



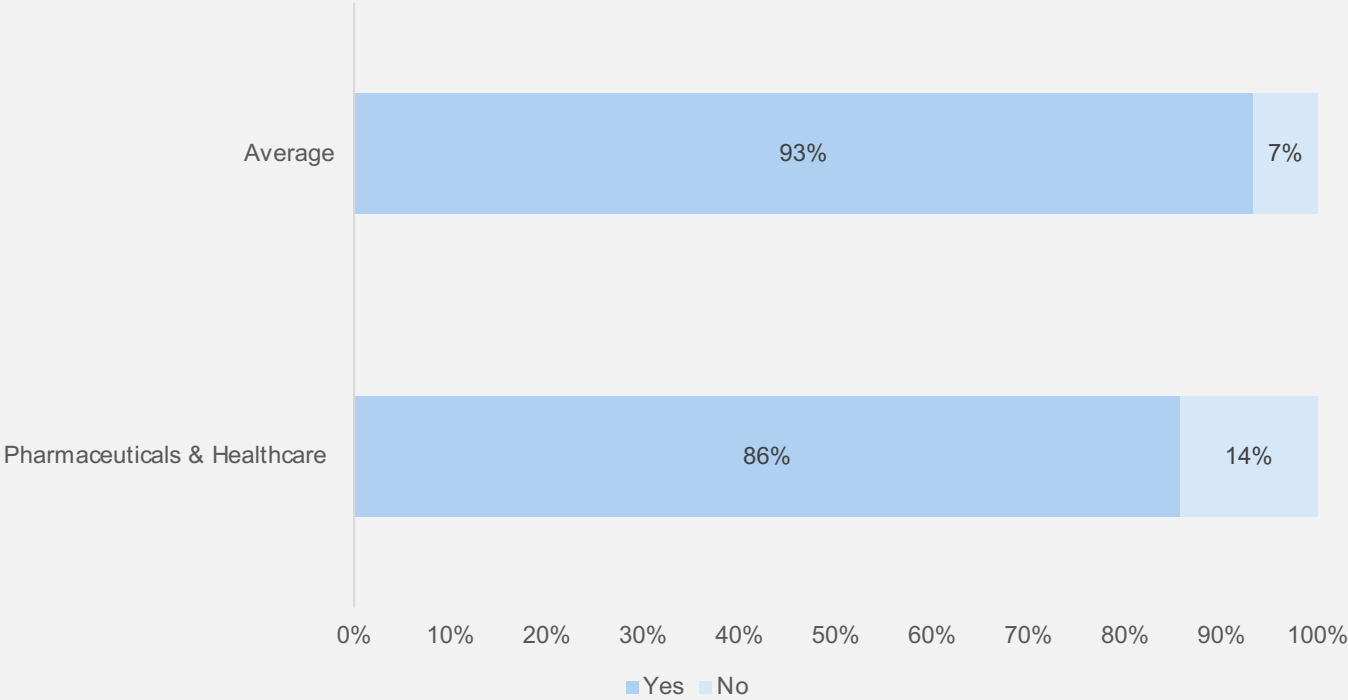
Untethered World

Leading in a Time of Chaos

Pharmaceutical
Viewpoint

Expanding Scope of Non-Traditional Business

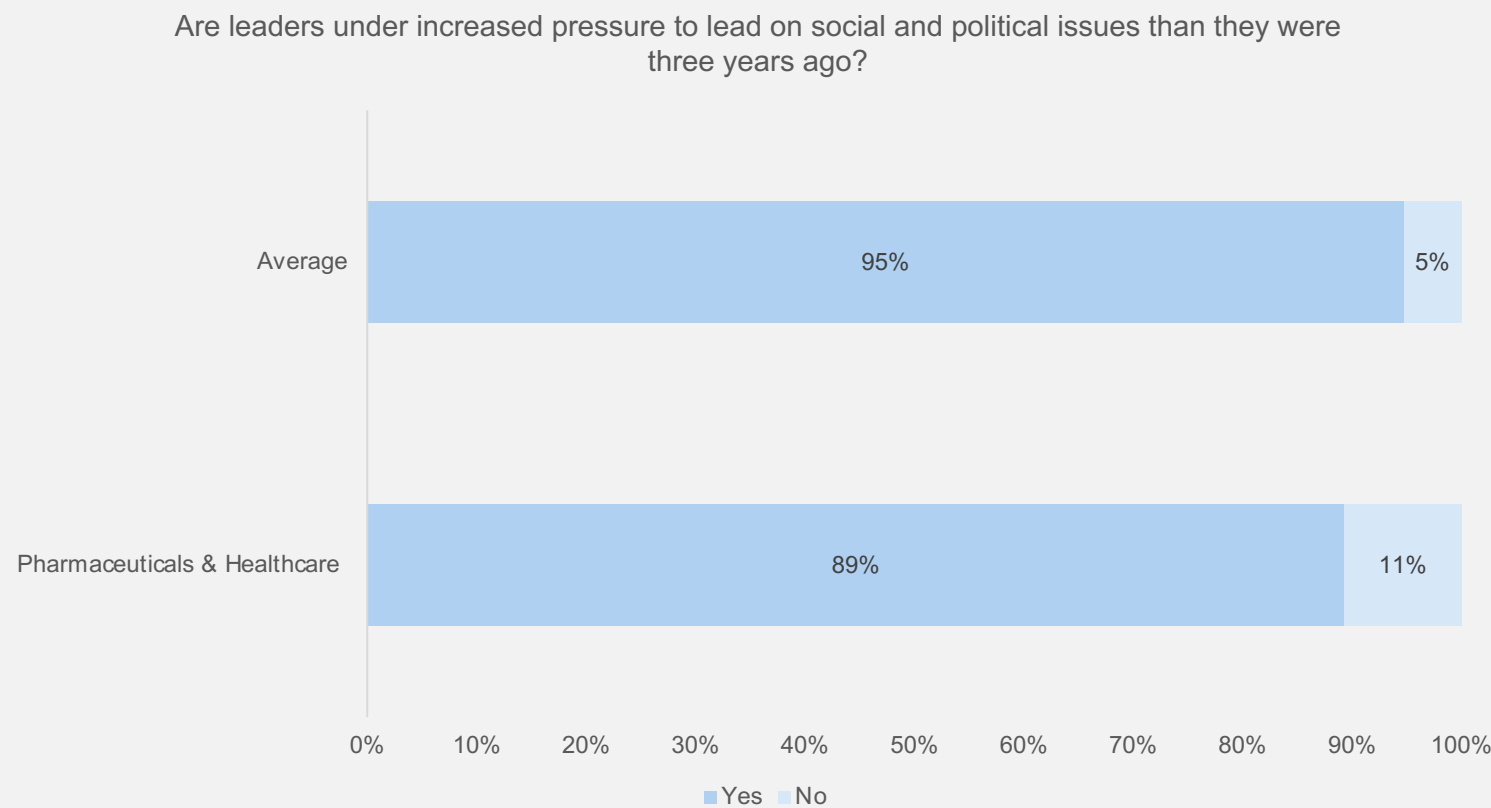
Are non-traditional business issues (i.e., social and political issues) a more significant part of business decisions now than they were three years ago?



86% of respondents from the pharmaceutical industry indicated that non-traditional business concerns play a more significant role in leaders' decision-making than they did three years ago.

n=209

More Pressure to Take a Stance

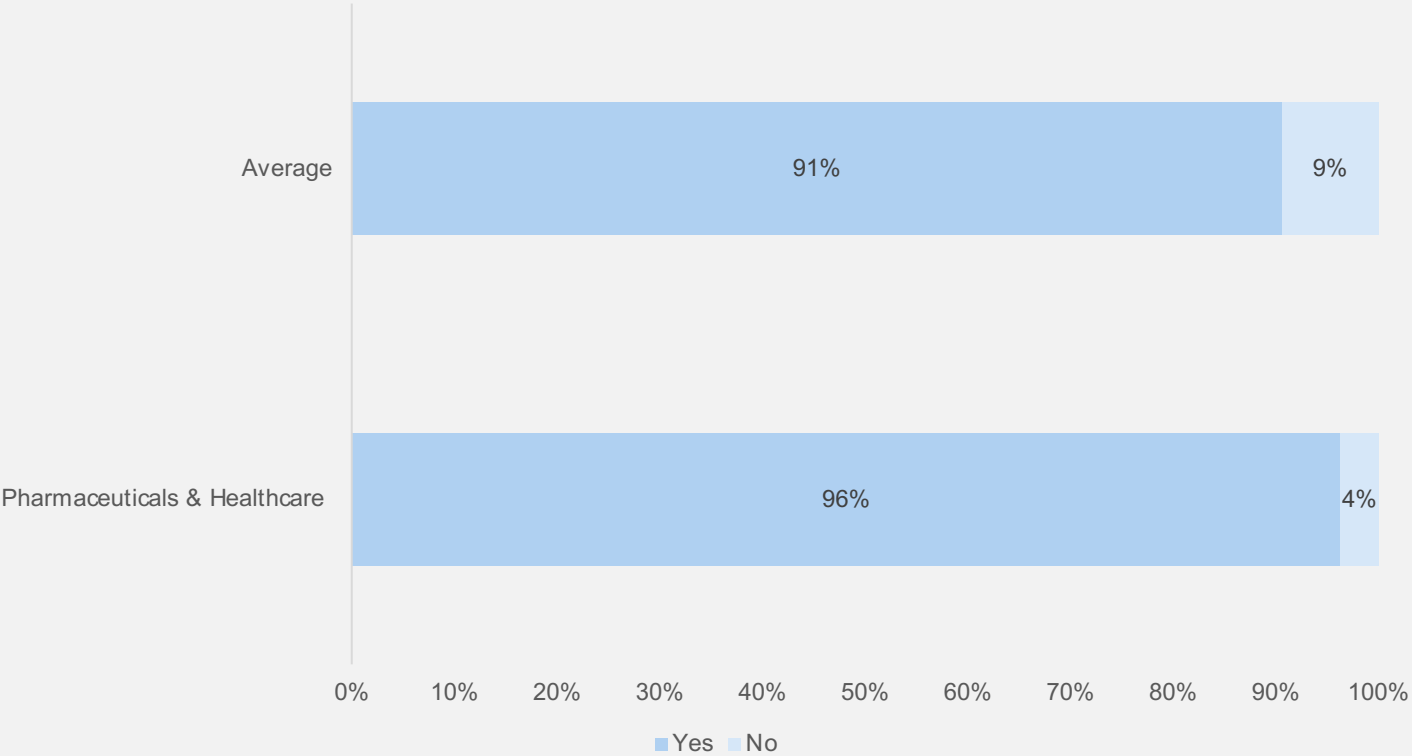


89% of respondents from organizations within the pharmaceutical industry said leaders are under increased pressure to take a stance on social and political issues. This compares to an average of 95%.

n=209

More Stakeholders to Manage

Are leaders managing a wider range of stakeholders than they were three years ago?



96% of pharmaceutical industry respondents indicated leaders must now manage a wider range of stakeholders compared to three years ago. This compares to an average figure of 91%.

n=203

Board Expectations Are Greatest Consideration for Complex Decision-Making

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

Pharmaceuticals

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

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 pharmaceutical industry indicate they are more concerned by board expectations than employee reaction, which was ranked first in the overall sample.

n=190

Board Expectations: A Chief Concern Three Years Ago

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

Today

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

n=180

Three years ago

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

Pharmaceutical leaders' priorities have remained unchanged.

*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 Is a Key Concern for Pharmaceutical Companies

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

Pharmaceuticals

Risks	Rank
Employee turnover	1
Regulatory action	2
Stakeholder discontent	3
Consumer backlash	4
Backlash from business community	5
Supplier disaffection	6
Investor abandonment	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 from the pharmaceutical industry and from the wider sample ranked employee turnover as the top risk of failing to appropriately respond to a major crisis.

n=195

The Most Important Stakeholders: Employees

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

Pharmaceuticals

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

n=204

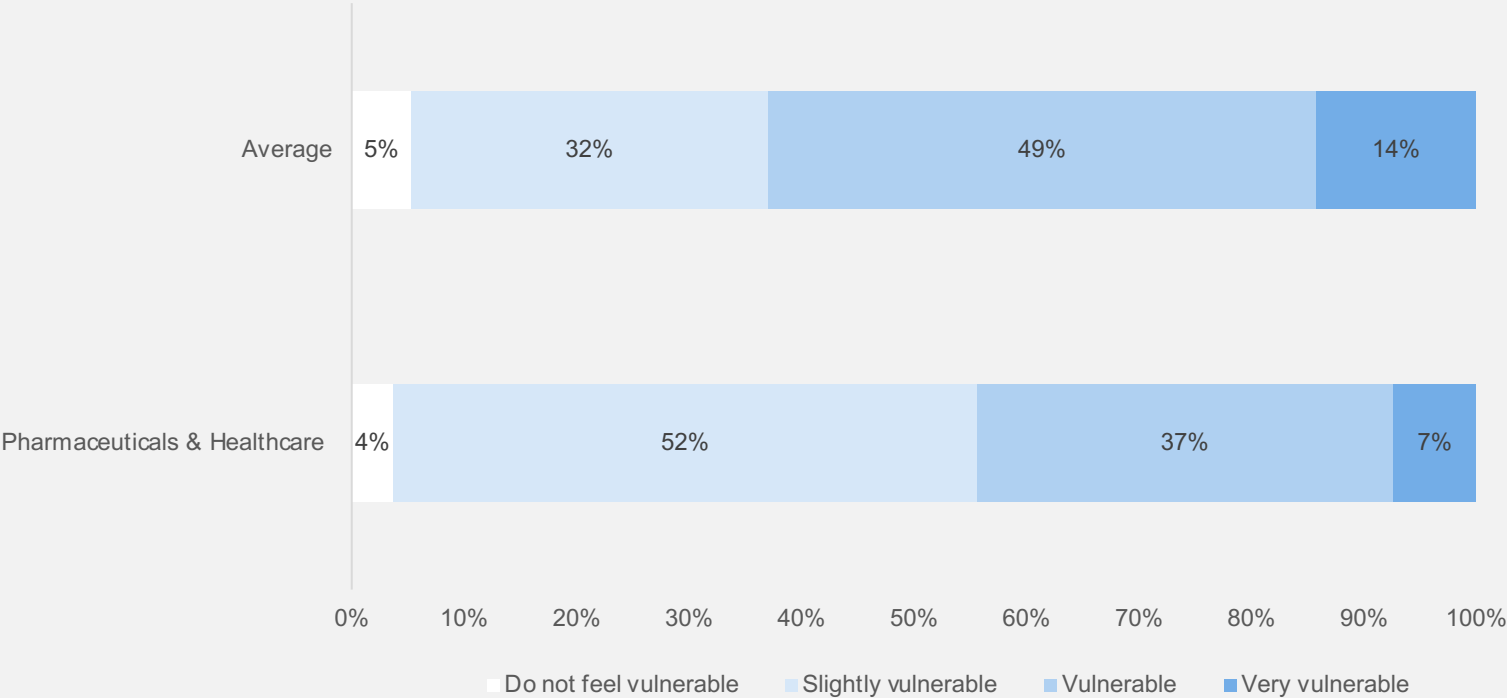
Average

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 the pharmaceutical industry ranked employees as their main priority when making decisions. That contrasts with the average sample, which ranked consumers first.

Pharmaceutical Leaders Less Likely to Feel Vulnerable

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



44% of respondents from the pharmaceutical industry indicated leaders felt “vulnerable” or “very vulnerable” when making complex decisions about major crises. The average is 62%.

n=189

Adaptability: The Top-Ranked Skill for Pharmaceutical Leaders

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

Pharmaceuticals

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

Average

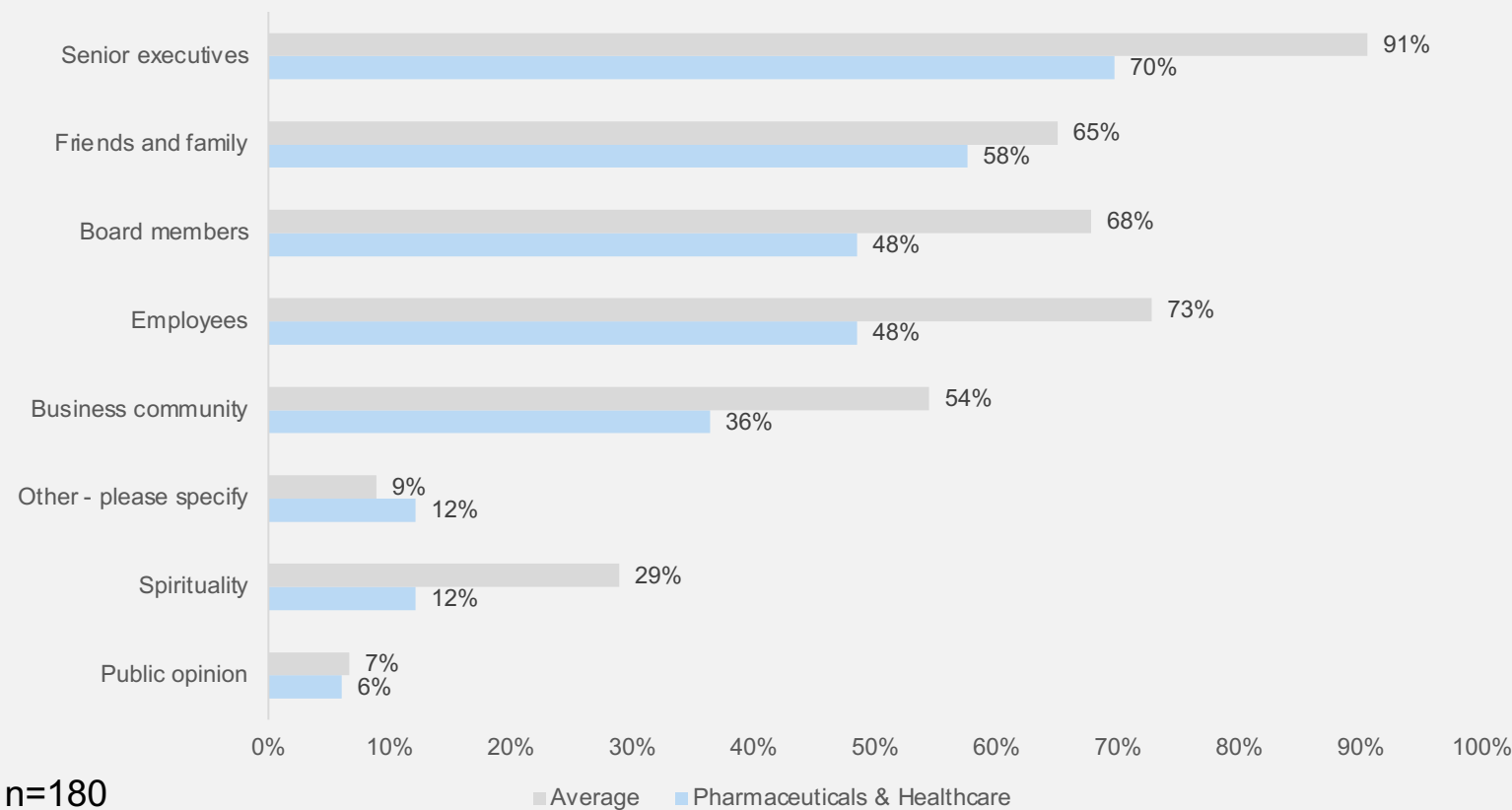
Qualities	Rank
Adaptability	1
Vision	2
Resilience	3
Empathy	4
Risk assessment	5
Personal courage	6
Stakeholder management	7
Political awareness	8
Social media awareness	9
Other - please specify	10

Respondents from organizations in the pharmaceutical industry ranked adaptability as the most important skill needed of leaders in the current environment—as did respondents from across the sample.

n=181

Pharmaceutical Leaders Lean on Senior Executives for Support

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



70% of respondents from the pharmaceutical industry said leaders seek support from their fellow senior executives, compared to an average figure of 91%.