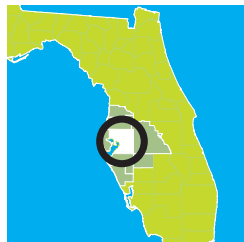


INFORMATION TECHNOLOGY INDUSTRY OVERVIEW



Florida is an information technology industry powerhouse, ranking third in the nation for high tech establishments. Claiming 20 percent of the state's IT workforce, Tampa Bay has emerged as the leading destination in Florida for IT companies across the industry spectrum.

In the past five years, Tampa Bay's IT sector job growth has climbed at twice the rate of overall job growth here. Employers in the region are recruiting talent at a faster pace than ever before.

Our talent pipeline is fueled by five major Florida public universities, the University of Tampa, St. Leo University, and Hillsborough Community College. Collectively, these institutions offer dozens of IT-centric degree programs and curricula in high demand specializations such as data science/big data and cybersecurity.

Hillsborough County has become a top destination for graduates with training in data warehousing, data scaling, data analytics, and data management. The region is also home to the Florida Center for Cybersecurity, a first of its kind shared resource for Florida's stakeholders in higher education, government, defense, and industry.

TAMPA BAY'S LEADING IT COMPANIES

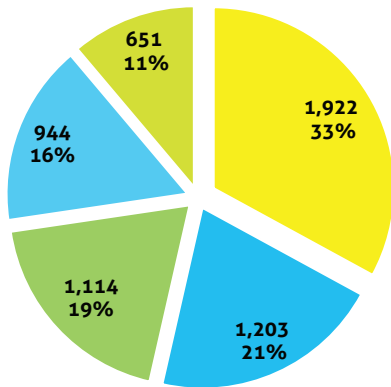
Accusoft
Ashcomm LLC
Bristol-Myers Squibb
CA Technologies
Catalina Marketing
Cognizant
ConnectWise
Crystal Clear Technologies
Digital Hands
Fintech
Greenway Health
Healthesystems
Jagged Peak
LabTech Software
myMatrixx
Open Text
ReliaQuest
Syniverse
Tech Data
Tribridge

"Florida and the Tampa area are an attractive place to do business given the robust infrastructure that has been created for technology companies, and the rich talent pool fed by the state's 13 universities and concentration of highly skilled military veterans and spouses."

– Steven Schwartz, Executive Vice President and Chief Legal and Corporate Affairs Officer, Cognizant

Global technology services giant Cognizant announced plans to expand its operations in Tampa in December 2014. The company is doubling its local workforce, adding more than 400 new employees to provide business process services, application development, and systems maintenance for U.S. corporations in the financial services, insurance, and health care industries.

IT INDUSTRY SECTORS TOTAL 2015 JOBS

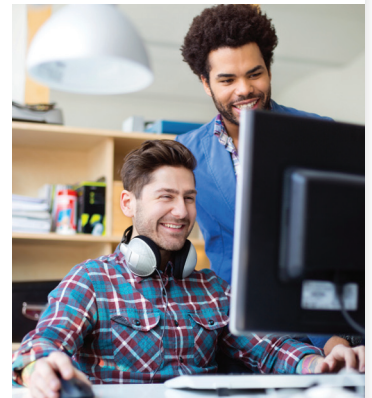


- Software Developers
- Computer Programmers
- Computer User Support Specialists
- Computer Systems Analysts
- Computer Network Architects

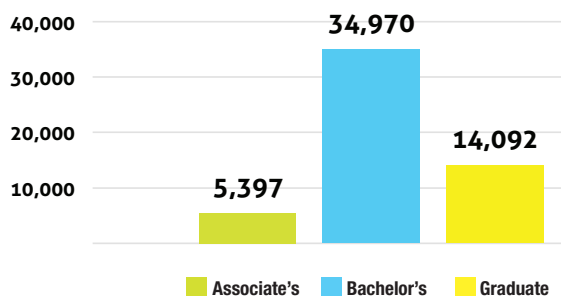
KEY OCCUPATIONS AND SECTORS AVERAGE WAGE COMPARISONS

SOC CODE	OCCUPATIONS	AVERAGE WAGE	
		TAMPA MSA	U.S.
15-1132	Software Developers	\$90,750	\$95,514
15-1131	Computer Programmers	\$76,627	\$77,542
15-1151	Computer User Support Specialists	\$44,000	\$47,611
15-1121	Computer Systems Analysts	\$80,912	\$82,700
15-1143	Computer Network Architects	\$75,109	\$98,425

NAICS CODE	SECTORS	AVERAGE WAGE	
		TAMPA MSA	U.S.
541511	Custom Computer Programming Services	\$95,595	\$123,765
541512	Computer Systems Design Services	\$106,610	\$116,269
541513	Computer Facilities Management Services	\$79,416	\$99,434
541519	Other Computer Related Services	\$94,700	\$118,694

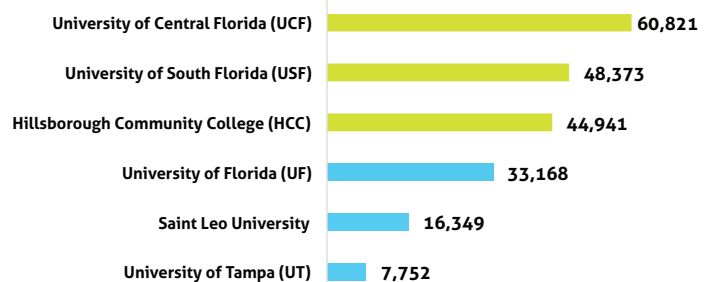


TOTAL DEGREES AWARDED BY LEVEL *



*2013/2014

ENROLLMENT AT FLORIDA HIGH TECH CORRIDOR COLLEGES AND UNIVERSITIES *



*2014/2015

RESOURCES



Florida High Tech Corridor

www.floridahightech.com

Stretching across Central Florida, the Florida High Tech Corridor is a

technology rich region with a mission to grow high tech industry and innovation through partnerships that support research, marketing, workforce, and entrepreneurship.

As an entity that promotes the high tech growth of the region, the Florida High Tech Corridor Council is an economic development initiative of three of the country's largest research institutions, the University of South Florida, the University of Central Florida, and the University of Florida.



Tampa Bay Technology Forum

(TBTF)

www.tbtf.org

TBTF is Florida's largest and most

influential technology association. Dedicated to growing and promoting Tampa Bay's technology industry, the organization provides events, education, networking, advocacy, and philanthropy programs.



Tampa Bay WaVE

www.tampabaywave.org

Tampa Bay WaVE, Inc. is a 'by entrepreneurs, for entrepreneurs'

nonprofit helping entrepreneurs turn ideas into growing tech businesses in Tampa Bay. The organization supports over 150 tech startups and is home to the First WaVE Venture Center Accelerator.



USF CONNECT

www.usfconnect.org

USF CONNECT is the business and economic development initiative

of USF that provides support for technology start-ups and serves as the point of entry for companies looking to do business with the university. USF CONNECT unites technology and talent with businesses throughout Central Florida and provides professional amenities and resources for successful business development and technology commercialization.

TALENT BY THE NUMBERS

#1 MSA in the South for Job Creation

ZipRecruiter Hiring Demand Index, 2015

Tampa MSA IT Workforce Concentration Rankings

#1

.NET developers
Data warehousing specialists
Hadoop developers
Computer network architects

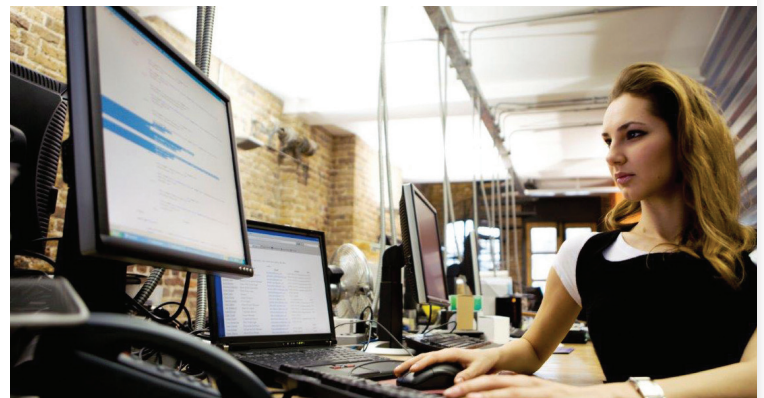
#2

E-commerce related occupations
NoSQL developers

#3

PHP developers

**compared with Florida overall. Source: LinkedIn, 2015*



59,000+

Florida State University System (SUS) graduates working in the IT industry

46%

USF graduates working in IT who are currently employed in the Tampa Bay area

DEMOGRAPHICS

TOTAL MSA POPULATION: **2.9M**

TOTAL MSA LABOR FORCE: **1.4M**

MEDIAN AGE: **37**

COLLEGE DEGREE HOLDERS: **31%**

COST OF LIVING INDEX: **92.6**

RANKINGS

#1 **BEST CITY IN THE SOUTHEAST**
(MONEY MAGAZINE, 2015)

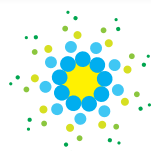
#6 **MOST COST FRIENDLY U.S. BUSINESS LOCATION AMONG LARGE U.S. CITIES**
(KPMG, 2014)

#10 **TOP TEN BEST AMERICAN CITIES TO WORK IN TECH**
(SMARTASSET, 2014)

CONNECTIVITY



Approximately **17 MILLION PEOPLE** each year are served by **MAJOR AIR CARRIERS** at Tampa International Airport (TPA), including Southwest, jetBlue, British Airways, Copa Airlines, Lufthansa, Alaska Airlines, and Edelweiss Air, on more than **200 DAILY FLIGHTS**. With **OVER 70 NONSTOP FLIGHTS TO DOMESTIC AND INTERNATIONAL DESTINATIONS** such as Atlanta, New York, Boston, Chicago, Seattle, London, Zurich, Panama City, and Frankfurt, travelers are able to get where they want and need to go quickly and easily. Interstate systems **I-4, I-75, and I-275** link the region to numerous major U.S. cities and more than **33 MILLION CONSUMERS WITHIN AN EIGHT-HOUR DRIVE**.



TAMPA HILLSBOROUGH
ECONOMIC DEVELOPMENT CORPORATION



For more information on the Information Technology industry in Tampa and Hillsborough County, please contact **Steve Morey, Director of Business Recruitment**, at (813) 518-2630 or smorey@tampaedc.com

Tampa Hillsborough Economic Development Corporation is the lead economic development agency for Hillsborough County and the cities of Tampa, Plant City, and Temple Terrace. Established in 2009 as a partnership between the public sector and private corporate investors, the EDC works to develop and sustain a thriving local economy through the attraction, retention, and expansion of high wage jobs and capital investment within targeted industry sectors.

The EDC exists because of the generous support of more than 100 corporations, the Board of County Commissioners of Hillsborough County, and the cities of Tampa, Plant City and Temple Terrace.

To learn more, visit www.tampaedc.com.