

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

219

Healthcare industry respondents

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES

10% Mean additional IT spend due to the pandemic

Budgets **49%** & Headcounts **54%** expected to rise in next year

OPERATIONAL PRIORITIES

- Top 3
- 1 Improving operational efficiency
 - 2 Enabling the workforce
 - 3 Improving customer engagement
- Power and Utilities most optimistic | Leisure least optimistic

INVESTMENT PRIORITIES

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

MANAGING TECHNOLOGY

51%

Security is number 1 investment priority

35% experienced additional incidents due to remote working.

Phishing **83%**

&

Malware **54%**

Experienced an increase in attacks during the crisis

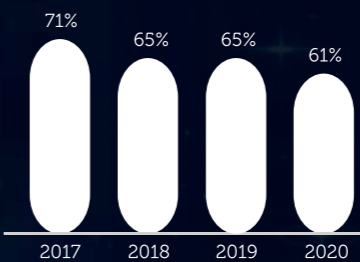


Data curators (...and 'Robot Overlords'!)

31% investing in automation as a top priority

TECHNOLOGY LEADERS

Executive team membership for CIOs



65%

think the pandemic has increased the influence of the technology leader

73%

Healthcare industry respondents

70%

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

26%

tech leaders are moved on

8%

female respondents IT executive level

More than half agree that diversity improves:

- Trust and collaboration
- Engagement with the business

RESOURCING THE TECH TEAM

89%

moved workforce to remote working

30%

will keep more than half of workforce remote working



72%

have enacted employee mental health programs

Culture & Leadership more important than Salary

TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19

- 1 Cyber security **35%**
- 2 Advanced analytics **26%**
- 3 Organizational change management **26%**
- 4 Technical architecture **26%**
- 5 Business analysis **23%**

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 **31%** that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

6.4x

as effective at scaling digital channels

3.7x

as effective at increasing worth of company

2.6x

better at customer loyalty

2.4x

better time to market for new products and services

3.9x

more likely to increase profit margin