

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

70

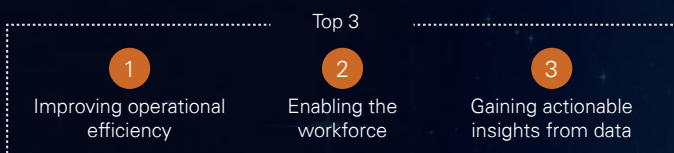
Oil & Gas industry respondents

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES



OPERATIONAL PRIORITIES



Power and Utilities most optimistic

Leisure least optimistic

INVESTMENT PRIORITIES



MANAGING TECHNOLOGY

50%

Security is a top investment priority

Phishing
90%

&

Malware
50%

Experienced an increase in attacks during the crisis



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

42%

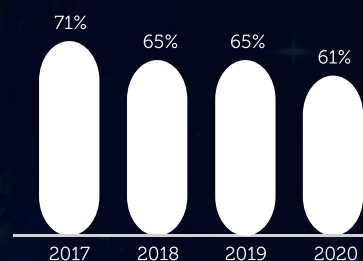
experienced additional incidents due to remote working.

Investment in automation

Oil & Gas sector out-pacing global average by **6%**

TECHNOLOGY LEADERS

Executive team membership for CIOs



60%

think the pandemic has increased the influence of the technology leader

83%

Oil & Gas 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:

Trust and collaboration
Engagement with the business
Access to skills

RESOURCING THE TECH TEAM

80%

moved workforce to remote working

36%

will keep more than half of workforce remote working



62%

have enacted employee mental health programs

Culture & Leadership more important than Salary

TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19



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 **29%** that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

2.9x

as effective at scaling digital channels

2.8x

as effective at increasing worth of company

2.3x

better at customer experience

2.3x

better at collecting valuable data