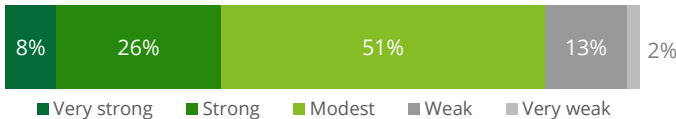


Fall 2022 Fortune/Deloitte CEO Survey

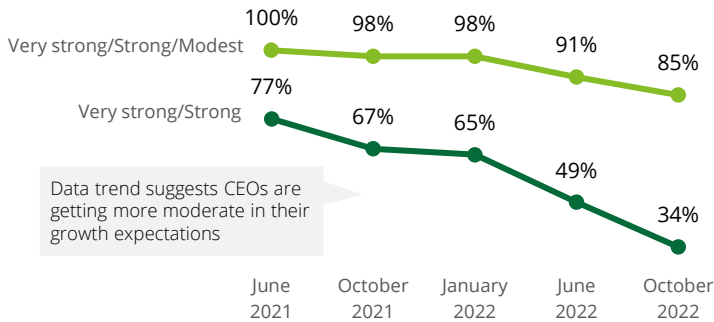
In this survey fielded September 28-October 6, 2022, 121 CEOs representing more than 15 industries share more modest growth expectations and fine tune strategic levers such as talent, workplace, and technology models to adapt to new conditions.



Over the next 12 months, I expect my organization's growth to be:



CEO expectations for strong growth over the next 12 months continue to trend downward, while growth expectations incorporating modest growth are only slightly down from June 2022



Data trend suggests CEOs are getting more moderate in their growth expectations



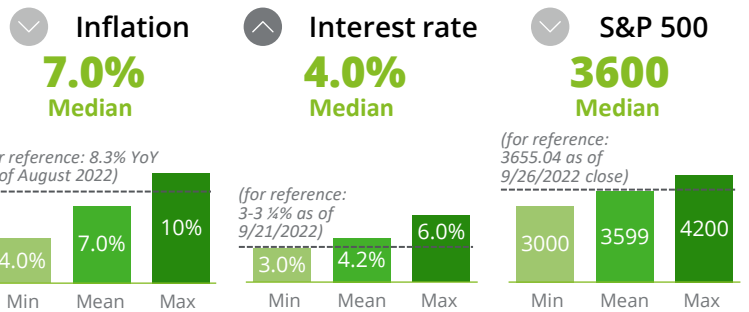
What external issues do CEOs expect to influence or disrupt their business strategy within the next 12 months?



While top disruptors are consistent with June 2022 findings, CEOs are showing decreasing concern around these top issues.



What is your best prediction regarding the below on December 31, 2022:

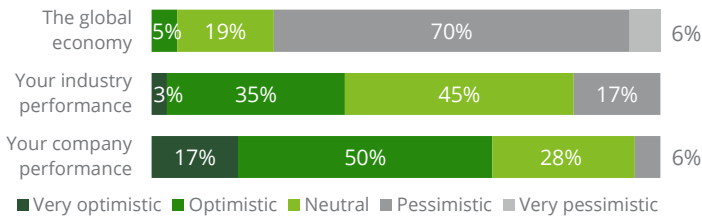


While predictions for inflation are down from current/reference rate, this expectation is much higher than expectations from nine months ago (4-5% average). In the Fall Survey 58% of respondents predicted ≥7%, compared to only 4% of CEOs in January 2022.



What is your personal outlook toward the following areas over the next 12 months?

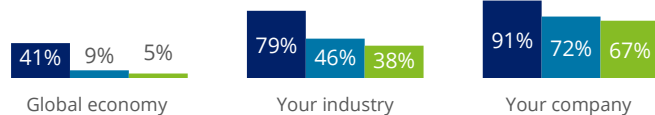
Two thirds (67%) of CEOs remain optimistic about their own company's performance but increasingly pessimistic toward global economy



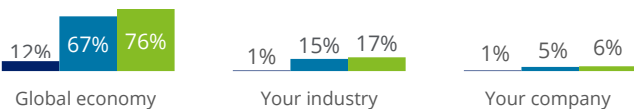
Optimism trending down, pessimism trending up

Legend: January 2022 (dark blue), June 2022 (medium blue), October 2022 (light green)

Comparison to past surveys – Optimistic/Very optimistic



Comparison to past surveys – Pessimistic/Very pessimistic

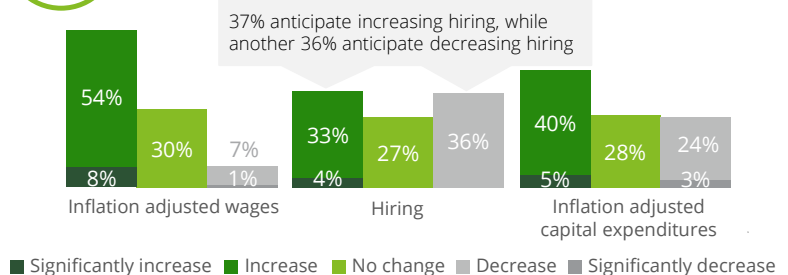


Note: Due to rounding, percentages may not always appear to add up to 100%.

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Compared to the past 12 months, how do you expect the following metrics to change over the next 12 months for your organization?



37% anticipate increasing hiring, while another 36% anticipate decreasing hiring

Legend: Significantly increase (dark green), Increase (medium green), No change (light green), Decrease (grey), Significantly decrease (dark grey)

