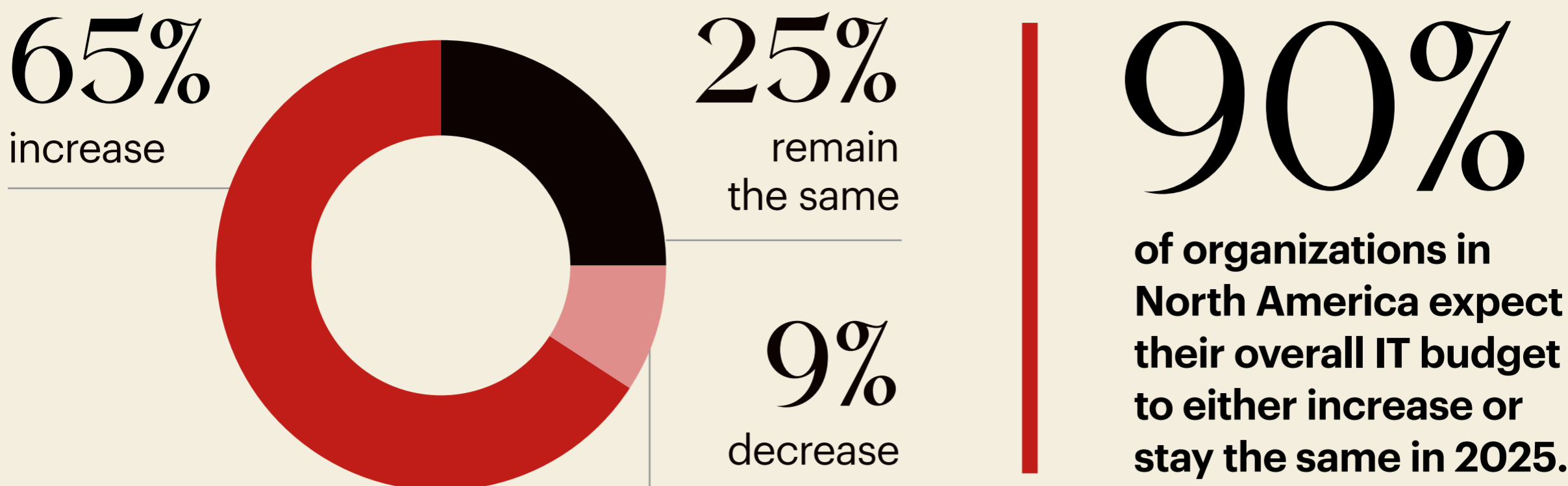


State of the CIO 2025

Technology budgets on the incline

Budget expectations



Note: Percentages do not total 100% due to rounding

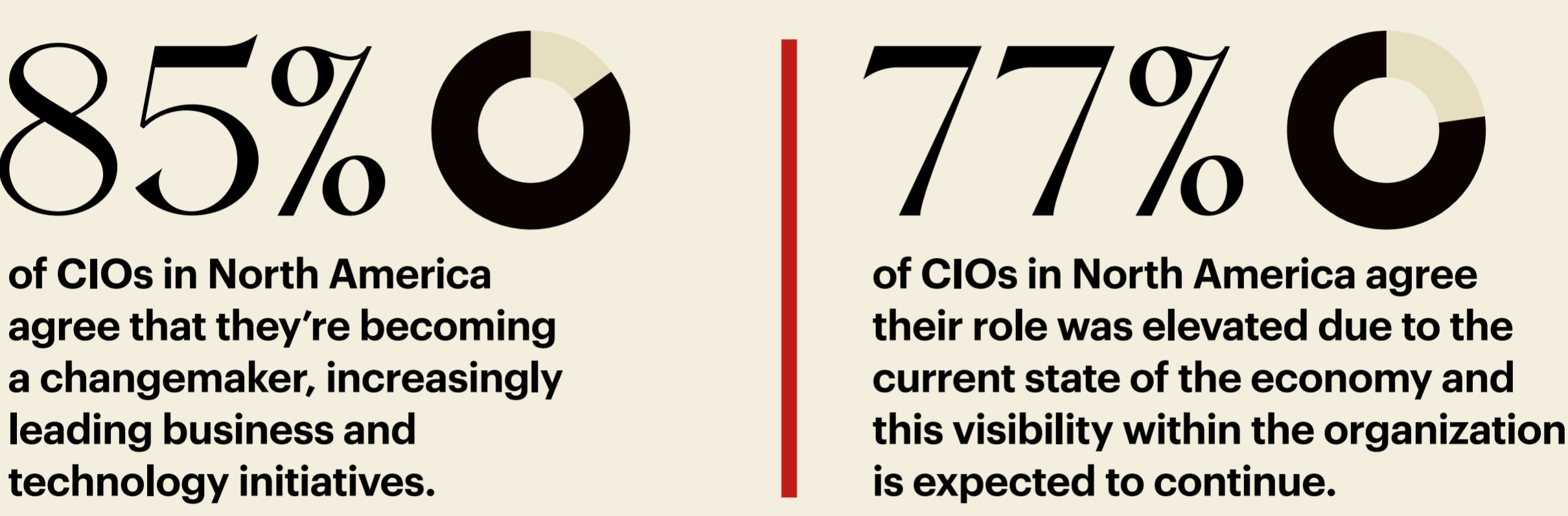
Top reasons for technology budget increase

Need for security improvements	30%
Keep pace with rising costs of technology and services	29%
Additional investments in AI/ML projects and/or products/services	26%
Infrastructure modernization/migration	26%
To scale IT operations in support of business growth	26%
Investment in new skills/talent	23%

Top reasons for technology budget decrease

Company finances/performance	56%
Economic instability/uncertainty	53%
Reduced employee headcount	35%
Downsized or closed physical offices/facilities	26%
Less focus on emerging technology	18%
Tech budget is moving to a different line of business	18%

Who is the North American CIO in today's business environment?



Compared to last year, North American CIOs are spending ...

More time on ...

1. Security management
2. Cost control/expense management
3. Improving IT operations/systems performance

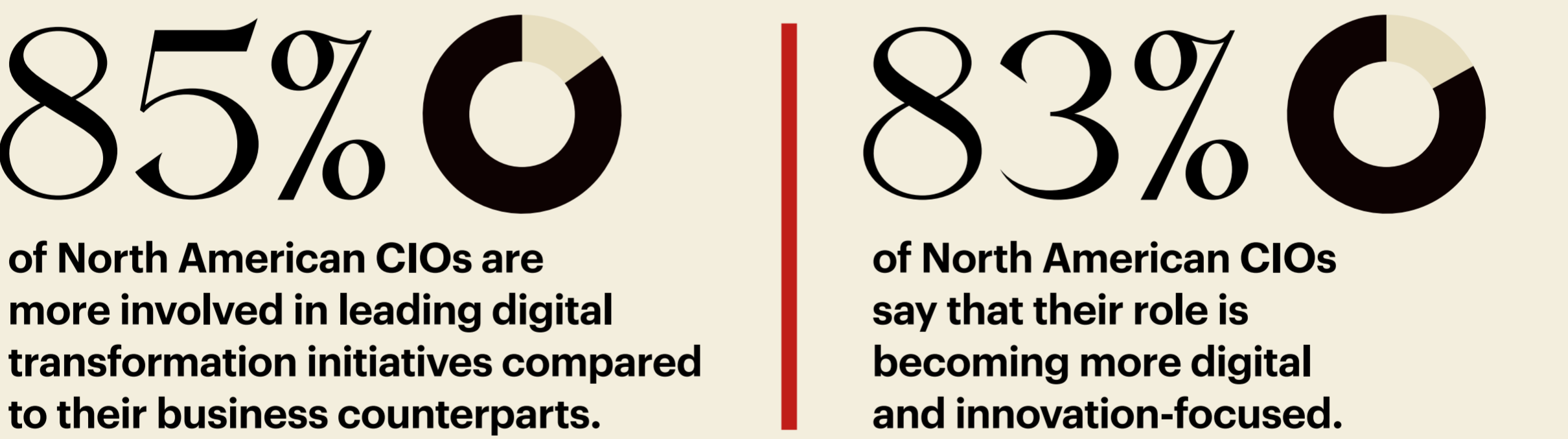
Less time on ...

1. Negotiating with IT vendors
2. Managing IT crises
3. Cost control/expense management

Which tech budgets are shifting ownership to IT?

Operations	26%	Risk management/compliance	17%
Engineering	21%	Research and development	17%
Finance/accounting	20%	Marketing	16%
Executive-level administration (planning, budgeting, organizing)	19%	Manufacturing/OT	14%
Human resources	18%	Sales	14%

North American business and technology initiatives in 2025



Which technology initiatives are driving IT investments?

Machine learning/artificial intelligence	43%
Security/risk management	37%
Data/business analytics	31%
Customer experience technologies (chatbots, mobile apps etc.)	28%
Application modernization	27%
Business process automation/IT automation	26%

Which technology initiatives are driving IT investments?

Monetizing company data	38%
Meeting compliance requirements (GDPR, etc.)	36%
Developing new digital revenue streams	35%
Improving talent acquisition/retention	32%
Improving the customer experience	31%
Improving/optimizing the employee experience	29%

Increasing involvement in AI in the North American region

