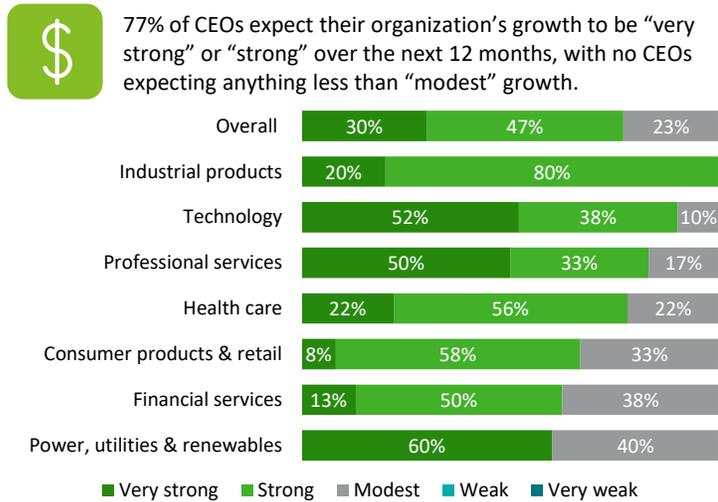


Fortune/Deloitte CEO Survey

Summer 2021 Highlights

CEOs have moved from cautious optimism to bold plans for growth in June 2021, with the majority expecting “strong” or “very strong” growth over the coming 12 months.

CEO expectations for growth over next 12 months



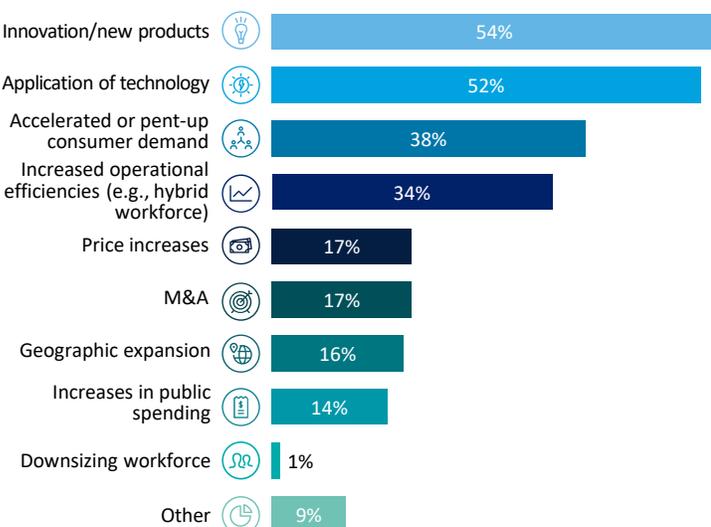
Note: Due to rounding, percentages may not always appear to add up to 100%. Analysis includes industries with 5% or more representation in the sample.

CEOs were divided on this question:



Expected drivers of business success over next 12 months

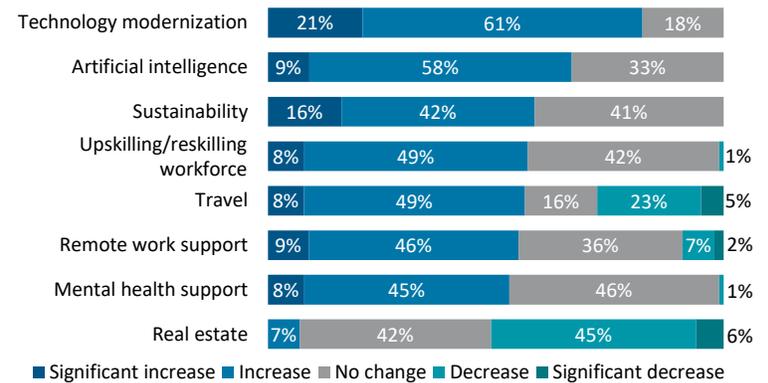
More than half of CEOs believe that innovation/new products or application of technology will be a top-three driver of business success over the next 12 months.



Note: CEOs were asked to select their top three. Percentages may not add to 100%. “Other” responses provided include investment plans, commodity prices, DEI, increased workforce, and easing of supply chain disruption.

Planned changes in level of spending over next 12 months

Spending will continue to increase in technology modernization and artificial intelligence, while more than half of CEOs anticipate a notable decrease in spending on real estate.



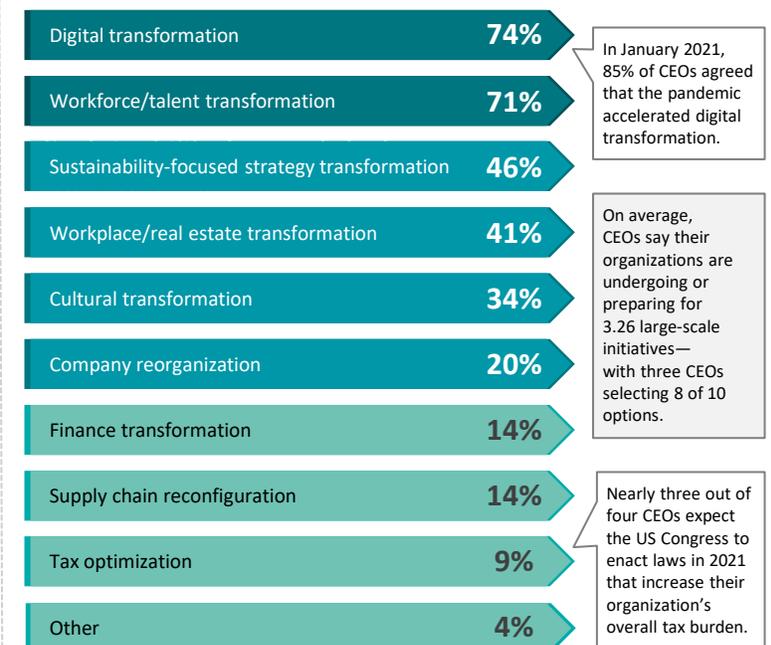
In January 2021, CEOs predicted needing 26% less office space in 2022 compared to 2019.

In January 2021, CEOs predicted 43% less travel in 2022 compared to 2019.

Note: Due to rounding, percentages may not always appear to add up to 100%.

Transformations or large-scale initiatives in the works

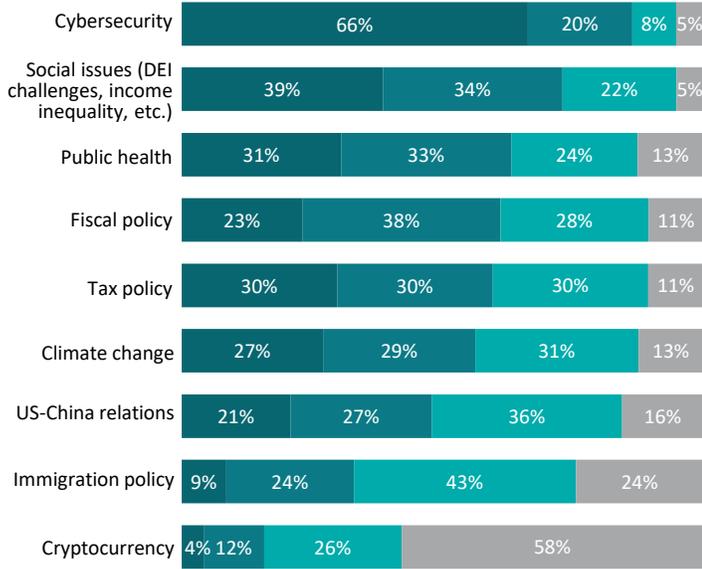
CEOs were asked if they consider their organization to be undergoing or preparing for any of the following large-scale initiatives. Nearly three out of four CEOs indicate their organization is undergoing or preparing for digital transformation.



Relevance to CEO agenda



CEOs were asked how relevant the following topics are to their CEO agenda. Cybersecurity is top of mind for CEOs. Cryptocurrency is not.



■ Highly relevant ■ Moderately relevant ■ Slightly relevant ■ Not at all relevant

Note: Due to rounding, percentages may not always appear to add up to 100%.

Top 3 factors in deciding to take a stand on social or societal issues



More than four out of five CEOs indicate that alignment with their organization's strategy, purpose, and values influences when they take a vocal stand on social issues. Notably, only 10% consider board input or approval to be a top-three factor in their decision.

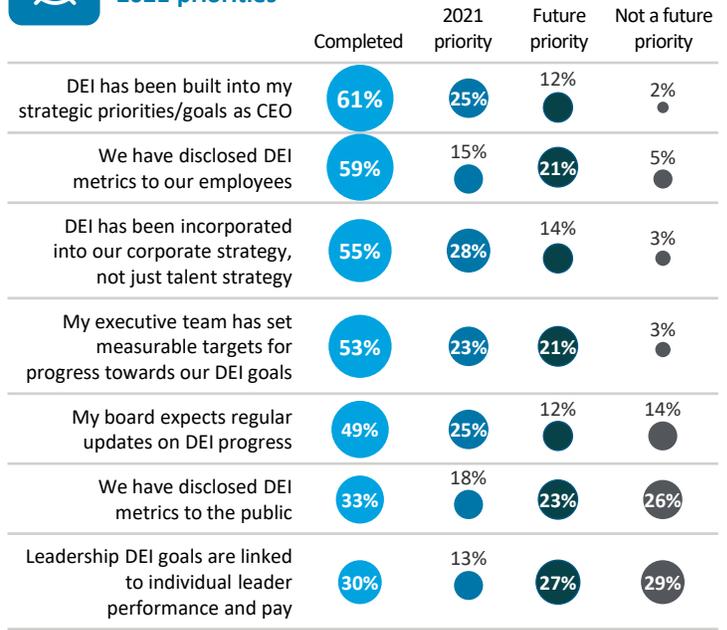


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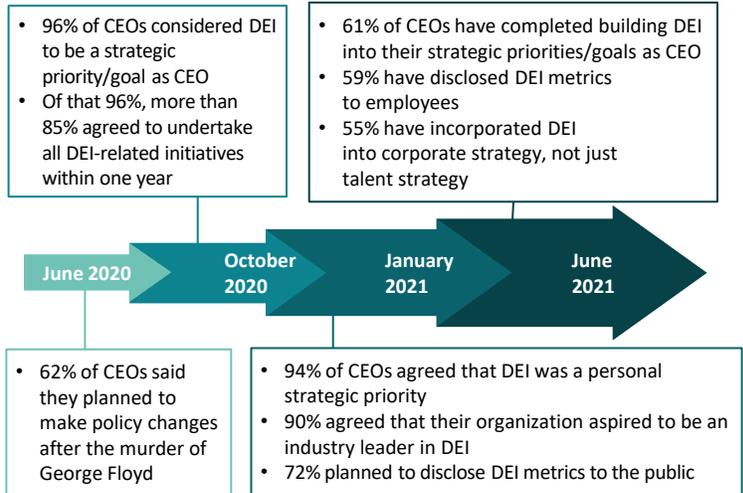
CEOs check off key DEI efforts as "completed" or 2021 priorities



Note: Due to rounding, percentages may not always appear to add up to 100%.



Data points over 12 months reflect CEOs' consistent commitment to DEI



The biggest challenge I face as a CEO today is:

