



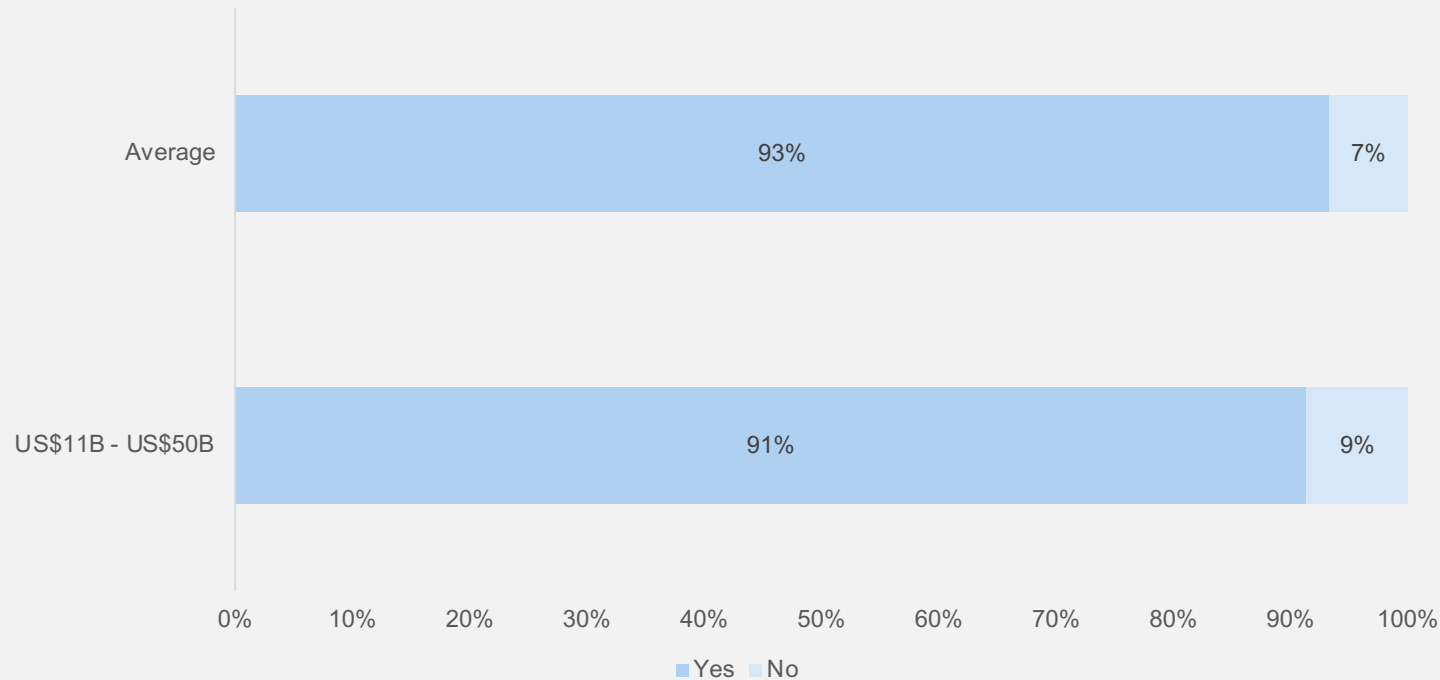
Untethered World

Leading in a Time of Chaos

Viewpoints From Member
Companies With US\$11-50
Billion Revenues

Expanding Scope of Non-Traditional Business

Are non-traditional business issues (i.e., social and political issues) a more significant part of business decisions now than they were three years ago?

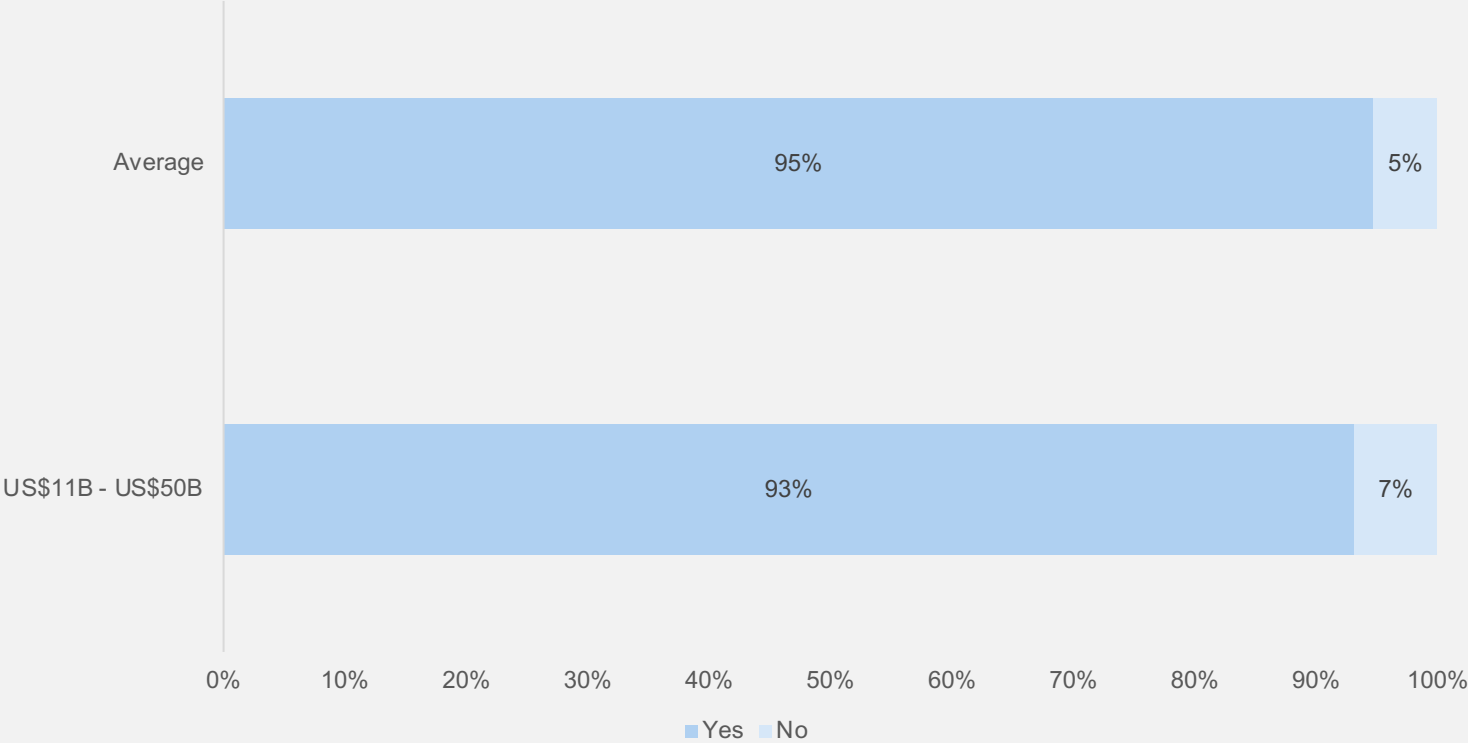


93% of respondents from organizations with revenues between US\$11 billion and US\$50 billion indicated that non-traditional issues play a more significant role in decision-making when compared to three years ago.

n=209

Increased Pressure to Take a Stance

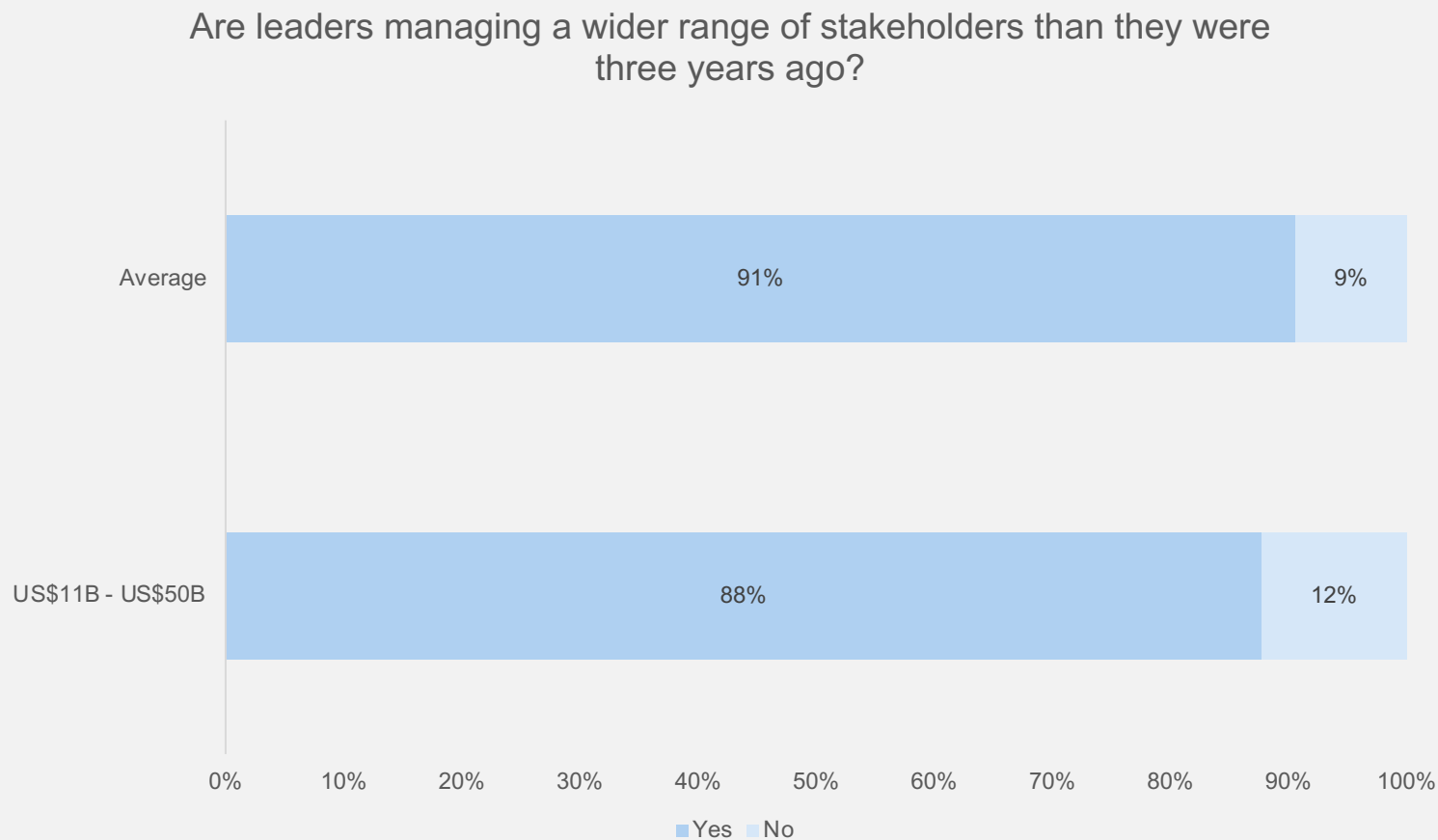
Are leaders under increased pressure to lead on social and political issues than they were three years ago?



Leaders are increasingly expected to take a stance on social and political issues, according to 93% of respondents from organizations with revenues between US\$11 billion and US\$50 billion.

n=209

More Stakeholders to Manage



At 88%, the proportion of respondents who indicated leaders are managing a wider range of stakeholders is slightly smaller among organizations with revenues between US\$11 billion and US\$50 billion when compared to the average of 91%.

n=203

Consumer Reactions Top Those of Employees

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

US\$11-50 Billion Organizations

Considerations	Rank
Consumer reaction	1
Employee reaction	2
Brand image	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 organizations with revenues between US\$11 billion and US\$50 billion ranked consumer reactions as the No. 1 influence on their decision-making. In comparison, respondents from the sample said they prioritized employee reactions, while ranking consumer reactions third behind brand image.

Three Years Ago, Boards Were Prioritized

Please rank the following considerations influencing leaders when making complex decisions today compared with three years ago.*

Today

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

Three years ago

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

When asked about the influences on their decision-making three years ago, respondents from organizations with revenues between US\$11 billion and US\$50 billion ranked board expectations first. This has slipped to fourth place today.

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.

The Risk of Consumer Backlash Tops Leaders' Concerns About Employee Turnover

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

US\$11-50 Billion Organizations

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

Respondents from organizations with revenues between US\$11 billion and US\$50 billion ranked consumer backlash as the top risk of failing to respond to a major external crisis. By comparison, respondents from the overall sample ranked employee turnover as the No. 1 risk.

n=195

Consumers and Employees Shape Decision-Making

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

US\$11-50 Billion Organizations

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

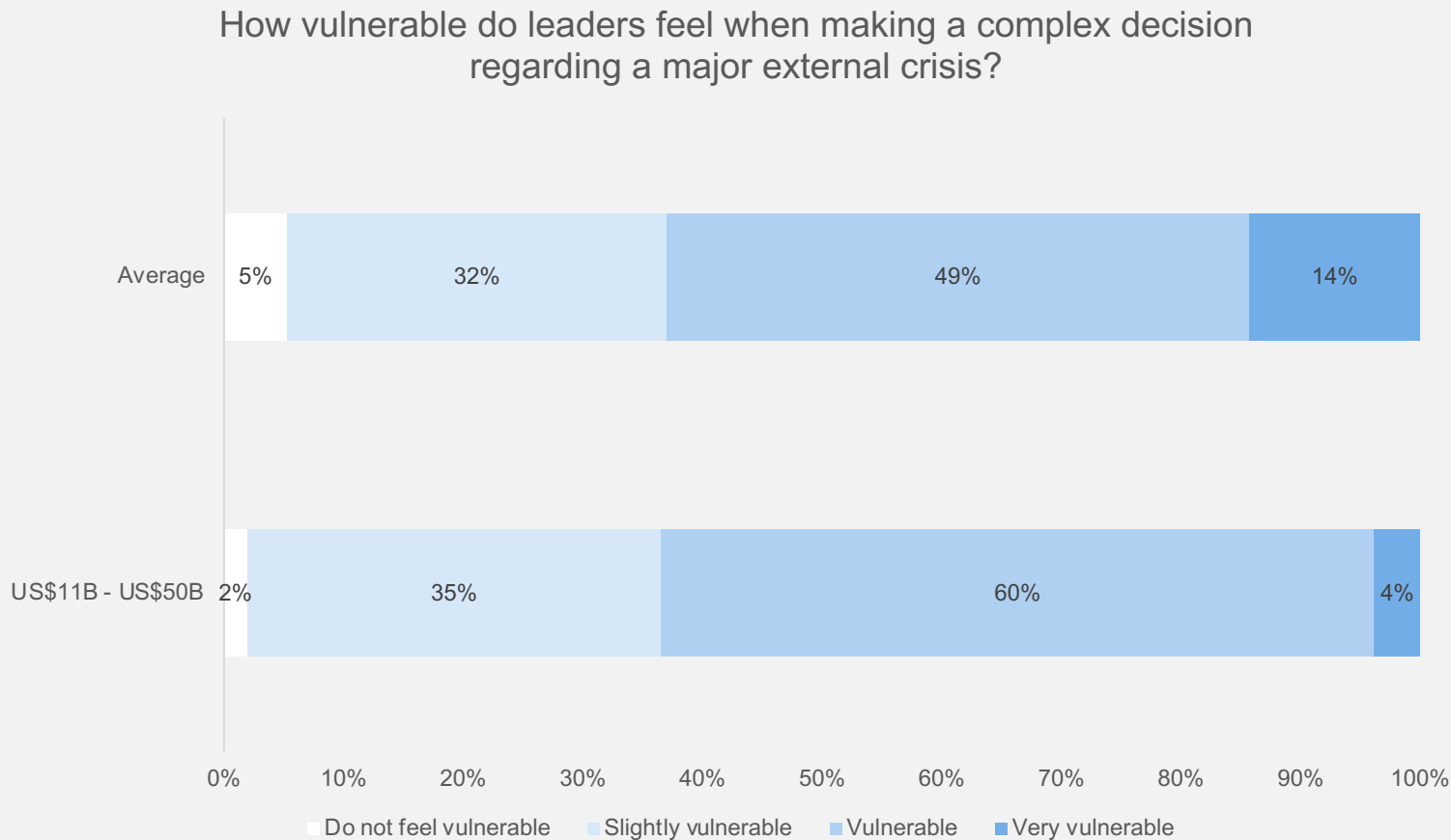
n=204

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

Respondents from organizations with revenues between US\$11 billion and US\$50 billion ranked consumers as the top stakeholder in terms of shaping decision-making, as did respondents from the wider sample.

Bigger Companies, Less Vulnerability?



Just 4% of respondents from organizations with revenues between US\$11 billion and US\$50 billion indicated they felt “very vulnerable” when making complex decisions about external crises, compared to an average figure of 14%.

n=189

The Most In-Demand Skills: Adaptability and Resilience

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

US\$11-50 Billion Organizations

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

n=181

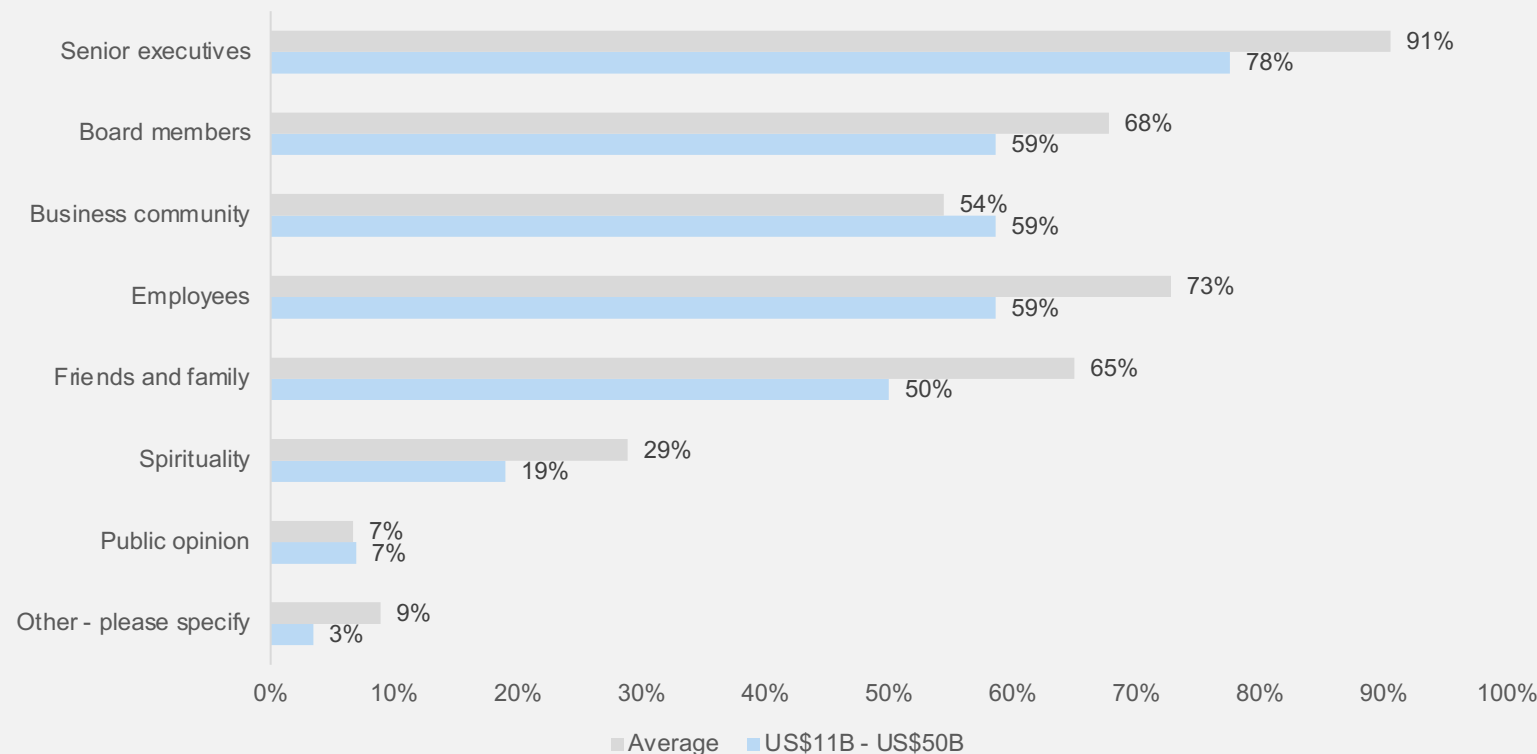
Average

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 with revenues between US\$11 billion and US\$50 billion, as well as those from the wider sample, ranked adaptability as the top skill leaders need to navigate the current environment. The two groups diverge on the importance of empathy, with respondents from the subset ranking empathy sixth and those from the wider sample ranking it fourth.

Leaders Get Support from Senior Executives

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



59% of respondents from organizations with revenues between US\$11 billion and US\$50 billion indicated they sought support and strength from the business community, compared to an average figure of 54%. Both groups indicated leaders were most likely to lean on their fellow senior executives for support.

n=180