

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

259

Consumer & Retail industry respondents

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES

5% Mean additional IT spend due to the pandemic

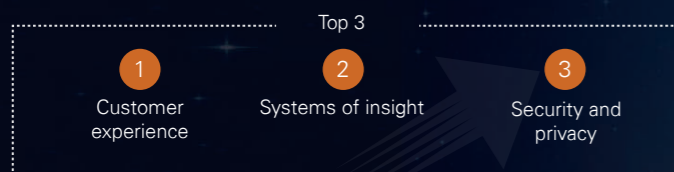
Budgets & Headcounts expected to rise in next year

44% & **51%**

OPERATIONAL PRIORITIES



INVESTMENT PRIORITIES



MANAGING TECHNOLOGY

36%

Security is number 1 investment priority

Phishing **93%**

&

Malware **53%**

Experienced an increase in attacks during the crisis



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

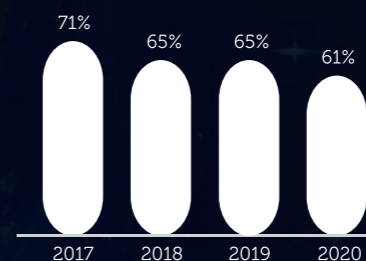
38%

experienced additional incidents due to remote working.

25% investing in automation as a top priority

TECHNOLOGY LEADERS

Executive team membership for CIOs



59%

think the pandemic has increased the influence of the technology leader

69%

Consumer & Retail industry respondents

70%

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

26%

tech leaders are moved on

9%

female respondents IT executive level

More than half agree that diversity improves:

Access to skills
Trust and collaboration
Engagement with the business
Innovation

RESOURCING THE TECH TEAM

88%

moved workforce to remote working

36%

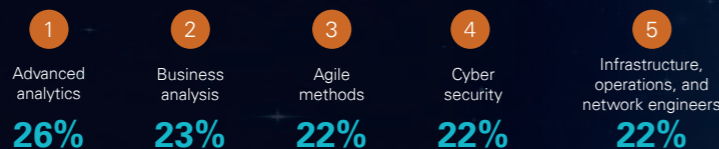
will keep more than half of workforce remote working

49%

have enacted employee mental health programs

Culture & Leadership more important than Salary

TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19



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 26% that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

5x

as effective at scaling digital channels

2.3x

as effective at increasing worth of company

2.3x

better at customer experience

2.6x

better at customer loyalty

2.6x

more likely to increase profit margin