

Digital Leaders Survey

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Published by BCS, The Chartered Institute for IT, First Floor, Block D, North Star House, North Star Avenue, Swindon, SN2 1FA, UK.

www.bcs.org

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1. Key findings

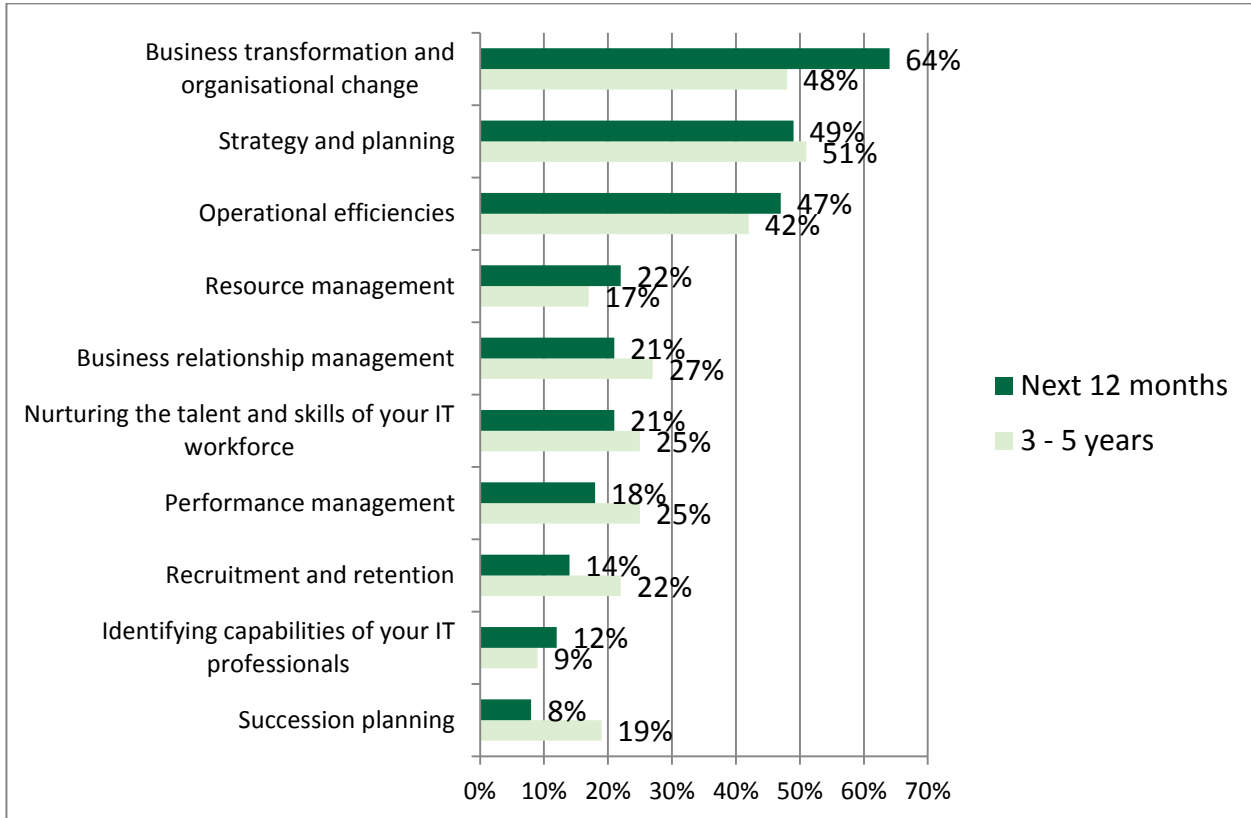
- Sixty four per cent of respondents rate *business transformation and organisational change* as among their organisation's top three management issues for the next 12 months. This is followed by *strategy and planning* (49%) and *operational efficiencies* (47%).
- Looking three to five years ahead, the same three issues are expected to be at the top of the list of priorities. However, the order is reversed with *strategy and planning* coming out top (51%), followed by *business transformation and organisational change* (48%), and *operational efficiencies* (42%).
- The greatest number of respondents (57%) rate *mobile computing* as among their organisation's top three IT topics or trends for the next 12 months. This is followed closely by *information security* (53%) and *cloud computing* (49%).
- When asked which IT topics or trends will be the top three priorities in three to five years' time, *information security* is the top answer with 55%. This is followed by *cloud computing* (48%) and *big data* (47%).
- Only 10% of respondents felt that their organisation had enough resources to address the management issues and IT trends that their company has prioritised. More than half (57%) indicated that they need enhanced IT skills among their existing workforce, 48% require additional IT staff that are suitably qualified, and 37% would like a bigger budget.
- When considering upcoming changes and trends in the IT industry, the thing most likely to keep respondents awake at night is information security issues.

2. Top three management issues

Questions:

- Which of the following management issues are your organisation's top three priorities for the next 12 months?
- In three to five years' time, which of these management issues do you think will be your organisation's top three priorities?

Figure 1 - Management issues that are organisations' top three priorities



Sixty four per cent of respondents rate *business transformation and organisational change* as among their organisation's top three management issues for the next 12 months. This is followed by *strategy and planning* (49%) and *operational efficiencies* (47%).

When asked which management issues they think will be the priorities in three to five years' time, the same issues occupy the first three places. However, the order is slightly different with *strategy and planning* coming out top on 51%.

There are a number of issues which are expected to become a higher priority in three to five years' time and these include *succession planning* (up from 8% to 19%) and *recruitment and retention* (up from 14% to 22%).

Among SMEs the issue most likely to be in the top three over the next 12 months is *strategy and planning* (60%).

For larger companies with over 250 employees, *business transformation and organisational change* (71% versus 41%) and *operational efficiencies* (51% versus 35%) are more likely to be high priorities compared with SMEs.

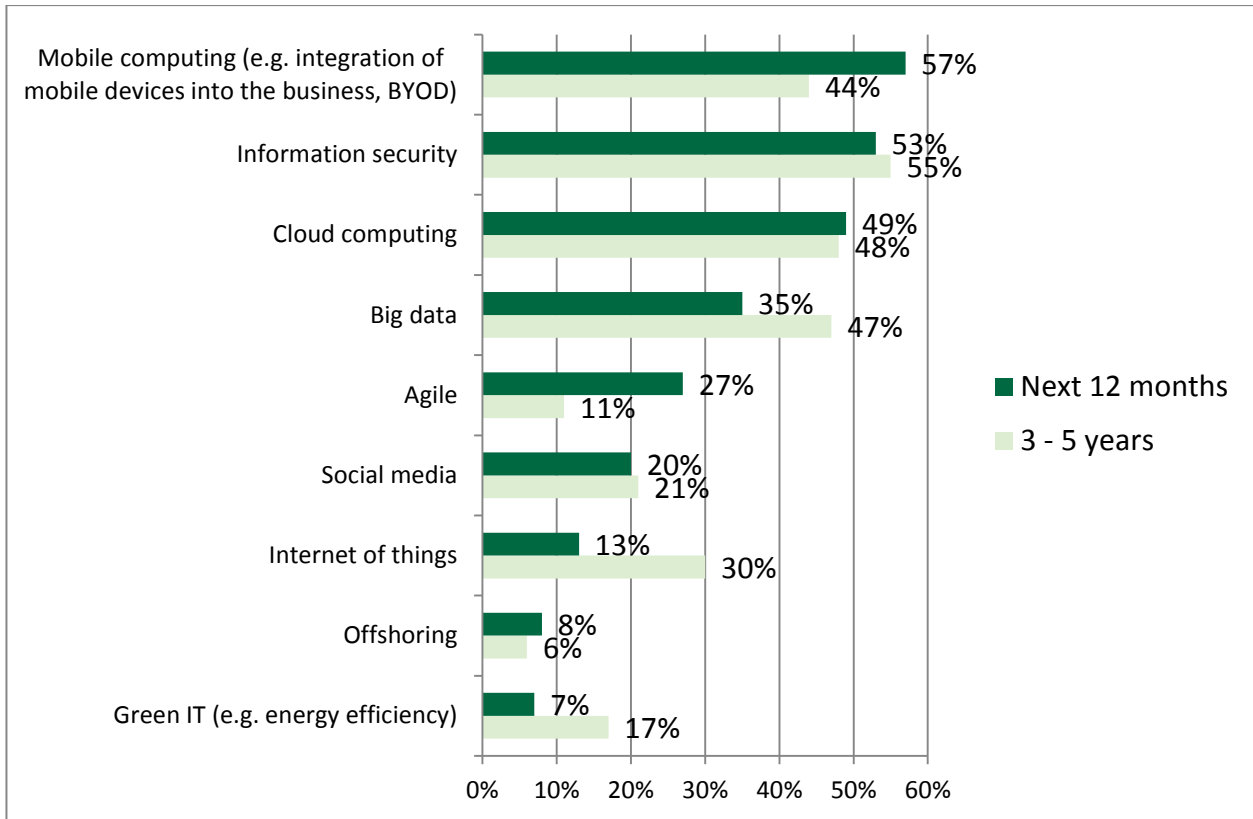
When it came to looking ahead three to five years, *strategy and planning is again the top issue for SMEs* (47%); whereas for larger companies *business transformation and organisational change* (54%) is again the top issue.

3. Top three IT topics or trends

Questions:

- Which of the following IT topics or trends are your organisation's top three priorities for the next 12 months?
- In three to five years' time, which of these IT topics or trends do you think will be your organisation's top three priorities?

Figure 2 - IT topics or trends that are organisations' top three priorities



The greatest number of respondents (57%) rate *mobile computing* as among their organisation's top three IT topics or trends for the next 12 months. This is followed closely by *information security* (53%) and *cloud computing* (49%).

When asked which IT topics or trends will be the top three priorities in three to five years' time, *information security* is the top answer with 55%. This is followed by *cloud computing* (48%) and *big data* (47%). *Mobile computing* drops down to fourth place with 44%.

The area showing the biggest rise is *internet of things* (up from 13% to 30%). Whilst *green issues* scored relatively low on 7%, it is expected to become increasingly important over the next three to five years (with 17% placing it in the top 3 priorities).

Regarding trends for the next 12 months, analysis by number of employees shows that *mobile computing* is the top answer for both SMEs and large companies (over 250 employees). *Information security* and *cloud computing* occupy the next two spots.

Internet of things is more likely to be a high priority for SMEs compared with larger organisations (23% versus 9%).

When it came to looking three to five years ahead, *information security* is the top answer for SMEs (63%). However, for larger organisations the 3 leading trends all scored around 50% and these are as follows:

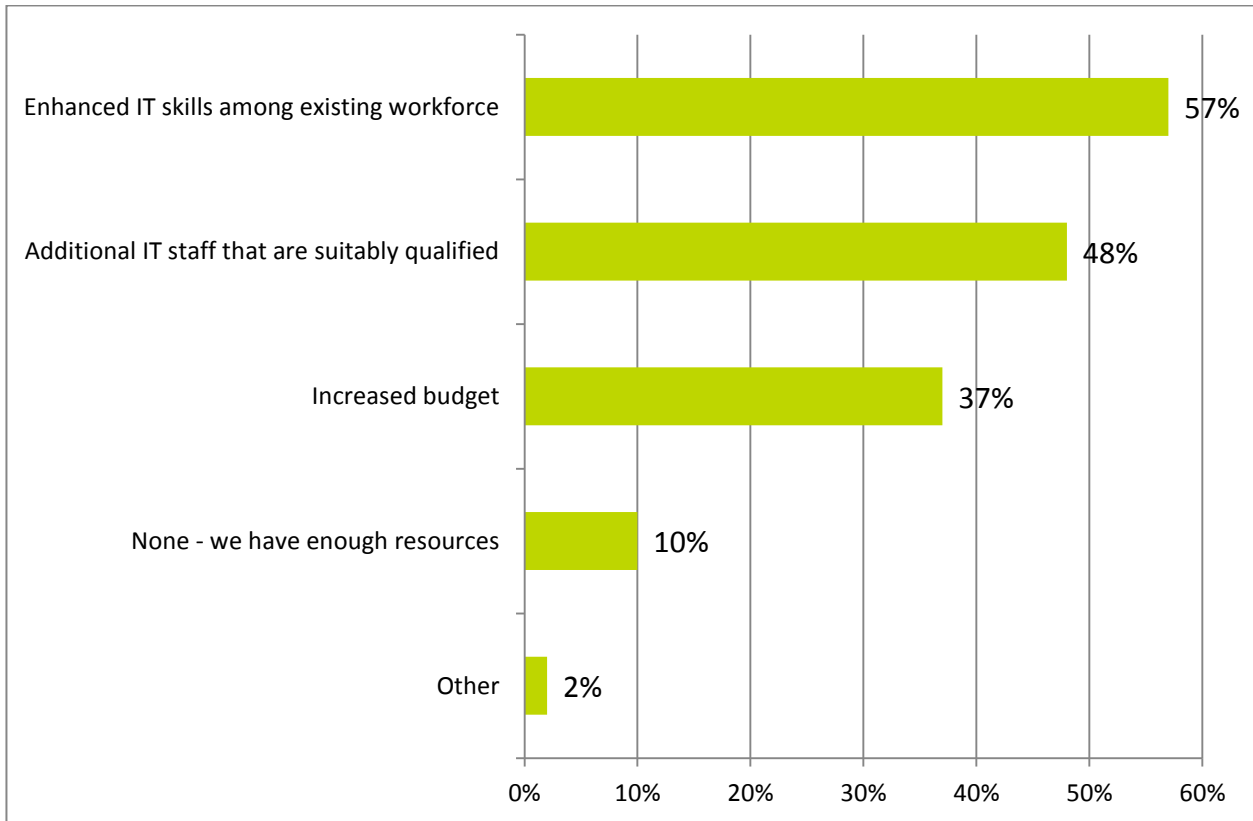
- Information security (52%)
- Big data (51%)
- Cloud computing (50%).

4. Additional resources needed to address the issues prioritised

Only 10% of respondents felt that their organisation had enough resources to address the management issues and IT trends that their company has prioritised.

More than half (57%) indicated that they need enhanced IT skills among their existing workforce, 48% require additional IT staff that are suitably qualified, and 37% would like a bigger budget.

Figure 3 - What additional resources, if any, would you require to address the management issues and IT trends your organisation has prioritised?



Note: respondents were permitted to select more than one option.

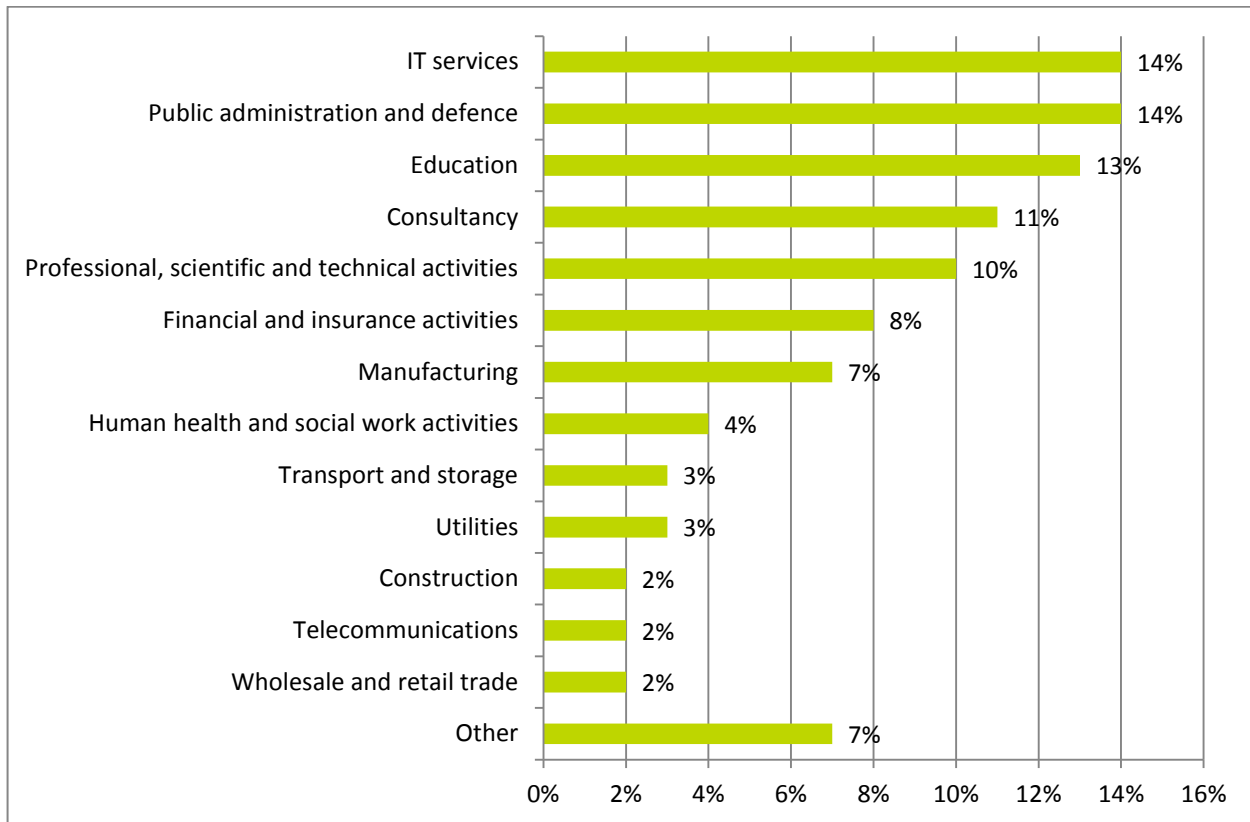
Larger organisations with over 250 employees are more likely than SMEs to need enhanced IT skills among their existing workforce (61% versus 45%).

SMEs are more likely than larger companies to have enough resources to address the management issues and IT trends their organisation has prioritised (18% versus 8%).

7. Profile of respondents

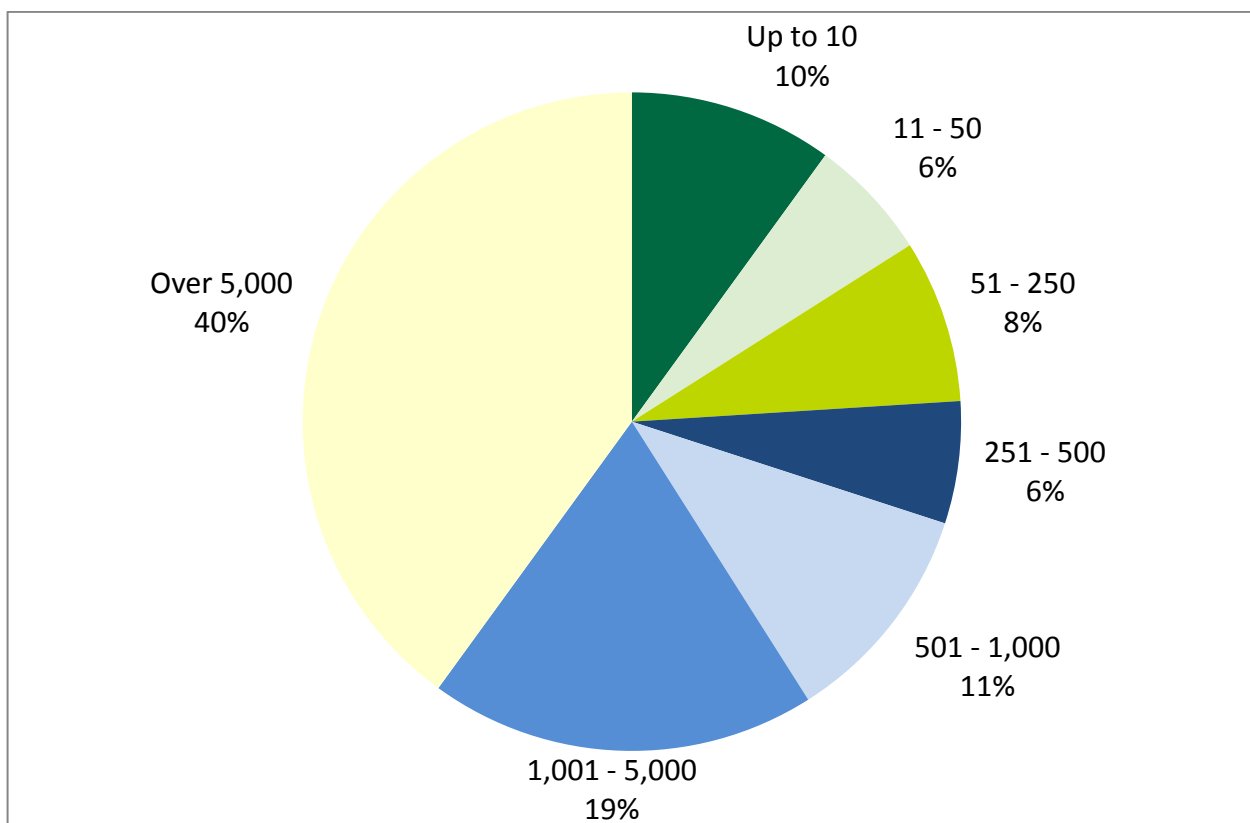
7.1 Type of organisation

Figure 6 - Type of organisation or company



7.2 Size of organisation

Figure 7 - Size of organisation or company



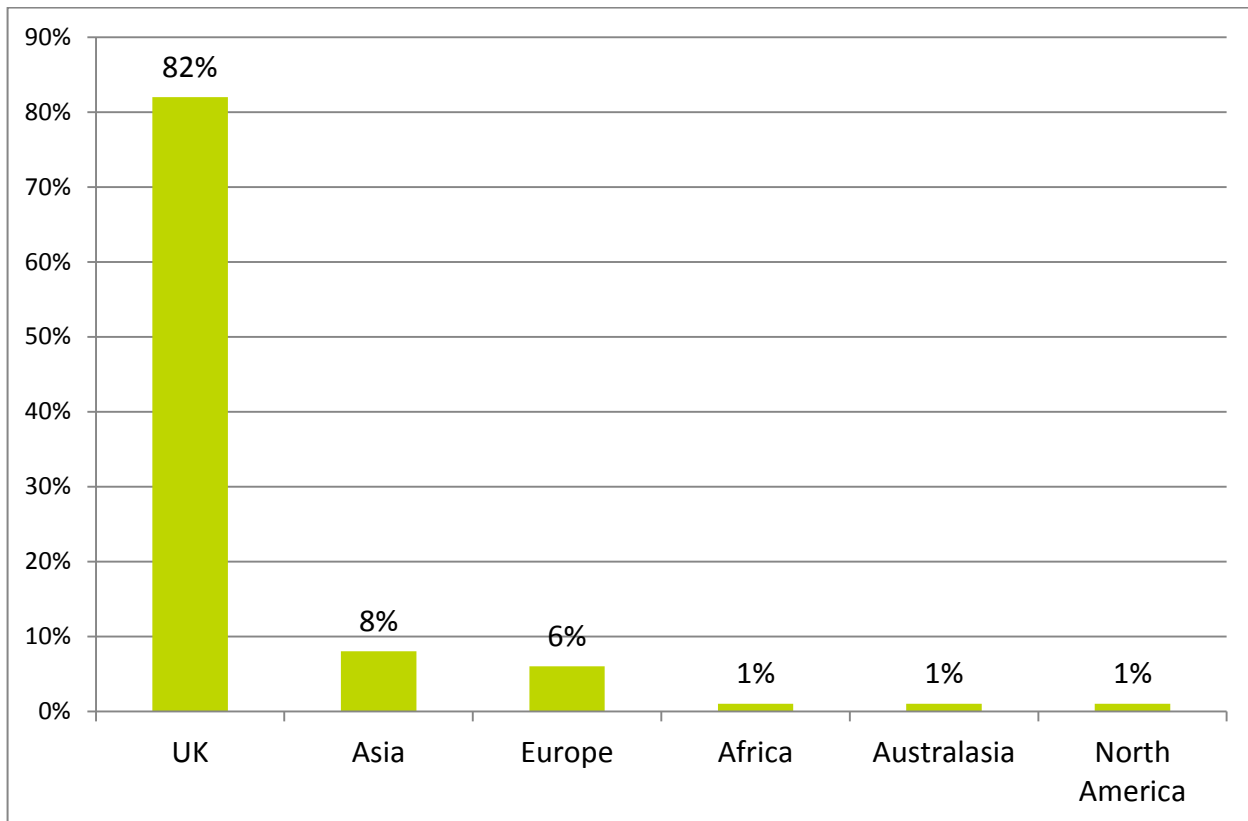
Note: question asked was *how many people are currently employed worldwide by your organisation/company?*

The greater numbers of respondents (40%) work in companies with over 5,000 employees. Nearly one-quarter (24%) work for SME's.

7.3 Location

Just over eight in ten respondents are based in the UK.

Figure 8 - Location of respondents



7.4 Job role

A breakdown of respondents' job roles is as follows:

- 21% CIO
- 31% Senior IT manager
- 10% Digital leader
- 12% IT manager
- 10% CEO
- 17% None of the above

Respondents answering 'none of the above' were asked whether they contribute towards their organisation's strategic objectives. Those answering 'no' were screened out of the survey. The data given here excludes those that were screened out.

Appendix

Research objectives:

- To find out what management issues and IT trends are being prioritised over the next 12 months and also over the next three to five years.
- To find out what additional resources, if any, are required to address the prioritised issues.

Technical notes on research method:

- The survey was conducted online by BCS among chartered members, corporate clients, and non-members. Personalised email invites were sent out and the survey was also promoted via eBCS, LinkedIn and Twitter.
- The survey targeted CIOs, digital leaders, IT managers, CEOs and others who have an input into their organisation's strategic objectives.
- A total of 326 responses were received during the period 13 September to 14 October 2013. Because of the various methods used to promote the survey it is not possible to calculate a response rate.
- Where responses do not sum to 100% for single response questions, this is normally due to rounding.