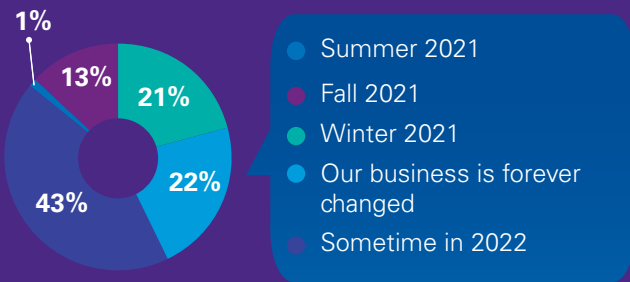


# KPMG 2021 CEO Outlook Pulse Survey Financial Services

A survey of 150 financial services CEOs in 11 key markets, our 2021 Pulse Survey provides a timely snapshot of CEOs' views on business growth resumption, their views on vaccine distribution, their top-of-mind organizational risks, and business transformation priorities going forward.

## Pandemic response

When do CEOs envision that their company will return to a normal course of business?



9 out of 10

CEOs are keen to ensure **staff safety** by asking employees to notify the business when they have been **vaccinated**.



58%

of financial services leaders are concerned not all employees will have access to a **COVID-19 vaccine**, jeopardizing their operations and competitive advantage.

What do bank CEOs think it will take to return to 'normal'?



A **successful COVID-19 vaccine roll-out** (at least 50% vaccinated)



**Governments** in key markets encouraging business to return to 'normal'



A significant **drop in COVID-19 infection** rates in key markets

## Perspectives from financial services leaders

Economic confidence



► Confidence over the 3 year horizon is up for **company, industry and country**. However, prospects for the **global economy** are **lower** than last year.

70% of financial services CEOs have an appetite for **M&A**.



### Top drivers for investment

- 1 On-board new **digital technology** to transform the **customer experience/value proposition**
- 2 Develop **disruptive technologies** that have potential to transform their **operating model**
- 3 Increase **market share**

Source: KPMG 2021 CEO Outlook Pulse

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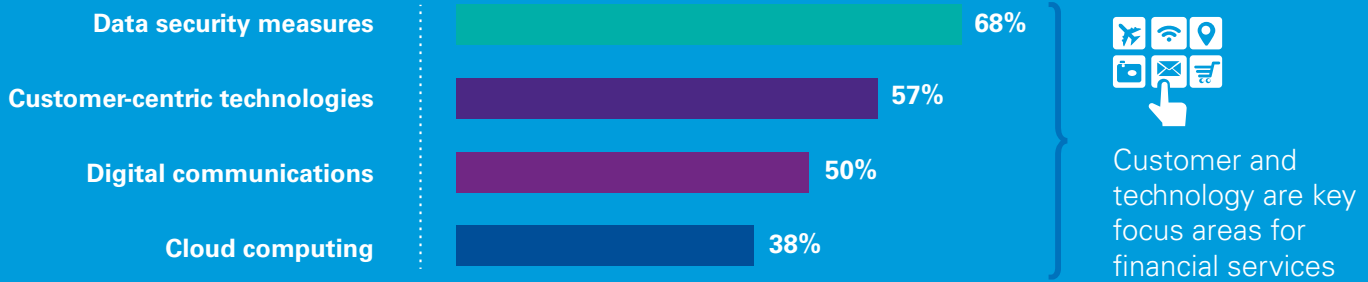
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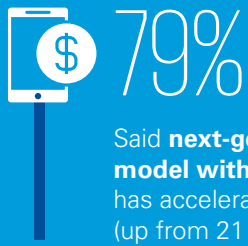
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## Digital acceleration priorities

CEOs are planning to invest more in technologies such as

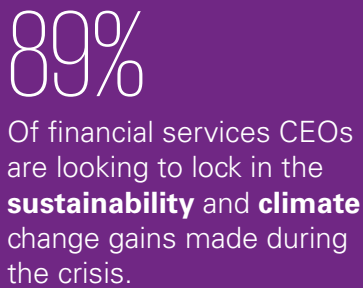


Long-term impact of the pandemic on financial services companies

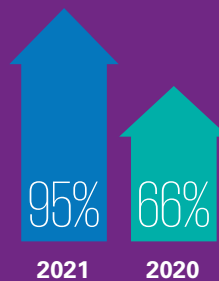


## Trust and reputation

Continued focus on environment and climate risk



Heightened focus on "S" component of ESG



Financial services leaders are shifting their focus to the **social** component of their ESG program up from August 2020.

Top DEI and workforce agenda issues for financial services CEOs



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