

**4,219**

IT leaders surveyed across a wide range of industries and geographies

**2,791** **1,428**

responses before March 2020  
responses to modified pandemic survey

**365**

Industrial Manufacturing industry respondents

**EVERYTHING CHANGED. OR DID IT?**

## BUDGETS & BOARD PRIORITIES

**5%** Mean additional IT spend due to the pandemic

Budgets **38%** & Headcounts **40%** expected to rise in next year

## OPERATIONAL PRIORITIES

- Top 3
- Operational efficiency to the business
  - Customer engagement
  - Delivering stable and consistent IT performance
- Power and Utilities most optimistic | Leisure least optimistic

## INVESTMENT PRIORITIES

- Top 3
- Security and privacy
  - Customer experience and engagement
  - Infrastructure / Cloud

## MANAGING TECHNOLOGY

**50%**

Security is number 1 investment priority

Phishing **85%**

&

Malware **67%**

Experienced an increase in attacks during the crisis



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

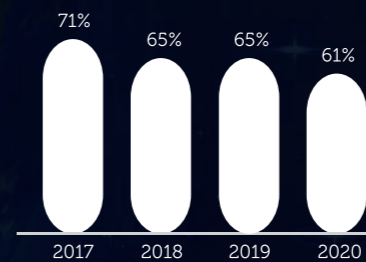
**47%**

experienced additional incidents due to remote working.

31% investing in automation as a top priority

## TECHNOLOGY LEADERS

Executive team membership for CIOs



**57%**

think the pandemic has increased the influence of the technology leader

**65%**

Industrial Manufacturing industry respondents

**70%**

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

**26%**  
tech leaders are moved on

**6%**

female respondents IT executive level

More than half agree that diversity improves:

- Access to skills
- Trust & collaboration
- Engagement with the business
- Creating customer focused products
- Innovation

## RESOURCING THE TECH TEAM

**81%**

moved workforce to remote working

**26%**

will keep more than half of workforce remote working

**43%**

have enacted employee mental health programs

Culture & Leadership more important than Salary

## TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19

- Cyber security **40%**
- Organizational change management **26%**
- Advanced analytics **23%**
- Enterprise architecture **22%**
- Agile methods **20%**

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](http://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

**8x**

as effective at scaling digital channels

**2.8x**

as effective at increasing worth of company

**2.3x**

better at customer experience

**3.2x**

better at customer loyalty

**2x**

better at collecting valuable data