2022 Leadership Poll Series

Q3 Results

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Which range best depicts the number of NC-based employees in your organization?
Is your organization headquartered in NC?

- No: 31%
- Yes: 69%
What is your role within your organization?

- C-Suite: 58.7%
- Sales/Marketing: 22.2%
- IT: 12.7%
- Operations: 8.7%
- Other: 8.7%
- Finance: 4%
- HR: 2.4%
How do you perceive the past quarter of 2022 has been for North Carolina’s technology sector?
How has the past quarter of 2022 been for your organization?

- **Great**: 19.8%
- **Good**: 49.2%
- **OK**: 15.9%
- **Slightly disappointing**: 12.7%
- **Terrible**: 2.4%
I expect that over the next quarter our business will:

- Grow 50.4%
- Stay the same 42.4%
- Decline 7.2%
This pandemic has impacted businesses in many ways. Please rate the following as it applies to your organization:

- **Focused more on new products**: 9.6% Strongly agree, 52.8% Agree, 27.2% Neither agree or disagree, 8% Disagree, 2.4% Strongly disagree
- **Focused more on client services**: 25.4% Strongly agree, 51.6% Agree, 21.4% Neither agree or disagree, 16.7% Disagree, 8% Strongly disagree
- **Focused more on employee retention**: 43.7% Strongly agree, 36.5% Agree, 13.6% Neither agree or disagree, 12.7% Disagree, 5.6% Strongly disagree
- **Focused more on employee health + safety**: 36.8% Strongly agree, 47.2% Agree, 16.7% Neither agree or disagree, 13.6% Disagree, 5.6% Strongly disagree
- **Expanded employee ability to work remotely**: 26.2% Strongly agree, 35.7% Agree, 25.4% Neither agree or disagree, 27% Disagree, 7.3% Strongly disagree
- **Expanded employee ability to set own schedule**: 22.6% Strongly agree, 42.7% Agree, 27.4% Neither agree or disagree, 27.4% Disagree, 17.5% Strongly disagree
- **Increased pay + benefits**: 22.6% Strongly agree, 40.5% Agree, 32.5% Neither agree or disagree, 22.6% Disagree, 11.1% Strongly disagree
- **Increased recruitment efforts**: 13.6% Strongly agree, 54.8% Agree, 26% Neither agree or disagree, 16.7% Disagree, 2.4% Strongly disagree
What impact has the economic environment had on your hiring?

- Still hiring: 81%
- Frozen hiring: 17.5%
- Implemented or exploring layoffs/furloughs/pay reductions: 1.6%
Please rate North Carolina’s strength for each of the following competitive areas:

<table>
<thead>
<tr>
<th>Area</th>
<th>Among the best nationally</th>
<th>Very competitive</th>
<th>About average</th>
<th>Below average</th>
<th>A competitive weakness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology workforce</td>
<td>26.2%</td>
<td>31%</td>
<td>13.5%</td>
<td>12.7%</td>
<td>4%</td>
</tr>
<tr>
<td>Business climate</td>
<td>17.5%</td>
<td>48.4%</td>
<td>30.2%</td>
<td>12.7%</td>
<td>4%</td>
</tr>
<tr>
<td>Cost of doing business</td>
<td>19.8%</td>
<td>54%</td>
<td>33.3%</td>
<td>11.1%</td>
<td>4%</td>
</tr>
<tr>
<td>Quality of life</td>
<td>7.9%</td>
<td>51.6%</td>
<td>37.3%</td>
<td>42.1%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Technology infrastructure</td>
<td>58.7%</td>
<td>56.3%</td>
<td>56.3%</td>
<td>53.2%</td>
<td>53.2%</td>
</tr>
<tr>
<td>Entrepre. support</td>
<td>12.7%</td>
<td>48.4%</td>
<td>37.3%</td>
<td>42.1%</td>
<td>42.1%</td>
</tr>
<tr>
<td>Higher Ed assets</td>
<td>19.8%</td>
<td>54%</td>
<td>33.3%</td>
<td>29.4%</td>
<td>29.4%</td>
</tr>
<tr>
<td>Innovation ecosystem</td>
<td>14.3%</td>
<td>53.2%</td>
<td>48.4%</td>
<td>37.3%</td>
<td>37.3%</td>
</tr>
</tbody>
</table>
What makes you optimistic about the next 12 months?

- Tech still driving business/innovation so investment in tech still happening
- Easing supply chain issues
- New businesses coming to NC/current markets expanding
- Growth in our clients’ industries
- COVID “fading” and/or less severe illness from recent variants
- State gov’t investing in infrastructure/broadband
- Our team’s resilience, culture, growth
- Strong economy in NC/statewide tech sector despite inflation
Which of the following issues are you most concerned will impact your business?
What percentage of your workforce is still fully remote on any given day?

- 76-100%: 35.2%
- 26-50%: 15.2%
- 51-75%: 27.2%
- 0-25%: 22.4%
What percentage of employees at your organization can choose the degree to which they work remotely?

- 76-100%: 52.8%
- 51-75%: 17.6%
- 26-50%: 8%
- 0-25%: 21.6%
<table>
<thead>
<tr>
<th>Varies based on role and requirements</th>
<th>Continuously re-evaluating, flexible/employee first approach</th>
<th>Long term flexible environment + hybrid workspaces</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees work with managers to determine hybrid schedule</td>
<td>100% remote with 4 day work week</td>
<td>Softened approach to WFH/remote due to attrition</td>
</tr>
<tr>
<td>Employees in-office 2-3 days a week</td>
<td>No plans to return to office/shifted to fully remote</td>
<td>Closing some offices and moving to shared spaces for those who wish to come in office</td>
</tr>
</tbody>
</table>
What are your organization’s future office space/facility plans?

- Move to fully remote: 5.6%
- Add space: 19%
- Decrease footprint: 26.2%
- Stay the same: 49.2%