aws executive insights

2022 AWS C-Suite Report:
Cloud-Enabled Growth

In This Report

1 The **results of a 2021 survey** on cloud and digital transformation distributed to over 1,500 C-level executives who were *not* in technical roles and who oversee business decisions at their organizations.

2 **How non-technical business executives (i.e. CEO, CFO, board) intend to make use of cloud** to enable their growth.

3 Insights on how executives across industries and geographies **perceive digital transformation** as an overall business objective.

4 **Key steps** — such as building mental models and alignment strategies — companies can take to make progress on digital transformation, based on our internal experience and client engagements.

AWS C-Suite Report

The C-suite insights in this report come from a comprehensive Amazon Web Services (AWS) 2021 study of 1,500 executives in 15 markets across 10 industries, and 14 C-level roles, and AWS work with executive customers. It explores the common thread to their success and how organizations can break the inertia to begin their own digital transformation.

AWS & Chief Executive Group Survey

A November 2021 survey of more than 500 leaders at companies in nearly every industry and size category by Chief Executive Group and AWS reveals a sizable shortfall in the organizational behaviors needed to **drive business growth** in the digital age — as well as huge opportunities to learn and leapfrog your competition.

Results of 2021 C-Suite Survey

**Business executives see cloud as
top enabler of their business outcomes,
as well as digital transformation**

By now, you've probably heard a lot about digital transformation. For nearly a decade, digital transformation is among the most potent business developments. Globally, business leaders acknowledge the necessity and power of digital transformation. And that importance is true even now.

Across the C-suite, 98% of executives surveyed see cloud as important to driving a digital transformation. **While "digital transformation" can have different definitions depending who you speak to, at the core it is about harnessing technology to continually evolve and improve a company's culture and customer engagement.** Digital transformation facilitates innovation and growth, and enables companies to seize new opportunities and revenue sources.

A primary reason why business leaders value digital transformation is because a majority are keenly focused on growth and stability. From our research, **52% of business executives prioritize growth** — including increasing revenue, expanding market share, and/or reinventing the business model (see chart below). While digital transformation can help both growth- and stability-oriented organizations, it is particularly relevant for growth due to the new possibilities it introduces.

Why are business leaders looking to take on digital transformation? Because digital transformation isn't just about implementing new technology, it is about using technology to drive growth. Leaders who envision reinvention for their business begin taking steps to invest in their strategy, process, people, and culture. These changes are not about scope size, but instead, impact. By making incremental changes, leaders begin to lay the foundation for transformation. As we'll find later in this report, it is the shared vision between the CIO or CTO and their C-suite counterparts that can provide the cornerstone for long-term success.

Executives' business strategies are focused on growth

Executive business priorities overall, by industry and by role

	Overall	Financial Services	Manufacturing	Healthcare & Life Sciences	Telecommunications	Energy	Retail	Consumer Packaged Goods	Media & Entertainment	Advertising	Board	CEO	CFO	COO	CDO/CSO	Head of Sales	BU Head	CMO	Chief Product Officer	Chief Compliance Officer	Chief Procurement Officer	Chief Supply Chain Officer	CHRO
Growing revenue	24%	26%	27%	25%	33%	8%	30%	23%	25%	9%	16%	23%	28%	23%	30%	29%	26%	29%	29%	21%	32%	18%	11%
Growing market share	18%	18%	14%	23%	19%	19%	18%	23%	19%	23%	16%	21%	18%	16%	15%	26%	23%	18%	21%	29%	19%	15%	20%
Reinvent business model	10%	8%	9%	13%	6%	11%	13%	12%	19%	11%	16%	8%	9%	7%	13%	12%	16%	8%	11%	7%	0%	15%	18%
Improving margins	17%	17%	19%	14%	22%	19%	13%	9%	14%	23%	15%	20%	19%	19%	14%	13%	13%	12%	4%	7%	16%	17%	16%
Reducing costs	13%	13%	13%	11%	11%	25%	17%	11%	8%	9%	15%	14%	8%	16%	13%	9%	7%	17%	14%	14%	16%	15%	20%
Defending market share	8%	9%	9%	7%	3%	14%	7%	10%	8%	11%	8%	9%	10%	10%	10%	6%	6%	7%	11%	7%	3%	9%	4%
Risk mitigation	9%	9%	9%	8%	6%	3%	3%	12%	6%	15%	13%	6%	8%	8%	4%	5%	7%	10%	11%	14%	13%	11%	11%

52% of executives selected growth-focused priorities when asked to rank their strategic business priorities

38% of executives selected stability-focused priorities

A cloud and digital transformation paradox: the desire to grow, yet reluctance to change

While growth is a top priority, when asked what factors sparked their company's start in using the cloud through the cloud, almost two-thirds of C-suite leaders revealed a high level of resistance to change. Many said action came because of disruptive developments, such as the pandemic or M&A.

Why the inertia?

Although executives understand the importance of cloud as an enabler of change such as digital transformation, the barriers cited are numerous: Legacy systems, operating under heavy regulatory scrutiny, change-resistant culture, lack of strategic digital expertise and talent, and unfamiliarity with the potential of digital to deliver on business objectives to name a few. When faced with one or more of these hurdles, a lot of organizations become stuck.

These barriers affect companies and organizations of all size, industry and geography. And we understand that overcoming these barriers is no small task. Working with our customers we also know these hurdles are surmountable. Leaders who've taken steps toward cloud-enabled change have equipped their companies to take on the challenges of today and the next 20 years.

Although most C-suite leaders in our survey remain reluctant, the proactive third are growing revenues, winning market share, and gaining a meaningful lead on the future of business. These companies also demonstrate that although digital transformation is not always easy, it is within reach for those with an understanding of how to proceed.

There is no single recipe for digital transformation. But from AWS's experience and from the lessons we've gathered from customers, we've found that leaders can make substantial progress by pursuing the following steps:

1   **Adopt the right mental model**

2   **Capitalize on the cloud as an enabler**

3   **Align technical and business leaders on digital transformation (you can't pivot if you aren't moving)**

In the sections below we elaborate on these steps to help you make progress on your cloud-enabled digital transformation.

Adopting the right mental model

Digital transformation requires a future-oriented mindset shift that harnesses technology to innovate and deliver greater value. By promoting an effective mental model, leaders can vanquish organizational inertia, venture into uncharted territory, and seek the change needed to catapult growth.

A mental model serves as a guiding principle for planning, decision-making and staying focused on your transformation goals throughout the organization. It enables employees, who may otherwise be risk averse, to forge a bold, innovative path forward.

The wrong mental model, or a poorly conceived one, can hobble evolution. For example, there are sometimes misunderstandings regarding the cloud may mean companies may mistakenly believe that simply migrating IT to the cloud constitutes digital transformation. Others see the cloud as a means of cutting IT overhead; such savings typically do occur, but setting this as a primary goal often results in underutilizing the cloud's capabilities.

This can harm the potential of evolution by sapping employee enthusiasm for efforts that don't deliver the expected groundbreaking results.

For instance, some companies set a goal of outsourcing an on-premises data center to the cloud, often to lower IT costs. As we discuss below, migrating to the cloud is an essential step, but it's a means to an end rather than a mental model. Lowering costs is not a guiding principle that business managers can use to pursue innovation. In the longer term, with such an approach companies start out with a curbed view of the possibilities. Some mental models are transactional, "one and done" with an endpoint, whereas cloud-enabled digital transformation is continuously ongoing and expanding.

Amazon commonly uses two proven mental models when we think about cloud-enabled digital transformation: **data as connective tissue and working backwards.**

Data as connective tissue

With an empowered organization, data made accessible by technology can be turned into insights, experimentation, action, and results. Data fosters organizational agility and resilience in the face of changing customer needs and competitive threats. It creates ways for businesses to pivot more seamlessly based on learnings, mitigating the need to perfectly predict the future.

Data is more than an operational asset like factories, machinery, IP, and capital. Used correctly, it is an invaluable source of potential growth. At AWS, we think of it as the organization's connective tissue, permeating and enabling collaboration across teams.

The key is to recognize data's inherent value, leverage it intelligently, and create a culture that embraces its power. On a working level, this mental model emphasizes collecting, storing, and analyzing data to generate insights that improve customer service, reduce costs, and reveal new revenue opportunities.

There are a variety of ways to jump-start data use. You can launch big data initiatives, broaden data-collection efforts, hire a chief data officer (CDO), or create new analytics functions. Most importantly, you need to establish an innovation culture that positions data at the core of the business strategy, and then build capabilities to help that culture thrive.

Working backwards

Working backward from the customer is another essential mental model at AWS, a bedrock upon which our culture and mission rest. This model has four steps:

1 **Identifying customer needs, typically using data**

2 **Developing solutions using minimum viable products to gauge customer interest**

3 **Continually testing to see whether solutions satisfy needs**

4 **Tweaking solutions in rapid iterations**

Working backwards merges a deep understanding of what's possible by leveraging technology with an equally deep understanding of the business, the business and technology C-suite can help transform how their company defines and drives value.

Approximately 90% of the features developed at AWS come directly from listening to our customers. The other 10% come from inventions we conceive based on our deep understanding of customer needs.

This model requires a culture and organizational capacity focused on earning and keeping customer trust every day. It entails digging into their experiences and frustrations, using data to generate insights that answer customer-centric questions and fuel new growth opportunities and operational efficiencies. Once we have a deep understanding of the context, we can innovate to address customer needs.

Read more on how to create a culture of innovation and build data-based capabilities ›

> **Our innovative, new collaboration with AWS creates a bridge to the future for our markets and represents the next major step forward in Nasdaq's cloud journey."**

Adena Friedman
President and CEO, Nasdaq

![Nasdaq logo]

Nasdaq transforms capital markets

More than a decade ago Nasdaq had a vision to grow by providing many of its in-house technologies and services to other organizations. Bringing that vision to life in November 2021, Adena Friedman, President and CEO, Nasdaq announced a partnership with AWS to build the next generation of global capital markets. "Our innovative, new collaboration with AWS creates a bridge to the future for our markets and represents the next major step forward in Nasdaq's cloud journey," said Friedman.

Nasdaq realized that its on-premise-only approach would not be able to deliver on this vision and that a fundamental change to their infrastructure was needed. The company gradually and systematically moved its foundational data and surrounding systems to the cloud in a safe, reliable and controlled way, giving it the flexibility, performance and control needed to broaden its reach.

While the company continues powering its namesake equities exchange, today Nasdaq has also become a technology and services provider to more than 130 different exchanges, regulators, and post-trade entities in more than 50 countries worldwide.

Read the full story ›

Capitalizing on the cloud as a digital transformation enabler

The cloud enables numerous benefits that support digital transformation. Perhaps the most powerful benefit is that the cloud dissolves limits on innovation by letting organizations quickly test growth ideas with relatively minimal upfront commitment. Once they've tested ideas, the cloud lets them rapidly take the best ideas to market at scale.

Agility and reliability are other benefits. Features can roll out almost instantaneously, with low latency everywhere on the planet. Applications can scale quickly, without having to install and prepare new back-end infrastructure. Cloud enables organizations to react swiftly to disruption and other market changes by scaling resources in real time, reducing unplanned downtime, and ensuring user productivity through applications that are always available and up to date.

As cloud technology has advanced, companies have gained access to a large and expanding range of artificial intelligence and machine learning tools that are built on top of the cloud layer. The cloud also enables data collection to fuel critical insights and analysis, and makes that information availabile to managers closest to the customer.

Market intelligence firm IDC reports that using the cloud results in 25% higher developer productivity, and enables the delivery of three times as many features compared to on-premises environments. The firm also estimates that with the cloud, organizations experience 94% less unplanned downtime, and realize a 14% increase in business user productivity.[1]

Our survey found that the cloud is almost universally valued by C-suite executives.

98% of respondents see it as essential to digital transformation. More than 90% said the cloud is essential to a host of digital initiatives, including: launching innovative offerings, moving to digital services, enhancing the use of advanced analytics, improving supply-chain reliability, and enabling a productive, distributed workforce. Nearly as many respondents (83%) said the cloud was important to delivering services reliably.

As the case examples below from Goldman Sachs, and Netflix demonstrate, organizations that use cloud can respond faster to unexpected challenges and take advantage of new opportunities and new markets. They can innovate more effectively, thereby driving growth, differentiation, and competitive advantages.

98%

of executives view the cloud as essential to digital transformation

Goldman Sachs

Goldman Sachs builds new businesse harnessing the power of the cloud

Financial firm Goldman Sachs is a 150-year-old bank that today is the modern poster child for digital transformation and a strong business-IT rapport.

Increasingly, Goldman Sachs had come to view technology as the driving force for customer-led innovation. Not only has IT modernized the way Goldman Sachs operates, but it has fueled the company's foray into digital. Those efforts include a growing consumer banking business with $110B in retail deposits, a cloud-native transaction banking platform, and the recent launch of Goldman Sachs Financial Cloud for Data, a powerful new suite of cloud-based data and analytics solutions for financial institutions.

IT isn't just supporting the business. IT is the business. That's demonstrated by the fact that 12,000 engineers make up about a quarter of Goldman Sachs's employees.

"Finance is the perfect environment to establish new technologies that can have immediate, real-world impact. Goldman Sachs serves corporations, governments, institutions and individuals. We're also offering services for developers. The same way you go to AWS for their best-in-class cloud services, we want to be your first choice to provide services that enable you to build financial functionality directly into your applications and workflows," said David Solomon, Chairman and CEO, The Goldman Sachs Group, Inc.

Read the full story ›

> *Finance is the perfect place to take new technologies and have immediate, real-world impact... The same way you go to AWS for their best-in-class cloud services, we want to be your first choice to provide services that enable you to build financial functionality directly into your applications and workflows."*

David Solomon
Chairman and CEO, The Goldman Sachs Group, Inc.

NETFLIX

Netflix relies on the cloud for globe-spanning resilience

Netflix is a prime example of resilience as a business mandatory. The world's leading internet television network boasts more than 200 million members in more than 190 countries that enjoy 125 million hours of TV shows and movies each day.

When millions of viewers want to binge the latest hit show, downtime is not an option. Netflix relies on the cloud for hundreds of functions including storage needs, databases, analytics, recommendation engines, video transcoding to name a few. Detailed failover models work in concert to shift tens of millions of viewers to a new cloud region in minutes may never be noticed by the average Netflix viewer, but that's because they worked thanks to the power of the cloud.

Read the full story ›

Increased organizational agility and operational excellence

Executives surveyed cited cloud as being important or very important to enabling organizational agility, with 96% of executives naming cloud as vital to improving the use of advanced analytics, and 92% indicting the need for cloud in improving customer insights.

Organizations can respond faster to unexpected challenges and take advantage of new opportunities by harnessing insights driven by collecting, aggregating, and analyzing new and existing data

within the business and making those insights widely available to those closest to customers, organizations.

The ability to do this quickly and efficiently is one of biggest benefits of cloud. IDC estimates that application development teams that have moved to the cloud are 25% more productive, and that turning on new capabilities such as storage for new features or functionality takes 90% less time to deploy.[1]

Advantages of business-driven digital transformation

Enables new business models
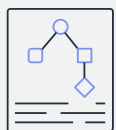
Facilitates new products/services

Fuels growth drivers

Innovates with customer demands

Evolves legacy systems and processes

Changes culture and workforce

Increases business agility

Builds business resilience

Greater productivity, efficiency and business resilience

Executives surveyed cited cloud as being important or very important to enabling increased organizational productivity, efficiency and resilience, with 96% of executives naming cloud as vital to increasing supply chain reliability, 96% citing cloud as key to enabling a productive distributed workforce, and 83% highlighting cloud's importance in delivering services reliably.

Cloud enables organizations to adapt to disruption, reactingswiftly to market changes by scaling resources in real-time, reducing unplanned downtime to ensure continuous operations and accessibility, and ensuring user productivity through applications that are always available and up to date. IDC reports that organizations that shift to cloud experience 94% less time lost to unplanned downtime, and realize a 14% increase in business user productivity.[1]

Aligning technical and business leaders on cloud-enabled digital transformation

Digital transformation initiatives are far-reaching. As such, they require ongoing discussion throughout the organization to ensure that all leaders support the changes. When leadership connects on the vision, and an understanding of how digital transformation will affect the whole organization — not just the IT team.

At most companies, executives understand the need to collaborate on digital transformation, but they need to be more closely involved during the implementation phase. In our study, 90% of executives that have embarked on digital transformation said they have engaged in

initial-stage decision making, but 58% would prefer to be even more involved in the future.

Despite the need to involve all stakeholders, CIOs, CTOs, and Chief Digital Officers continue to lead technology decisions. CIOs are the biggest advocates for digital transformation, according to 57% of survey respondents. Nonetheless, the broader C-suite is becoming more fluent in digital transformation and linchpin technologies such as the cloud. This is allowing leaders to collaborate to drive growth, by identifying well-targeted digital initiatives.

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All C-suite members prioritize security and data privacy, performance and reliability in the cloud journey

Most important factors when considering technology solutions like cloud as a key enabler of business strategy

	Board	CEO	CFO	COO	CDO/CSO	Head of Sales	BU Head	CMO	Chief Product Officer	Chief Compliance Officer	Chief Procurement Officer	Chief Supply Chain Officer	CHRO
Performance and reliability of core systems / applications	38%	42%	39%	42%	49%	50%	52%	38%	32%	50%	45%	42%	29%
Security / data privacy profile with new tools, service, expertise access	43%	36%	46%	45%	36%	27%	36%	38%	50%	50%	32%	41%	36%
Access to more advanced capabilities	43%	36%	35%	34%	47%	36%	36%	36%	29%	39%	35%	26%	44%
Resource productivity	30%	29%	25%	37%	31%	33%	43%	32%	39%	39%	23%	36%	42%
Scalability / flexibility across enterprise applications, platforms	30%	27%	24%	31%	39%	38%	37%	34%	25%	29%	35%	24%	22%
Reduction in TCO for applications, infrastructure, platforms	25%	28%	38%	36%	31%	35%	25%	22%	29%	32%	45%	35%	13%
Sufficient internal expertise and availability of IT / digital / cloud talent	25%	26%	31%	36%	32%	23%	27%	27%	29%	29%	23%	27%	33%
Leading technology and tools to attract best in class digital talent	25%	35%	28%	28%	31%	23%	23%	28%	39%	18%	29%	34%	42%
Degree of customization / control over IT resources and assets	43%	34%	32%	27%	22%	36%	27%	31%	25%	25%	35%	22%	33%
Time to market or ability to innovate more rapidly	25%	30%	24%	23%	32%	26%	30%	33%	43%	36%	16%	25%	24%
Predictability of TCO / future spend	26%	25%	33%	24%	23%	29%	32%	28%	21%	21%	39%	28%	31%
Split between Capex and Opex dollars	21%	26%	26%	25%	12%	23%	14%	27%	25%	14%	23%	32%	27%
Competitive pressures or industry trends	30%	25%	19%	13%	15%	21%	17%	26%	14%	18%	19%	28%	22%

Broad C-suite involvement is essential due to the diverse and external-facing perspectives that different executive roles bring.

Our study found that COOs prioritize resource security (45%) and performance (42%) over access to more advanced capabilities(34%) and total cost of ownership (TCO) (36%). Chief Procurement Officers care most about TCO (45%) and performance (45%) over time-to-market or the ability to innovate quickly (16%). CHROs lean toward access to leading technology and tools to attract the best-in-class digital talent (42%).

C-suite alignment is about combining business and technology into a joint effort. There are no requirements tossed over the wall; instead, there is cross-functional collaboration that ensures the technology investments can deliver on the business objectives. It helps to have T-shaped people whose skills cross business and technology. For example, service teams at AWS are charged with driving out costs and passing the savings on to customers, but the team decides for themselves what requirements will accomplish that objective.

Finally, in addition to viewing both IT and forward-thinking business efforts through a single lens, digital transformation requires stakeholders to examine the current state of IT alongside business's strategic imperatives. This helps elucidate budget requirements, the effectiveness of new investments, and the impact on top-level business objectives.

The C-suite brings diverse perspectives to digital transformation

"

There's three commonalities for companies undergoing digital transformation: 1/ recruitment for digital talent, 2/ cultural shift toward innovation and risk-taking, and 3/ financial investments shifting to digital offerings launched in the last 5 years."

Chief Digital Officer at a
US finance company

"

For me, digital transformation includes operational, data, and channels such as MarTech and CRM systems. I see cloud as important in operational and data systems, because you can get scale for a reasonable price."

CMO at a UK retailer

"

I see cloud as an enabler to deploy other things. If we want to deploy automation, it's easier to do that, because everything is on the cloud."

COO of a UK energy company

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" **"**

Many decisions are reversible, two-way doors. Those decisions can use a light-weight process. Most decisions should probably be made with somewhere around 70 percent of the information you wish you had. Use the phrase 'disagree and commit.' This phrase will save a lot of time."

Jeff Bezos
Founder and Executive Chair, Amazon

A new social contract and the use of two-way doors

Building a shared leadership commitment often requires a new social contract among team members intimately involved in critical dialogue about the shape and speed of reinvention.

At Amazon, one of our Leadership Principles called **Disagree and Commit** has worked well in accelerating decision-making while ensuring people at all levels feel comfortable challenging ideas (ideally with supporting data) and committing to a plan. The approach works primarily with decisions that are "two-way doors" — ones where you can backtrack without major consequences.

As Amazon Founder and Executive Chair Jeff Bezos explains, "Many decisions are reversible, two-way doors. Those decisions can use a light-weight process. Most decisions should probably be made with somewhere around 70% of the information you wish you had. Use the phrase 'disagree and commit.' This phrase will save a lot of time."

Bias for Action, another Amazon Leadership Principle, emphasizes rapid decision-making. The C-suite may benefit from embodying this principle to enable vigorous debate on major directional shifts, then make decisions. A decision that is a irreversible "one-way door" requires more time, or even experiments, to test the hypothesis. The aim is to avoid signs that leaders are not fully aligned, as that will be amplified throughout the organization.

At AWS we've seen firsthand that to advance at speed and scale, autonomous teams need to make decisions themselves, but that those decisions need to have a common organizing principle throughout the enterprise. For AWS, that revelation has resulted in agreement on a common set of values or principles that the entire enterprise uses in its decision making. Senior leadership can be sure their objectives are being fulfilled, while they're still getting the benefits of team autonomy. The same can be said of any C-suite taking on digital transformation initiatives. Unity of effort is key.

Fostering innovation at AWS with Leadership Principles

A primary reason why Amazon has been able to maintain our culture of innovation, focusing on customers and working backwards from their needs, is through how we employ Amazon's Leadership Principles every day. Using these principles fosters our culture of innovation. They guide how we approach business decisions, how we want our leaders to lead, and how we keep the customer at the center of every decision we make.

The ability to be open to learn, adapt, and constantly grow your capability to satisfy customer needs also helps keep a company agile in an ever-changing environment. It better equips organizations to not just respond to what customers want, but proactively invent on their behalf. A few of our Leadership Principles are noteworthy for their impact on driving innovation at Amazon, including having a Bias for Action, Thinking Big, Diving Deep where needed, and being able to Disagree (with supporting data) and Commit to the resulting decision.

Read more about Leadership Principles ›

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Remember: It's still early days

Some of our customers often feel that they're behind on digital transformation. Many worry that they haven't started in earnest. That's understandable. However, despite the talk about the rapidly approaching new digital era, it's important to realize that it's still early in the game.

Experts estimate that only a small percentage of global IT spending has moved to the cloud. Businesses have yet to take advantage of next-generation economies of scale, speed, automation, and intelligence, all of which have the potential to disrupt entire industries.

The starting point for every organization is relative. Gaining the organizational momentum needed to embark on digital transformation takes a dedicated effort. It's a challenge that every company faces.

The consensus in the C-suite is clear: digital transformation through the cloud is integral to achieving growth. To break the inertia and begin your digital transformation with the cloud there's a critical role for leaders to play:

1   **Define the company's growth agenda**

2   **Adopt the right mental model**

3   **Align C-suite goals and build a shared leadership commitment**

In this way you'll be able to chart an effective transformation journey, unlocking new innovation, new efficiencies, and new customers, and propelling your organization into the future.

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Appendix

The report is informed by a 2021 AWS study of 1,500 executives in 15 markets across 10 industries and exploring 14 C-level roles. The study focused on enterprise-wide digital transformation vs. line of business transformation and included organizations with a mix of cloud adoption, approximately 40% late adopter, 40% moderate adopter, 20% early adopter.

Country	Count	% Respondents
United States	233	15
Greater China Region	154	10
United Kingdom	135	9
Germany	137	9
France	108	7
South Korea	105	7
Japan	109	7
India	105	7
Brazil	95	6
Mexico	91	6
Itali	82	5
Australia	68	4
Netherlands	54	3
Spain	51	3
Canada	33	2

Role	Count	% Respondents
Chief Financial Officer	196	15
Chief Operating Officer	167	13
Chief Digital Officer / Chief Strategy Officer	177	13
Chief Executive Officer	140	10
Business Unit Head of GM	130	10
Chief Supply Chain / Manufacturing	100	8
Chief Marketing Officer	89	7
Chief Commercial Officer / Head of Sales	78	6
Board	80	6
Chief HR Officer / Chief People Officer	47	4
SI / Partner	36	3
Chief Compliance / Risk Officer	34	3
Chief Product Officer / Head of Product	28	2
Chief Procurement Officer	32	2

Industry	Count	% Respondents
Manufacturing	293	19
Financial Services	281	18
Healthcare & Life Sciences	268	17
GSI (General Systems Integrator)	226	14
Retail	185	12
Consumer Packaged Goods	118	8
Media & Entertainment	67	4
Advertising	50	3
Telecommunications	36	2
Oil & Gas / Electricity / Natural Gas	36	2

Cloud Adoption Status	Count	% Respondents
Actively migrating most workloads to cloud with all new deployments on cloud	378	33
Have migrated some significant workloads to cloud	232	20
All or almost all workloads deployed in cloud	202	17
Have migrated a few small-scale workloads to cloud	148	13
Experimenting with or piloting workloads on cloud	75	6
Plan to evaluate cloud in less than 1 year	59	5
Actively evaluating cloud workload deployments	50	4
Plan to evaluate cloud in 1 to 3 years	8	1
Have no plans to evaluate cloud at this time	2	0

Business Type	Count	% Respondents
Convential enterprise company	741	71
Online digitally inclined business*	210	20
Cloud-native digitally inclined business**	76	7

* Business was founded on the Internet (e.g. Expedia, PayPal, eBay)
** Business was founded on the cloud (e.g. Robinhood, Warby Parker)

Company Size	Count	% Respondents
$50 million to less than $100 million	32	3
$100 million to less than $500 million	165	14
$500 million to less than $1 billion	263	22
$1 billion to less than $10 billion	435	37
$10 billion to less than $20 billion	168	14
$20 billion or greater	113	10

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About AWS

For over 15 years, Amazon Web Services has been the world's most comprehensive and broadly adopted cloud offering. Today, we serve millions of customers, from the fastest-growing startups to the largest enterprises, across a myriad of industries in practically every corner of the globe. We've had the opportunity to help these customers grow their businesses through digital transformation efforts enabled by the cloud. In doing so, we have worked closely with the C-suite, providing a unique vantage point to see the diverse ways executives approach digital transformation—the distinct thought processes across C-suite roles, their attitudes and priorities, obstacles to progress, and best practices that have resulted in the most success.

Endnotes:

1. Source: https://pages.awscloud.com/rs/112-TZM-766/images/IDC%202018%20-%20Fostering%20Business%20and%20Organizational%20Transformation%20to%20Generate%20Business%20Value%20with%20Amazon%20Web%20Services.pdf