

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

568

Tech industry respondents

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES

12% Mean additional IT spend due to the pandemic

Budgets **46%** & Headcounts **49%** expected to rise in next year

OPERATIONAL PRIORITIES

- Top 3
- 1 Improving customer engagement
 - 2 Developing new products and services
 - 3 Improving agility and speed to market

Power and Utilities most optimistic

Leisure least optimistic

INVESTMENT PRIORITIES

- Top 3
- 1 Security and privacy
 - 2 Customer experience and engagement
 - 3 Automation

MANAGING TECHNOLOGY

50%

Security is number 1 investment priority

Phishing **83%**

&

Malware **68%**

Experienced an increase in attacks during the crisis



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

46%

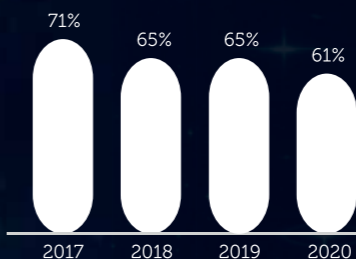
experienced additional incidents due to remote working

Investment in automation

Tech sector out-pacing global average by 7%

TECHNOLOGY LEADERS

Executive team membership for CIOs



64%

think the pandemic has increased the influence of the technology leader

69%

Tech 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:

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

RESOURCING THE TECH TEAM

85%

moved workforce to remote working

62%

will keep more than half of workforce remote working



58%

have enacted employee mental health programs

Culture & Leadership more important than Salary

TOP SKILLS SHORTAGES HIGHLIGHTED BY COVID-19

- 1 Cyber security **40%**
- 2 DevOps **25%**
- 3 Modern architecture **25%**
- 4 IT strategy **24%**

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 **53%** that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

3.9x

as effective at scaling digital channels

3x

as effective at increasing worth of company

2.3x

better at customer experience

2.1x

better at customer loyalty

2.7x

more likely to increase profit margin