

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

61

Media industry respondents

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES

9% Mean additional IT spend due to the pandemic

Budgets **38%** & Headcounts **19%** expected to rise in next year

OPERATIONAL PRIORITIES

- Top 3
- 1 Developing new products and services
 - 2 Improving customer engagement
 - 3 Improving operational efficiency

Power and Utilities most optimistic

Leisure least optimistic

INVESTMENT PRIORITIES

- Top 3
- 1 Customer experience and engagement
 - 2 Technology development, management and operations
 - 3 Systems of insight

RESOURCING THE TECH TEAM

96%

moved workforce to remote working

52%

will keep more than half of workforce remote working

81%

have enacted employee mental health programs

Culture & Leadership more important than Salary

TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19

- 1 Organizational change management **31%**
- 2 Advanced analytics **25%**
- 3 Cloud **25%**
- 4 Cyber security **25%**
- 5 DevOps **25%**

MANAGING TECHNOLOGY

Phishing **71%**

&

Malware **57%**

Experienced an increase in attacks during the crisis

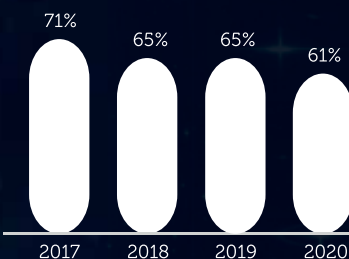
33% experienced additional incidents due to remote working

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

10% 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

78%

Media industry respondents

70%

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

26% tech leaders are moved on

10%

female respondents IT executive level

More than half agree that diversity improves:

Trust and collaboration
Innovation
Access to skills

DRIVING BUSINESS PERFORMANCE THROUGH TECHNOLOGY

Digital leaders:

the **60%** that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

2.2x

as effective at scaling digital channels

3.2x

as effective at increasing worth of company

2.3x

better at customer experience

4.2x

better at customer loyalty

5.7x

more likely to increase profit margin

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