

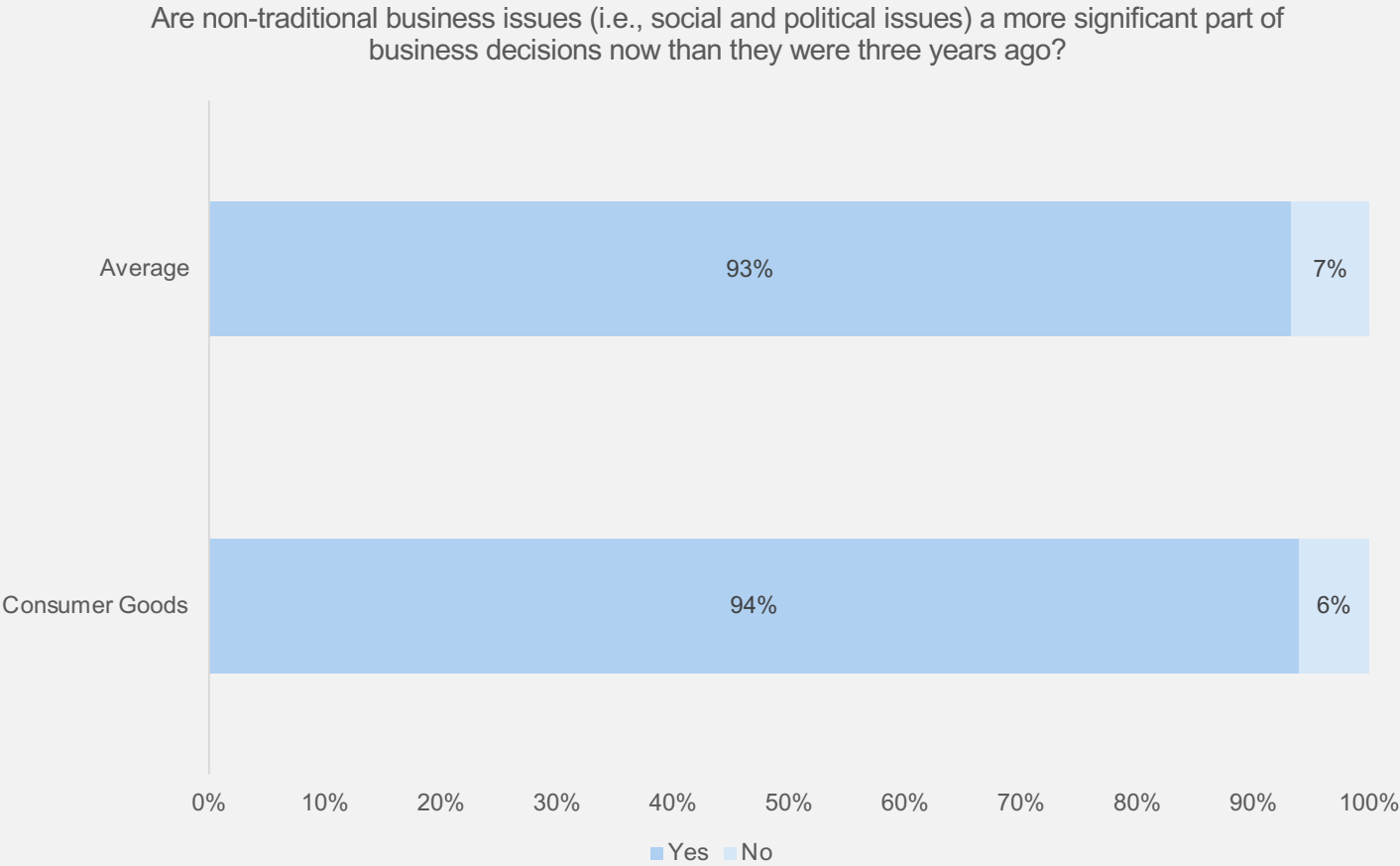


# Untethered World

Leading in a Time of Chaos

Consumer Goods  
Viewpoint

# Expanding Scope of Non-Traditional Business

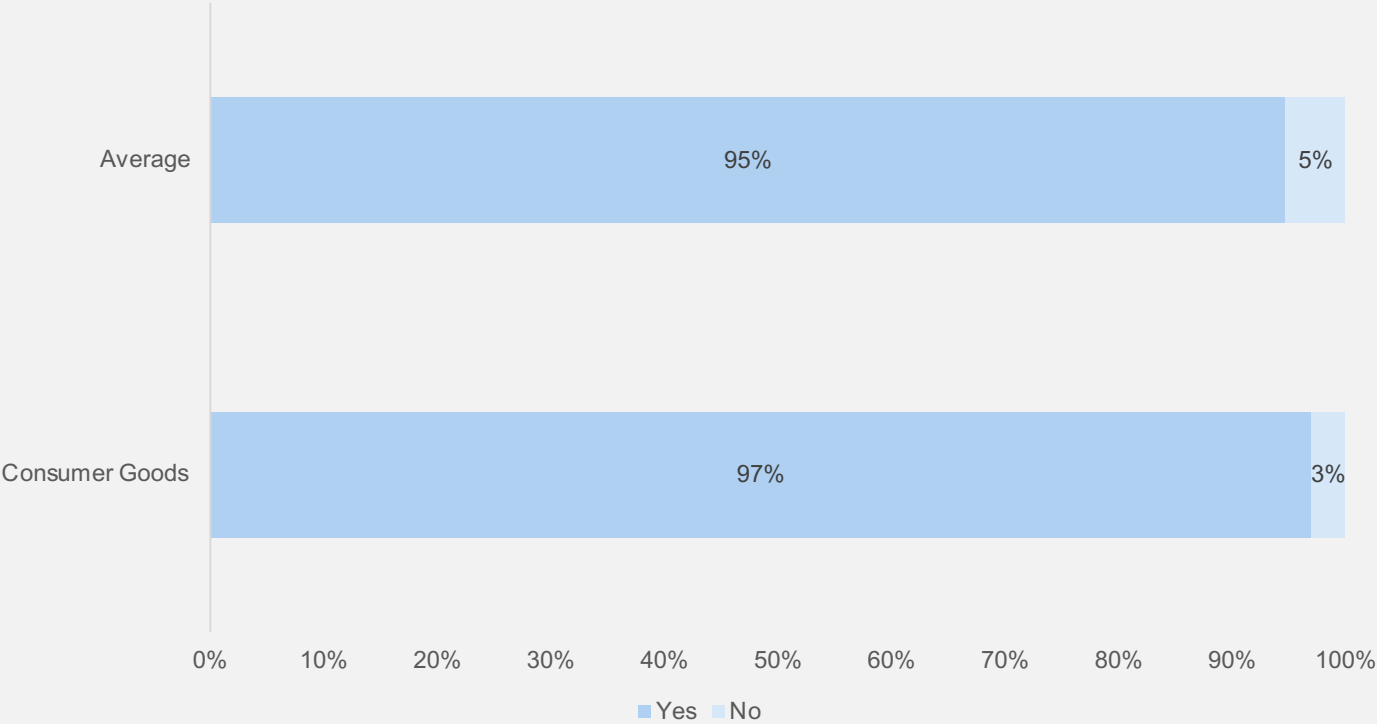


94% of respondents from the consumer goods industry indicated that non-traditional business concerns play a more significant role in their decision-making compared to three years ago.

n=209

# More Pressure to Take a Stance

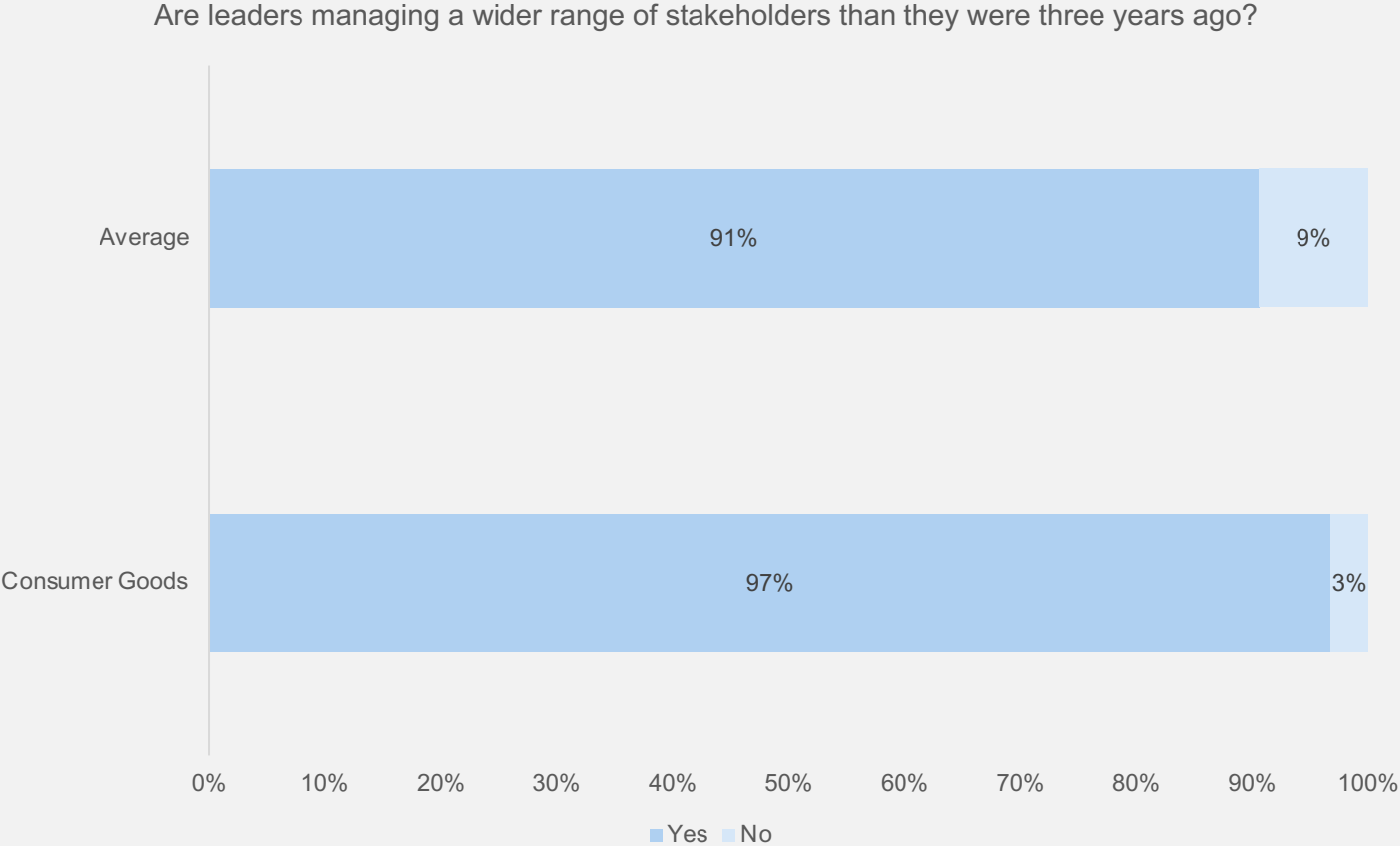
Are leaders under increased pressure to lead on social and political issues than they were three years ago?



97% of respondents from organizations within the consumer goods industry said leaders are under increased pressure to take a stance on social and political issues now versus three years ago. This is compared to an average of 95%.

n=209

# More Stakeholders to Manage



97% of consumer goods industry respondents indicated leaders must now manage a wider range of stakeholders when compared to three years ago. This compares to an average figure of 91%.

n=203

# Consumer Goods Leaders Rank Consumer Reactions Above Brand Image

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

Consumer Goods

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

n=190

Average

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

Respondents from the consumer goods industry indicate they are more concerned by consumer reactions than brand image, compared to the sample average.

# Decision-Making Factors: No Change From Three Years Ago

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

Today

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

n=180

Three years ago

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

Respondents from organizations in the consumer goods industry indicated that leaders were most influenced by consumer reaction three years ago when making complex decisions, showing no change.

\*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.

# Consumer Goods Leaders Focus on Consumer Backlash

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

Consumer Goods

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

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

Organizations in the consumer goods industry place a higher value on the risk of consumer backlash than employee turnover compared to the sample average.

n=195

# Consumer Goods Leaders Rank Consumers Over Employees When Making Decisions

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

Consumer Goods

Stakeholders	Rank
Consumers	1
Employees	2
Internal executive leadership	3
Institutional investors	4.5
Regulators	4.5
Suppliers	6
Local communities	7
Individual investors	8
Business peer groups	9
Online influencers	10
Other	11

Average

Stakeholders	Rank
Consumers	1
Employees	2
Internal executive leadership	3
Institutional investors	4
Regulators	5
Suppliers	6
Local communities	7
Individual investors	8.5
Business peer groups	8.5
Online influencers	10
Other	11

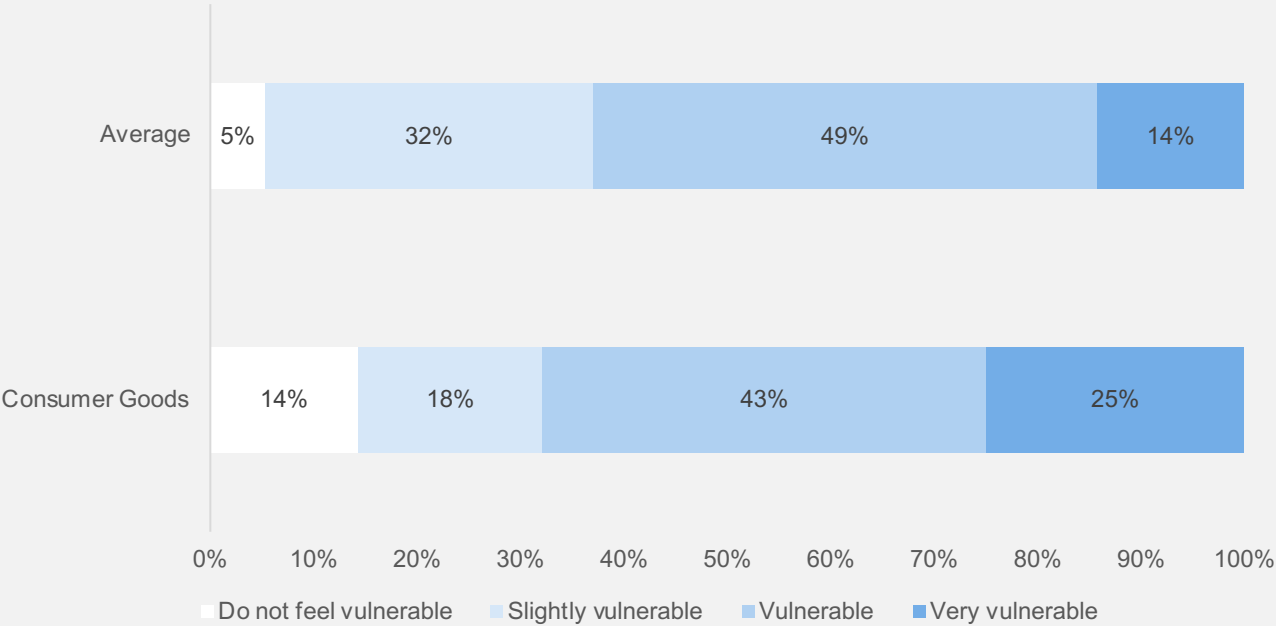
Organizations in the consumer goods industry align with the sample average.

n=204



# Consumer Goods Leaders Feel Vulnerable When Making Complex Decisions

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



25% of respondents from organizations in the consumer goods industry said leaders feel “very vulnerable” when making complex decisions about external crises. This compares to an average figure of 14%.

n=189

# The Top Skill for Consumer Leaders: Adaptability

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

## Consumer Goods

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

## Average

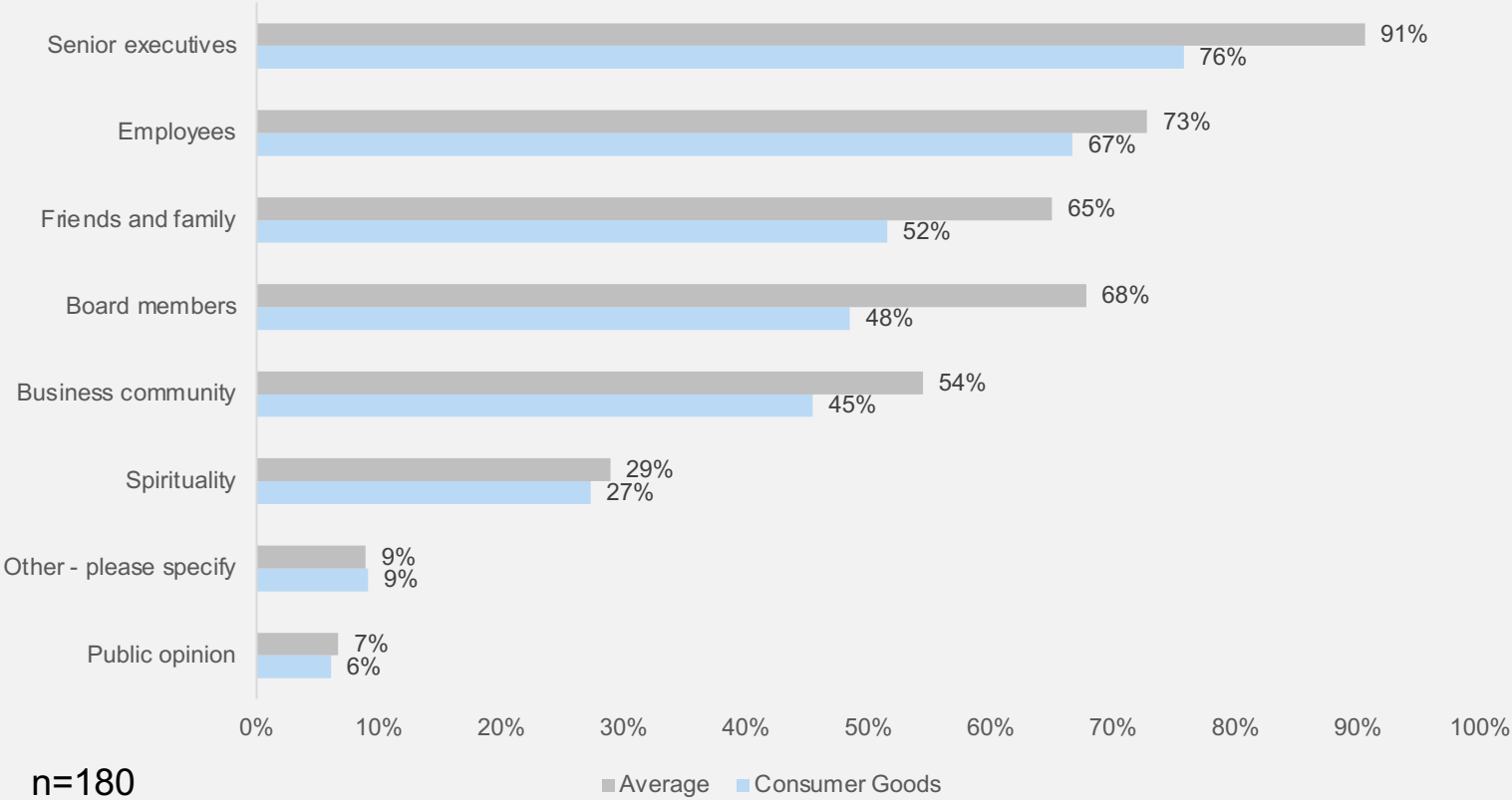
Qualities	Rank
Adaptability	1
Vision	2
Resilience	3
Empathy	4
Risk assessment	5
Personal courage	6
Stakeholder management	7
Political awareness	8
Social media awareness	9
Other - please specify	10

Respondents from organizations in the consumer goods industry ranked adaptability as the No. 1 skill needed of leaders in the current environment, as did respondents from across the sample.

n=181

# Consumer Leaders Lean Less on Senior Executives

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



76% of respondents from the consumer goods industry said leaders seek support from their fellow senior executives, compared to an average figure of 91%.