HARVEY NASH
The Power of Talent

THE HARVEY NASH / KPMG **CIO SURVEY 2019**

KPMG

3,645
IT leaders surveyed across a wide range of industries and geographies

11% other C-level roles
5% CEOs
52% CIOs or CTOs

The 2019 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 3,645 CIOs and technology leaders across 108 countries.
www.hnkpmgciosurvey.com

BUDGETS & BOARD PRIORITIES

MORE BUDGET INCREASES THAN EVER BEFORE
55%

Leisure **68%**
Broadcast / Media **62%**

52% expect budget increase next year

51% expect headcount increase next year

OPERATIONAL PRIORITIES

Top 3

1. Delivering consistent and stable IT performance
2. Improving business processes
3. Increasing operational efficiencies

Increasing efficiencies through Automation *is fastest growing board priority*

MANAGING TECHNOLOGY

BUSINESS-MANAGED IT

almost **two-thirds** (64%) allow business-managed IT investment and 1 in 10 actively encourage it

Digital Leaders are most likely to encourage business-managed IT spend

Organizations that encourage it are more likely to feel very well positioned to deal with cyber risks

TECHNOLOGY ADOPTION

77% using Cloud

1 in 5 using on demand platforms, internet of things, RPA, AI or ML

AI/Automation
65% feel that more than 10% of workforce could be replaced with AI/Automation in the next 5 years

A CHANGING PERSPECTIVE

CIO CAREERS

47% saw salary increase

45% had bonus of more than 10% of salary

32% find their role very fulfilling

ORGANIZATIONS ARE TRANSFORMING

44% plan some transformational changes (e.g. new offerings)

38% plan major transformational changes (e.g. new dominant offerings)

6% plan radical transformational changes (e.g. move to a new revenue models)

DIGITAL LEADERS

The 30% of organizations that are 'very or extremely effective at using digital technology to advance their business strategy'

Digital Leaders are more likely to:

1. Report to the CEO & sit on the executive team
2. Have Boards that prioritize the creation of innovative products and services
3. Have Making Money as a priority rather than Saving it
4. Collaborate to deliver technology change
5. Use Agile methods to speed up delivery
6. Use cross-functional teams

PEOPLE, SKILLS & TALENT

ALL TIME HIGH FOR SKILLS SHORTAGES
67%

45% use outsourcing to access skills

37% use outsourcing to add scale

41% plan to increase outsourcing

Females on technology Teams **22%**

26% feel very successful at promoting diversity & inclusion

MOST SCARCE SKILLS

Top 3

1. Big data/Analytics **43%**
2. Cyber security **39%**
3. Artificial intelligence **38%**

SECURITY, DATA & PRIVACY

Cyber security up 14% as board priority

39% are experiencing a shortage in cyber security skills

74% feel vulnerable to cyber attack

32% have had major attack in last 2 years

1 in 10 exposed in multiple areas

45% not or only slightly, effective at maximizing value from data

91% feel they could do more to build customer trust

91% agree that data privacy and trust will be as important as product/service offering in customer attraction

94% feel they could be better at identifying & managing key security issues

83% feel the need for data security limits their ability to innovate