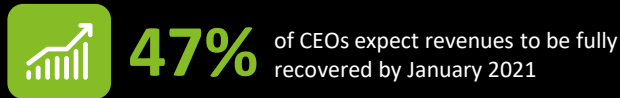


### Fortune/Deloitte CEO Survey

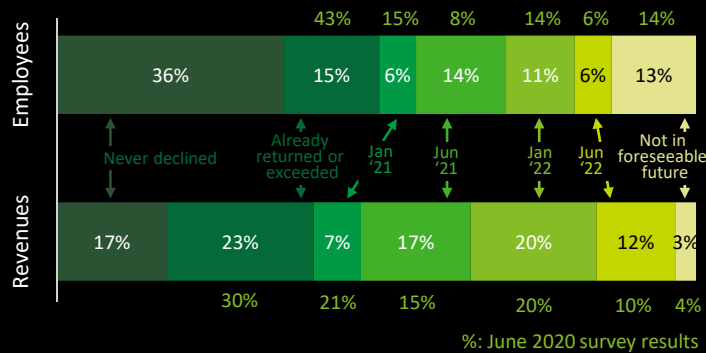
#### October 2020 Highlights

More than 125 CEOs participated in a recent Fortune/Deloitte CEO Survey, the second in a series of three

#### CEOs predict revenue to return faster than employees



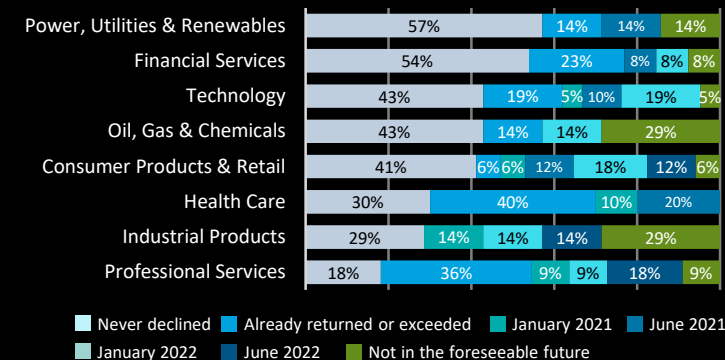
#### When do you predict that the following will return to pre-crisis levels?



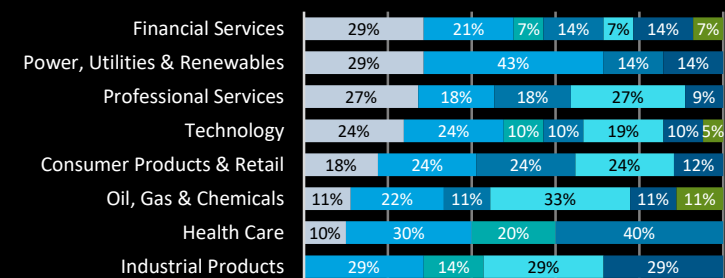
#### Health Care CEOs anticipate full recovery by June 2021

CEOs expect faster recovery of revenues to pre-crisis levels than employee levels, with Health Care as the only industry to expect to fully recover employee levels in the foreseeable future

#### Return to pre-crisis levels – Employees



#### Return to pre-crisis levels – Revenues



#### Pandemic shifts accelerate digital transformation, focus on sustainability, and new partnerships

CEOs indicated their level of agreement with the following statements:

- 85%** Our digital transformation has significantly accelerated during the crisis
- 78%** Our company will sustain focus on sustainability and carbon reductions
- 74%** Crisis created significant new opportunities for our company
- 70%** Pandemic is fostering formation of new partnerships and alliances
- 58%** Crisis has improved our outlook for greater profitability in medium-to-long term
- 47%** Our company will likely expand workforce in next six months
- 40%** Our supply chain needs to be redesigned as result of pandemic
- 23%** Our company will likely reduce workforce in next six months

#### Path to financial recovery: Vaccine and advancements in therapeutics capture top two rankings

What do CEOs think is necessary to financially recover from the economic crisis caused by the pandemic? They ranked eight factors in this order:

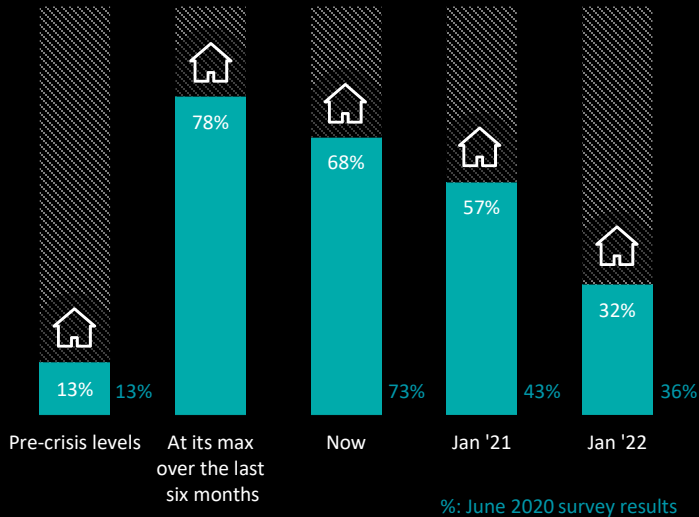
- 1 Vaccine
- 2 Advancements in therapeutics
- 3 Public confidence
- 4 Sustained fiscal stimulus
- 5 Sustained monetary stimulus
- 6 Herd immunity through widespread infection
- 7 Re-opened schools
- 8 US election results

## Shift to remote workforce continues to be the new norm



CEOs expect almost **one-third of employees** to be working remotely in January 2022

### Avg. percentage of employees expected to work remotely



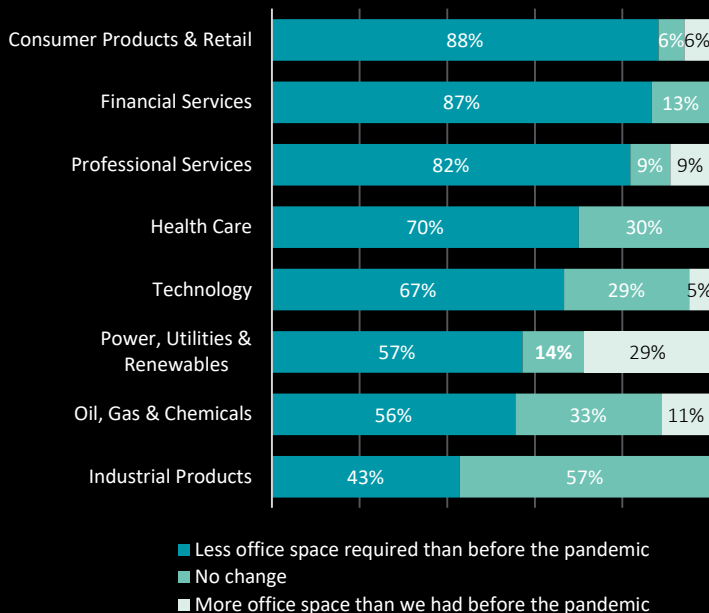
## Future office space needs



**76%** of CEOs say their companies will need less office space in the future

A notable industry outlier: 29% of Power, Utilities & Renewables CEOs expect needing *more* office space in the future

### Office space needs as compared to before the pandemic



#### About Deloitte

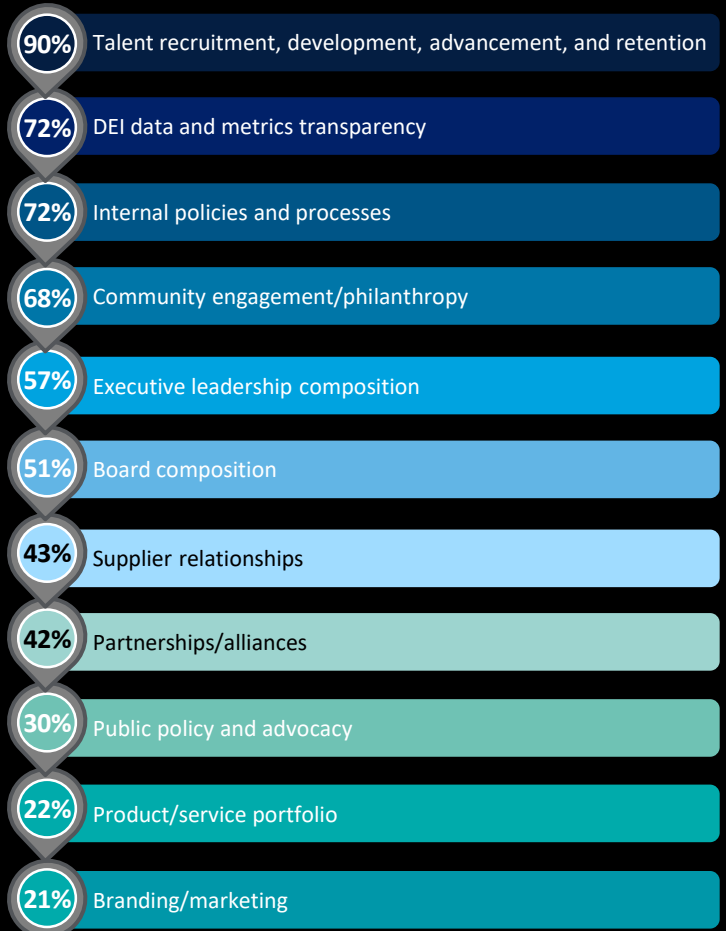
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## Diversity, Equity, and Inclusion (DEI) initiatives are on the rise



**96%** of CEOs agree DEI is a strategic priority/goal for them

### What DEI areas are CEOs prioritizing or investing in over the next 12 months?



### Where CEOs say their companies have struggled the most during the crisis



**40%**

of CEOs say employees are more innovative in the virtual workforce environment; 37% say less innovative

**90%**

of CEOs say they have taken action to support the mental health and well-being of employees over the past six months