Digital Transformation Index 2020

Vanson Bourne Research Findings & Methodology

Global benchmark indicates businesses’ status of digital transformation across the globe and how they are performing in this digital age.
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01 Research Methodology
Research Methodology
Vanson Bourne

The DT Index debuted in 2016 to create a repeatable methodology that maps digital transformation progress of mid-to large-sized companies across the world. The DT Index was run again in 2018, and now also in 2020.

4,300 QUANTITATIVE
Responses from Director, C-Suite, mid-size to enterprise w/key functions

13 INDUSTRIES
• Finance
• Sales
• IT/Tech
• Customer services
• Marketing
• Production & Manufacturing
• Owner/Executive
• R&D
• Digital
• Customer Experience
• Logistics & Supply Chain
• Automotive
• Financial Services
• Public Healthcare
• Private Healthcare (combined with public healthcare in reporting)
• Insurance
• Life Sciences
• Manufacturing
• Media and Entertainment
• Oil and Gas
• Retail and Consumer
• Technology
• Telecoms
• Other commercial

18 COUNTRIES
AMERICAS
Brazil, Canada, Mexico, US
APJC
Australia, China, India, Japan, New Zealand (combined with Australia in reporting), Singapore
EUROPE
France, Germany, Italy, Netherlands, Poland, Spain, Sweden, UK
02 Pace of Transformation
Successful Acceleration Of Digital Transformation Programs

*Have you successfully accelerated any of your digital transformation programs this year?* Base: all 2020 respondents (4300)

- Yes, for all of our digital transformation programs: 12%
- Yes, for most of our digital transformation programs: 29%
- Yes, for some of our digital transformation programs: 39%
- No – we tried, but were unable to successfully accelerate any digital transformation programs: 8%
- No, but we are planning to: 7%
- No and we are not planning to: 3%
- I don’t know: 3%

80% have successfully accelerated at least some of their digital transformation programs this year.
Digital Transformation Programs Accelerated

- Strengthening our cybersecurity defenses: 48%
- Rolling out broader working from home/remote working capabilities: 44%
- Remote patient care and diagnosis **: 43%
- Reinventing how we deliver digital experiences to customers & employees: 38%
- Using data in completely new ways: 37%
- Transforming our services and consumption models: 34%
- Extending our business domain: 33%
- Transforming our Edge deployments (and its connection with the core and the cloud): 33%
- Smart Manufacturing/Industry 4.0 initiatives *: 33%
- Transforming our processes with AI initiatives: 30%
- Personalized/Precision medicine **: 24%

*Which digital transformation programs have you successfully accelerated this year?* Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), except asterisked answer options. Not showing “Other” or “Don’t know” options

* Indicates answer only shown to respondents from the manufacturing industry

** Indicates answer only shown to respondents from the public and private healthcare industries
We have an engaged leadership team (championing digital transformation) 46%
We have an agile, remote workforce 42%
We have the right in-house digital skills 41%
We have the right technologies to work at the speed of business 41%
Our employees have ready access to high speed internet in their homes 41%
We rapidly shifted our digital investment priorities 37%
We have a mature digital culture 35%

“What enabled you to successfully accelerate your transformation programs?” Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427).
03 Barriers to Transformation
Barriers To Digital Progress

Data privacy and security concerns 31%
Lack of budget and resources 30%
Unable to extract valuable insights from data and/or information overload 29%
Lack of economic growth 24%
Lack of the right in-house skill sets and expertise (analytics, technology, and business skills) 24%
Regulation or legislative changes 23%
Immature digital culture: lack of alignment and collaboration across the company 21%
Lack of the right technologies to work at the speed of business 21%
Lack of coherent digital strategy and vision 18%
Weak digital governance and structure 18%
Lack of the right senior support/leadership 17%
A fragmented or siloed computing environment 16%
We are temporarily closed for business (in relation in Covid-related disruption) 15%
Reactive approach to competitor activities 15%

*What are the main barriers to digitally transforming your organization?* Base: all 2020 respondents (4300)
Not showing respondents who selected “Other” or “There are no barriers”

Data privacy concerns and lack of budget continue to be the two primary barriers to digital transformation, as they were in 2018.
### Barriers To Digital Progress: Historical Comparison

<table>
<thead>
<tr>
<th>2016</th>
<th>2018</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Lack of budget &amp; resources</td>
<td>Data privacy &amp; security concerns</td>
<td>Lack of budget &amp; security concerns</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Lack of the in-house right skills sets and expertise</td>
<td>Lack of budget &amp; resources</td>
<td>Lack of budget &amp; resources</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Lack of senior support/leadership</td>
<td>*Unable to extract valuable insights from data and/or information overload</td>
<td>*Unable to extract valuable insights from data and/or information overload</td>
</tr>
<tr>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Lack of the right tech to work at the speed of business</td>
<td>Lack of the in-house right skills sets and expertise</td>
<td>New Lack of economic growth</td>
</tr>
<tr>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Data privacy &amp; security concerns</td>
<td>Regulation &amp; legislative changes</td>
<td>Lack of the in-house right skills sets and expertise</td>
</tr>
<tr>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Reactive approach to competitor activities</td>
<td>Immature digital culture</td>
<td>Regulation &amp; legislative changes</td>
</tr>
<tr>
<td>7</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Lack of a coherent digital strategy &amp; vision</td>
<td>Lack of the right tech to work at the speed of business</td>
<td>Lack of the right tech to work at the speed of business</td>
</tr>
<tr>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Immature digital culture</td>
<td>Lack of senior support/leadership</td>
<td>Lack of senior support/leadership</td>
</tr>
<tr>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Regulation &amp; legislative changes</td>
<td>Lack of a coherent digital strategy &amp; vision</td>
<td>Lack of a coherent digital strategy &amp; vision</td>
</tr>
<tr>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>A fragmented or siloed computing environment</td>
<td>Weak digital governance &amp; structure</td>
<td>Weak digital governance &amp; structure</td>
</tr>
<tr>
<td>11</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>*Unable to extract valuable insights from data and/or information overload</td>
<td>Reactive approach to competitor activities</td>
<td>Reactive approach to competitor activities</td>
</tr>
<tr>
<td>12</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>Weak digital governance &amp; structure</td>
<td>A fragmented or siloed computing environment</td>
<td>We are temporarily closed for business (in relation to Covid-related disruption)</td>
</tr>
</tbody>
</table>

*What are the main barriers to digitally transforming your organization?* Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000) * Indicates answer option asked and reported on as two separate options in 2016 and 2018

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04 How Will Organizations Transform?
How Organizations Are Transforming Today

- Investing in digital skills/talent: 2020 - 49%, 2018 - 27%, 2016 - 46%
- Sharing knowledge across business functions: 2020 - 44%, 2018 - 48%, 2016 - 19%
- Integrating digital goals into all departmental/staff objectives: 2020 - 46%, 2018 - 45%, 2016 - 43%
- Using emerging tech to develop and motivate staff in different, more engaging ways (e.g. through gamification): 2020 - 40%
- Addressing the digital skills gap through our diversity and inclusion programs: 2020 - 37%
- We’ve always encouraged remote working: 2020 - 31%
- In communication with/from the C-Suite to identify discrete projects in the business that can be digitized: 2020 - 30%
- Appointing/ed a Chief Data Officer: 2020 - 20%
- Hosting hackathons/scrums to encourage innovation and collaboratively fix problems: 2020 - 17%

“Thinking about what a digital business looks like, which of the following is your organization doing?” Base: Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000)
"Thinking about your digital transformation strategy, which of the following is your organization doing?" Base: all 2020 respondents (4300)

- Making decisions based on data in real-time: 57%
- Prioritizing sustainable technology: 49%
- Practicing DevSecOps: 42%
- Working with LOBs to identify digital Use Cases: 38%
- Practicing Ci/CD: 34%
- Actively encouraging a fail-fast-then-succeed mindset: 29%
- I don't know: 3%
- None of these: 2%

Most businesses are now making decisions based on data in real-time.
Addressing the Following ‘Attributes of a Digital Business’

- Predictively spot new opportunities: 36% (2020), 32% (2018), 40% (2016)
- Innovate in an agile way: 38% (2020), 28% (2018), 37% (2016)
- Provide unique, personalized experiences: 38% (2020), 26% (2018), 36% (2016)
- Always on, operate in real time: 46% (2020), 31% (2018), 41% (2016)
- We prove we can be trusted: 56% (2020)
- We are transparent: 49% (2020)

“How is your organization addressing each of the below to stay competitive and succeed in this increasingly digital world?” Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000). Showing the proportion of respondents who selected “Doing well, organization-wide”
Areas of Investment
### Current Investments in Digital Technology

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Made significant investments in Edge</td>
<td>16%</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Made significant investments in a multi-cloud environment</td>
<td>18%</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>Made significant investments in Artificial Intelligence (AI)</td>
<td>11%</td>
<td>21%</td>
<td>30%</td>
</tr>
<tr>
<td>Made significant investments in data management and analytics</td>
<td>23%</td>
<td>33%</td>
<td>26%</td>
</tr>
<tr>
<td>Made significant investments in cybersecurity and privacy</td>
<td>30%</td>
<td>31%</td>
<td>22%</td>
</tr>
<tr>
<td>Made significant investments in 5G infrastructure</td>
<td>9%</td>
<td>19%</td>
<td>28%</td>
</tr>
<tr>
<td>Made significant investments in on-demand digital services</td>
<td>17%</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>Made significant investments in the digital workplace</td>
<td>21%</td>
<td>32%</td>
<td>27%</td>
</tr>
</tbody>
</table>

*In terms of your organization’s existing IT strategy, to what extent are you doing the following to support your digital business transformation?*

Base: all 2020 respondents (4300). Not showing “Don’t know” answers
Technology Investment Plans Over the Next 1-3 Years: High to Low

<table>
<thead>
<tr>
<th>2020</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cybersecurity solutions (infrastructure, application and end-user device security)</td>
<td>43%</td>
</tr>
<tr>
<td>Data management tools to transform data into something that is useful and protected</td>
<td>39%</td>
</tr>
<tr>
<td>5G infrastructure</td>
<td>37%</td>
</tr>
<tr>
<td>Privacy software (e.g. to help businesses know what data they have, evaluate…</td>
<td>35%</td>
</tr>
<tr>
<td>Multi-cloud environment where each application is deployed in the most…</td>
<td>35%</td>
</tr>
<tr>
<td>5G ready hardware</td>
<td>33%</td>
</tr>
<tr>
<td>Artificial intelligence algorithms</td>
<td>32%</td>
</tr>
<tr>
<td>Software: containers and serverless</td>
<td>32%</td>
</tr>
<tr>
<td>Real-time applications at the Edge (sensor enabled data processing and…</td>
<td>28%</td>
</tr>
<tr>
<td>Natural user interfaces (touch screen, gesture analysis, speech recognition)</td>
<td>24%</td>
</tr>
<tr>
<td>Industrial robotics (automated, programmed robots, to perform tasks…</td>
<td>20%</td>
</tr>
<tr>
<td>Mixed Augmented or Virtual Reality</td>
<td>16%</td>
</tr>
<tr>
<td>Quantum computing</td>
<td>16%</td>
</tr>
<tr>
<td>Distributed ledgers such as Blockchain</td>
<td>15%</td>
</tr>
<tr>
<td>Commercial robotics (UAVs/drones, medical robots, co-bots etc.)</td>
<td>11%</td>
</tr>
<tr>
<td>Evolutionary nanotechnology</td>
<td>13%</td>
</tr>
<tr>
<td>Neuromorphic hardware</td>
<td>13%</td>
</tr>
<tr>
<td>Additive manufacturing</td>
<td>11%</td>
</tr>
<tr>
<td>Brain-machine interfaces</td>
<td>11%</td>
</tr>
</tbody>
</table>

“What new innovations or solutions is your organization investing in over the next 1-3 years to enable digital business?” Base: all 2020 respondents (4300), all 2018 respondents (4600). Comparisons shown for options asked in 2018.
Investment in Multi-Cloud Environments: Year On Year Breakdown

In terms of your organization’s existing IT strategy, to what extent are you doing the following to support your digital business transformation? Made significant investments in a multi-cloud environment. Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000). Not showing “Don’t know” answers.
Hopes for Edge Computing

We'll have a solid Edge strategy that will future-proof our organization

We'll overcome latency / bandwidth issues with the Edge

We'll extract insights at the Edge

Our data will be secure at The Edge

75%

75%

75%

77%

“How confident are you that your organization will achieve the following, over the next 12 months, by investing in Edge?” Base: respondents who have, are currently or plan to invest in Edge (3782). Showing the proportion of respondents who selected “Very confident” or “Fairly confident”
06 The Digital Transformation Index III
Benchmark Methodology
Methodology: Index based on respondents’ performance and progress against digital business attributes they agreed were imperative, plus current and planned investments for digital transformation.

All performance related questions from the research were filtered through, and 1250 points allocated across the curve.
Benchmark Questions and Scores (i)

How is your organization addressing each of the below to stay competitive and succeed in this increasingly digital world?

- Predictively spot new opportunities
- Innovate in an agile way
- We prove we can be trusted
- We are transparent
- Provide unique, personalized experiences
- Always on, operate in real time

For each of the above, respondents selected one of the below statements (score in brackets):

Doing well, organization-wide (128 points)
Doing well, in pockets of the organization (e.g. some regions/departments) (70 points)
Not doing well, organization-wide (20 points)
Not doing well, in pockets of the organization (10 points)
Research/planning stage (5 points)
No plans (0 points)
I don't know (0 points)

Maximum score = 768 points

In terms of your organization’s existing IT strategy, to what extent are you doing the following to support your digital business transformation?

- Made significant investment in Edge (bringing computation, connectivity and data storage closer to where it is needed rather than waiting for data to be sent to the cloud and back)
- Made significant investments in a multi-cloud environment
- Made significant investments in Artificial Intelligence (AI)
- Made significant investments in data management and analytics
- Made significant investments in cybersecurity and privacy
- Made significant investments in 5G infrastructure
- Made significant investments in on-demand digital services
- Made significant investments in the digital workplace

For each of the above, respondents selected one of the below statements (score in brackets):

Fully completed most recent round of investment (20 points)
In process of doing – mature stages (15 points)
In process of doing – early stages (10 points)
Planned to do (3 points)
Not done and no plans to do (0 points)
I don't know (0 points)

Maximum score = 160 points
What new innovations or solutions is your organization investing in over the next 1-3 years to enable digital business?

- Artificial intelligence algorithms (near-autonomous/learning technology, trained to automatically answer questions, discover insights and provide recommendations) (11 points)
- Real-time applications at the Edge (sensor enabled data processing and location aware technologies that can send and receive data) (11 points)
- Quantum computing (use the properties of quantum physics to store data and perform computations; resulting in a leap in processing power) (0 points)
- Neuromorphic hardware (an electronic system for information processing. It resembles the behavior of a biological nervous system, can learn from its inputs and requires very little power) (6 points)
- Brain-machine interfaces (devices that enable its users to interact with computers by mean of brain-activity only) (0 points)
- Evolutionary nanotechnology (in shaping matter at the atomic and molecular scale, nanotechnology offers the potential for new, faster kinds of computers and more efficient power sources) (0 points)
- Additive manufacturing (creates three dimensional objects by depositing materials, usually in layers) (5 points)
- Mixed Augmented or Virtual Reality (11 points)
- Natural user interfaces (touch screen, gesture analysis, speech recognition) (11 points)
- Distributed ledgers such as Blockchain (6 points)

- 5G ready hardware (5 points)
- 5G infrastructure (5 points)
- Data management tools to transform data into something that is useful and protected (11 points)
- Cybersecurity solutions (infrastructure, application and end-user device security) (11 points)
- Privacy software (e.g. to help businesses know what data they have, evaluate their risks and disclose data to customers upon request) (11 points)
- Commercial robotics (UAVs/drones, medical robots, co-bots etc.) and/or Industrial robotics (automated, programmable robots, to perform tasks with high precision and repeatability) (11 points)
- Software: containers (standard unit of software that packages up code and all its dependencies so the application runs quickly in any IT infrastructure) and serverless (built on next-generation cloud services that auto-scale and charge only when used) (11 points)
- Multi-cloud environment where each application is deployed in the most appropriate cloud (private, public or hybrid) (11 points)
- We are not investing in any technology initiatives to enable digital business (0 points)
- I don’t know (0 points)

Respondents scored for each of the above (score in brackets)

Maximum score = 137 points
Thinking about your digital transformation strategy, which of the following is your organization doing?

- Practicing Ci/CD (continuous integration, continuous delivery) (18 points)
- Actively encouraging a fail-fast-then-succeed mindset (18 points)
- Working with LOBs to identify digital Use Cases (18 points)
- Practicing DevSecOps (creating a ‘security as a code’ culture. Building robust security and privacy protocols into all devices, applications and algorithms) (18 points)
- Making decisions based on data in real-time (18 points)
- Prioritizing sustainable technology (i.e. using recyclable material/technologies that use less power) (5 points)
- I don’t know (0 points)
- None of these (0 points)

Respondents scored for each of the above (score in brackets)

Maximum score = 95 points

Thinking about your workforce in the digital era, which of the following is your organization doing?

- Integrating digital goals into all departmental/staff objectives (10 points)
- Sharing knowledge across business functions (for example, equipping IT leaders with business skills and business leaders with IT skills and / or dispatching IT staff to specific LoB departments) (10 points)
- Appointing/ed a Chief Data Officer (10 points)
- In communication with/from the C-Suite to identify discrete projects in the business that can be digitized (10 points)
- Investing in digital skills/talent (i.e. teaching all employees how to code, training IT staff on automation, cloud, etc.) (10 points)
- Hosting hackathons/scrums to encourage innovation and collaboratively fix problems (10 points)
- We’ve always encouraged remote working (10 points)
- Addressing the digital skills gap through our diversity and inclusion programs (10 points)
- Using emerging tech to develop and motivate staff in different, more engaging ways (e.g. through gamification) (10 points)
- I don’t know (0 points)
- None of these (0 points)

Respondents scored for each of the above (score in brackets)

Maximum score = 90 points
## Benchmark – Overall Maturity Distribution

<table>
<thead>
<tr>
<th>VARIABLES</th>
<th>DIGITAL LAGGARDS</th>
<th>DIGITAL FOLLOWERS</th>
<th>DIGITAL EVALUATORS</th>
<th>DIGITAL ADOPTERS</th>
<th>DIGITAL LEADERS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ATTRIBUTE PERFORMANCE</strong></td>
<td>Not done, in planning</td>
<td>Limited to pockets, poorly done</td>
<td>Spread more widely yet not done well</td>
<td>Done well in pockets</td>
<td>Well done and organization wide</td>
</tr>
<tr>
<td><strong>DIGITAL INITIATIVES</strong></td>
<td>Limited</td>
<td>A small number</td>
<td>4-5 initiatives</td>
<td>5-6 initiatives</td>
<td>8+ adopted</td>
</tr>
<tr>
<td><strong>ADOPTED CURRENTLY</strong></td>
<td>Little or none</td>
<td>In planning or early stages</td>
<td>Early to mid stages</td>
<td>In mature stage, few fully completed</td>
<td>Most fully completed</td>
</tr>
<tr>
<td><strong>IT STRATEGY &amp; DIGITAL INVESTMENT</strong></td>
<td>Very few in line</td>
<td>A handful in scope</td>
<td>3-4 innovations in scope for future investment</td>
<td>Growing number of innovations (4-6)</td>
<td>8+ in line for future investment</td>
</tr>
<tr>
<td><strong>INNOVATION &amp; FUTURE INVESTMENT</strong></td>
<td>3%</td>
<td>13%</td>
<td>39%</td>
<td>39%</td>
<td>6%</td>
</tr>
</tbody>
</table>
The Digital Transformation Index III Rankings and Digital Maturity
## Digital Transformation Index 2020

### How are companies performing?

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>Do not have a digital plan, limited initiatives and investment in place</td>
<td>3%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>Very few digital investments: tentatively planning for the future</td>
<td>13%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>Gradually embracing digital transformation and planning for the future</td>
<td>39%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>Have a mature digital plan, investments and innovations in place</td>
<td>39%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
<td>6%</td>
</tr>
</tbody>
</table>
Digital Transformation Index

Year on Year Comparison

<table>
<thead>
<tr>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>No digital plans; limited initiatives and investments</td>
<td>Very few investments: tentative plans</td>
<td>Gradual digital transformation and planning</td>
<td>Mature digital plans, investments and innovations in place</td>
<td>Digital ingrained in DNA</td>
</tr>
<tr>
<td>3% improvement</td>
<td>17% improvement</td>
<td>6% rise</td>
<td>16% rise</td>
<td>1% rise</td>
</tr>
</tbody>
</table>

2020

2018

2016

| Benchmarking group respondents fell into. Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000) |

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Maturity by Country/Sub-Region

Average score out of 100
Color coded: EUROPE, APJC, Americas

<table>
<thead>
<tr>
<th>Country/Sub-Region</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>38</td>
</tr>
<tr>
<td>Sweden</td>
<td>52</td>
</tr>
<tr>
<td>Netherlands</td>
<td>52</td>
</tr>
<tr>
<td>France</td>
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</tr>
<tr>
<td>Australia and New Zealand</td>
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<td>UK</td>
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<td>US</td>
<td>58</td>
</tr>
<tr>
<td>Spain</td>
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<tr>
<td>Italy</td>
<td>60</td>
</tr>
<tr>
<td>Brazil</td>
<td>60</td>
</tr>
<tr>
<td>Poland</td>
<td>60</td>
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<tr>
<td>Mexico</td>
<td>61</td>
</tr>
<tr>
<td>India</td>
<td>64</td>
</tr>
</tbody>
</table>

Average benchmark group scores. Base: all respondents (4300)
Best and Worst Performers by Country

<table>
<thead>
<tr>
<th>2020</th>
<th>2018</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>India</td>
<td>India</td>
</tr>
<tr>
<td>Mexico</td>
<td>Brazil</td>
<td>Brazil</td>
</tr>
<tr>
<td>Poland</td>
<td>Thailand</td>
<td>Mexico</td>
</tr>
<tr>
<td>Netherlands</td>
<td>France</td>
<td>UK</td>
</tr>
<tr>
<td>Sweden</td>
<td>Denmark</td>
<td>China</td>
</tr>
<tr>
<td>Japan</td>
<td>Japan</td>
<td>Japan</td>
</tr>
</tbody>
</table>

Surveyed in 2018 only
Digital Transformation and COVID-19
Proportion of staff working remotely before the pandemic and today.

- **Before the pandemic:**
  - On average, 25%

- **Today:**
  - On average, 52%

**Proportion of staff working remotely:***
- 0-30%
- 30-60%
- 60-90%
- 90-100%
- Don’t know

*What proportion of your organization’s staff worked remotely before the pandemic/are currently working remotely?* Base: all 2020 respondents (4300)
Responses To COVID-19

While most organizations have been able to maintain a seamless customer experience during COVID-19, many are reinventing their business model as a result of the upheaval.

I am concerned that we didn’t transition to becoming a digital business fast enough

- 50% of respondents agreed

We are reinventing our business model

- 79% of respondents agreed

We’ve ensured our customers’ digital experience is seamless

- 84% of respondents agreed

We’re seeing a more humane side of business (driven by wanting to help society at large)

- 83% of respondents agreed

“As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?”
Base: all 2020 respondents (4300). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”
Opened-up new digital channels to support customers 43%
 Loaned people with IT skills/knowledge to the relief effort 31%
 Set-up funds to support organizations that urgently need new technology and mobile devices 29%
 Sharing data with a public body/another business to aid the relief effort 27%
 Loaned unused computing power to the relief effort (i.e. via crowdsourced computing platforms) 24%
 Deploying our additive manufacturing capabilities (i.e. 3D printers) to produce vital medical equipment (to ease supply shortages) * 23%
 Providing emerging technologies such as robotics or VR to support the safe treatment of patients at a distance ** 21%

- We have done this
- We’ve not done this yet but would do in the event of subsequent disasters
- We’re not equipped to do this/not applicable to our business
- We are in the process of doing this
- We have no plans to do this neither now nor in the future
- We’re not equipped to do this/not applicable to our business

Which of the following has your organization done to support the wider coronavirus effort?* Base: all 2020 respondents (4300), except asterisked options:
* Indicates option was only shown to respondents from organizations in the manufacturing industry, or who work in the production and manufacturing, or supply chain or logistics departments
** Indicates option was only shown to respondents from organizations in the public and private healthcare industry

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Responses to Unprecedented Upheaval

- The coronavirus crisis has shown us that we need a more agile, scalable IT environment that provides for contingencies: 89%
- Myself / my team are at risk of burn-out from trying to adapt our IT strategy in these abnormal times: 48%
- We expect to gain market share (win business from competitors that couldn’t adapt fast enough): 78%
- I am proud of my team/my organization in the way that we’ve adapted our IT and business/operational strategy: 89%

“As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?” Base: all 2020 respondents (4300). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”
“As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?” Base: all 2020 respondents (4300). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”
"How confident are you that your organization's data and AI are advanced enough to be able to support efforts to develop medicines/technologies to fight COVID-19?" Base: respondents from organizations in the public and private healthcare industries (392)
09 Expectations For The Future
We'll be part of a more globally connected, remote workforce

Data privacy will be a protected basic human right

Businesses will use AI and data models to predict potential disruptions, so we can mitigate disasters/disruptions

People will use Augmented Reality to learn how to do things/fix things in an instant

Distributed Ledgers, like Blockchain, will make the gig economy fairer

5G holographic projection will transform marketing efforts

An AI will become my work partner, and do the stuff I don't want to do or can't do

“How do you envision emerging technology impacting our lives/work/business 3-5 years from now?” Base: all 2020 respondents (4300)
Appendix
10 Industry Spotlights
Maturity by Industry: 2016 to 2018 Comparison

Average score out of 100

<table>
<thead>
<tr>
<th>Industry</th>
<th>2020</th>
<th>2018</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology</td>
<td>59</td>
<td>45</td>
<td>50</td>
</tr>
<tr>
<td>Telecoms</td>
<td>59</td>
<td>46</td>
<td>50</td>
</tr>
<tr>
<td>Financial services</td>
<td>58</td>
<td>42</td>
<td>48</td>
</tr>
<tr>
<td>Life sciences</td>
<td>58</td>
<td>43</td>
<td>48</td>
</tr>
<tr>
<td>Insurance</td>
<td>56</td>
<td>41</td>
<td>45</td>
</tr>
<tr>
<td>Automotive</td>
<td>56</td>
<td>42</td>
<td>48</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>56</td>
<td>43</td>
<td>45</td>
</tr>
<tr>
<td>Retail and consumer products</td>
<td>56</td>
<td>42</td>
<td>46</td>
</tr>
<tr>
<td>Media and entertainment</td>
<td>55</td>
<td>44</td>
<td>48</td>
</tr>
<tr>
<td>Oil and gas</td>
<td>55</td>
<td>42</td>
<td>46</td>
</tr>
<tr>
<td>Public and private healthcare</td>
<td>53</td>
<td>38</td>
<td>44</td>
</tr>
<tr>
<td>Other commercial</td>
<td>53</td>
<td>38</td>
<td>44</td>
</tr>
</tbody>
</table>

Average maturity score. Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000)
### Best and Worst Performers By Industry

<table>
<thead>
<tr>
<th>2020</th>
<th>2018</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology</td>
<td>Telecoms</td>
<td>Telecoms</td>
</tr>
<tr>
<td>Telecoms</td>
<td>Technology</td>
<td>Technology</td>
</tr>
<tr>
<td>Financial services</td>
<td>Financial services</td>
<td>Media and entertainment</td>
</tr>
<tr>
<td>Media and entertainment</td>
<td>Insurance</td>
<td>Retail and consumer products</td>
</tr>
<tr>
<td>Oil and gas</td>
<td>Manufacturing</td>
<td>Insurance</td>
</tr>
<tr>
<td>Public and private healthcare</td>
<td>Public and private healthcare</td>
<td>Public and private healthcare</td>
</tr>
</tbody>
</table>

Based on average maturity scores. Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000)
<table>
<thead>
<tr>
<th>Region</th>
<th>APJC</th>
<th>EMEA</th>
<th>Americas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most Mature</td>
<td>Technology</td>
<td>Telecoms</td>
<td>Technology</td>
</tr>
<tr>
<td></td>
<td>Life sciences</td>
<td>Financial services</td>
<td>Financial services</td>
</tr>
<tr>
<td></td>
<td>Telecoms</td>
<td>Life sciences</td>
<td>Insurance</td>
</tr>
<tr>
<td>Least Mature</td>
<td>Public and private healthcare</td>
<td>Insurance</td>
<td>Automotive</td>
</tr>
<tr>
<td></td>
<td>Media and entertainment</td>
<td>Public and private healthcare</td>
<td>Media and entertainment</td>
</tr>
<tr>
<td></td>
<td>Retail and consumer products</td>
<td>Oil and gas/energy</td>
<td>Public and private healthcare</td>
</tr>
</tbody>
</table>

Based on average maturity scores. Base: all 2020 respondents (4300)
“Have you successfully accelerated any of your digital transformation programs this year?*
Base: all 2020 respondents (4300) Showing the proportion of respondents who selected “Yes, for all of our digital transformation programs”, “Yes, for most of our digital transformation programs” or “Yes, for some of our digital transformation programs”
“What proportion of your organization’s staff worked remotely before the pandemic/are currently working remotely?”

Base: all 2020 respondents (4300)

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**Made significant investment in on-demand digital services**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>17%</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>Automotive</td>
<td>14%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Financial services</td>
<td>21%</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>Public and Private Healthcare</td>
<td>14%</td>
<td>27%</td>
<td>32%</td>
</tr>
<tr>
<td>Insurance</td>
<td>21%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Life sciences</td>
<td>22%</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>14%</td>
<td>28%</td>
<td>30%</td>
</tr>
<tr>
<td>Media and entertainment</td>
<td>22%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Oil and gas</td>
<td>16%</td>
<td>24%</td>
<td>30%</td>
</tr>
<tr>
<td>Retail</td>
<td>13%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Technology</td>
<td>12%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Telecoms</td>
<td>20%</td>
<td>30%</td>
<td>26%</td>
</tr>
<tr>
<td>Other commercial</td>
<td>14%</td>
<td>30%</td>
<td>26%</td>
</tr>
</tbody>
</table>

*In terms of your organization’s existing IT strategy, to what extent are you doing the following to support your digital business transformation?*

Answer: Made significant investments in on-demand digital services; Base: all 2020 respondents (4300). Not showing all answer options.
Automotive
Digital Transformation Index 2020

Automotive

Digital Laggards
Do not have a digital plan, limited initiatives and investment in place

Digital Followers
Very few digital investments: tentatively planning for the future

Digital Evaluators
Gradually embracing digital transformation and planning for the future

Digital Adopters
Have a mature digital plan, investments and innovations in place

Digital Leaders
Digital transformation is ingrained in the DNA of the business

Benchmarking group respondents fell into. Base: respondents from the Automotive industry in 2020 (384)
Digital Transformation Index

Automotive - Year on Year Comparison

Digital Laggards
No digital plans; limited initiatives and investments

Digital Followers
Very few investments: tentative plans

Digital Evaluators
Gradual digital transformation and planning

Digital Adopters
Mature digital plans, investments and innovations in place

Digital Leaders
Digital ingrained in DNA

Benchmarking group respondents fell into. Base: respondents from the Automotive industry in 2020 (384), 2018 (360) and 2016 (304)
### Transformation Acceleration

- 81% accelerated digital transformation programs vs. 80% globally
- 15 pp jump in Digital Leaders and Adopters vs. 15pp globally
- 41% could accelerate because they had the right digital skills vs. 41% globally
- 36% rapidly shifted their digital investment priorities vs. 37% globally

### Transformation Strategies

- 27% in communication with the C-Suite to digitize vs. 30% globally
- 19% Appointing/ed a Chief Data Officer vs. 20% globally
- 35% practicing CiCD vs. 34% globally
- 32% actively encouraging a fail-fast-and-then succeed mindset vs. 29% globally

### Successes

- 80% reinventing their business model vs. 79% globally
- 89% proud of how their team has adapted vs. 89% globally
- 52% are transparent vs. 49% globally

Base: respondents from the Automotive sector in 2020 (384)
Automotive – Standout investment areas

Currently investing in

- **Artificial intelligence** (37% in the mature stages or fully complete vs. 32% globally)
- **Multi-cloud environment** (51% in the mature stages or fully complete vs. 47% globally)

Planning to invest in 1-3 years

- **Commercial/industrial robotics** (44% vs. 29% globally)

Base: respondents from the Automotive sector in 2020 (384)
Automotive - Where they’re facing challenges

**Barriers & Concerns**

- 31% are worried that they won’t survive (vs. 32% globally)
- **Top 3 Barriers**
  1. Unable to extract valuable insights from data and/or information overload (34% vs. 29% globally)
  2. Data privacy and security concerns (28% vs. 31% globally)
  3. Lack of budget and resources (28% vs. 32% globally)

**Transformation strategies & investments**

- **Least likely/lowest investment area** (mature stages or fully complete):
  - 5G infrastructure (29% vs. 28% globally)
  - Privacy software (30% vs. 35% globally)
- **Future investment plans lagging behind**
  - Multi-cloud environment (31% vs. 35% globally)

Base: respondents from the Automotive sector in 2020 (384)
Financial services
Digital Transformation Index 2020
Financial services

Digital Laggards
Do not have a digital plan, limited initiatives and investment in place
2%

Digital Followers
Very few digital investments: tentatively planning for the future
13%

Digital Evaluators
Gradually embracing digital transformation and planning for the future
35%

Digital Adopters
Have a mature digital plan, investments and innovations in place
44%

Digital Leaders
Digital transformation is ingrained in the DNA of the business
7%

Benchmarking group respondents fell into. Base: respondents from the Financial services industry in 2020 (492)
Digital Transformation Index

Financial services - Year on Year Comparison

Digital Laggards
No digital plans; limited initiatives and investments
- 6% improvement

Digital Followers
Very few investments: tentative plans
- 17% improvement

Digital Evaluators
Gradual digital transformation and planning
- No change

Digital Adopters
Mature digital plans, investments and innovations in place
- 23% rise

Digital Leaders
Digital ingrained in DNA
- No change

Benchmarking group respondents fell into. Base: respondents from the Financial services sector in 2020 (492), 2018 (443) and 2016 (396)

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## Financial services - Where they’re excelling

### Transformation Acceleration
- 84% accelerated digital transformation programs vs. 80% globally
- 23 pp jump in Digital Leaders and Adopters vs. 15pp globally
- 42% could accelerate because they had the right digital skills vs. 41% globally
- 41% rapidly shifted their digital investment priorities vs. 37% globally

### Transformation Strategies
- 33% in communication with the C-Suite to digitize vs. 30% globally
- 26% Appointing/ed a Chief Data Officer vs. 20% globally
- 37% practicing CiCD vs. 34% globally
- 30% actively encouraging a fail-fast-and-then succeed mindset vs. 29% globally

### Successes
- 83% reinventing their business model vs. 79% globally
- 90% proud of how their team has adapted vs. 89% globally
- 51% are transparent vs. 49% globally

---

**Base:** respondents from the Financial services industry in 2020 (492)

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Financial services – Standout investment areas

Currently investing in

- **On-demand digital services** (52% in mature stages or fully complete vs. 45% globally)
- **Artificial intelligence** (37% in mature stages or fully complete vs. 32% globally)
- **Multi-cloud environment** (51% in mature stages or fully complete vs. 47% globally)

Planning to invest in 1-3 years

- **Privacy software** (41% vs. 35% globally)
Financial services - Where they’re facing challenges

Barriers & Concerns

• 33% are worried that they won’t survive (vs. 32% globally)
• Top 3 Barriers
  1. Unable to extract valuable insights from data and/or information overload (35% vs. 29% globally)
  2. Data privacy and security concerns (34% vs. 31% globally)
  3. Lack of budget and resources (28% vs. 30% globally)

Transformation strategies & investments

• Least likely/lowest investment area (mature stages or fully complete):
  • 5G infrastructure (31% vs. 28% globally)
• Future investment plans lagging behind
  • Data management tools (36% vs. 39% globally)

Base: respondents from the Financial services industry in 2020 (492)
Public and private healthcare
Digital Transformation Index 2020
Public and private healthcare

- **Digital Laggards**: Do not have a digital plan, limited initiatives and investment in place
- **Digital Followers**: Very few digital investments; tentatively planning for the future
- **Digital Evaluators**: Gradually embracing digital transformation and planning for the future
- **Digital Adopters**: Have a mature digital plan, investments and innovations in place
- **Digital Leaders**: Digital transformation is ingrained in the DNA of the business

Benchmarking group respondents fell into. Base: respondents from the Public and private healthcare industry in 2020 (392)
Digital Transformation Index
Public and private healthcare - Year on Year Comparison

**Digital Laggards**
No digital plans; limited initiatives and investments
- 11% improvement

**Digital Followers**
Very few investments: tentative plans
- 14% improvement

**Digital Evaluators**
Gradual digital transformation and planning
- 14% rise

**Digital Adopters**
Mature digital plans, investments and innovations in place
- 11% rise

**Digital Leaders**
Digital ingrained in DNA
- 1% fall

### 2020
- Digital Laggards: 3%
- Digital Followers: 16%
- Digital Evaluators: 46%
- Digital Adopters: 32%
- Digital Leaders: 3%

### 2018
- Digital Laggards: 14%
- Digital Followers: 30%
- Digital Evaluators: 32%
- Digital Adopters: 21%
- Digital Leaders: 4%

### 2016
- Digital Laggards: 17%
- Digital Followers: 37%
- Digital Evaluators: 34%
- Digital Adopters: 10%
- Digital Leaders: 2%

Benchmarking group respondents fell into. Base: respondents from the Public and private healthcare industry in 2020 (392), 2018 (662) and 2016 (517)
# Public and private healthcare – Where they’re excelling

## Transformation Acceleration

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Local</th>
<th>Globally</th>
</tr>
</thead>
<tbody>
<tr>
<td>75% accelerated digital transformation programs</td>
<td>75%</td>
<td>80%</td>
</tr>
<tr>
<td>11 pp jump in Digital Leaders and Adopters</td>
<td>11</td>
<td>15</td>
</tr>
<tr>
<td>38% could accelerate because they had the right digital skills</td>
<td>38%</td>
<td>41%</td>
</tr>
<tr>
<td>40% rapidly shifted their digital investment priorities</td>
<td>40%</td>
<td>37%</td>
</tr>
</tbody>
</table>

## Transformation Strategies

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Local</th>
<th>Globally</th>
</tr>
</thead>
<tbody>
<tr>
<td>30% in communication with the C-Suite to digitize</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>18% Appointing/ed a Chief Data Officer</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>34% practicing CiCD</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>28% actively encouraging a fail-fast-and-then succeed mindset</td>
<td>28%</td>
<td>29%</td>
</tr>
</tbody>
</table>

## Successes

<table>
<thead>
<tr>
<th>Success</th>
<th>Local</th>
<th>Globally</th>
</tr>
</thead>
<tbody>
<tr>
<td>77% reinventing their business model</td>
<td>77%</td>
<td>79%</td>
</tr>
<tr>
<td>87% proud of how their team has adapted</td>
<td>87%</td>
<td>89%</td>
</tr>
<tr>
<td>43% are transparent</td>
<td>43%</td>
<td>49%</td>
</tr>
</tbody>
</table>

_base: respondents from the Public and private healthcare industry in 2020 (392)_
Public and private healthcare – Where they’re facing challenges

Barriers & Concerns

- 34% are worried that they won’t survive (vs. 32% globally)
- **Top 3 Barriers**
  1. Unable to extract valuable insights from data and/or information overload (35% vs. 29% globally)
  2. Data privacy and security concerns (34% vs. 31% globally)
  3. Lack of budget and resources (28% vs. 30% globally)

Transformation strategies & investments

- **Least likely/lowest investment area** (mature stages or fully complete):
  - 5G infrastructure (24% vs. 28% globally)
- **Future investment plans lagging behind**
  - Cybersecurity solutions (38% vs. 43% globally)
  - 5G infrastructure (33% vs. 37% globally)

Base: respondents from the Public and private healthcare industry in 2020 (392)
Insurance
### Digital Transformation Index 2020

#### Insurance

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>Do not have a digital plan, limited initiatives and investment in place</td>
<td>3%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>Very few digital investments: tentatively planning for the future</td>
<td>12%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>Gradually embracing digital transformation and planning for the future</td>
<td>39%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>Have a mature digital plan, investments and innovations in place</td>
<td>41%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
<td>6%</td>
</tr>
</tbody>
</table>

Benchmarking group respondents fell into. Base: respondents from the Insurance industry in 2020 (290)

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### Digital Transformation Index

**Insurance - Year on Year Comparison**

<table>
<thead>
<tr>
<th>Category</th>
<th>2016</th>
<th>2018</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Digital Laggards</strong></td>
<td>18%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Digital Followers</strong></td>
<td>30%</td>
<td>30%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Digital Evaluators</strong></td>
<td>30%</td>
<td>28%</td>
<td>39%</td>
</tr>
<tr>
<td><strong>Digital Adopters</strong></td>
<td>30%</td>
<td>25%</td>
<td>41%</td>
</tr>
<tr>
<td><strong>Digital Leaders</strong></td>
<td>3%</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

- **Digital Laggards**: No digital plans; limited initiatives and investments. **9% improvement**
- **Digital Followers**: Very few investments: tentative plans. **18% improvement**
- **Digital Evaluators**: Gradual digital transformation and planning. **11% rise**
- **Digital Adopters**: Mature digital plans, investments and innovations in place. **16% rise**
- **Digital Leaders**: Digital ingrained in DNA. **1% rise**

Benchmarking group respondents fell into. Base: respondents from the Insurance industry in 2020 (290), 2018 (272) and 2016 (288)
## Transformation Acceleration

- 82% accelerated digital transformation programs vs. 80% globally
- 17 pp jump in Digital Leaders and Adopters vs. 15pp globally
- 39% could accelerate because they had the right digital skills vs. 41% globally
- 33% rapidly shifted their digital investment priorities vs. 37% globally

## Transformation Strategies

- 30% in communication with the C-Suite to digitize vs. 30% globally
- 20% Appointing/ed a Chief Data Officer vs. 20% globally
- 30% practicing CiCD vs. 34% globally
- 26% actively encouraging a fail-fast-and-then succeed mindset vs. 29% globally

## Successes

- 79% reinventing their business model vs. 79% globally
- 92% proud of how their team has adapted vs. 89% globally
- 53% are transparent vs. 49% globally

---

Base: respondents from the Insurance industry in 2020 (290)
Currently investing in

- Digital workplace (60% in mature stages or fully complete vs. 53% globally)

Planning to invest in 1-3 years

- No standout areas
Insurance - Where they’re facing challenges

Barriers & Concerns

- 35% are worried that they won’t survive (vs. 32% globally)
- Top 3 Barriers
  1. Data privacy and security concerns (32% vs. 31% globally)
  2. Unable to extract valuable insights from data and/or information overload (30% vs. 29% globally)
  3. Regulation or legislative changes (28% vs. 23% globally)

Transformation strategies & investments

- Least likely/lowest investment area (mature stages or fully complete):
  - 5G infrastructure (26% vs. 28% globally)
- Future investment plans lagging behind
  - Data management tools (32% vs. 39% globally)
  - Artificial intelligence algorithms (23% vs. 32% globally)
Life sciences
Digital Transformation Index 2020
Life sciences

Digital Laggards
Do not have a digital plan, limited initiatives and investment in place

Digital Followers
Very few digital investments: tentatively planning for the future

Digital Evaluators
Gradually embracing digital transformation and planning for the future

Digital Adopters
Have a mature digital plan, investments and innovations in place

Digital Leaders
Digital transformation is ingrained in the DNA of the business

2%  9%  42%  41%  6%

Benchmarking group respondents fell into. Base: respondents from the Life sciences industry in 2020 (289)
## Digital Transformation Index

**Life sciences - Year on Year Comparison**

<table>
<thead>
<tr>
<th>Group</th>
<th>Description</th>
<th>2020</th>
<th>2018</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Digital Laggards</strong></td>
<td>No digital plans; limited initiatives and investments</td>
<td>2%</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Digital Followers</strong></td>
<td>Very few investments: tentative plans</td>
<td>9%</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td><strong>Digital Evaluators</strong></td>
<td>Gradual digital transformation and planning</td>
<td>42%</td>
<td>35%</td>
<td>41%</td>
</tr>
<tr>
<td><strong>Digital Adopters</strong></td>
<td>Mature digital plans, investments and innovations in place</td>
<td>41%</td>
<td>23%</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Digital Leaders</strong></td>
<td>Digital ingrained in DNA</td>
<td>6%</td>
<td>5%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Benchmarking group respondents fell into. Base: respondents from the Life sciences industry in 2020 (289), 2018 (242) and 2016 (259)

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Life sciences - Where they’re excelling

**Transformation Acceleration**
- 87% accelerated digital transformation programs
- 19 pp jump in Digital Leaders and Adopters
- 51% could accelerate because they had the right digital skills
- 44% rapidly shifted their digital investment priorities

**Transformation Strategies**
- 34% in communication with the C-Suite to digitize
- 26% Appointing/ed a Chief Data Officer
- 40% practicing CiCD
- 34% actively encouraging a fail-fast-and-then succeed mindset

**Successes**
- 82% reinventing their business model
- 91% proud of how their team has adapted
- 55% are transparent

Base: respondents from the Life sciences industry in 2020 (289)
Life sciences – Standout investment areas

Currently investing in

- Artificial intelligence (39% in mature stages or fully complete vs. 32% globally)
- Edge (47% in mature stages or fully complete vs. 41% globally)
- Multi-cloud environment (53% in mature stages or fully complete vs. 47% globally)
- Cybersecurity and privacy (66% in mature stages or fully complete vs. 60% globally)
- 5G infrastructure (34% in mature stages or fully complete vs. 28% globally)
- Digital workplace (59% in mature stages or fully complete vs. 53% globally)

Planning to invest in 1-3 years

- Commercial/industrial robotics (36% vs. 29% globally)
- Multi-cloud environment (41% vs. 35% globally)
- Artificial intelligence algorithms (38% vs. 32% globally)

Base: respondents from the Life sciences industry in 2020 (289)
Life sciences - Where they’re facing challenges

**Barriers & Concerns**

- 29% are worried that they won’t survive (vs. 32% globally)
- **Top 3 Barriers**
  1. Data privacy and security concerns (35 vs. 31% globally)
  2. Lack of budget and resources (34% vs. 30% globally)
  3. Unable to extract valuable insights from data and/or information overload (30% vs. 29% globally)

**Transformation strategies & investments**

- **Least likely/lowest investment area** (mature stages or fully complete):
  - 5G infrastructure (34% vs. 28% globally)
Manufacturing
# Digital Transformation Index 2020

## Manufacturing

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>Do not have a digital plan, limited initiatives and investment in place</td>
<td>3%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>Very few digital investments: tentatively planning for the future</td>
<td>12%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>Gradually embracing digital transformation and planning for the future</td>
<td>40%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>Have a mature digital plan, investments and innovations in place</td>
<td>38%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
<td>7%</td>
</tr>
</tbody>
</table>

Benchmarking group respondents fell into. Base: respondents from the Manufacturing industry in 2020 (489)
Digital Transformation Index
Manufacturing - Year on Year Comparison

Digital Laggards
No digital plans; limited initiatives and investments
9% improvement

Digital Followers
Very few investments: tentative plans
18% improvement

Digital Evaluators
Gradual digital transformation and planning
9% rise

Digital Adopters
Mature digital plans, investments and innovations in place
15% rise

Digital Leaders
Digital ingrained in DNA
3% rise

Benchmarking group respondents fell into. Base: respondents from the Manufacturing industry in 2020 (489), 2018 (479) and 2016 (421)
Manufacturing - Where they’re excelling

### Transformation Acceleration

- 79% accelerated digital transformation programs vs. 80% globally
- 17 pp jump in Digital Leaders and Adopters vs. 15pp globally
- 41% could accelerate because they had the right digital skills vs. 41% globally
- 37% rapidly shifted their digital investment priorities vs. 37% globally

### Transformation Strategies

- 28% in communication with the C-Suite to digitize vs. 30% globally
- 17% Appointing/ed a Chief Data Officer vs. 20% globally
- 36% practicing CiCD vs. 34% globally
- 26% actively encouraging a fail-fast-and-then succeed mindset vs. 29% globally

### Successes

- 77% reinventing their business model vs. 79% globally
- 89% proud of how their team has adapted vs. 89% globally
- 49% are transparent vs. 49% globally

Base: respondents from the Manufacturing industry in 2020 (489)
Manufacturing – Standout investment areas

Currently investing in

• No standout areas

Planning to invest in 1-3 years

• Commercial/industrial robotics (40% vs. 29% globally)
Manufacturing - Where they’re facing challenges

Barriers & Concerns

• 30% are worried that they won’t survive (vs. 32% globally)
• Top 3 Barriers
  1. Lack of budget and resources (32% vs. 30% globally)
  2. Data privacy and security concerns (31% vs. 31% globally)
  3. Unable to extract valuable insights from data and/or information overload (25% vs. 29% globally)

Transformation strategies & investments

• Least likely/lowest investment area (mature stages or fully complete):
  • 5G infrastructure (25% vs. 28% globally)
• Future investment plans lagging behind
  • 5G infrastructure (31% vs. 37% globally)
  • Software: containers and serverless (27% vs. 32% globally)

Base: respondents from the Manufacturing industry in 2020 (489)
Media and entertainment
Digital Transformation Index 2020
Media and entertainment

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>Do not have a digital plan, limited initiatives and</td>
<td>2%</td>
</tr>
<tr>
<td></td>
<td>investment in place</td>
<td></td>
</tr>
<tr>
<td>Digital Followers</td>
<td>Very few digital investments: tentatively planning for</td>
<td>17%</td>
</tr>
<tr>
<td></td>
<td>the future</td>
<td></td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>Gradually embracing digital transformation and planning</td>
<td>36%</td>
</tr>
<tr>
<td></td>
<td>for the future</td>
<td></td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>Have a mature digital plan, investments and innovations</td>
<td>42%</td>
</tr>
<tr>
<td></td>
<td>in place</td>
<td></td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>Digital transformation is ingrained in the DNA of the</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>business</td>
<td></td>
</tr>
</tbody>
</table>

Benchmarking group respondents fell into. Base: respondents from the Media and entertainment industry in 2020 (299)
Digital Transformation Index

Media and entertainment - Year on Year Comparison

Digital Laggards
No digital plans; limited initiatives and investments

- 6% improvement

Digital Followers
Very few investments: tentative plans

- 10% improvement

Digital Evaluators
Gradual digital transformation and planning

- 1% fall

Digital Adopters
Mature digital plans, investments and innovations in place

- 20% rise

Digital Leaders
Digital ingrained in DNA

- 2% rise

Benchmarking group respondents fell into. Base: respondents from the Media and entertainment industry in 2020 (299), 2018 (313) and 2016 (293)
### Transformation Acceleration

- 82% accelerated digital transformation programs vs. 80% globally
- 18 pp jump in Digital Leaders and Adopters vs. 15 pp globally
- 41% could accelerate because they had the right digital skills vs. 41% globally
- 36% rapidly shifted their digital investment priorities vs. 37% globally

### Transformation Strategies

- 30% in communication with the C-Suite to digitize vs. 30% globally
- 25% Appointing/ed a Chief Data Officer vs. 20% globally
- 20% practicing CiCD vs. 34% globally
- 30% actively encouraging a fail-fast-and-then succeed mindset vs. 29% globally

### Successes

- 77% reinventing their business model vs. 79% globally
- 88% proud of how their team has adapted vs. 89% globally
- 46% are transparent vs. 49% globally

Base: respondents from the Media and entertainment industry in 2020 (299)
Media and entertainment – Standout investment areas

Currently investing in

- Digital workplace (57% in mature stages or fully complete vs. 53% globally)
- On-demand digital services (48% in mature stages or fully complete vs. 45% globally)

Planning to invest in 1-3 years

- Privacy software (38% vs. 35% globally)

Base: respondents from the Media and entertainment industry in 2020 (299)
Barriers & Concerns

• 33% are worried that they won’t survive (vs. 32% globally)
• Top 3 Barriers
  1. Lack of budget and resources (30% vs. 30% globally)
  2. Data privacy and security concerns (29% vs. 31% globally)
  3. Unable to extract valuable insights from data and/or information overload (27% vs. 29% globally)

Transformation strategies & investments

• Least likely/lowest investment area (mature stages or fully complete):
  • 5G infrastructure (28% vs. 28% globally)
• Future investment plans lagging behind
  • 5G infrastructure (33% vs. 37% globally)
  • Software: containers and serverless (27% vs. 32% globally)

Base: respondents from the Media and entertainment industry in 2020 (299)
Oil and gas
Digital Transformation Index 2020

Oil and gas

Digital Laggards: Do not have a digital plan, limited initiatives and investment in place
Digital Followers: Very few digital investments: tentatively planning for the future
Digital Evaluators: Gradually embracing digital transformation and planning for the future
Digital Adopters: Have a mature digital plan, investments and innovations in place
Digital Leaders: Digital transformation is ingrained in the DNA of the business

3% Digital Laggards
16% Digital Followers
39% Digital Evaluators
36% Digital Adopters
5% Digital Leaders

Benchmarking group respondents fell into. Base: respondents from the Oil and gas industry in 2020 (331)
Digital Transformation Index

Oil and gas - Year on Year Comparison

Digital Laggards
No digital plans; limited initiatives and investments
7% improvement

Digital Followers
Very few investments: tentative plans
12% improvement

Digital Evaluators
Gradual digital transformation and planning
1% fall

Digital Adopters
Mature digital plans, investments and innovations in place
20% rise

Digital Leaders
Digital ingrained in DNA
1% fall

Benchmarking group respondents fell into. Base: respondents from the Oil and gas industry in 2020 (331), 2018 (264) and 2016 (355)

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## Transformation Acceleration

- 78% accelerated digital transformation programs vs. 80% globally
- 20 pp jump in Digital Leaders and Adopters vs. 15pp globally
- 40% could accelerate because they had the right digital skills vs. 41% globally
- 33% rapidly shifted their digital investment priorities vs. 37% globally

## Transformation Strategies

- 33% in communication with the C-Suite to digitize vs. 30% globally
- 22% Appointing/ed a Chief Data Officer vs. 20% globally
- 35% practicing CiCD vs. 34% globally
- 27% actively encouraging a fail-fast-and-then succeed mindset vs. 29% globally

## Successes

- 80% reinventing their business model vs. 79% globally
- 91% proud of how their team has adapted vs. 89% globally
- 46% are transparent vs. 49% globally

Base: respondents from the Oil and gas industry in 2020 (331)
Oil and gas – Standout investment areas

Currently investing in

• 5G infrastructure (34% in mature stages or fully complete vs. 28% globally)
• Edge (46% in mature stages or fully complete vs. 41% globally)

Planning to invest in 1-3 years

• Commercial/industrial robotics (38% vs. 29% globally)
• Artificial intelligence algorithms (37% vs. 32% globally)
• Real-time applications at the Edge (35% vs. 28% globally)

Base: respondents from the Oil and gas industry in 2020 (331)
Oil and gas – Where they’re facing challenges

**Barriers & Concerns**

- 38% are worried that they won’t survive (vs. 32% globally)
- **Top 3 Barriers**
  1. Data privacy and security concerns (33% vs. 31% globally)
  2. Unable to extract valuable insights from data and/or information overload (33% vs. 29% globally)
  3. Lack of budget and resources (27% vs. 30% globally)

**Transformation strategies & investments**

- **Least likely/lowest investment area** (mature stages or fully complete):
  - Artificial intelligence (33% vs. 32% globally)
- **Future investment plans lagging behind**
  - Cybersecurity solutions (40% vs. 43% globally)
  - Privacy software (31% vs. 35% globally)

Base: respondents from the Oil and gas industry in 2020 (331)
Retail and consumer
Digital Transformation Index 2020
Retail and consumer

Digital Laggards
Do not have a digital plan, limited initiatives and investment in place
2%

Digital Followers
Very few digital investments: tentatively planning for the future
14%

Digital Evaluators
Gradually embracing digital transformation and planning for the future
43%

Digital Adopters
Have a mature digital plan, investments and innovations in place
36%

Digital Leaders
Digital transformation is ingrained in the DNA of the business
5%

Benchmarking group respondents fell into. Base: respondents from the Retail and consumer industry in 2020 (477)
Digital Transformation Index
Retail and consumer - Year on Year Comparison

Digital Laggards
No digital plans; limited initiatives and investments
8% improvement

Digital Followers
Very few investments: tentative plans
16% improvement

Digital Evaluators
Gradual digital transformation and planning
13% rise

Digital Adopters
Mature digital plans, investments and innovations in place
11% rise

Digital Leaders
Digital ingrained in DNA
No change

Benchmarking group respondents fell into. Base: respondents from the Retail and consumer industry in 2020 (477), 2018 (474) and 2016 (401)
## Retail and consumer - Where they’re excelling

### Transformation Acceleration

- 78% accelerated digital transformation programs vs. 80% globally
- 11 pp jump in Digital Leaders and Adopters vs. 15pp globally
- 40% could accelerate because they had the right digital skills vs. 41% globally
- 34% rapidly shifted their digital investment priorities vs. 37% globally

### Transformation Strategies

- 30% in communication with the C-Suite to digitize vs. 30% globally
- 16% Appointing/ed a Chief Data Officer vs. 20% globally
- 34% practicing CiCD vs. 34% globally
- 29% actively encouraging a fail-fast-and-then succeed mindset vs. 29% globally

### Successes

- 79% reinventing their business model vs. 79% globally
- 87% proud of how their team has adapted vs. 89% globally
- 51% are transparent vs. 49% globally

Base: respondents from the Retail and consumer industry in 2020 (477)
Barriers & Concerns

• 30% are worried that they won’t survive (vs. 32% globally)
• **Top 3 Barriers**
  1. Lack of budget and resources (31% vs. 30% globally)
  2. Data privacy and security concerns (26% vs. 31% globally)
     Unable to extract valuable insights from data and/or information overload (26% vs. 29% globally)
     Lack of economic growth (26% vs. 24% globally)
  3. n/a

Transformation strategies & investments

• **Least likely/lowest investment area** (mature stages or fully complete):
  • 5G infrastructure (21% vs. 28% globally)
• **Future investment plans lagging behind**
  • Artificial intelligence algorithms (26% vs. 32% globally)
  • Software: containers and serverless (27% vs. 32% globally)
Technology
Digital Transformation Index 2020

Technology

Digital Laggards
Do not have a digital plan, limited initiatives and investment in place
2%

Digital Followers
Very few digital investments: tentatively planning for the future
8%

Digital Evaluators
Gradually embracing digital transformation and planning for the future
39%

Digital Adopters
Have a mature digital plan, investments and innovations in place
43%

Digital Leaders
Digital transformation is ingrained in the DNA of the business
9%

Benchmarking group respondents fell into. Base: respondents from the Technology industry in 2020 (148)
Digital Transformation Index
Technology - Year on Year Comparison

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>2%</td>
<td>6%</td>
<td>14%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>8%</td>
<td>26%</td>
<td>29%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>39%</td>
<td>38%</td>
<td>34%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>43%</td>
<td>25%</td>
<td>16%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>9%</td>
<td>5%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Benchmarking group respondents fell into. Base: respondents from the Technology industry in 2020 (148), 2018 (473) and 2016 (378)
## Technology - Where they’re excelling

### Transformation Acceleration
- 80% accelerated digital transformation programs vs. 80% globally
- 21 pp jump in Digital Leaders and Adopters vs. 15pp globally
- 47% could accelerate because they had the right digital skills vs. 41% globally
- 33% rapidly shifted their digital investment priorities vs. 37% globally

### Transformation Strategies
- 29% in communication with the C-Suite to digitize vs. 30% globally
- 12% Appointing/ed a Chief Data Officer vs. 20% globally
- 36% practicing CiCD vs. 34% globally
- 28% actively encouraging a fail-fast-and-then succeed mindset vs. 29% globally

### Successes
- 76% reinventing their business model vs. 79% globally
- 88% proud of how their team has adapted vs. 89% globally
- 53% are transparent vs. 49% globally

---

Base: respondents from the Technology industry in 2020 (148)
Technology – Standout investment areas

Currently investing in

• No standout areas

Planning to invest in 1-3 years

• Artificial intelligence algorithms (40% vs. 32% globally)
• Software: containers and serverless (40% vs. 32% globally)

Base: respondents from the Technology industry in 2020 (148)
Technology – Where they’re facing challenges

Barriers & Concerns

- 32% are worried that they won’t survive (vs. 32% globally)
- **Top 3 Barriers**
  1. Data privacy and security concerns (33% vs. 31% globally)
  2. Lack of budget and resources (30% vs. 30% globally)
  3. Lack of the right in house skill sets and expertise (26% vs. 24% globally)

Transformation strategies & investments

- **Least likely/lowest investment area** (mature stages or fully complete):
  - 5G infrastructure (23% vs. 28% globally)

Base: respondents from the Technology industry in 2020 (148)
Digital Transformation Index 2020
Telecoms

Digital Laggards
Do not have a digital plan, limited initiatives and investment in place
3%

Digital Followers
Very few digital investments: tentatively planning for the future
10%

Digital Evaluators
Gradually embracing digital transformation and planning for the future
37%

Digital Adopters
Have a mature digital plan, investments and innovations in place
42%

Digital Leaders
Digital transformation is ingrained in the DNA of the business
9%

Benchmarking group respondents fell into. Base: respondents from the Telecoms industry in 2020 (417)
## Digital Transformation Index

**Telecoms - Year on Year Comparison**

<table>
<thead>
<tr>
<th>Category</th>
<th>2020</th>
<th>2018</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>3%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>10%</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>37%</td>
<td>33%</td>
<td>37%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>42%</td>
<td>29%</td>
<td>19%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>9%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Benchmarking group respondents fell into. Base: respondents from the Telecoms industry in 2020 (417), 2018 (356) and 2016 (283)
### Telecoms - Where they’re excelling

#### Transformation Acceleration
- 85% accelerated digital transformation programs
  - vs. 80% globally
- 17 pp jump in Digital Leaders and Adopters
  - vs. 15pp globally
- 42% could accelerate because they had the right digital skills
  - vs. 41% globally
- 38% rapidly shifted their digital investment priorities
  - vs. 37% globally

#### Transformation Strategies
- 32% in communication with the C-Suite to digitize
  - vs. 30% globally
- 21% Appointing/ed a Chief Data Officer
  - vs. 20% globally
- 38% practicing CiCD
  - vs. 34% globally
- 31% actively encouraging a fail-fast-and-then succeed mindset
  - vs. 29% globally

#### Successes
- 84% reinventing their business model
  - vs. 79% globally
- 91% proud of how their team has adapted
  - vs. 89% globally
- 49% are transparent
  - vs. 49% globally

Base: respondents from the Telecoms industry in 2020 (417)
Telecoms – Standout investment areas

Currently investing in

• 5G infrastructure (35% in mature stages or fully complete vs. 28% globally)
• Multi-cloud environment (53% in mature stages or fully complete vs. 47% globally)

Planning to invest in 1-3 years

• 5G infrastructure (49% vs. 37% globally)
• 5G ready hardware (40% vs 33% globally)
• Software: containers and serverless (40% vs. 32% globally)

Base: respondents from the Telecoms industry in 2020 (417)
Barriers & Concerns

- 36% are worried that they won’t survive (vs. 32% globally)
- Top 3 Barriers
  1. Data privacy and security concerns (35% vs. 31% globally)
  2. Unable to extract valuable insights from data/information overload (31% vs. 29% globally)
  3. Lack of budget and resources (26% vs. 30% globally)

Transformation strategies & investments

- Future investment plans lagging behind
  - Commercial/industrial robotics (25% vs. 29% globally)
Other commercial industries
Digital Transformation Index 2020
Other commercial

<table>
<thead>
<tr>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not have a digital plan, limited initiatives and investment in place</td>
<td>Very few digital investments: tentatively planning for the future</td>
<td>Gradually embracing digital transformation and planning for the future</td>
<td>Have a mature digital plan, investments and innovations in place</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
</tr>
<tr>
<td>7%</td>
<td>18%</td>
<td>33%</td>
<td>37%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Benchmarking group respondents fell into. Base: respondents from Other commercial industries in 2020 (292)
# Digital Transformation Index

Other commercial industries - Year on Year Comparison

<table>
<thead>
<tr>
<th>Category</th>
<th>2020</th>
<th>2018</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>7%</td>
<td>11%</td>
<td>22%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>18%</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>33%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>37%</td>
<td>22%</td>
<td>10%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Benchmarking group respondents fell into. Base: respondents from Other commercial industries in 2020 (292), 2018 (262) and 2016 (105)
## Transformation Acceleration

<table>
<thead>
<tr>
<th>Transformation Acceleration</th>
<th>Transformation Strategies</th>
<th>Successes</th>
</tr>
</thead>
<tbody>
<tr>
<td>64% accelerated digital transformation programs vs. 80% globally</td>
<td>24% in communication with the C-Suite to digitize vs. 30% globally</td>
<td>73% reinventing their business model vs. 79% globally</td>
</tr>
<tr>
<td>17 pp jump in Digital Leaders and Adopters vs. 15pp globally</td>
<td>14% Appointing/ed a Chief Data Officer vs. 20% globally</td>
<td>85% proud of how their team has adapted vs. 89% globally</td>
</tr>
<tr>
<td>34% could accelerate because they had the right digital skills vs. 41% globally</td>
<td>33% practicing CiCD vs. 34% globally</td>
<td>-</td>
</tr>
<tr>
<td>34% rapidly shifted their digital investment priorities vs. 37% globally</td>
<td>22% actively encouraging a fail-fast-and-then succeed mindset vs. 29% globally</td>
<td>48% are transparent vs. 49% globally</td>
</tr>
</tbody>
</table>

Base: respondents from Other commercial industries in 2020 (292)
Other commercial industries –
Standout investment areas

Currently investing in

• Cybersecurity and privacy (64% in mature stages or fully complete vs. 60% globally)

Planning to invest in 1-3 years

• Data management tools (47% vs. 39% globally)
• Cybersecurity solutions (48% vs. 43% globally)

Base: respondents from Other commercial industries in 2020 (292)
Other commercial industries – Where they’re facing challenges

**Barriers & Concerns**

- 25% are worried that they won’t survive (vs. 32% globally)
- **Top 3 Barriers**
  1. Lack of budget and resources (39% vs. 30% globally)
  2. Unable to extract valuable insights from data/information overload (26% vs. 29% globally)
  3. Lack of the right in-house skill sets and expertise (26% vs. 24% globally)

**Transformation strategies & investments**

- Least likely/lowest investment area (mature stages or fully complete):
  - 5G infrastructure (20% vs. 28% globally)
- Future investment plans lagging behind
  - 5G infrastructure (31% vs. 37% globally)
  - Multi-cloud environment (30% vs. 35% globally)

Base: respondents from Other commercial industries in 2020 (292)
Regional Spotlights
APJC
Have you successfully accelerated any of your digital transformation programs this year?*

*Base: all 2020 respondents (4300) APJC (1400) Showing the proportion of respondents who selected “Yes, for all of our digital transformation programs”, “Yes, for most of our digital transformation programs” or “Yes, for some of our digital transformation programs”
Top Three Digital Transformation Programs Accelerated

<table>
<thead>
<tr>
<th>Rank</th>
<th>Program Description</th>
<th>Australia/New Zealand</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Singapore</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Strengthening our cybersecurity defenses: 50% (2% more than the global average)</td>
<td>Strengthening our cybersecurity defenses: 50%</td>
<td>Strengthening our cybersecurity defenses: 52%</td>
<td>Strengthening our cybersecurity defenses: 52%</td>
<td>Rolling out broader remote working capabilities: 46%</td>
<td>Strengthening our cybersecurity defenses: 49%</td>
</tr>
<tr>
<td>2</td>
<td>Reinventing how we deliver digital experiences to customers and employees: 44% (6% more than the global average)</td>
<td>Rolling out broader remote working capabilities: 45%</td>
<td>Reinventing how we deliver digital experiences: 51%</td>
<td>Transforming our services and consumption models: 48%</td>
<td>Strengthening our cybersecurity defenses: 42%</td>
<td>Rolling out broader remote working capabilities: 42%</td>
</tr>
<tr>
<td>3</td>
<td>Rolling out broader remote working capabilities: 43% (1% less than the global average)</td>
<td>Using data in completely new ways: 43%</td>
<td>Transforming our Edge deployments: 49%</td>
<td>Using data in completely new ways/ extending our business domain: 48%</td>
<td>Reinventing how we deliver digital experiences: 32%</td>
<td>Transforming our services and consumption models: 40%</td>
</tr>
</tbody>
</table>

*Which digital transformation programs have you successfully accelerated this year?*

Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427) APJC (1171)
We have an engaged leadership team (championing digital transformation)

We have an agile, remote workforce

We have the right in-house digital skills

We have the right technologies to work at the speed of business

Our employees have ready access to high speed internet in their homes

We rapidly shifted our digital investment priorities

We have a mature digital culture

**“What enabled you to successfully accelerate your transformation programs?”**

Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), APJC (1171)
We have an engaged leadership team (championing digital transformation)

We have an agile, remote workforce

We have the right in-house digital skills

We have the right technologies to work at the speed of business

Our employees have ready access to high speed internet in their homes

We rapidly shifted our digital investment priorities

We have a mature digital culture

“What enabled you to successfully accelerate your transformation programs?”

Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), APJC (1171)
Making decisions based on data in real-time
Prioritizing sustainable technology (i.e. using recyclable material/technologies that use less power)
Practicing DevSecOps
Working with LOBs to identify digital Use Cases
Practicing Ci/CD (continuous integration, continuous delivery)
Actively encouraging a fail-fast-then-succeed mindset

"Thinking about your digital transformation strategy, which of the following is your organization doing?"
Base: all 2020 respondents (4300) APJC (1400) Not showing “Don’t know” or “None of these”
“Thinking about your digital transformation strategy, which of the following is your organization doing?”

**Base:** all 2020 respondents (4300) APJC (1400) Not showing “Don’t know” or “None of these”

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Australia/New Zealand</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Singapore</th>
</tr>
</thead>
<tbody>
<tr>
<td>Making decisions based on data in real-time</td>
<td>61%</td>
<td>64%</td>
<td>39%</td>
<td>65%</td>
<td>63%</td>
</tr>
<tr>
<td>Prioritizing sustainable technology</td>
<td>50%</td>
<td>65%</td>
<td>57%</td>
<td>30%</td>
<td>50%</td>
</tr>
<tr>
<td>Practicing DevSecOps</td>
<td>40%</td>
<td>59%</td>
<td>56%</td>
<td>20%</td>
<td>50%</td>
</tr>
<tr>
<td>Working with LOBs to identify digital Use Cases</td>
<td>26%</td>
<td>40%</td>
<td>20%</td>
<td>36%</td>
<td>30%</td>
</tr>
<tr>
<td>Practicing Ci/CD</td>
<td>38%</td>
<td>44%</td>
<td>41%</td>
<td>14%</td>
<td>37%</td>
</tr>
<tr>
<td>Actively encouraging a fail-fast-then-succeed mindset</td>
<td>30%</td>
<td>38%</td>
<td>38%</td>
<td>41%</td>
<td>31%</td>
</tr>
</tbody>
</table>
## Top Three Barriers To Digital Transformation

### Australia/New Zealand
- **Data privacy and security concerns**: 37% (6% more than the global average)
- Lack of budget and resources: 41%

### China
- **Lack of the right in-house skill sets and expertise**: 33%

### India
- **Data privacy and security concerns**: 47%

### Japan
- **Lack of budget and resources**: 33%

### Singapore
- Data privacy and security concerns/Lack of budget and resources: 42%

## 1. Data privacy and security concerns: 37% (6% more than the global average)

## 2. Lack of budget and resources: 32% (2% more than the global average)

## 3. Unable to extract valuable insights from data and/or information overload: 31% (2% more than the global average)

---

"What are the main barriers to digitally transforming your organization?"

Base: all 2020 respondents (4300) APJC (1400)

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Top Three Tech Investments

<table>
<thead>
<tr>
<th>Rank</th>
<th>Innovation Area</th>
<th>Australia/New Zealand</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Singapore</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cybersecurity solutions: 42%</td>
<td>Data management tools: 43%</td>
<td>Cybersecurity solutions: 53%</td>
<td>Artificial intelligence algorithms: 50%</td>
<td>Artificial intelligence algorithms: 27%</td>
<td>Data management tools: 48%</td>
</tr>
<tr>
<td></td>
<td>(1% less than the global average)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Data management tools: 41%</td>
<td>Cybersecurity solutions: 37%</td>
<td>Artificial intelligence algorithms: 50%</td>
<td>5G infrastructure: 45%</td>
<td>Commercial/industrial robotics: 24%</td>
<td>Cybersecurity solutions: 47%</td>
</tr>
<tr>
<td></td>
<td>(2% more than the global average)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Artificial intelligence algorithms: 40%</td>
<td>Privacy software: 35%</td>
<td>Data management tools: 48%</td>
<td>Software: containers and serverless: 44%</td>
<td>5G ready hardware: 21%</td>
<td>5G infrastructure/Privacy software/Artificial intelligence algorithms: 37%</td>
</tr>
<tr>
<td></td>
<td>(8% more than the global average)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

“What new innovations or solutions is your organization investing in over the next 1-3 years to enable digital business?”
Base: all 2020 respondents (4300) APJC (1400)
Proportion Of Staff Working Remotely

“What proportion of your organization’s staff worked remotely before the pandemic/are currently working remotely?”

Base: all 2020 respondents (4300) APJC (1400)

Global average: agree
- Before the pandemic: 25%
- Currently: 52%

APJC
- Before the pandemic: 27%
- Currently: 51%

Australia/New Zealand
- Before the pandemic: 25%
- Currently: 54%

China
- Before the pandemic: 29%
- Currently: 44%

India
- Before the pandemic: 37%
- Currently: 58%

Japan
- Before the pandemic: 17%
- Currently: 40%

Singapore
- Before the pandemic: 22%
- Currently: 62%

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Adapting to Unprecedented Upheaval

The coronavirus crisis has shown us that we need a more agile, scalable IT environment that provides for contingencies. Myself / my team are at risk of burnout from trying to adapt our IT strategy in these abnormal times. We are reinventing our business model. I am proud of my team/my organization in the way that we’ve adapted our IT and business/operational strategy.

“As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?”
Base: all 2020 interim respondents (4300) APJC (1400). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”
"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"

Base: respondents from APJC (1400). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”

The coronavirus crisis has shown us that we need a more agile, scalable IT environment that provides for contingencies

- Australia/New Zealand: 87%
- China: 98%
- India: 93%
- Japan: 82%
- Singapore: 93%

Myself / my team are at risk of burn-out from trying to adapt our IT strategy in these abnormal times

- Australia/New Zealand: 46%
- China: 52%
- India: 57%
- Japan: 66%
- Singapore: 55%

We are reinventing our business model

- Australia/New Zealand: 77%
- China: 97%
- India: 92%
- Japan: 84%

I am proud of my team/my organization in the way that we’ve adapted our IT and business/operational strategy

- Australia/New Zealand: 90%
- China: 97%
- India: 93%
- Japan: 64%
- Singapore: 94%
As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?

I am worried that my organization might not survive the next couple of years

- Global: 32%
- APJC: 38%

I believe my organization will survive but we will shed many more jobs and it will take years to return to profitability/previous expenditure levels

- Global: 60%
- APJC: 68%

Base: all 2020 respondents (4300) APJC (1400). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”
I am worried that my organization might not survive the next couple of years:
- Australia/New Zealand: 37%
- China: 29%
- India: 38%
- Japan: 35%
- Singapore: 62%

I believe my organization will survive but we will shed many more jobs and it will take years to return to profitability/previous expenditure levels:
- Australia/New Zealand: 64%
- China: 63%
- India: 69%
- Japan: 77%
- Singapore: 73%

“As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?”
Base: respondents from APJC (1400). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”
EUROPE
“Have you successfully accelerated any of your digital transformation programs this year?”
Base: all 2020 respondents (4300), Europe (1900). Showing the proportion of respondents who selected “Yes, for all of our digital transformation programs”, “Yes, for most of our digital transformation programs” or “Yes, for some of our digital transformation programs”
Top Three Digital Transformation Programs Accelerated

<table>
<thead>
<tr>
<th>Program</th>
<th>UK</th>
<th>France</th>
<th>Germany</th>
<th>Italy</th>
<th>Netherlands</th>
<th>Poland</th>
<th>Spain</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Strengthening our cybersecurity defenses: 45% (3% less than the global average)</td>
<td>Strengthening our cybersecurity defenses: 47%</td>
<td>Rolling out broader remote working capabilities: 44%</td>
<td>Strengthening our cybersecurity defenses: 46%</td>
<td>Rolling out broader remote working capabilities: 47%</td>
<td>Strengthening our cybersecurity defenses/ Rolling out broader remote working capabilities: 43%</td>
<td>Strengthening our cybersecurity defenses: 52%</td>
<td>Rolling out broader remote working capabilities: 48%</td>
<td>Rolling out broader remote working capabilities: 47%</td>
</tr>
<tr>
<td>2. Rolling out broader remote working capabilities: 45% (1% more than the global average)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>3. Using data in completely new ways: 34% (3% less than the global average)</td>
<td>-</td>
<td>Using data in completely new ways: 32%</td>
<td>Reinventing how we deliver digital experiences: 34%</td>
<td>Using data in completely new ways/ Transforming our Edge deployments: 36%</td>
<td>Using data in completely new ways/ Transforming our Edge deployments: 35%</td>
<td>Reinventing how we deliver digital experiences: 34%</td>
<td>Strengthening our cybersecurity defenses: 38%</td>
<td>-</td>
</tr>
</tbody>
</table>
We have an engaged leadership team (championing digital transformation)
We have an agile, remote workforce
We have the right in-house digital skills
We have the right technologies to work at the speed of business
Our employees have ready access to high speed internet in their homes
We rapidly shifted our digital investment priorities
We have a mature digital culture

“What enabled you to successfully accelerate your transformation programs?”
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), Europe (1430)
We have an engaged leadership team (championing digital transformation)

We have an agile, remote workforce

We have the right in-house digital skills

We have the right technologies to work at the speed of business

Our employees have ready access to high speed internet in their homes

We rapidly shifted our digital investment priorities

We have a mature digital culture

“What enabled you to successfully accelerate your transformation programs?”

Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), Europe (1430)

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Making decisions based on data in real-time
Prioritizing sustainable technology
Practicing DevSecOps
Working with LOBs to identify digital Use Cases
Practicing Ci/CD
Actively encouraging a fail-fast-then-succeed mindset

“Thinking about your digital transformation strategy, which of the following is your organization doing?”
Base: all 2020 respondents (4300) Europe (1900) Not showing “Don’t know” or “None of these”
“Thinking about your digital transformation strategy, which of the following is your organization doing?”
Base: all 2020 respondents (4300) Europe (1900) Not showing “Don’t know” or “None of these”
### Top Three Barriers To Digital Transformation

#### 1. Lack of budget and resources: 29%
   - UK: Lack of budget and resources: 37%
   - France: Lack of budget and resources: 30%
   - Germany: Unable to extract valuable insights from data and/or information overload: 34%
   - Italy: Data privacy and security concerns: 30%
   - Netherlands: Lack of economic growth: 30%
   - Poland: Regulation or legislative changes: 32%
   - Spain: Data privacy and security concerns: 39%
   - Sweden: Lack of budget and resources: 28%

   (1% less than the global average)

#### 2. Unable to extract valuable insights from data and/or information overload: 28%
   - UK: Data privacy and security concerns: 28%
   - France: Unable to extract valuable insights from data and/or information overload: 28%
   - Germany: Data privacy and security concerns: 31%
   - Italy: Regulation or legislative changes: 24%
   - Netherlands: Lack of budget and resources: 29%
   - Poland: Unable to extract valuable insights from data and/or information overload: 31%
   - Spain: Lack of economic growth: 32%
   - Sweden: Unable to extract valuable insights from data and/or information overload: 26%

   (1% less than the global average)

#### 3. Data privacy and security concerns: 27%
   - UK: Unable to extract valuable insights from data and/or information overload: 27%
   - France: Regulation or legislative changes: 26%
   - Germany: Lack of budget and resources: 26%
   - Italy: Lack the right technologies to work at the speed of business: 23%
   - Netherlands: Unable to extract valuable insights from data and/or information overload: 27%
   - Poland: Lack of budget and resources: 29%
   - Spain: Unable to extract valuable insights from data and/or information overload: 27%
   - Sweden: Data privacy and security concerns/ Lack of economic growth: 26%

   (4% less than the global average)

---

"What are the main barriers to achieving digital transformation within your organization?"  
Base: all 2020 respondents (4300) Europe (1900)
### Top Three Tech Investments

**Cybersecurity solutions:**
- **UK:** 50%
- **France:** 38%
- **Germany:** 39%
- **Italy:** 41%
- **Netherlands:** 50%
- **Poland:** 45%
- **Spain:** 45%
- **Sweden:** 45%

1. **Cybersecurity solutions:** 42% (1% less than the global average)

**5G infrastructure:**
- **UK:** 45%
- **France:** 31%
- **Germany:** 38%
- **Italy:** 45%
- **Netherlands:** 39%
- **Poland:** 39%
- **Spain:** 44%
- **Sweden:** 37%

2. **5G infrastructure:** 36% (1% less than the global average)

**Data management tools:**
- **UK:** 39%
- **France:** 31%
- **Germany:** 34%
- **Italy:** 10%
- **Netherlands:** 38%
- **Poland:** 38%
- **Spain:** 41%
- **Sweden:** 35%

3. **Data management tools:** 35% (4% more than the global average)

---

“What new innovations or solutions is your organization investing in over the next 1-3 years to enable digital business?”

Base: all 2020 respondents (4300) Europe (1900)
Proportion Of Staff Working Remotely

“What proportion of your organization’s staff worked remotely before the pandemic/are currently working remotely?”
Base: all 2020 respondents (4300) Europe (1900)
"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"

Base: all 2020 respondents (4300) Europe (1900). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”

The coronavirus crisis has shown us that we need a more agile, scalable IT environment that provides for contingencies

Myself / my team are at risk of burn-out from trying to adapt our IT strategy in these abnormal times

We are reinventing our business model

I am proud of my team/my organization in the way that we’ve adapted our IT and business/operational strategy

© Copyright 2020 Dell Inc.
As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?

**Base:** respondents from Europe (1900). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”

**Adapting to Unprecedented Upheaval**

**The coronavirus crisis has shown us that we need a more agile, scalable IT environment that provides for contingencies**

- **UK:** 89%
- **France:** 91%
- **Germany:** 79%
- **Italy:** 86%
- **Netherlands:** 74%
- **Poland:** 85%
- **Spain:** 91%
- **Sweden:** 84%

**Myself / my team are at risk of burn-out from trying to adapt our IT strategy in these abnormal times**

- **UK:** 43%
- **France:** 39%
- **Germany:** 47%
- **Italy:** 45%
- **Netherlands:** 30%
- **Poland:** 59%
- **Spain:** 46%
- **Sweden:**

**We are reinventing our business model**

- **UK:** 78%
- **France:** 74%
- **Germany:** 61%
- **Italy:** 81%
- **Netherlands:** 72%
- **Poland:** 58%
- **Spain:** 68%
- **Sweden:**

**I am proud of my team/my organization in the way that we’ve adapted our IT and business/operational strategy**

- **UK:** 91%
- **France:** 87%
- **Germany:** 93%
- **Italy:** 83%
- **Netherlands:** 89%
- **Poland:** 88%
- **Spain:** 82%
- **Sweden:**

“As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?”

Base: respondents from Europe (1900). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”
Survival Expectations

"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"

Base: all 2020 respondents (4300) Europe (1900). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”

I am worried that my organization might not survive the next couple of years
- Global: 32%
- Europe: 28%

I believe my organization will survive but we will shed many more jobs and it will take years to return to profitability/previous expenditure levels
- Global: 60%
- Europe: 52%
I am worried that my organization might not survive the next couple of years

I believe my organization will survive but we will shed many more jobs and it will take years to return to profitability/previous expenditure levels

“As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?”

Base: respondents from Europe (1900). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”
Americas
“Have you successfully accelerated any of your digital transformation programs this year?”
Base: all 2020 respondents (4300) Americas (1000) Showing the proportion of respondents who selected “Yes, for all of our digital transformation programs”, “Yes, for most of our digital transformation programs” or “Yes, for some of our digital transformation programs”
Top Three Digital Transformation Programs Accelerated

<table>
<thead>
<tr>
<th>Program</th>
<th>US</th>
<th>Canada</th>
<th>Brazil</th>
<th>Mexico</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strengthening our cybersecurity defenses:</td>
<td>Strengthening our cybersecurity defenses: 48%</td>
<td>Strengthening our cybersecurity defenses: 51%</td>
<td>Rolling out broader remote working capabilities: 58%</td>
<td>Strengthening our cybersecurity defenses: 54%</td>
</tr>
<tr>
<td>Rolling out broader remote working capabilities:</td>
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<tr>
<td>Using data in completely new ways:</td>
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<td>Reinventing how we deliver digital experiences to customers and employees</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transforming our Edge deployments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

“Which digital transformation programs have you successfully accelerated this year?”
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427) Americas (826)

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Acceleration Enablers

We have an engaged leadership team (championing digital transformation)
We have an agile, remote workforce
We have the right in-house digital skills
We have the right technologies to work at the speed of business
Our employees have ready access to high speed internet in their homes
We rapidly shifted our digital investment priorities
We have a mature digital culture

“What enabled you to successfully accelerate your transformation programs?”
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), Americas (826)
### Acceleration Enablers

<table>
<thead>
<tr>
<th>Enabler</th>
<th>US</th>
<th>Canada</th>
<th>Brazil</th>
<th>Mexico</th>
</tr>
</thead>
<tbody>
<tr>
<td>We have an engaged leadership team (championing digital transformation)</td>
<td>45%</td>
<td>46%</td>
<td>37%</td>
<td>47%</td>
</tr>
<tr>
<td>We have an agile, remote workforce</td>
<td>42%</td>
<td>37%</td>
<td>55%</td>
<td>40%</td>
</tr>
<tr>
<td>We rapidly shifted our digital investment priorities</td>
<td>32%</td>
<td>38%</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>We have a mature digital culture</td>
<td>38%</td>
<td>27%</td>
<td>33%</td>
<td>28%</td>
</tr>
</tbody>
</table>

**Our employees have ready access to high speed internet in their homes**

<table>
<thead>
<tr>
<th></th>
<th>US</th>
<th>Canada</th>
<th>Brazil</th>
<th>Mexico</th>
</tr>
</thead>
<tbody>
<tr>
<td>We rapidly shifted our digital investment priorities</td>
<td>32%</td>
<td>38%</td>
<td>45%</td>
<td>45%</td>
</tr>
</tbody>
</table>

**US**: 3427, **Americas**: 826

“What enabled you to successfully accelerate your transformation programs?”

Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), Americas (826)
Making decisions based on data in real-time: 57% global, 64% Americas

Prioritizing sustainable technology: 49% global, 50% Americas

Practicing DevSecOps: 42% global, 46% Americas

Working with LOBs to identify digital Use Cases: 38% global, 36% Americas

Practicing Ci/CD: 34% global, 34% Americas

Actively encouraging a fail-fast-then-succeed mindset: 29% global, 26% Americas

"Thinking about your digital transformation strategy, which of the following is your organization doing?"
Base: all 2020 respondents (4300) Americas (1000). Not showing “Don’t know” or “None of these”
"Thinking about your digital transformation strategy, which of the following is your organization doing?"
Base: all 2020 respondents (4300) Americas (1000). Not showing “Don’t know” or “None of these”

- Making decisions based on data in real-time: 68% (US), 68% (Canada), 65% (Brazil), 52% (Mexico)
- Prioritizing sustainable technology: 42% (US), 43% (Canada), 65% (Brazil), 58% (Mexico)
- Practicing DevSecOps: 41% (US), 42% (Canada), 52% (Brazil), 54% (Mexico)
- Working with LOBs to identify digital Use Cases: 26% (US), 26% (Canada), 51% (Brazil), 42% (Mexico)
- Practicing Ci/CD: 26% (US), 31% (Canada), 34% (Brazil), 42% (Mexico)
- Actively encouraging a fail-fast-then-succeed mindset: 26% (US), 26% (Canada), 18% (Brazil), 33% (Mexico)
Top Three Barriers To Digital Transformation

1. Data privacy and security concerns: 33% (2% more than the global average)
2. Lack of budget and resources: 31% (1% more than the global average)
3. Unable to extract valuable insights from data and/or information overload: 29% (Same proportion as the global average)

US
- Data privacy and security concerns: 37%
- Lack of budget and resources: 44%
- Lack of economic growth: 35%

Canada
- Lack of budget and resources: 31%
- Data privacy and security concerns: 37%
- Unable to extract valuable insights from data and/or information overload: 33%

Brazil
- Unable to extract valuable insights from data and/or information overload: 31%
- Unable to extract valuable insights from data and/or information overload: 29%
- Data privacy and security concerns/ Lack of budget and resources: 28%

Mexico
- Data privacy and security concerns: 37%
- Lack of budget and resources: 44%
- Immature digital culture: 26%
- We are temporarily closed for business in relation to Covid-related disruption: 28%

“What are the main barriers to digitally transforming your organization?”
Base: all 2020 respondents (4300) Americas (1000)
Top Three Tech Investments in 1-3 years

1. Cybersecurity solutions: 45% (2% more than the global average)
   - US: Cybersecurity solutions: 46%
   - Canada: Cybersecurity solutions: 46%
   - Brazil: 5G infrastructure: 53%
   - Mexico: Cybersecurity solutions: 50%

2. Data management tools: 42% (3% more than the global average)
   - US: Data management tools: 40%
   - Canada: Data management tools: 46%
   - Brazil: Privacy software: 52%
   - Mexico: Privacy software: 48%

3. Privacy software: 41% (6% more than the global average)
   - US: 5G infrastructure: 39%
   - Canada: Multi-cloud environment: 37%
   - Brazil: Data management tools: 46%
   - Mexico: Software: containers and serverless: 41%

“What new innovations or solutions is your organization investing in over the next 1-3 years to enable digital business?”
Base: all 2020 respondents (4300) Americas (1000)
“What proportion of your organization’s staff worked remotely before the pandemic/are currently working remotely?”

Base: all 2020 respondents (4300) Americas (1000)
Adapting to Unprecedented Upheaval

As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?

Base: all 2020 respondents (4300) Americas (1000).

Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”

- The coronavirus crisis has shown us that we need a more agile, scalable IT environment that provides for contingencies:
  - Global: 89%
  - Americas: 91%

- Myself / my team are at risk of burn-out from trying to adapt our IT strategy in these abnormal times:
  - Global: 48%
  - Americas: 49%

- We are reinventing our business model:
  - Global: 79%
  - Americas: 84%

- I am proud of my team/my organization in the way that we’ve adapted our IT and business/operational strategy:
  - Global: 89%
  - Americas: 92%

*As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?*

*Base: all 2020 respondents (4300) Americas (1000). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”*
As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?

Base: respondents from the Americas (1000).

Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”

- **The coronavirus crisis has shown us that we need a more agile, scalable IT environment that provides for contingencies**
  - US: 90%
  - Canada: 89%
  - Brazil: 96%
  - Mexico: 92%

- **Myself / my team are at risk of burn-out from trying to adapt our IT strategy in these abnormal times**
  - US: 47%
  - Canada: 48%
  - Brazil: 45%
  - Mexico: 58%

- **We are reinventing our business model**
  - US: 80%
  - Canada: 80%
  - Brazil: 92%
  - Mexico: 88%

- **I am proud of my team/my organization in the way that we’ve adapted our IT and business/operational strategy**
  - US: 91%
  - Canada: 91%
  - Brazil: 95%
  - Mexico: 91%

*As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?*

Base: respondents from the Americas (1000). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”
I am worried that my organization might not survive the next couple of years

I believe my organization will survive but we will shed many more jobs and it will take years to return to profitability/previous expenditure levels

Global
Americas

60%
63%

32%
31%

“As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?”
Base: all 2020 respondents (4300) Americas (1000). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”
I am worried that my organization might not survive the next couple of years

I believe my organization will survive but we will shed many more jobs and it will take years to return to profitability/previous expenditure levels

“As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?”
Base: respondents from the Americas (1000). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”
12 Individual Country Curves
Digital Transformation Index 2020 – APJC

- **Digital Laggards**: Do not have a digital plan; limited initiatives and investments in place (5%)
- **Digital Followers**: Very few digital investments; tentatively planning for the future (14%)
- **Digital Evaluators**: Gradually embracing digital transformation and planning for the future (37%)
- **Digital Adopters**: Have a mature digital plan, investments and innovations in place (39%)
- **Digital Leaders**: Digital transformation is ingrained in the DNA of the business (6%)
Digital Transformation Index Over the Years

APJC

<table>
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<tr>
<th></th>
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<th>2018</th>
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<tr>
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Digital Laggards: Do not have a digital plan; limited initiatives and investments in place

Digital Followers: Very few digital investments; tentatively planning for the future

Digital Evaluators: Gradually embracing digital transformation and planning for the future

Digital Adopters: Have a mature digital plan, investments and innovations in place

Digital Leaders: Digital transformation is ingrained in the DNA of the business
Digital Transformation Index 2020 – Australia & New Zealand

Digital Laggards: Do not have a digital plan; limited initiatives and investments in place

Digital Followers: Very few digital investments; tentatively planning for the future

Digital Evaluators: Gradually embracing digital transformation and planning for the future

Digital Adopters: Have a mature digital plan, investments and innovations in place

Digital Leaders: Digital transformation is ingrained in the DNA of the business

2% Digital Laggards
16% Digital Followers
45% Digital Evaluators
34% Digital Adopters
3% Digital Leaders
Digital Transformation Index Over the Years

Australia & New Zealand

**Digital Laggards**
Do not have a digital plan; limited initiatives and investments in place

**Digital Followers**
Very few digital investments; tentatively planning for the future

**Digital Evaluators**
Gradually embracing digital transformation and planning for the future

**Digital Adopters**
Have a mature digital plan, investments and innovations in place

**Digital Leaders**
Digital transformation is ingrained in the DNA of the business

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Digital Transformation Index Over the Years

Australia & New Zealand

**Digital Laggards**
Do not have a digital plan; limited initiatives and investments in place

**Digital Followers**
Very few digital investments; tentatively planning for the future

**Digital Evaluators**
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Digital Transformation Index Over the Years

Australia & New Zealand

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## Digital Transformation Index 2020 – Greater China

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</table>
Digital Transformation Index Over the Years
Greater China

Digital Laggards
Do not have a digital plan; limited initiatives and investments in place

Digital Followers
Very few digital investments; tentatively planning for the future

Digital Evaluators
Gradually embracing digital transformation and planning for the future

Digital Adopters
Have a mature digital plan, investments and innovations in place

Digital Leaders
Digital transformation is ingrained in the DNA of the business

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<td>22%</td>
<td>2%</td>
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Digital Transformation Index Over the Years
Greater China

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Digital Transformation Index 2020 – India

Digital Laggards
Do not have a digital plan; limited initiatives and investments in place
1%

Digital Followers
Very few digital investments; tentatively planning for the future
5%

Digital Evaluators
Gradually embracing digital transformation and planning for the future
27%

Digital Adopters
Have a mature digital plan, investments and innovations in place
55%

Digital Leaders
Digital transformation is ingrained in the DNA of the business
12%
Digital Transformation Index Over the Years
India

**Digital Laggards**
Do not have a digital plan; limited initiatives and investments in place

**Digital Followers**
Very few digital investments; tentatively planning for the future

**Digital Evaluators**
Gradually embracing digital transformation and planning for the future

**Digital Adopters**
Have a mature digital plan, investments and innovations in place

**Digital Leaders**
Digital transformation is ingrained in the DNA of the business

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Digital Transformation Index 2020 – Japan

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<tr>
<td>Digital Leaders</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
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### Digital Transformation Index Over the Years

**Japan**

<table>
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Digital Transformation Index 2020 – Singapore

Digital Laggards
Do not have a digital plan; limited initiatives and investments in place

Digital Followers
Very few digital investments; tentatively planning for the future

Digital Evaluators
Gradually embracing digital transformation and planning for the future

Digital Adopters
Have a mature digital plan, investments and innovations in place

Digital Leaders
Digital transformation is ingrained in the DNA of the business

2%  14%  45%  36%  4%
Digital Transformation Index Over the Years
Singapore

- **Digital Laggards**: Do not have a digital plan; limited initiatives and investments in place
- **Digital Followers**: Very few digital investments; tentatively planning for the future
- **Digital Evaluators**: Gradually embracing digital transformation and planning for the future
- **Digital Adopters**: Have a mature digital plan, investments and innovations in place
- **Digital Leaders**: Digital transformation is ingrained in the DNA of the business

### Digital Transformation Index Over the Years

<table>
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<th>Year</th>
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<td>2020</td>
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© Copyright 2020 Dell Inc.
EUROPE
## Digital Transformation Index 2020 – Europe

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<tr>
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<td>Digital transformation is ingrained in the DNA of the business</td>
<td>6%</td>
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Digital Transformation Index Over the Years
Europe

<table>
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<tr>
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Digital Transformation Index 2020 – UK

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- Digital Laggards: 2%
- Digital Followers: 14%
- Digital Evaluators: 46%
- Digital Adopters: 32%
- Digital Leaders: 5%
Digital Transformation Index Over the Years
UK

Digital Laggards
Do not have a digital plan; limited initiatives and investments in place

Digital Followers
Very few digital investments; tentatively planning for the future

Digital Evaluators
Gradually embracing digital transformation and planning for the future

Digital Adopters
Have a mature digital plan, investments and innovations in place

Digital Leaders
Digital transformation is ingrained in the DNA of the business

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<tr>
<td>2016</td>
<td>19%</td>
<td>41%</td>
<td>24%</td>
<td>12%</td>
<td>4%</td>
</tr>
</tbody>
</table>

© Copyright 2020 Dell Inc.
Digital Transformation Index 2020 – France

Digital Laggards: Do not have a digital plan; limited initiatives and investments in place

Digital Followers: Very few digital investments; tentatively planning for the future

Digital Evaluators: Gradually embracing digital transformation and planning for the future

Digital Adopters: Have a mature digital plan, investments and innovations in place

Digital Leaders: Digital transformation is ingrained in the DNA of the business

- 2%
- 17%
- 44%
- 31%
- 6%
<table>
<thead>
<tr>
<th>Year</th>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>2%</td>
<td>17%</td>
<td>44%</td>
<td>31%</td>
<td>6%</td>
</tr>
<tr>
<td>2018</td>
<td>25%</td>
<td>35%</td>
<td>18%</td>
<td>17%</td>
<td>4%</td>
</tr>
<tr>
<td>2016</td>
<td>13%</td>
<td>31%</td>
<td>40%</td>
<td>13%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Digital Transformation Index Over the Years France

- **Digital Laggards**: Do not have a digital plan; limited initiatives and investments in place.
- **Digital Followers**: Very few digital investments; tentatively planning for the future.
- **Digital Evaluators**: Gradually embracing digital transformation and planning for the future.
- **Digital Adopters**: Have a mature digital plan, investments and innovations in place.
- **Digital Leaders**: Digital transformation is ingrained in the DNA of the business.
## Digital Transformation Index 2020 – Germany

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>Do not have a digital plan; limited initiatives and investments in place</td>
<td>5%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>Very few digital investments; tentatively planning for the future</td>
<td>13%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>Gradually embracing digital transformation and planning for the future</td>
<td>38%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>Have a mature digital plan, investments and innovations in place</td>
<td>38%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>2020</td>
<td>2018</td>
</tr>
<tr>
<td>---------------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Digital Laggards</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>13%</td>
<td>33%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>38%</td>
<td>31%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>38%</td>
<td>21%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Digital Transformation Index 2020 – Italy

- **Digital Laggards**: Do not have a digital plan; limited initiatives and investments in place
  - 3%
- **Digital Followers**: Very few digital investments; tentatively planning for the future
  - 8%
- **Digital Evaluators**: Gradually embracing digital transformation and planning for the future
  - 36%
- **Digital Adopters**: Have a mature digital plan, investments and innovations in place
  - 46%
- **Digital Leaders**: Digital transformation is ingrained in the DNA of the business
  - 9%
Digital Transformation Index Over the Years
Italy

<table>
<thead>
<tr>
<th>Category</th>
<th>2020</th>
<th>2018</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>3%</td>
<td>6%</td>
<td>17%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>8%</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>36%</td>
<td>26%</td>
<td>35%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>46%</td>
<td>28%</td>
<td>16%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>9%</td>
<td>10%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Digital Laggards: Do not have a digital plan; limited initiatives and investments in place
Digital Followers: Very few digital investments; tentatively planning for the future
Digital Evaluators: Gradually embracing digital transformation and planning for the future
Digital Adopters: Have a mature digital plan, investments and innovations in place
Digital Leaders: Digital transformation is ingrained in the DNA of the business
Digital Transformation Index 2020 – Netherlands

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>Do not have a digital plan; limited initiatives and investments in place</td>
<td>4%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>Very few digital investments; tentatively planning for the future</td>
<td>22%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>Gradually embracing digital transformation and planning for the future</td>
<td>41%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>Have a mature digital plan, investments and innovations in place</td>
<td>30%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
<td>4%</td>
</tr>
</tbody>
</table>
Digital Transformation Index Over the Years

Netherlands

**Digital Laggards**
Do not have a digital plan; limited initiatives and investments in place

**Digital Followers**
Very few digital investments; tentatively planning for the future

**Digital Evaluators**
Gradually embracing digital transformation and planning for the future

**Digital Adopters**
Have a mature digital plan, investments and innovations in place

**Digital Leaders**
Digital transformation is ingrained in the DNA of the business

<table>
<thead>
<tr>
<th>Year</th>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>4%</td>
<td>22%</td>
<td>41%</td>
<td>30%</td>
<td>4%</td>
</tr>
<tr>
<td>2018</td>
<td>11%</td>
<td>44%</td>
<td>30%</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>2016</td>
<td>14%</td>
<td>31%</td>
<td>45%</td>
<td>9%</td>
<td>2%</td>
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</table>

© Copyright 2020 Dell Inc.
**Digital Transformation Index 2020 – Poland**

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>Do not have a digital plan; limited initiatives and investments in place</td>
<td>0%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>Very few digital investments; tentatively planning for the future</td>
<td>8%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>Gradually embracing digital transformation and planning for the future</td>
<td>41%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>Have a mature digital plan, investments and innovations in place</td>
<td>43%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
<td>9%</td>
</tr>
</tbody>
</table>
Digital Transformation Index Over the Years
Poland

Digital Laggards
Do not have a digital plan; limited initiatives and investments in place

Digital Followers
Very few digital investments; tentatively planning for the future

Digital Evaluators
Gradually embracing digital transformation and planning for the future

Digital Adopters
Have a mature digital plan, investments and innovations in place

Digital Leaders
Digital transformation is ingrained in the DNA of the business

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2020</th>
</tr>
</thead>
</table>
| Poland
|       |      |      |
| Digital Laggards | 3%   | 0%   |
| Digital Followers | 31%  | 8%   |
| Digital Evaluators | 37%  | 41%  |
| Digital Adopters | 24%  | 43%  |
| Digital Leaders  | 5%   | 9%   |
Digital Transformation Index 2020 – Spain

- **Digital Laggards**: Do not have a digital plan; limited initiatives and investments in place
- **Digital Followers**: Very few digital investments; tentatively planning for the future
- **Digital Evaluators**: Gradually embracing digital transformation and planning for the future
- **Digital Adopters**: Have a mature digital plan, investments and innovations in place
- **Digital Leaders**: Digital transformation is ingrained in the DNA of the business

- **0%**
- **9%**
- **42%**
- **44%**
- **6%**
Digital Transformation Index Over the Years
Spain

<table>
<thead>
<tr>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not have a digital plan; limited initiatives and investments in place</td>
<td>Very few digital investments; tentatively planning for the future</td>
<td>Gradually embracing digital transformation and planning for the future</td>
<td>Have a mature digital plan, investments and innovations in place</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>5%</td>
<td>23%</td>
<td>42%</td>
<td>28%</td>
<td>2%</td>
</tr>
<tr>
<td>2020</td>
<td>0%</td>
<td>9%</td>
<td>42%</td>
<td>44%</td>
<td>6%</td>
</tr>
</tbody>
</table>
# Digital Transformation Index 2020 – Sweden

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>Do not have a digital plan; limited initiatives and investments in place</td>
<td>3%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>Very few digital investments; tentatively planning for the future</td>
<td>24%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>Gradually embracing digital transformation and planning for the future</td>
<td>39%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>Have a mature digital plan, investments and innovations in place</td>
<td>32%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
<td>3%</td>
</tr>
</tbody>
</table>
Digital Transformation Index Over the Years

Sweden

<table>
<thead>
<tr>
<th>Year</th>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>3% 9%</td>
<td>24% 30%</td>
<td>39% 36%</td>
<td>32% 19%</td>
<td>3% 6%</td>
</tr>
<tr>
<td>2018</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Digital Laggards
Do not have a digital plan; limited initiatives and investments in place

Digital Followers
Very few digital investments; tentatively planning for the future

Digital Evaluators
Gradually embracing digital transformation and planning for the future

Digital Adopters
Have a mature digital plan, investments and innovations in place

Digital Leaders
Digital transformation is ingrained in the DNA of the business
Americas
Digital Transformation Index 2020 – Americas

Digital Laggards: Do not have a digital plan; limited initiatives and investments in place
Digital Followers: Very few digital investments; tentatively planning for the future
Digital Evaluators: Gradually embracing digital transformation and planning for the future
Digital Adopters: Have a mature digital plan, investments and innovations in place
Digital Leaders: Digital transformation is ingrained in the DNA of the business

1% 11% 38% 44% 6%
### Digital Transformation Index Over the Years

#### Americas

<table>
<thead>
<tr>
<th>Year</th>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>1%</td>
<td>11%</td>
<td>38%</td>
<td>44%</td>
<td>6%</td>
</tr>
<tr>
<td>2018</td>
<td>6%</td>
<td>24%</td>
<td>34%</td>
<td>31%</td>
<td>5%</td>
</tr>
<tr>
<td>2016</td>
<td>11%</td>
<td>34%</td>
<td>33%</td>
<td>16%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Digital Laggards: Do not have a digital plan; limited initiatives and investments in place.

Digital Followers: Very few digital investments; tentatively planning for the future.

Digital Evaluators: Gradually embracing digital transformation and planning for the future.

Digital Adopters: Have a mature digital plan, investments and innovations in place.

Digital Leaders: Digital transformation is ingrained in the DNA of the business.
Digital Transformation Index 2020 – Brazil

Digital Laggards
Do not have a digital plan; limited initiatives and investments in place

Digital Followers
Very few digital investments; tentatively planning for the future

Digital Evaluators
Gradually embracing digital transformation and planning for the future

Digital Adopters
Have a mature digital plan, investments and innovations in place

Digital Leaders
Digital transformation is ingrained in the DNA of the business

1% Digital Laggards
9% Digital Followers
37% Digital Evaluators
50% Digital Adopters
4% Digital Leaders
Digital Transformation Index Over the Years

Brazil

<table>
<thead>
<tr>
<th>Year</th>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>1%</td>
<td>9%</td>
<td>37%</td>
<td>50%</td>
<td>4%</td>
</tr>
<tr>
<td>2018</td>
<td>2%</td>
<td>22%</td>
<td>33%</td>
<td>37%</td>
<td>6%</td>
</tr>
<tr>
<td>2016</td>
<td>9%</td>
<td>23%</td>
<td>36%</td>
<td>20%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Digital Laggards:
Do not have a digital plan; limited initiatives and investments in place.

Digital Followers:
Very few digital investments; tentatively planning for the future.

Digital Evaluators:
Gradually embracing digital transformation and planning for the future.

Digital Adopters:
Have a mature digital plan, investments and innovations in place.

Digital Leaders:
Digital transformation is ingrained in the DNA of the business.
Digital Transformation Index 2020 – Canada

Digital Laggards: 4%
- Do not have a digital plan; limited initiatives and investments in place

Digital Followers: 16%
- Very few digital investments; tentatively planning for the future

Digital Evaluators: 41%
- Gradually embracing digital transformation and planning for the future

Digital Adopters: 36%
- Have a mature digital plan, investments and innovations in place

Digital Leaders: 4%
- Digital transformation is ingrained in the DNA of the business

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Digital Transformation Index Over the Years
Canada

<table>
<thead>
<tr>
<th>Year</th>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>4%</td>
<td>16%</td>
<td>41%</td>
<td>36%</td>
<td>4%</td>
</tr>
<tr>
<td>2018</td>
<td>9%</td>
<td>34%</td>
<td>22%</td>
<td>29%</td>
<td>6%</td>
</tr>
<tr>
<td>2016</td>
<td>18%</td>
<td>45%</td>
<td>24%</td>
<td>12%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Digital Laggards: Do not have a digital plan; limited initiatives and investments in place

Digital Followers: Very few digital investments; tentatively planning for the future

Digital Evaluators: Gradually embracing digital transformation and planning for the future

Digital Adopters: Have a mature digital plan, investments and innovations in place

Digital Leaders: Digital transformation is ingrained in the DNA of the business
Digital Transformation Index 2020 – Mexico

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>Do not have a digital plan; limited initiatives and investments in place</td>
<td>2%</td>
</tr>
<tr>
<td>Digital Followers</td>
<td>Very few digital investments; tentatively planning for the future</td>
<td>6%</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>Gradually embracing digital transformation and planning for the future</td>
<td>36%</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>Have a mature digital plan, investments and innovations in place</td>
<td>52%</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
<td>6%</td>
</tr>
</tbody>
</table>
Digital Transformation Index Over the Years

Mexico

Digital Laggards
Do not have a digital plan; limited initiatives and investments in place

Digital Followers
Very few digital investments; tentatively planning for the future

Digital Evaluators
Gradually embracing digital transformation and planning for the future

Digital Adopters
Have a mature digital plan, investments and innovations in place

Digital Leaders
Digital transformation is ingrained in the DNA of the business

Digital Transformation Index Over the Years

- **2020**
  - Digital Laggards: 2%
  - Digital Followers: 6%
  - Digital Evaluators: 36%
  - Digital Adopters: 52%
  - Digital Leaders: 6%

- **2018**
  - Digital Laggards: 2%
  - Digital Followers: 14%
  - Digital Evaluators: 49%
  - Digital Adopters: 31%
  - Digital Leaders: 4%

- **2016**
  - Digital Laggards: 7%
  - Digital Followers: 28%
  - Digital Evaluators: 39%
  - Digital Adopters: 18%
  - Digital Leaders: 7%

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<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Laggards</td>
<td>Do not have a digital plan; limited initiatives and investments in place</td>
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<tr>
<td>Digital Followers</td>
<td>Very few digital investments; tentatively planning for the future</td>
</tr>
<tr>
<td>Digital Evaluators</td>
<td>Gradually embracing digital transformation and planning for the future</td>
</tr>
<tr>
<td>Digital Adopters</td>
<td>Have a mature digital plan, investments and innovations in place</td>
</tr>
<tr>
<td>Digital Leaders</td>
<td>Digital transformation is ingrained in the DNA of the business</td>
</tr>
</tbody>
</table>

Digital Transformation Index 2020 – USA

- **0%**: Digital Laggards
- **13%**: Digital Followers
- **39%**: Digital Evaluators
- **42%**: Digital Adopters
- **7%**: Digital Leaders
Digital Transformation Index Over the Years

USA

<table>
<thead>
<tr>
<th>Year</th>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>0%</td>
<td>13%</td>
<td>39%</td>
<td>42%</td>
<td>7%</td>
</tr>
<tr>
<td>2018</td>
<td>8%</td>
<td>24%</td>
<td>25%</td>
<td>38%</td>
<td>6%</td>
</tr>
<tr>
<td>2016</td>
<td>12%</td>
<td>41%</td>
<td>30%</td>
<td>13%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Digital Laggards: Do not have a digital plan; limited initiatives and investments in place

Digital Followers: Very few digital investments; tentatively planning for the future

Digital Evaluators: Gradually embracing digital transformation and planning for the future

Digital Adopters: Have a mature digital plan, investments and innovations in place

Digital Leaders: Digital transformation is ingrained in the DNA of the business
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