

Total number of respondents:
4,498

NAVIGATING UNCERTAINTY

CIO PRIORITIES

MANAGING CHANGE

64% say the political, business and economic **environment** is becoming **more unpredictable**.

Increasingly, uncertain times seem to be correlated with **shifting IT leadership priorities**:

INCREASINGLY important compared with last year:

Delivering consistent and stable IT performance **UP 21%**

Developing innovative new products and services **UP 21%**

Saving costs **UP 8%**

Increasing operational efficiencies **UP 7%**

DECREASINGLY important compared with last year:

Better engagement with customers/prospects **DOWN 18%**

Improving the success rate of projects **DOWN 11%**

TOP RESPONSES TO POLITICAL/BUSINESS/ECONOMIC CHANGE:

1

Creating a more nimble technology platform **52%**

2

Working with restricted budgets **49%**

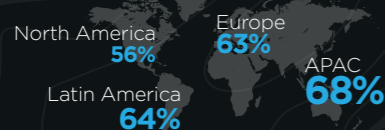
3

Investing in cyber security **45%**

PEOPLE, SKILLS AND TALENT

Six in ten consistently report **technology skills shortage** 2017 (62%), 2016 (65%), 2015 (59%), 2014 (60%)

Skills shortage is unequal across the world:



SKILLS THAT ARE MOST SCARCE:

Big Data/Analytics (42%) - most in demand by large employers

Business Analysis (34%) - most in demand by smaller employers

Enterprise Architecture (34%) - fastest growing - up 26% compared with last year

No progress on women in IT leadership



9% of senior IT leadership are women, **same as last year**

Yet **35%** of organisations have a **formal diversity initiative** in place

This varies greatly by organisational size:

(28%) smaller

(51%) mid-sized

(72%) larger organisations

Despite slow progress: **more women had salary rises** than men (**42%** versus **32%**)

The 2017 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 4,498 CIOs and technology leaders across 86 countries. www.hnkpmgciosurvey.com

DEALING WITH DIGITAL

Proportion of organisations with **enterprise-wide digital strategy** is **up by 52%** in three years: 2017 **41%**, 2016 **35%**, 2015 **27%**

Biggest impediment to digital success is **resistance to change 43%**. Only 25% saw **lack of budget** as a major issue.

TOP TACTICS TO FOSTER DIGITAL INNOVATION ARE TO:

1

Dedicate more time for innovation **54%**

2

Partner with innovative organisations e.g. academic institutions **52%**

3

Ring-fencing innovation budgets **31%** a distant third

A quarter of organisations (25%) now employ a **Chief Digital Officer**: 2017 **25%**, 2016 **18%**, 2015 **17%**, 2014 **7%**

MANAGING IT

TOP WAYS IT LEADERS ARE LOOKING TO IMPROVE AGILITY AND RESPONSIVENESS:

1

Implementing agile methodologies **28%**

2

Buying more solutions as a service' **19%**

3

Taking different approaches with multi-mode IT **15%**

34% OF IT LEADERS ARE ALREADY **INVESTING** OR ARE **PLANNING TO INVEST IN DIGITAL LABOUR** IN 2017:

62% of respondents from **larger organisations** are **investing**, compared with **27%** of peers in smaller firms

27% believe **digital labour is most effective** at improving quality, ahead of **24%** who value efficiency

Relentless rise of organisations being subject to **'major' cyber attacks** during past four years: 2017 **32%**, 2016 **28%**, 2015 **25%**, 2014 **22%**

IT BUDGETS ARE GROWING: **79%** have seen budgets upheld or increased this year. **Only one in five** IT leaders (21%) have seen **IT budgets cut**

CIO CAREERS

The majority of CIOs (58%) can expect to be in the job for **five years or less**:

28% of CIOs at **larger firms** more likely to **move job** this year vs **20%** at smaller organisations

CIOs **most likely to move** job this year are in **Charity/Non-Profit** **34%** want to **change role**

CIO job satisfaction has **risen by 18%** since 2015 and is at a three-year high (**39%** rate themselves 'very fulfilled'):

44% of CIOs who sit on their executive management team record the **highest levels of job satisfaction**

Non-Profit CIOs see **12% drop in fulfilment** (likely linked to career restlessness)

33% of CIOs benefited from an **increase in base salary** last year, **62%** of salaries were unchanged