Harvey Nash Group Digital Leadership Report 2021

Start of Block: Introduction

The Harvey Nash Group Digital Leadership Report (previously the ‘Harvey Nash CIO Survey’) is the world’s largest study on the priorities, strategies and careers of tech and digital leaders. It is aimed at anyone where technology plays a big part in their role, for instance CIOs, heads of tech, CTOs, CDOs, CEOs, CMOs, COOs, CFOs, and their senior team members.   In return for taking part you will receive, over the coming months: A full copy of the 30+ page report summarising our findings An invite to one of our exclusive launch events or webinars across the world Access to data, allowing you to benchmark yourself with peers **Taking the Survey** Information you disclose will be used solely for the purposes of this survey Data will be used and analyzed on an aggregated basis; no individual responses will be published This survey should take 16 minutes to complete. Please answer as many questions as possible. If you feel a question is not relevant or requests information that you do not wish to disclose, please leave it blank You can save your answers at any point, and return to the survey later The currency used in this survey is US Dollar (USD); at the launch of the survey the conversion rate was GBP 1 = USD 1.39 / Euro 1 = USD 1.18.   If you have any questions please contact [michelle.thomas@harveynash.com](mailto:michelle.thomas@harveynash.com). Thank you.   *Please read our* [privacy policy](https://www.harveynash.com/privacypolicy/) *to find out how we use personal data, as well as how to change your preferences. Should you ever wish to unsubscribe from Harvey Nash marketing communications please email* [info@harveynash.com](mailto:info@harveynash.com) *with ‘unsubscribe’ in the subject line.*

End of Block: Introduction

Start of Block: About You

***You have completed 5% of the survey.***  
***Just a reminder: if you are unsure how to answer a question, just move on to the next.***

What is your email address? (so we can send you the survey results or information relating to the survey.)

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What is your gender?

* Male (1)
* Female (2)
* Non-binary (3)
* Prefer not to say (4)

What is your job title?

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Which category best describes your job role?

* CEO (1)
* CFO / Finance Director (2)
* CIO / IT Director (3)
* CTO (4)
* COO / Operations Director (5)
* Chief Digital Officer (6)
* Chief Data Officer (7)
* CMO / Marketing Director (8)
* CISO / Head of Information Security (9)
* HR Director / Head of HR (10)
* Other C level (11)
* VP / Director / Senior Manager IT (12)
* VP / Director / Senior Manager Non IT (13)
* Other Manager (14)
* Other, please specify (15) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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To whom do you report?

* CEO (1)
* CFO / Finance Director (2)
* COO / Operations Director (3)
* CIO / IT Director (4)
* Chief Digital Officer (5)
* CMO / Marketing Director (6)
* Other, please specify (7) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Are you a member of the operational board / executive management team of your organization?

* Yes (1)
* No (2)

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In which sector is your organization primarily engaged?

* Advertising / PR (1)
* Broadcast / Media (2)
* Business / Professional Services (3)
* Charity / Non Profit (4)
* Construction / Engineering (5)
* Defence (6)
* Education (7)
* Financial Services - Banking (8)
* Financial Services - Insurance (9)
* Financial Services - Investment management (10)
* Financial Services - Other (11)
* Government - Central/Federal Government (12)
* Government - Local/State Government (13)
* Healthcare (14)
* Leisure (15)
* Manufacturing / Automotive (16)
* Oil & Gas (17)
* Pharmaceuticals (18)
* Power & utilities (19)
* Retail (20)
* Technology (21)
* Telecommunications (22)
* Transport / Logistics (23)
* Other, please specify (24) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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In which country, jurisdiction or region are you based? (You can select 'Other' at the bottom of the list.)

* Argentina (1)
* Australia (2)
* Austria (60)
* Belgium (3)
* Brazil (4)
* Cambodia (5)
* Canada (6)
* Chile (7)
* China - Mainland (8)
* China – Hong Kong (SAR) and Macau (SAR) (9)
* Colombia (10)
* Costa Rica (59)
* Czech Republic (11)
* Denmark (12)
* Ethiopia (13)
* Finland (14)
* France (15)
* Germany (16)
* Greece (17)
* India (18)
* Indonesia (19)
* Italy (20)
* Japan (21)
* Kenya (22)
* Luxembourg (23)
* Malaysia (24)
* Mexico (25)
* Netherlands (26)
* New Zealand (27)
* Nigeria (28)
* Norway (29)
* Oman (30)
* Panama (31)
* Peru (32)
* Philippines (33)
* Poland (34)
* Portugal (35)
* Qatar (58)
* Republic of Ireland (36)
* Russia (57)
* Rwanda (37)
* Saudi Arabia (38)
* Singapore (39)
* South Africa (40)
* Spain (41)
* Sweden (42)
* Switzerland (43)
* Taiwan (44)
* Thailand (45)
* Trinidad and Tobago (46)
* Turkey (47)
* Uganda (48)
* Ukraine (49)
* United Arab Emirates (50)
* United Kingdom (51)
* United States (52)
* Uruguay (53)
* Venezuela (54)
* Vietnam (55)
* Other, please specify (56) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Display This Question:

If In which country, jurisdiction or region are you based? (You can select 'Other' at the bottom of... = United States

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If you are based in the United States, in which State are you located?

* Alabama (1)
* Alaska (2)
* American Samoa (3)
* Arizona (4)
* Arkansas (5)
* California (6)
* Colorado (7)
* Connecticut (8)
* Delaware (9)
* District of Colombia (10)
* Florida (11)
* Georgia (12)
* Hawaii (13)
* Idaho (14)
* Illinois (15)
* Indiana (16)
* Iowa (17)
* Kansas (18)
* Kentucky (19)
* Louisiana (20)
* Maine (21)
* Maryland (22)
* Massachusetts (23)
* Michigan (24)
* Minnesota (25)
* Mississippi (26)
* Missouri (27)
* Montana (28)
* Nebraska (29)
* Nevada (30)
* New Hampshire (31)
* New Jersey (32)
* New Mexico (33)
* New York (34)
* North Carolina (35)
* North Dakota (36)
* Ohio (37)
* Oklahoma (38)
* Oregon (39)
* Pennsylvania (40)
* Puerto Rico (41)
* Rhode Island (42)
* South Carolina (43)
* South Dakota (44)
* Tennessee (45)
* Texas (46)
* Utah (47)
* Vermont (48)
* Virginia (49)
* Washington (50)
* West Virginia (51)
* Wisconsin (52)
* Wyoming (53)

Display This Question:

If In which country, jurisdiction or region are you based? (You can select 'Other' at the bottom of... = United Kingdom

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If you are based in the United Kingdom, please indicate which region / country you are based in

* Scotland (1)
* Wales (2)
* Northern Ireland (3)
* England - Northwest (4)
* England - Yorkshire (5)
* England - Northeast (6)
* England - Midlands (7)
* England - East Anglia (8)
* England - Greater London (9)
* England - Southeast (10)
* England - Southwest (11)

End of Block: About You

Start of Block: Leadership

***You have completed 20% of the survey.***  
**This survey is intentionally wide-ranging. If you don't feel a question is relevant to you, feel free to jump to the next question.**

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What are the top three business aims that your management board is looking for technology to address?

* Improving customer engagement (1)
* Improving employee engagement (2)
* Enabling the workforce (3)
* Entering new geographical markets (4)
* Developing new products and services (5)
* Improving operational efficiency (6)
* Gaining actionable insights from data (7)
* Improving agility and speed to market (8)
* Improving security and trust (9)
* Delivering stable and consistent IT performance (10)
* Improving sustainability (society / environment) (11)

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Who in your organization has the most responsibility for technology strategy for the following? (if your organization doesn’t have the exact job title listed, please select the closest one, or ‘Other’ if no role listed is close enough)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | CIO (1) | CTO (2) | CEO/COO (3) | CMO (4) | Chief Digital Officer (5) | Other (6) |
| Ensuring stable and consistent technology infrastructure (1) |  |  |  |  |  |  |
| Enabling the workforce to be more productive (10) |  |  |  |  |  |  |
| Driving efficiencies and cost savings into the business (e.g. automation) (11) |  |  |  |  |  |  |
| Driving stronger customer engagement (12) |  |  |  |  |  |  |
| Creating new technology based products and services (13) |  |  |  |  |  |  |
| Gaining insights from data (14) |  |  |  |  |  |  |

What proportion of your core applications are cloud based?

* Few or none (4)
* Some (3)
* Most (2)
* All (1)

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What would you say is your greatest technology challenge?

* Realising the potential of what you already have (1)
* Building new ways to realise potential (2)

To what extent does the board value/recognise technology as crucial to improving your organizations sustainability/carbon footprint?

* No extent (2)
* Little extent (8)
* Some extent (9)
* Great extent (11)
* Extreme extent (12)

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To what extent is your organization realizing the potential of using technology to improving sustainability/carbon footprint?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | No extent (1) | Little extent (2) | Some extent (3) | Great extent (4) | Extreme extent (5) |
| Using tech to reduce the need to travel (1) |  |  |  |  |  |
| Using tech to improve operational efficiencies of your organization (2) |  |  |  |  |  |
| Improving the carbon footprint of technology itself (e.g. data centers) (3) |  |  |  |  |  |

In your opinion, is the role of CIO / IT Director becoming more or less strategic within your organization?

* Less (2)
* Same (3)
* More (1)

To what extent do you believe your CEO/main board is committed to promoting the potential of technology in your organization?

* No extent (1)
* Little extent (2)
* Some extent (3)
* Great extent (4)
* Extreme extent (5)

Currently, how does your organization perform relative to its competitors on the following metrics?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Significantly worse than competitors (1) | Worse than competitors (2) | About the same as competitors (3) | Better than competitors (4) | Significantly better than competitors (5) |
| Operational efficiency (1) |  |  |  |  |  |
| Time to market for new product or service offerings (2) |  |  |  |  |  |
| Customer experience (3) |  |  |  |  |  |
| Responding to changes in the business environment (4) |  |  |  |  |  |
| Employee experience (5) |  |  |  |  |  |

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To what extent, if at all, do you believe your organization's primary business activity will transform over the next 3 years?

* No change at all (1)
* Minor changes – e.g. existing products/services evolving (2)
* Some changes – e.g. new products/services introduced, existing ones still dominant (3)
* Major changes – e.g. new products/services introduced which are equal to or more dominant than existing ones (4)
* Radical transformation – e.g. entirely new revenue model, such as transitioning from goods based to service based offering (5)

End of Block: Leadership

Start of Block: Talent

***You have completed 40% of the survey.***

Thinking about your whole organisation, how many days per week are you expecting / planning staff to work from home?

* 0 (1)
* 1 (2)
* 2 (3)
* 3 (4)
* 4 (5)
* 5 (6)

Thinking about your whole organisation, do you think your staff feel this level of home working is…

* Too little (2)
* Just about right (3)
* Too much (1)

How has the Covid crisis and home working affected the following people factors in your team?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Decreased a lot (1) | Decreased a little (2) | Stayed the same (3) | Increased a little (4) | Increased a lot (5) |
| Mental wellness (1) |  |  |  |  |  |
| Engagement of staff (2) |  |  |  |  |  |
| Productivity (3) |  |  |  |  |  |
| Cross-organisation collaboration (4) |  |  |  |  |  |
| Inclusivity (5) |  |  |  |  |  |
| Work/life balance (6) |  |  |  |  |  |

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As a leader, what have been the most important ways you have responded to leading in a remote working environment? Tick all that apply

* Introduced new ways to communicate with the team (1)
* Invested in more communications technology (4)
* Relaxed rules about holidays and working hours (5)
* Redesigned the employee ‘offer’ to suit a home working environment (6)
* Reduced the need for fixed office space (7)
* Increased need for flexible office space (8)
* Permanently reduced the need for international travel (9)
* Started recruiting talent from further away than usual (10)
* Started recruiting talent from other countries (11)
* Increased investment in well-being / mental health initiatives (12)

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Does a skills shortage prevent your organization from keeping up with the pace of change?

* Yes (1)
* No (2)

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In what areas are you suffering a skills shortage?  Tick all that apply

* Technical architecture (1)
* Enterprise architecture (2)
* Business analysis (3)
* Development (4)
* IT strategy (5)
* Project management (6)
* Cyber security (7)
* Change management (8)
* Big data / analytics (9)
* Artificial intelligence (10)
* Automation / robotics (11)
* Agile methods (12)
* DevOps (13)
* Cloud (14)
* Network engineers (15)
* UX/UI engineers (16)
* Blockchain (17)
* Other, please specify (18) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Over the next 2 years, how do you think the following use of technology resources will change?

|  |  |  |  |
| --- | --- | --- | --- |
|  | Decrease (1) | Same (2) | Increase (3) |
| Permanent hires (1) |  |  |  |
| Contractors (2) |  |  |  |
| Niche consultancies (3) |  |  |  |
| Statement of Work contracts (4) |  |  |  |
| Apprenticeships (5) |  |  |  |
| Cross-training (6) |  |  |  |
| Outsourcing (7) |  |  |  |

To what extent are you retaining your best technology talent?

* Little / no extent - most of our key staff leave before we want them to (1)
* Some extent - we retain some key staff, but could do better (2)
* Great extent - most of our key staff are retained for the period we want them (3)

To what extent has the Crisis made your staff reconsider their life priorities, and making retention harder?

* Little/no extent (1)
* Some extent (2)
* Great extent (3)

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Typically, why do your best people leave?  Pick top 2

* More money (1)
* Better career prospects & training (2)
* More interesting / exciting work (3)
* Stronger brand in the market (10)
* Better flexibility in working (4)
* Other, please specify (11) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Over the next year how do you expect your IT / Technology headcount to change?

* Decrease (1)
* Stay the same (2)
* Increase (3)

What proportion of your tech team are female?

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How successful has your current organization been at promoting inclusion and diversity in the technology team?

* Not at all successful (1)
* Somewhat successful (5)
* Quite successful (2)
* Sucessful (3)
* Very successful (4)

What active ways are you looking to improve diversity & inclusion in your team?

|  |  |  |  |
| --- | --- | --- | --- |
|  | Have not tried (1) | Tried but with limited success (2) | Tried with success (3) |
| Inclusion training / communications (1) |  |  |  |
| Mandatory quotas on shortlists of candidates (2) |  |  |  |
| Mandatory quotas on hiring decisions (3) |  |  |  |
| Creating employee support networks (4) |  |  |  |
| Having a clear vision for inclusion and transparent reporting (5) |  |  |  |
| Having an inclusion steering team, with genuine powers (6) |  |  |  |

Overall, do you think your current diversity and inclusion approach is improving the quality of hires you are making?

* Yes (1)
* No (2)

End of Block: Talent

Start of Block: Technology

**You have completed 60% of the survey.**

The currency used in this survey is US Dollar (USD); at the launch of the survey the conversion rate was GBP 1 = USD 1.39 / Euro 1 = USD 1.18.

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What is your current total central IT / technology budget (capex and opex)?

▼ Less than $1m (1) ... More than $1bn (9)

What percentage of the overall revenue of your organization is spent on technology?

▼ 0% (1) ... 100% (19)

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Looking forward, over the next 12 months, do you expect your overall IT/technology budget to

* Decrease (1)
* Stay the same (2)
* Increase (3)

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What proportion of the overall spend on IT is controlled by / managed outside the IT organization / department?

▼ 0% (1) ... 76-100% (6)

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What best describes your view on business managed IT for an organization?

* It’s an enabler, as long as IT is involved in governance (1)
* It’s an enabler, regardless of IT’s involvement (2)
* It’s not an enabler (3)

Overall, how effective has your organization been in

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Not effective (1) | Slightly effective (2) | Moderately effective (3) | Very effective (4) | Extremely effective (5) |
| Using digital technologies to advance its business strategy (1) |  |  |  |  |  |
| Pivoting and scaling digital channels to meet new customer demands and expectations (2) |  |  |  |  |  |
| Using data insights to generate more revenue (3) |  |  |  |  |  |
| Using data insights to inform your product / service offering (4) |  |  |  |  |  |

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How would you characterize your organization's usage of the following technologies?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Have not considered (1) | Actively considering (2) | Piloting (3) | Small-scale implementation (4) | Large-scale implementation (5) |
| Artificial intelligence / Machine Learning (4) |  |  |  |  |  |
| Augmented Reality / Virtual Reality (3) |  |  |  |  |  |
| Blockchain / Distributed Ledger (6) |  |  |  |  |  |
| Cloud (8) |  |  |  |  |  |
| Internet of Things (2) |  |  |  |  |  |
| On-demand marketplace platforms (5) |  |  |  |  |  |
| Quantum computing (7) |  |  |  |  |  |
| Robotic process automation (1) |  |  |  |  |  |
| Big data / analytics (10) |  |  |  |  |  |

To what extent do you feel your organization is positioned to identify and deal with current and near future IT security / cyber attacks?

* Not well - we are exposed in multiple areas (1)
* Quite well - most reasonable risks are covered, although we are exposed in some specific areas (2)
* Very well positioned - we are confident that all reasonable risks are covered (3)

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Has your organization been subjected to any major IT security or cyber-attacks in the last 2 years?

* Yes (1)
* No (2)

Display This Question:

If Has your organization been subjected to any major IT security or cyber-attacks in the last 2 years? = Yes

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If yes, please indicate the extent to which the following happened as a result of cyber breaches in the last two years

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|  | Little / no extent (3) | Some extent (2) | Major extent (1) |
| Revenue was lost (17) |  |  |  |
| Customer data was lost (4) |  |  |  |
| Customer trust was lost (18) |  |  |  |
| Service provision was interrupted (5) |  |  |  |
| More resources allocated to InfoSec (6) |  |  |  |
| IT team blamed for incident (7) |  |  |  |

End of Block: Technology

Start of Block: Innovation

**You have completed 80% of the survey.**

In your role as a digital leader, how important are the following activities

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Not very important (1) | Slightly important (2) | Moderately important (3) | Important (4) | Very important (5) |
| Doing business as usual (1) |  |  |  |  |  |
| Reducing IT costs (2) |  |  |  |  |  |
| Transforming the enterprise to unlock new value from digital (3) |  |  |  |  |  |
| Bringing in effective partners (4) |  |  |  |  |  |
| Developing a P/L business based on a digital capability (5) |  |  |  |  |  |
| Supporting innovation (9) |  |  |  |  |  |
| Creating modular components and service enabling them with APIs (10) |  |  |  |  |  |
| Ensuring cyber security throughout the enterprise (11) |  |  |  |  |  |
| Transforming and digitizing the enterprise (12) |  |  |  |  |  |

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Compared to your peers, how successful has your organization been at innovating in the last 2 years?

* Much worse (5)
* Worse (4)
* Same (2)
* Better (3)
* Much better (1)

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What have been the most successful ways you have become more innovative? Select up to 3

* Acquiring new, innovative organisations (4)
* Partnering with other organisations on new ventures (7)
* Having a technology platform that can change and scale quickly (8)
* Creating new divisions within your organisation with the brief to innovate (9)
* Embedding innovation as a formal job responsibility of leaders (10)
* Having an innovation board / steering team (11)
* Bringing in outside consultants to help innovate (12)
* Other, please specify (13) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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What are your key areas you wish to improve on innovation? Select up to 3

* Gaining a deeper understanding of the customer (1)
* Having more creative ideas (4)
* Increasing pace and urgency (5)
* Better insight into what competitors and peers are doing (6)
* Stronger ownership of innovation within the business and by board (7)
* Better reporting and ROI (8)
* Greater budget (9)

End of Block: Innovation

Start of Block: Your Details and Preferences

***Almost there...You have completed 95% of the survey.***

To receive of copy of the CIO Survey and your personal benchmark report please enter your details below:

* Name (1) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Company (2) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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We will use the following email address to communicate with you, which you provided at the beginning of this survey. Please feel free to edit this here:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Join CIONET**   
    
Our partners [CIONET](https://www.cionet.com/) are one of the world’s fastest growing digital leadership communities, with over 10,000 members worldwide. Digital Leadership Report participants can join for free, if they meet certain criteria around job role. If you are interested in joining or finding out more please tick the box below. Harvey Nash Group will share your contact details (name, email address, job title, company name, location) with CIONET, for the purpose of receiving information about [CIONET](https://www.cionet.com/) membership. If you consent, your personal data will be processed in the manner outlined in CIONET’s privacy policy which can be found [here](https://www.cionet.com/privacy-policy).

* Yes please (please make sure you have completed your contact details above) (1)

This year, the Center for Information Systems Research at MIT is working with us to look at the changing role of digital leaders. One part of the research will be to cross-reference survey data with publicly available data on companies and sectors. If you are happy to participate in this research please enter your company name below. As with everything in this survey, neither you nor your company will be identifiable and your personal information will remain strictly confidential.

* Yes please (please make sure you have entered your company name above) (1)

Display This Question:

If In which country, jurisdiction or region are you based? (You can select 'Other' at the bottom of... != Canada

And In which country, jurisdiction or region are you based? (You can select 'Other' at the bottom of... != United States

With our wish to be as environmentally friendly as we can, and also with the current situation as it stands, please do think twice before requesting a hard copy of this year’s report.  We will of course still send you a copy if it is something that is very useful for you, but do bear in mind that we will have a perfectly rendered digitally native version of the report to send out too.  If you do require a printed copy of this year’s CIO Survey, please enter your full postal address (please include your name, address and country / region).

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Would you like to attend our launch event on Tuesday 9th November 2021 at 4pm GMT?  If yes, please make sure you've left your contact details

* Yes, I would like to attend (1)
* I would like to attend, but that date and time doesn't work for me (2)
* No, I would not like to attend (3)

Any other comments about the survey? How could we improve it for you next year? (We do read every comment.)

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