

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

119

State & Local Government respondents

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES

7% Mean additional IT spend due to the pandemic

49% Budgets & **48%** Headcounts expected to rise in next year

OPERATIONAL PRIORITIES

- Top 3
- 1 Improving operational efficiency
 - 2 Enabling the workforce
 - 3 Improving customer engagement

Power and Utilities most optimistic

Leisure least optimistic

INVESTMENT PRIORITIES

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

RESOURCING THE TECH TEAM

84%

moved workforce to remote working

30%

will keep more than half of workforce remote working

57%

have enacted employee mental health programs

Culture & Leadership more important than Salary

TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19

- 1 Technical architecture **35%**
- 2 Cyber security **32%**
- 3 Organizational change management **32%**
- 4 Enterprise architecture **30%**
- 5 Intelligent automation **30%**

MANAGING TECHNOLOGY

37%

Security is a top investment priority

50%

experienced additional incidents due to remote working

Phishing **79%**

&

Malware **68%**

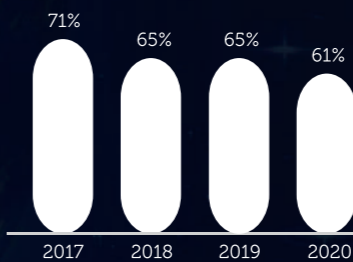
Experienced an increase in attacks during the crisis

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

34% investing in automation as a top priority

TECHNOLOGY LEADERS

Executive team membership for CIOs



58%

think the pandemic has increased the influence of the technology leader

78%

State & Local Government 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 four in ten agree that diversity improves:

Access to skills
Trust and collaboration
Engagement with the business

DRIVING BUSINESS PERFORMANCE THROUGH TECHNOLOGY

Digital leaders:

the **25%** that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

2.2x

as effective at scaling digital channels

3.3x

as effective at increasing revenues

3.2x

as effective at customer loyalty

2.1x

better on time to market for new products and services

2.5x

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