

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

351

Banking & Capital Markets industry respondents

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES

10% Mean additional IT spend due to the pandemic

Budgets **38%** & Headcounts **37%** expected to rise in next year

OPERATIONAL PRIORITIES

- Top 3
- Operational efficiency
 - Customer engagement
 - Agility and speed to market

Power and Utilities most optimistic

Leisure least optimistic

INVESTMENT PRIORITIES

- Top 3
- Infrastructure/cloud
 - Security and privacy
 - Customer experience and engagement

MANAGING TECHNOLOGY

49%

Security is in top 3 investment priorities

Phishing **81%**

&

Malware **55%**

Experienced an increase in attacks during the crisis



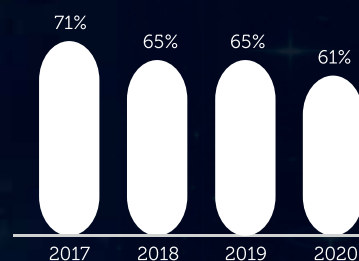
Data curators (...and 'Robot Overlords'!)

35% experienced additional incidents due to remote working.

31% investing in automation as a top priority

TECHNOLOGY LEADERS

Executive team membership for CIOs



61% think the pandemic has increased the influence of the technology leader

70% Banking & Capital Markets 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
- Accessing the right skills
- Creating customer focused products
- Ability to innovate
- Risk tolerance

RESOURCING THE TECH TEAM

87% moved workforce to remote working

47% will keep more than half of workforce remote working

63%

have enacted employee mental health programs

Culture & Leadership more important than Salary

TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19

- Cyber security **34%**
- Agile methods **24%**
- Cloud **23%**
- Organizational change management **23%**
- DevOps **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.hnkpmgciossurvey.com

DRIVING BUSINESS PERFORMANCE THROUGH TECHNOLOGY

Digital leaders:

the **36%** that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

4.6x as effective at scaling digital channels

2.2x better on time to market for new products and service offerings

4.1x better at increasing revenues

2.8x better at collecting valuable data

2.6x more likely to increase profit margin