

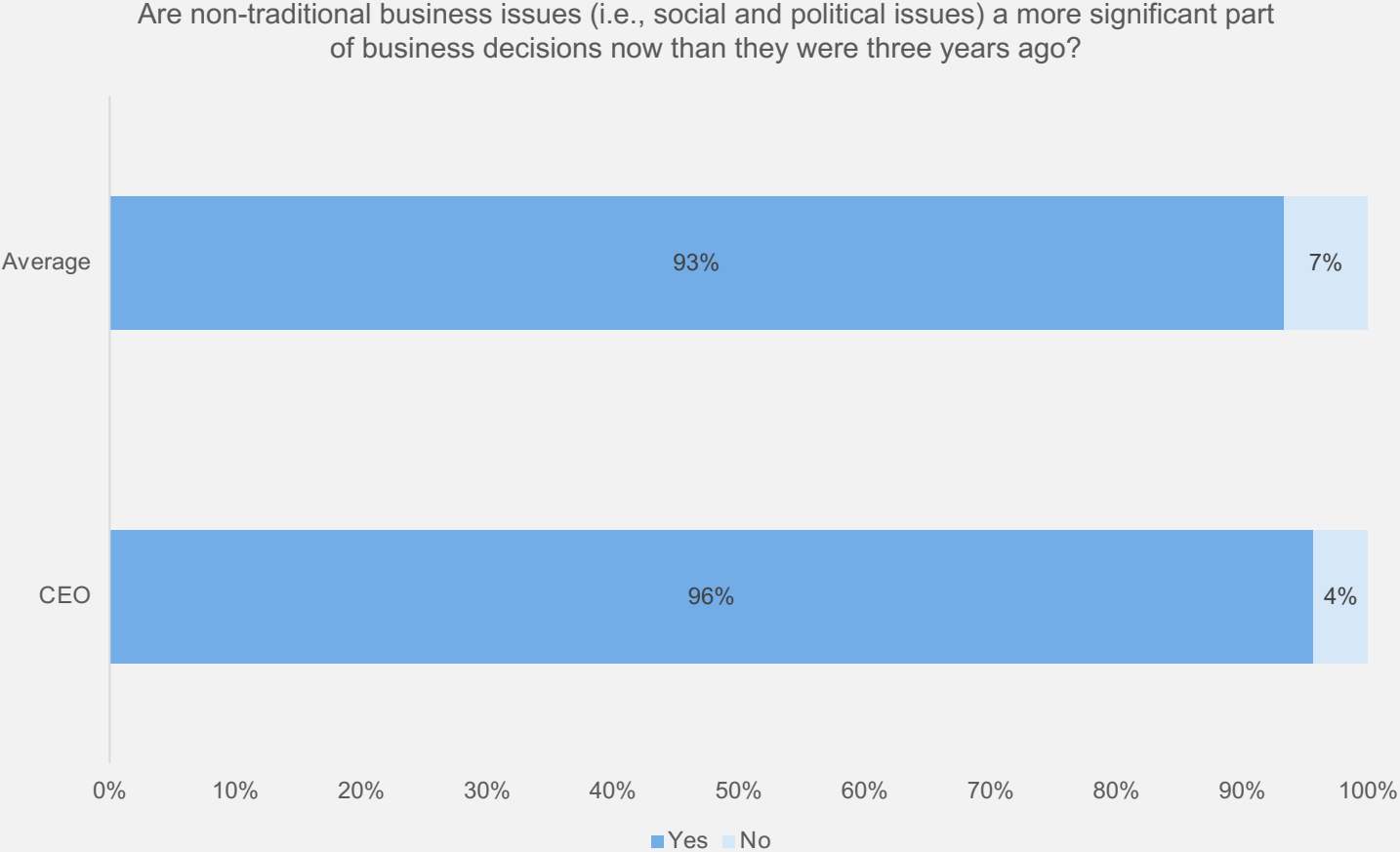


Untethered World

Leading in a Time of Chaos

CEO Viewpoint

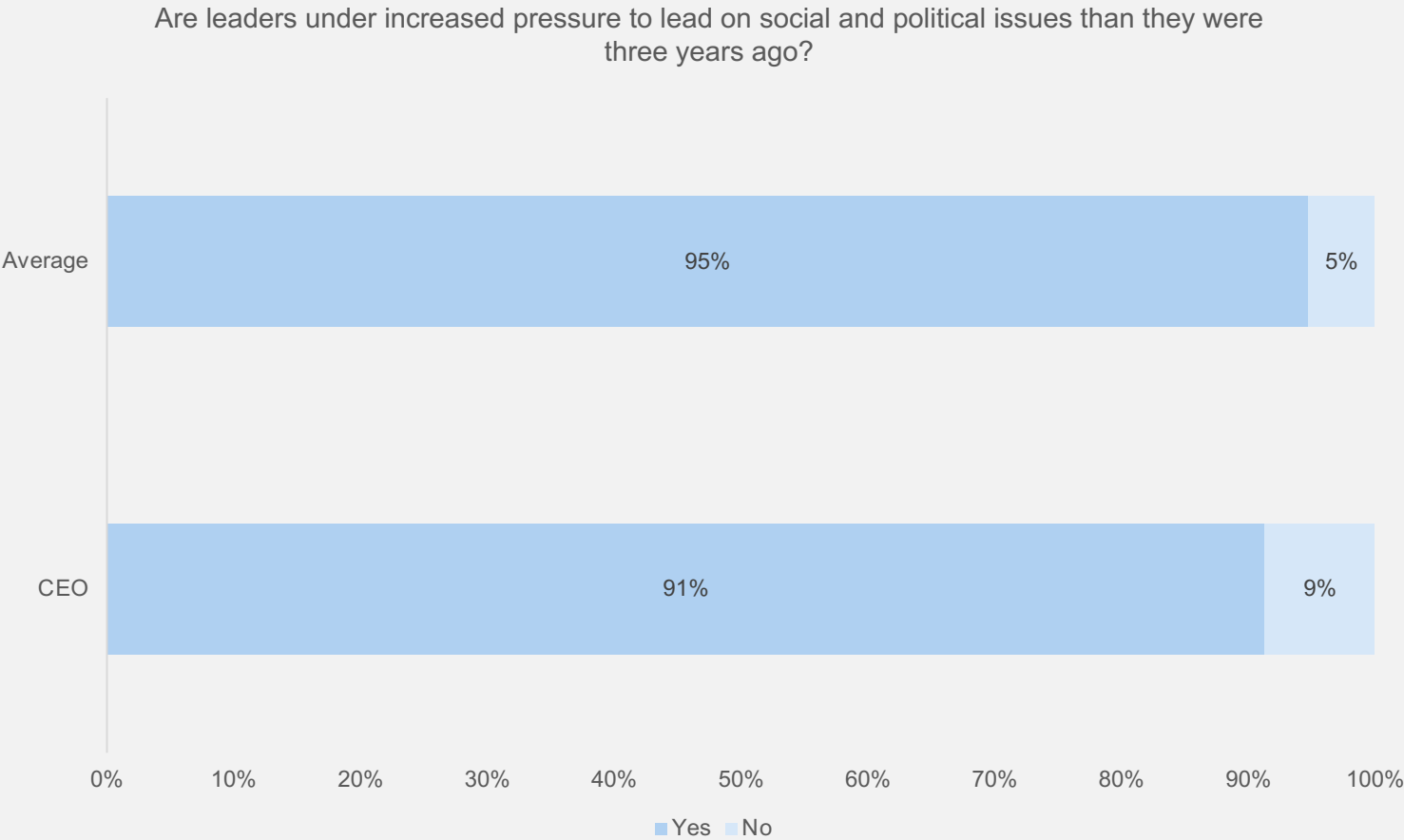
Expanding Scope of Non-Traditional Business



96% of CEOs are seeing an increase in the importance of non-traditional issues in comparison to three years ago.

n=209

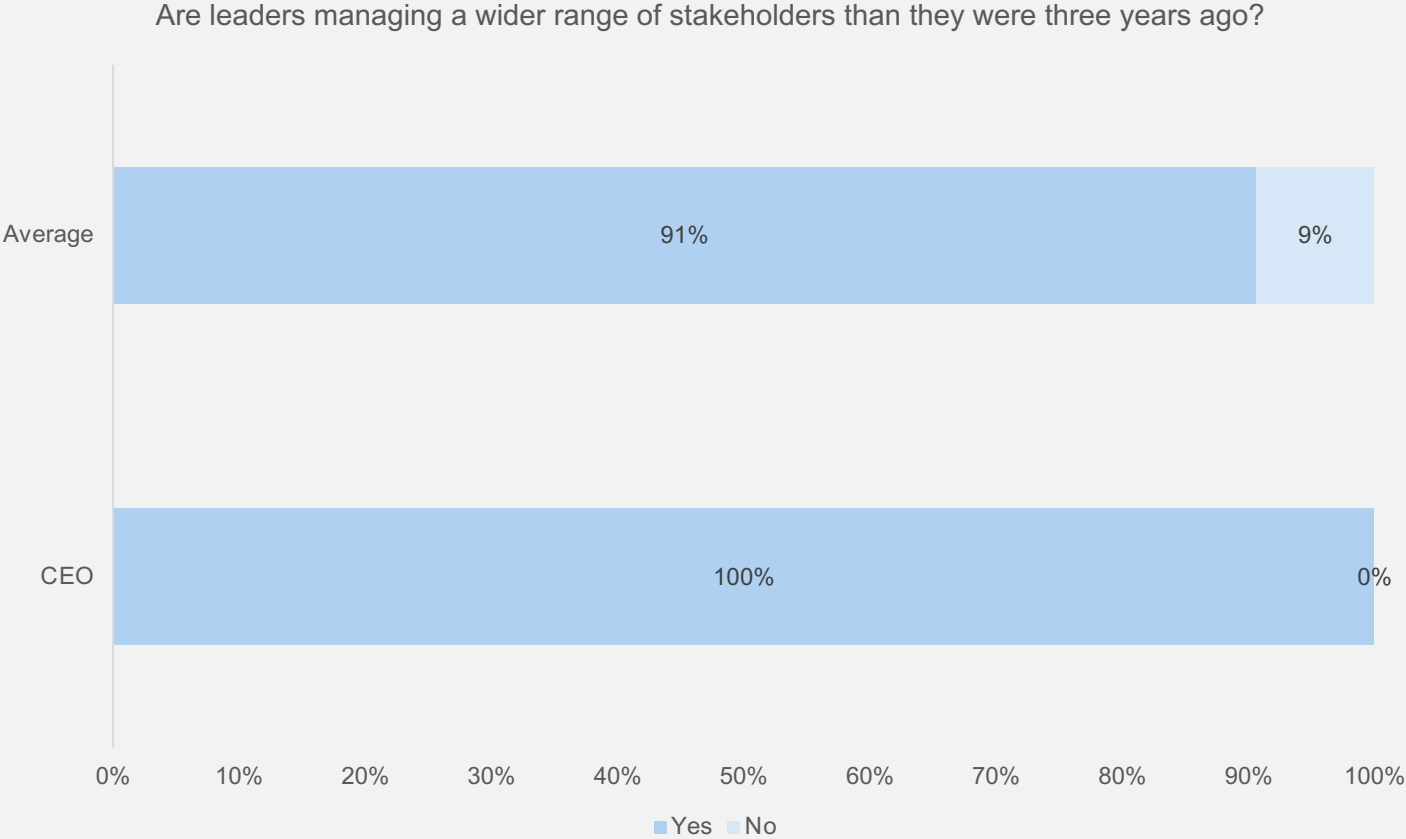
Increased Pressure to Take a Stance



91% of CEOs are facing more pressure to lead on social and political issues today in comparison to three years ago.

n=209

More Stakeholders to Manage



100% of CEOs, compared to an average of 91% of respondents, indicated they are managing a wider range of stakeholders than they were three years ago.

n=203

Employee Reaction: Greatest Factor for CEOs

Please rank the following considerations influencing leaders when making complex decisions today.

CEO

Average

Considerations	Rank
Employee reaction	1
Brand image	2
Consumer reaction	3
Board expectations	4
Investor sentiments	5
Shareholder reaction	6
Public opinion	7
Supplier relationships	8

Considerations	Rank
Employee reaction	1
Brand image	2
Consumer reaction	3
Board expectations	4
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Supplier relationships	8

CEOs ranked employee reaction as the topmost consideration, further highlighting the important role employees play in shaping CEO decisions.

Board expectations ranked fourth.

n=190

Employee and Board Reactions Were Top Priorities Three Years Ago

Please rank the following considerations that influenced leaders when they were making complex decisions today compared with three years ago.*

Today

Considerations	Rank
Employee reaction	1
Brand image	2
Consumer reaction	3
Board expectations	4
Investor sentiments	5
Shareholder reaction	6
Public opinion	7
Supplier relationships	8

Three years ago

Considerations	Rank
Employee reaction	1=
Board expectations	1=
Brand image	3
Shareholder reaction	4
Investor sentiments	5
Consumer reaction	6
Public opinion	7
Supplier relationships	8

CEOs ranked employee reaction as the topmost consideration both today and three years ago, further highlighting the important role employees play in shaping CEO decisions.

n=180

*Note that executives were asked to rank their own perspectives as they believed they would have ranked them three years ago. This survey was not conducted three years ago.

Employee Turnover: The Greatest Risk for CEOs

Rank the impact of the following risks of failing to appropriately respond to a major external crisis.

CEO	
Risks	Rank
Employee turnover	1
Stakeholder discontent	2
Consumer backlash	3
Investor abandonment	4.5
Regulatory action	4.5
Backlash from business community	6
Supplier disaffection	7
Other	8

n=195

Average	
Risks	Rank
Employee turnover	1
Consumer backlash	2
Regulatory action	3
Stakeholder discontent	4
Investor abandonment	5
Backlash from business community	6
Supplier disaffection	7
Other	8

CEOs ranked employee turnover as the topmost consideration, matching the sample average. However they placed higher emphasis than the average on Stakeholder discontent.

Employees are the Most Important Stakeholders

Please rank the following stakeholders in order of how important they are in shaping your decision-making.

CEO

Stakeholder	Rank
Employees	1
Consumers	2
Internal executive leadership	3
Institutional investors	4
Regulators	5
Suppliers	6
Local communities	7
Individual investors	8
Business peer groups	9
Online influencers	10
Other	11

n=204

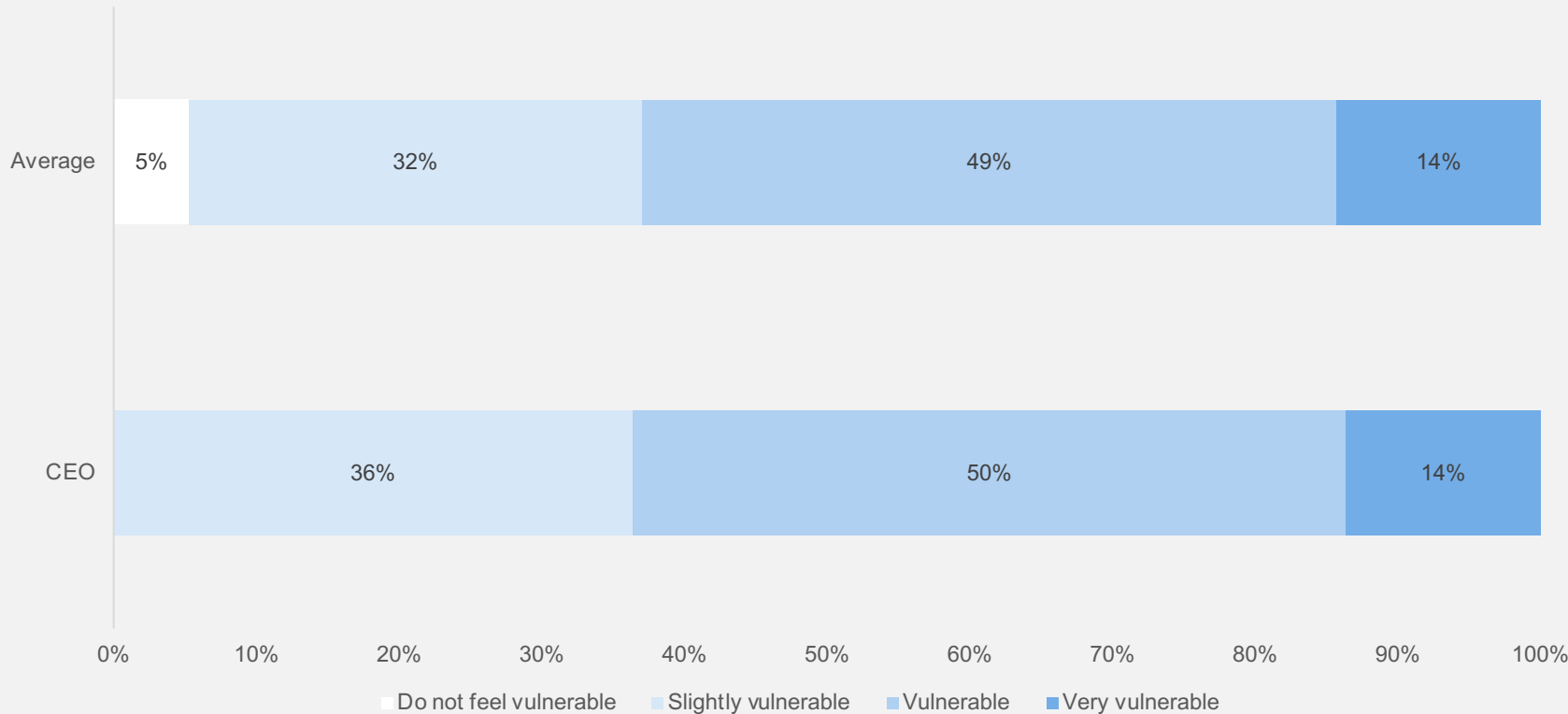
Average

Stakeholders	Rank
Consumers	1
Employees	2
Internal executive leadership	3
Institutional investors	4
Regulators	5
Suppliers	6
Local communities	7
Individual investors	8=
Business peer groups	8=
Online influencers	10
Other	11

When it comes to shaping their decisions, CEOs have ranked employees as the most important stakeholder group, with consumers ranking second.

CEOs: More Vulnerable Than Other Leaders

How vulnerable do leaders feel when making a complex decision regarding a major external crisis?



n=189

CEOs: Adaptability and Vision Needed Now

Please rank the following skills or capabilities leaders need in the current environment.

CEO

Qualities	Rank
Adaptability	1
Vision	2
Resilience	3
Empathy	4
Personal courage	5
Risk assessment	6
Stakeholder management	7
Political awareness	8
Social media awareness	9
Other - please specify	10

Average

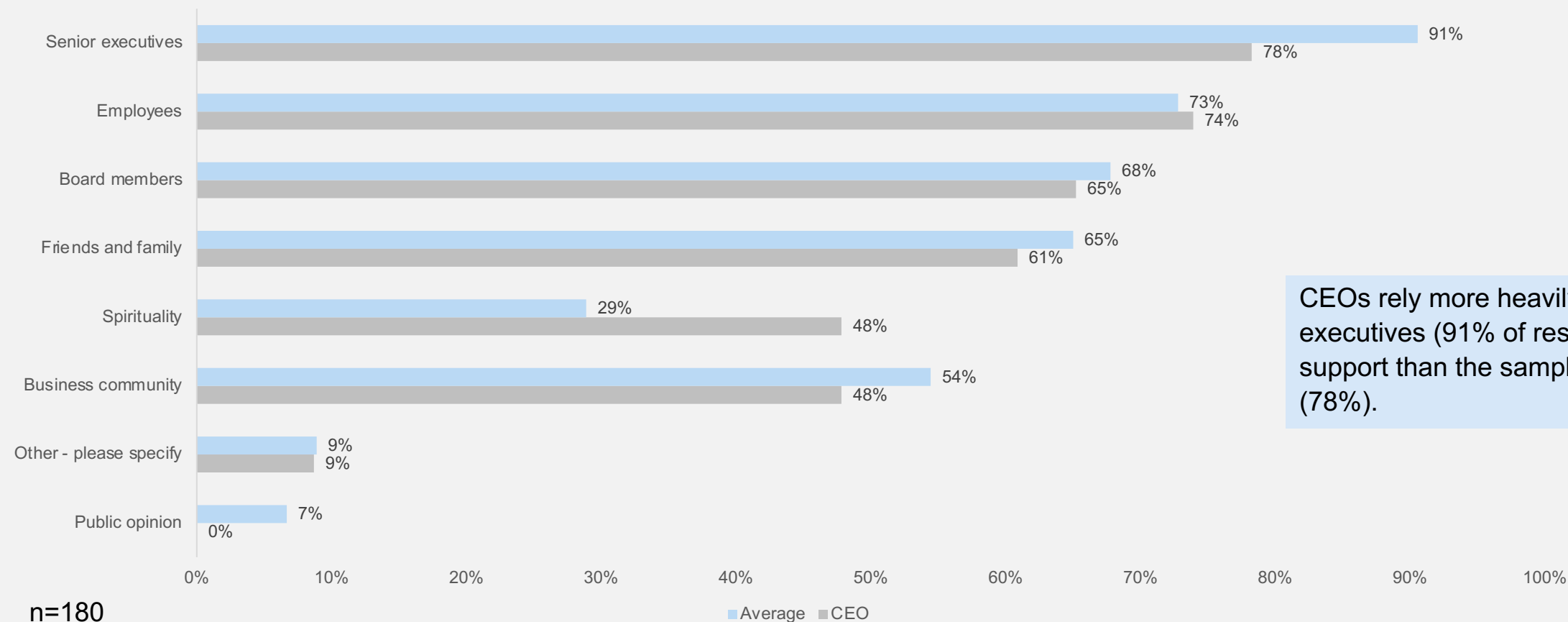
Qualities	Rank
Adaptability	1
Vision	2
Resilience	3
Empathy	4
Risk assessment	5
Personal courage	6
Stakeholder management	7
Political awareness	8
Social media awareness	9
Other - please specify	10

CEOs match the top 4 skills or capabilities as the sample average; with only a slight difference between personal courage and risk assessment.

n=181

CEOs Look to Senior Executives for Support

When making complex decisions, where do leaders get support or draw strength from?



CEOs rely more heavily on senior executives (91% of responses) for support than the sample average (78%).