

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

190

insurance industry respondents

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES

9% Mean additional IT spend due to the pandemic

39% Budgets & **46%** Headcounts expected to rise in next year

OPERATIONAL PRIORITIES

- Top 3
- Operational efficiency to the business
 - Customer engagement
 - Developing new products and services

Power and Utilities most optimistic

Leisure least optimistic

INVESTMENT PRIORITIES

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

MANAGING TECHNOLOGY

45%

Security is number 1 investment priority

Phishing **89%**

&

Malware **67%**

Experienced an increase in attacks during the crisis



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

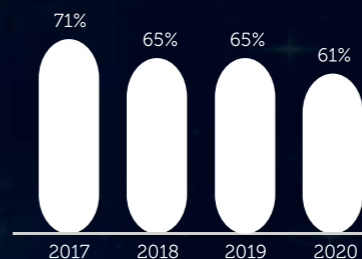
32%

experienced additional incidents due to remote working

Investment in automation insurance sector out-pacing global average by 12%

TECHNOLOGY LEADERS

Executive team membership for CIOs



60%

think the pandemic has increased the influence of the technology leader

57%

insurance industry 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 half agree that diversity improves:

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

RESOURCING THE TECH TEAM

91%

moved workforce to remote working

39% will keep more than half of workforce remote working

62%

have enacted employee mental health programs

Culture & Leadership more important than Salary

- Cyber security **48%**
- Agile methods **33%**
- Org. change management **28%**
- Technical architecture **28%**
- Business analytics **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.hnkpmgciossurvey.com

DRIVING BUSINESS PERFORMANCE THROUGH TECHNOLOGY

Digital leaders:

the **23%** that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

4.1x

as effective at scaling digital channels

2.7x

better at operational efficiency

2x

better at customer experience

3.5x

better at increasing revenues

2.7x

more likely to increase profit margin