THE HARVEY NASH / KPMG **CIO SURVEY 2020**

Harvey Nash.

KPMG

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

EVERYTHING CHANGED. OR DID IT?

BUDGETS & BOARD PRIORITIES

5% Mean additional IT spend due to the pandemic

Budgets **43%** & Headcounts **45%** expected to rise in next year

Power and Utilities most optimistic

Leisure least optimistic

OPERATIONAL PRIORITIES

Top 3

1. Operational efficiency to the business
2. Customer engagement
3. Enabling the workforce

4 modes of recovery:
1. **Hard reset.** 2. **Modified business-as-usual.**
3. **Transform to re-emerge** 4. **Surge.**

RESOURCING THE TECH TEAM

86% moved workforce to remote working

43% will keep more than half of workforce remote working

84% concerned with the mental health of team

Culture & Leadership more important than Salary

TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19

1	2	3	4	5
Cyber security	Org. change management	Enterprise architecture	Technical architecture	Advanced analytics
35%	**26%**	**22%**	**22%**	**22%**

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

MANAGING TECHNOLOGY

47% Security is number 1 investment priority

41% experienced additional incidents due to remote working.

Phishing **83%** & Malware **62%**
Experienced an increase in attacks during the crisis

Data curators (...and 'Robot Overlords'!) Some of the new roles being created

Investing in emergent technology has aided crisis response

TECHNOLOGY LEADERS

Executive team membership for CIOs

71%	65%	65%	61%
2017	2018	2019	2020
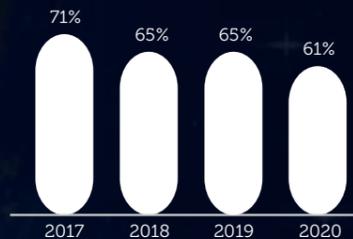
61% think the pandemic has increased the influence of the technology leader

26% tech leaders are moved on

23% leave of their own accord

70% say crisis has increased the collaboration between their team and the business

11% female respondents
9% CIOs or CTOs

More than half agree that diversity improves:
Innovation
Access to skills
Engagement with the business
Trust & Collaboration

DRIVING BUSINESS PERFORMANCE THROUGH TECHNOLOGY

Digital leaders:
the **30%** that are 'very' or 'extremely' effective at using digital technology to advance their business strategy

52% embed security into projects at the start

4x better at operational efficiency

3x better at customer experience

3.5x better at increasing revenues

7x more likely to use AI to manage enterprise data