

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

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'!)

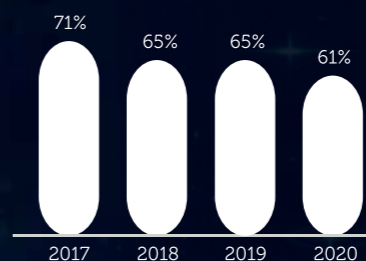
47%

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

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