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

The survey found that:

- **Mean additional IT spend due to the pandemic** is expected to rise in next year.
- **Operational efficiency** to the business is the top priority.
- **Cyber security** is the top skill shortage highlighted by COVID-19.
- **Security** is the number 1 investment priority.
- **Phishing** & **Malware** are the most common types of attacks.
- **Diversity** improves innovation, access to skills, engagement with the business, trust, and collaboration.
- **AI** is more likely to be used to manage enterprise data.

**EVERYTHING CHANGED. OR DID IT?**

- **70%** say crisis has increased collaboration between their team and the business.
- **61%** think the pandemic has increased the influence of the technology leader.
- **6%** leave of their own accord.
- **26%** move on.
- **23%** think crisis has increased the collaboration between their team and the business.

**BUDGETS & BOARD PRIORITIES**

- **5%** mean additional IT spend due to the pandemic.
- **Budgets & Headcounts** 43% expected to rise 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.
- **84%** concerned with the mental health of team.
- **43%** will keep more than half of workforce remote working.
- **Culture & Leadership** more important than Salary.

**TOP 5 SKILLS SHORTAGES HIGHLIGHTED BY COVID-19**

- Cybersecurity: 35%
- Org change management: 26%
- Enterprise architecture: 22%
- Technical architecture: 22%
- Advanced analytics: 22%

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

**DRIVING BUSINESS PERFORMANCE THROUGH TECHNOLOGY**

- **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.

**MANAGING TECHNOLOGY**

- **47%** security investment priority.
- **41%** experienced additional incidents due to remote working.
- **83%** phishing & **62%** malware.
- **Data curators (…and ‘Robot Overlords’!)**
- **71%** digital leaders.
- **65%** embed security into projects at the start.
- **61%** 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.