

4,219

IT leaders surveyed across a wide range of industries and geographies

2,791

responses before March 2020

1,428

responses to modified pandemic survey

125

Asset Management industry respondents

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES

9% Mean additional IT spend due to the pandemic

Budgets & Headcounts expected to rise in next year

52% & **53%**

OPERATIONAL PRIORITIES

- Top 3
- Operational efficiency to the business
 - Customer engagement
 - Workforce enablement

Power and Utilities most optimistic

Leisure least optimistic

INVESTMENT PRIORITIES

- Top 3
- Security and privacy
 - Automation
 - Customer experience and engagement

MANAGING TECHNOLOGY

60%

Security is number 1 investment priority

Phishing **78%**

&

Malware **72%**

Experienced an increase in attacks during the crisis



Data curators (...and 'Robot Overlords'!)

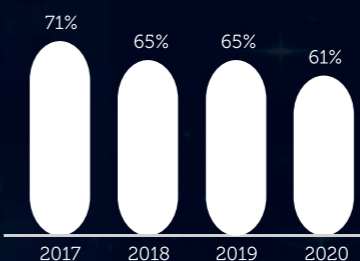
39%

experienced additional incidents due to remote working

21% investing in automation as a top priority

TECHNOLOGY LEADERS

Executive team membership for CIOs



64%

think the pandemic has increased the influence of the technology leader

75%

Asset Management industry respondents

70%

say crisis has increased the collaboration between their team and the business

26%

tech leaders are moved on

7%

female respondents IT executive level

More than four in ten agree that diversity improves:

- Trust and collaboration
- Engagement with the business
- Ability to innovate
- Accessing the right skills
- Risk tolerance

RESOURCING THE TECH TEAM

89%

moved workforce to remote working

40%

will keep more than half of workforce remote working

62%

have enacted employee mental health programs

Culture & Leadership and Salary are top factors in engaging and retaining talent

TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19

- Cyber security **38%**
- Artificial intelligence **24%**
- Intelligent automation **24%**
- Technical architecture **24%**
- Business analysis **22%**

The 2020 Harvey Nash / KPMG CIO Survey is the largest IT leadership survey in the world in terms of number of respondents. The survey was conducted of 4,219 CIOs and technology leaders across 83 countries. www.hnkpmgciosurvey.com

DRIVING BUSINESS PERFORMANCE THROUGH TECHNOLOGY

Digital leaders:

the 22% that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

5.1x

as effective at scaling digital channels

2.3x

better at customer satisfaction/experience

2.6x

better at customer loyalty

2.3x

better at increasing worth of company

2.6x

more likely to increase profit margin