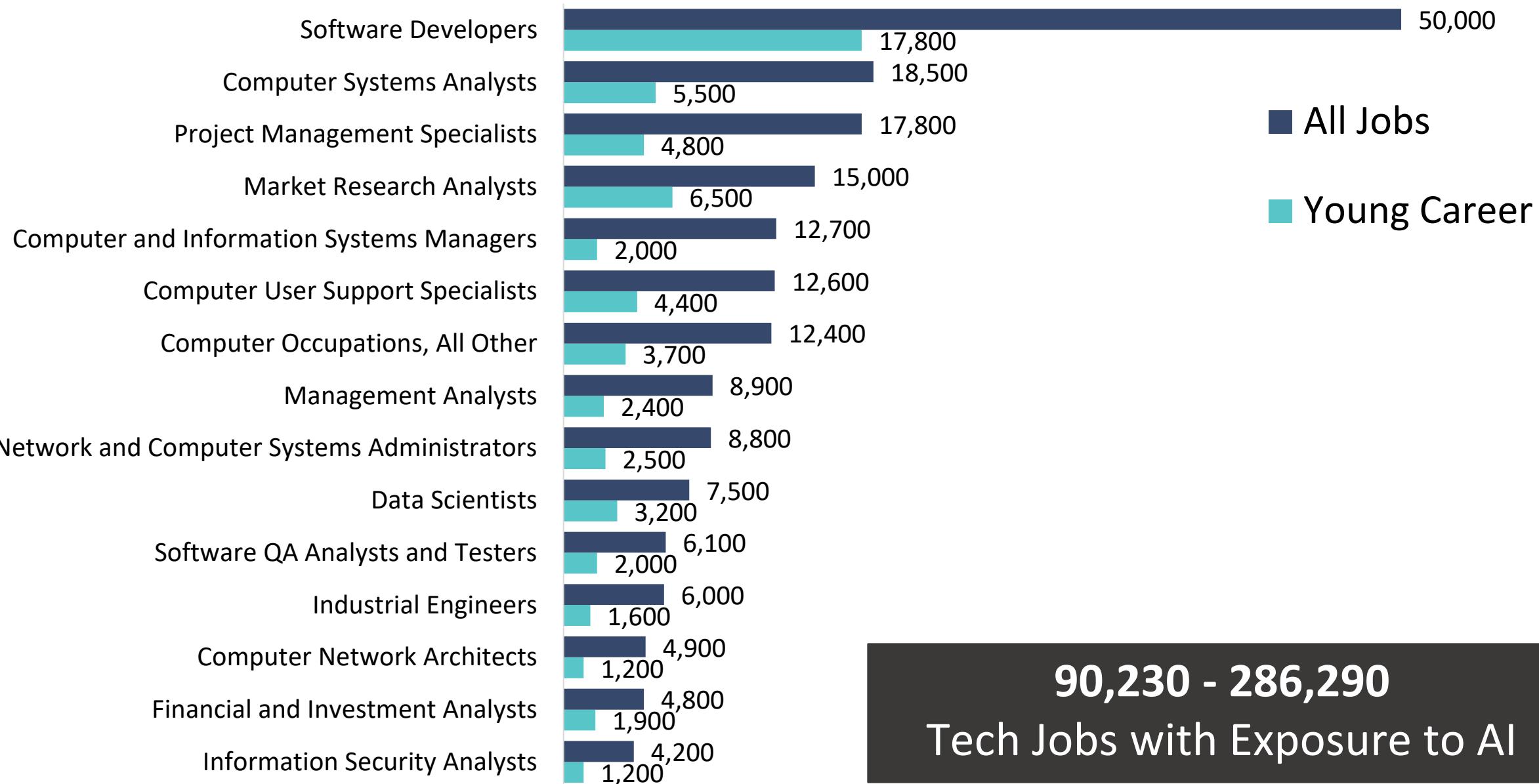
- **AI's impact is most likely to be felt in larger and more densely populated metro areas as well as in areas with higher educational attainment levels**
- **Forecasted AI related impacts range from 29 percent of jobs to 39 percent of jobs (occupations)**
- **Top occupations exposed to AI impacts are software developers, general and operations managers, customer service representatives, and clerical workers**
- **Half the jobs in finance and insurance, professional services, information, and management exposed**

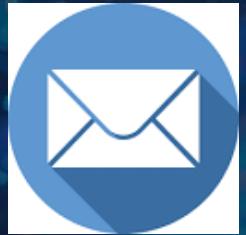
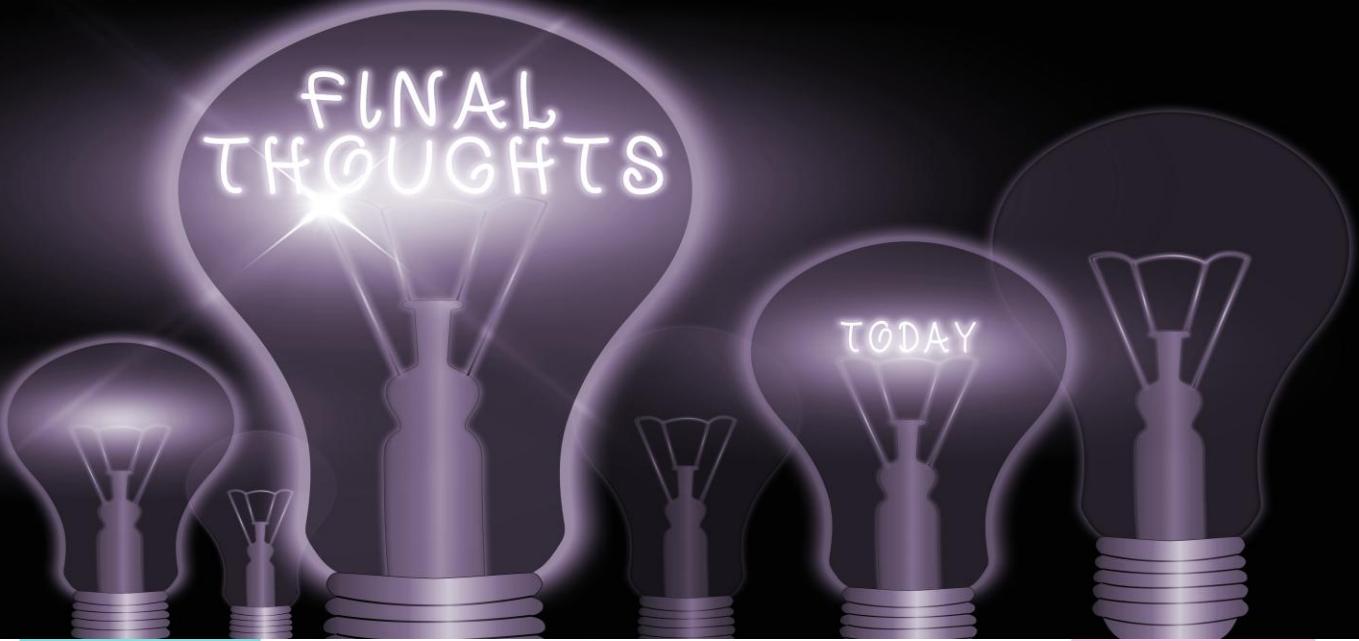
Share of Employment Highly Exposed to AI



Source: Data from Schendstok & Wertz, U.S. Dept. of Treasury, Office of Economic Policy

North Carolina Tech Occupations with Greatest AI Exposure





ted@econleadership.com

Connect with me on LinkedIn!
Ted Abernathy

