

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

130

National Government respondents

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES

15% Mean additional IT spend due to the pandemic

Budgets **53%** & Headcounts **41%** expected to rise in next year

OPERATIONAL PRIORITIES

- Top 3
- 1 Enabling the workforce
 - 2 Gaining actionable insights
 - 3 Improving operational efficiency

Power and Utilities most optimistic

Leisure least optimistic

INVESTMENT PRIORITIES

- Top 3
- 1 Infrastructure/cloud
 - 2 Customer experience and engagement
 - 3 Security and privacy

RESOURCING THE TECH TEAM

92% moved workforce to remote working

43% will keep more than half of workforce remote working

51% have enacted employee mental health programs

Culture & Leadership more important than Salary

TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19

- 1 Cyber security **44%**
- 2 Cloud **28%**
- 3 Enterprise architecture **25%**
- 4 IT strategy **25%**
- 5 Agile methods **17%**

MANAGING TECHNOLOGY

42%

Security is a top investment priority

39%

experienced additional incidents due to remote working.

Phishing **92%**

&

Malware **75%**

Experienced an increase in attacks during the crisis

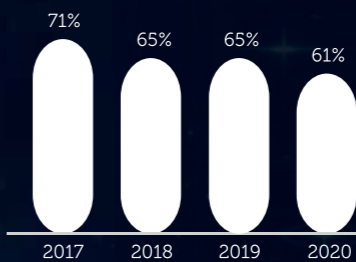


Data curators (...and 'Robot Overlords'!)

18% investing in automation as a top priority

TECHNOLOGY LEADERS

Executive team membership for CIOs



68% think the pandemic has increased the influence of the technology leader

83% National Government 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 four in ten agree that diversity improves:

- Trust and collaboration
- Engagement with the business
- Creating citizen focused products
- Access to skills

DRIVING BUSINESS PERFORMANCE THROUGH TECHNOLOGY

Digital leaders:

the **33%** that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

3.1x as effective at scaling digital channels

5.3x as effective at increasing revenues

2x better at customer experience

3.1x better on time to market for new products and services

3x as effective at increasing worth of company

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