

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

65

Pharmaceuticals industry respondents

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES

7% Mean additional IT spend due to the pandemic

Budgets **65%** & Headcounts **47%** expected to rise in next year

OPERATIONAL PRIORITIES

- Top 3
- 1 Improving operational efficiency
 - 2 Enabling the workforce
 - 3 Delivering stable and consistent IT performance

Power and Utilities most optimistic

Leisure least optimistic

INVESTMENT PRIORITIES

- Top 3
- 1 Security and privacy
 - 2 Automation
 - 3 Operations and production

MANAGING TECHNOLOGY

29%

Security is number 1 investment priority

41%

experienced additional incidents due to remote working.

Phishing **83%**

&

Malware **33%**

Experienced an increase in attacks during the crisis

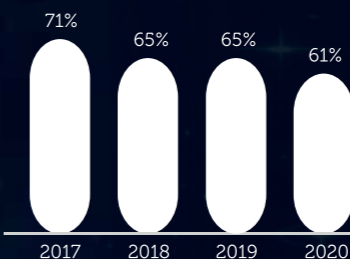


Data curators (...and 'Robot Overlords'!)

29% investing in automation as a top priority

TECHNOLOGY LEADERS

Executive team membership for CIOs



39%

think the pandemic has increased the influence of the technology leader

78%

Pharmaceuticals industry respondents

70%

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

26%

tech leaders are moved on

9%

female respondents IT executive level

More than half agree that diversity improves:

- Engagement with the business
- Trust and collaboration
- Access to skills

RESOURCING THE TECH TEAM

78%

moved workforce to remote working

47%

will keep more than half of workforce remote working



53%

have enacted employee mental health programs

Culture & Leadership more important than Salary

TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19

- 1 Organizational change management **62%**
- 2 Advanced analytics **38%**
- 3 Intelligent automation **38%**
- 4 IT strategy **38%**
- 5 Business analysis **31%**

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 21% that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

6x

as effective at increasing worth of company

2.1x

better time to market for new products and services

3x

better at customer loyalty

2.5x

more effective at branding