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

No 33.3%

Yes 66.7%
What is your role within your organization?

- C-Suite: 60.4%
- IT: 22.3%
- Sales + Marketing: 18%
- Operations: 7.9%
- Other: 5%
- Finance: 1.4%
- HR: 1.4%
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: 22.5%
- Good: 41.3%
- OK: 24.6%
- Slightly disappointing: 10.1%
- Terrible: 1.4%
I expect that over the next quarter our business will:

- Grow 48.9%
- Decline 4.3%
- Stay the same 46.8%
This pandemic has impacted businesses in many ways. Please rate the following as it applies to your organization:

- Focused more on new products: 16.5%
- Agreed: 43.2%
- Neither agree or disagree: 25.9%
- Disagree: 13.7%
- Strongly disagree: 8.1%

- Focused more on client services: 43.1%
- Agreed: 49.6%
- Neither agree or disagree: 15.8%
- Disagree: 15.8%
- Strongly disagree: 11.5%

- Focused more on employee retention: 38.8%
- Agreed: 43.9%
- Neither agree or disagree: 15.8%
- Disagree: 15.8%
- Strongly disagree: 5.8%

- Focused more on employee health and safety: 35.5%
- Agreed: 37.7%
- Neither agree or disagree: 24.6%
- Disagree: 22.2%
- Strongly disagree: 11.5%

- Expanded employee ability to work remotely: 41%
- Agreed: 40.3%
- Neither agree or disagree: 11.5%
- Disagree: 5.8%
- Strongly disagree: 5.8%

- Expanded employee ability to set own schedule: 16.7%
- Agreed: 33.3%
- Neither agree or disagree: 36.2%
- Disagree: 8%
- Strongly disagree: 8%

- Increased pay and benefits: 20.1%
- Agreed: 24.6%
- Neither agree or disagree: 28.8%
- Disagree: 20.6%
- Strongly disagree: 8.1%

- Increased recruitment efforts: 33.1%
- Disagree: 33.1%
- Strongly disagree: 20.6%
- Unmarked: 8.1%
What impact has the economic environment had on your hiring?

- Still hiring: 86.1%
- Frozen hiring: 11.7%
- Implemented or exploring layoffs/furloughs/pay reductions: 2.2%
Please rate North Carolina’s strength for each of the following competitive areas:

- **Technology workforce**: 25.9% Among the best nationally, 20.3% Very competitive, 15.9% Above average, 14.4% Below average, 8.6% A competitive weakness, 13.1% Unmarked.
- **Business climate**: 56.8% Among the best nationally, 64.5% Very competitive, 50.7% About average, 27.5% Below average, 15.1% A competitive weakness, 14.5% Unmarked.
- **Cost of doing business**: 54.3% Among the best nationally, 50.7% Very competitive, 41.9% About average, 39.1% Below average, 19.4% A competitive weakness, 5% Unmarked.
- **Quality of life**: 63.3% Among the best nationally, 54.3% Very competitive, 55% About average, 39% Below average, 14% A competitive weakness, 2.2% Unmarked.
- **Technology infrastructure**: 44.6% Among the best nationally, 41% Very competitive, 41% About average, 39% Below average, 14% A competitive weakness, 5% Unmarked.
- **Entrepreneur support**: 56.8% Among the best nationally, 50.4% Very competitive, 44.6% About average, 41% Below average, 19.4% A competitive weakness, 7.2% Unmarked.
- **Higher Ed assets**: 35.3% Among the best nationally, 34.3% Very competitive, 39% About average, 35% Below average, 7.2% A competitive weakness, 2.2% Unmarked.
- **Innovation ecosystem**: 56.8% Among the best nationally, 50.4% Very competitive, 44.6% About average, 41% Below average, 19.4% A competitive weakness, 7.2% Unmarked.
What makes you optimistic about the next 12 months?

Technology/tech services will always be relevant/needed/in demand

Reduced pandemic impact on supply chain, workforce issues

Continued new businesses coming to NC/current markets expanding

Demand for talent still strong in NC compared to other regions

Continued strong investment in innovation/digital

Clients still spending and growing

Cautiously optimistic but honestly worried about recession

"Not much"

Nearing November elections
Which of the following issues are you most concerned will impact your business?

- Inflation: 84.8%
- Unemployment/Talent: 48.6%
- Supply chain issues: 38.4%
- "Great Resignation": 33.3%
- Political: 31.2%
- Russia + Ukraine: 26.8%
- Other: 6.5%
- Southern Border: 2.9%
What percentage of your workforce is still fully remote on any given day?

- 76-100%: 30.2%
- 51-75%: 25.2%
- 26-50%: 20.9%
- 0-25%: 23.7%
What percentage of employees at your organization can choose the degree to which they work remotely?

- 24.5% 0-25%
- 18.7% 51-75%
- 10.8% 26-50%
- 46% 76-100%
What are your organization’s future office space/facility plans?

- Stay the same: 50.4%
- Decrease footprint: 29.9%
- Add space: 16.1%
- Move to fully remote: 3.6%