

# Leadership in a VUCA World

*A briefing to the Aluminum Stewardship Initiative*

April 4, 2017



# A Volatile, Uncertain, Complex and Ambiguous (VUCA) World





# Sources of Insight

## GLOBAL PUBLIC OPINION SURVEY



## GLOBAL EXPERTS SURVEY



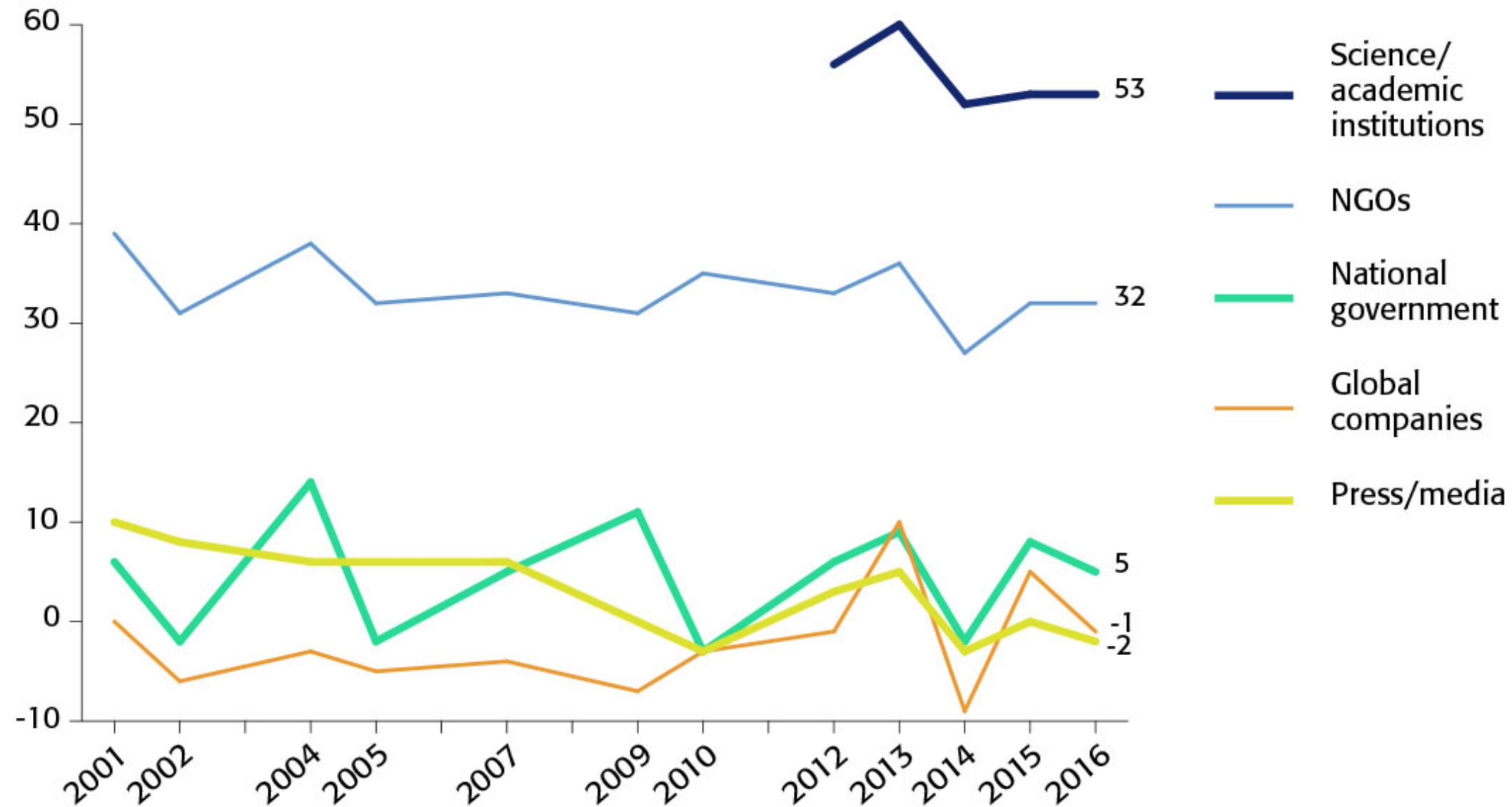
# MORE SOCIAL CAPITAL REQUIRED



# A Low Trust Environment

## Trust in Institutions

Net Trust,\* Average of 17 Countries,\*\* 2001–2016



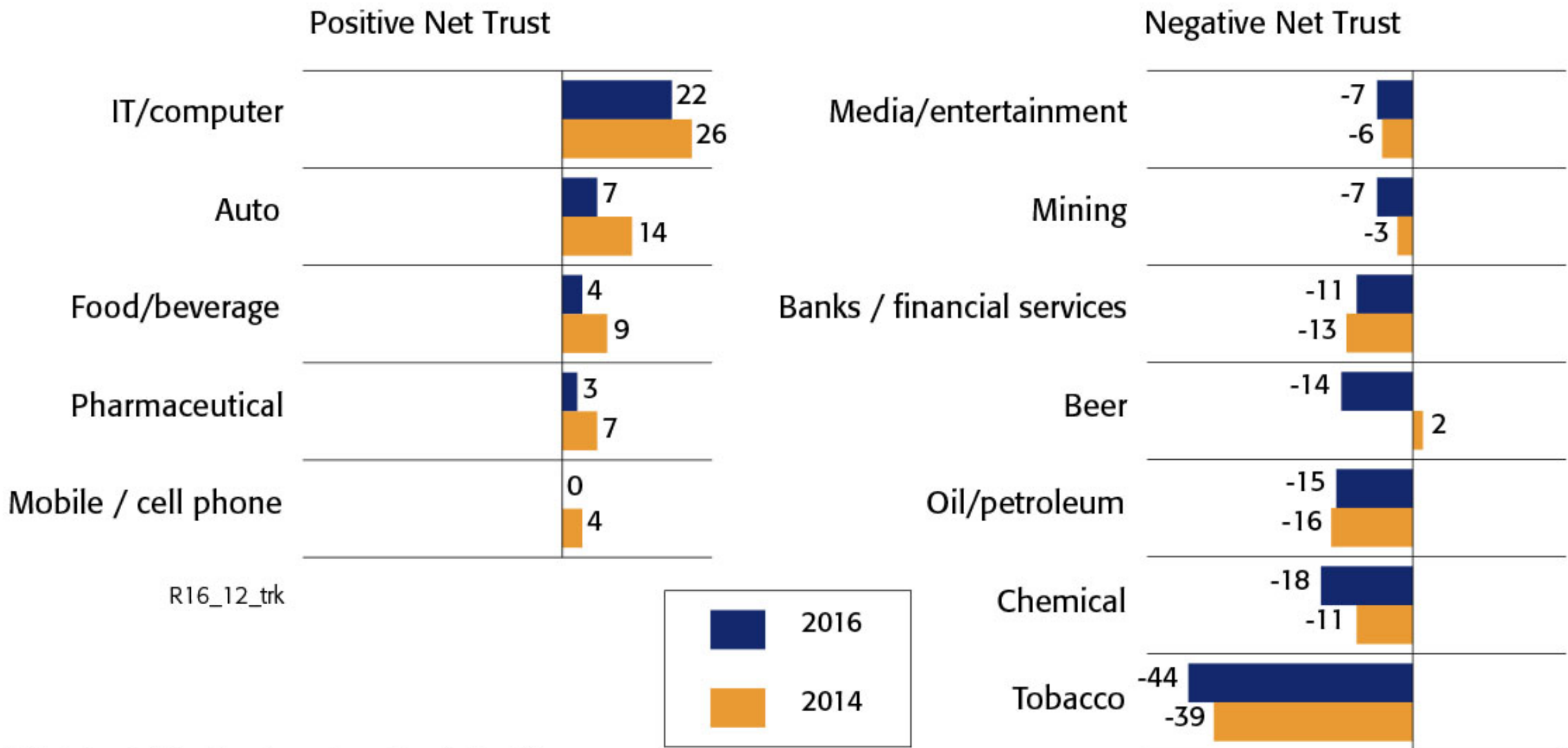
\*"A lot of trust" and "Some trust" minus "Not much trust" and "No trust at all"

\*\*Includes Australia, Canada, Chile, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA

# Varying & Declining Trust Levels Across Most Sectors



Net Trust\* in Industry Sectors  
Average of 22 Countries,\*\* 2014–2016



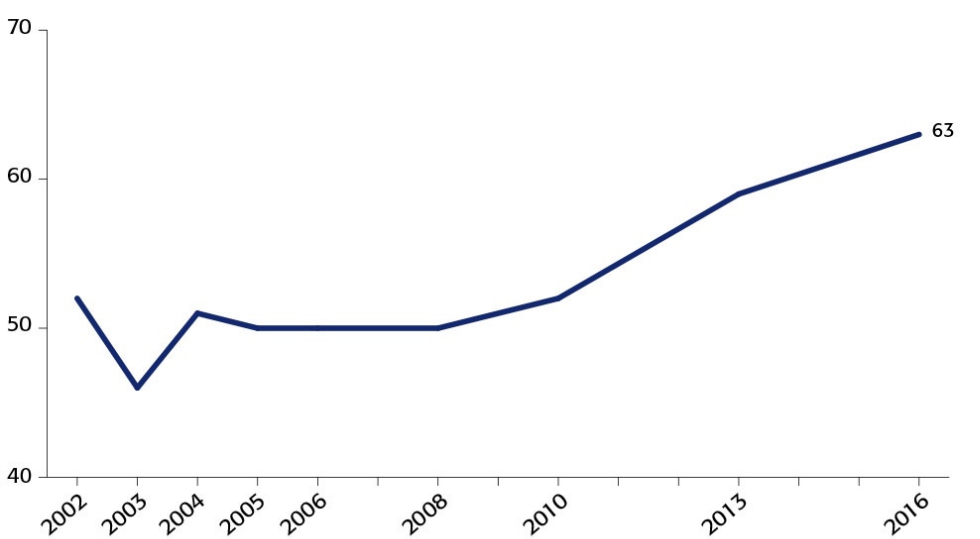
\*High trust (4+5) minus Low trust (1+2)



# Implications Of Low Trust

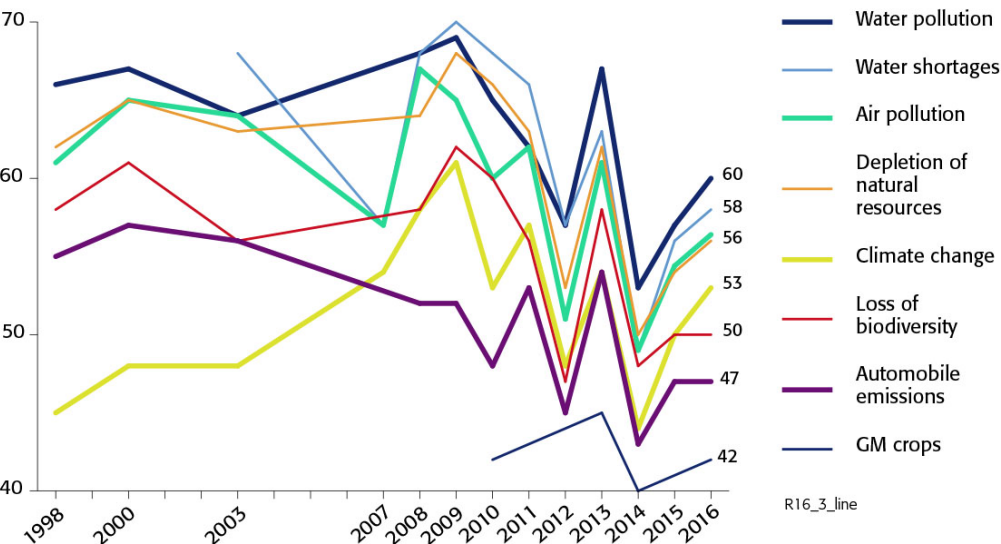
## Governments Should Require Large Companies to Work toward a Better Society

"Agree,"\* Average of 21 Countries,\*\* 2002–2016



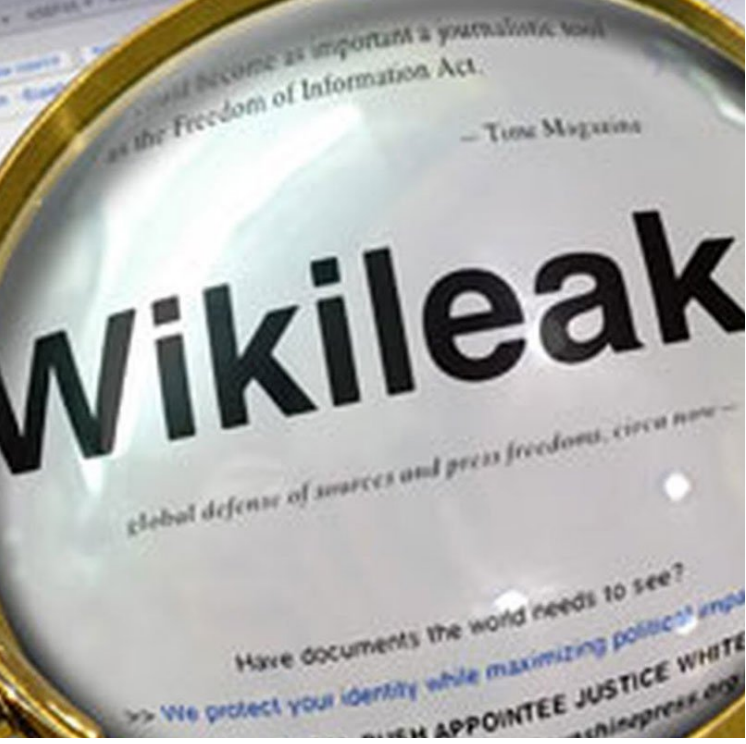
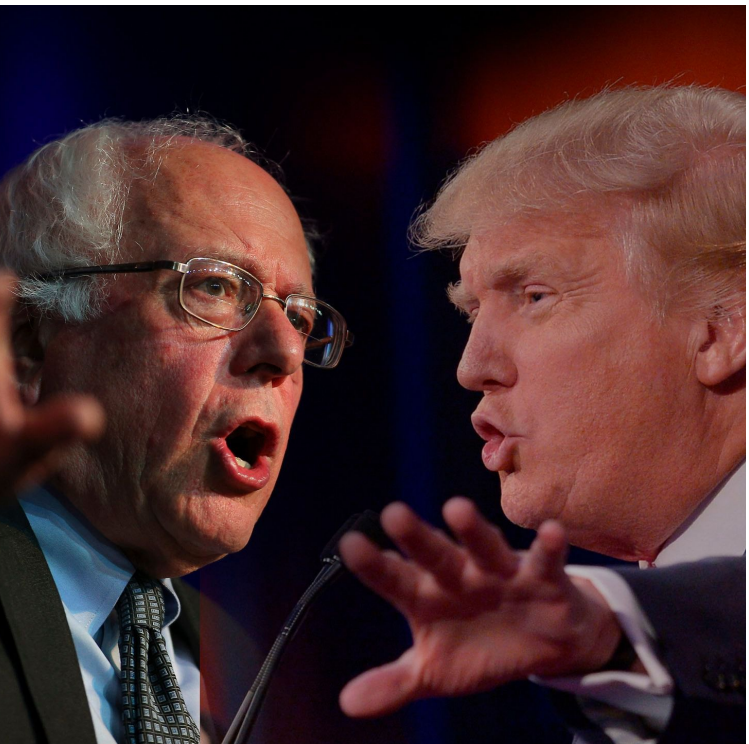
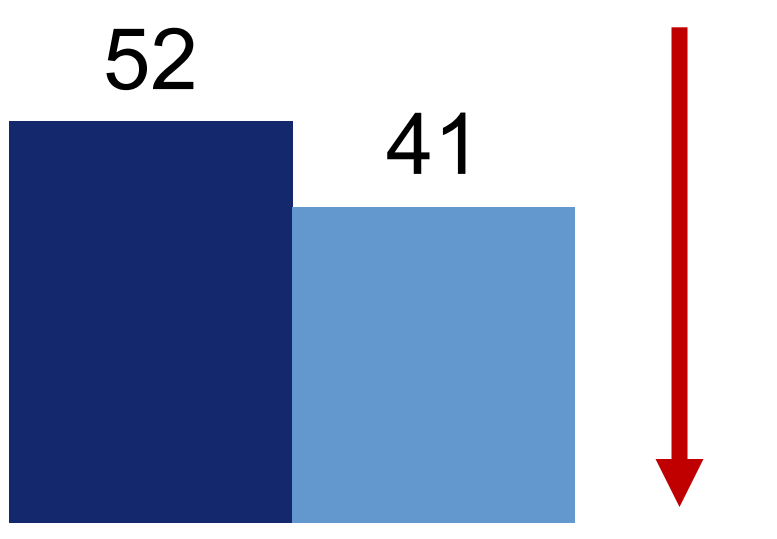
## Seriousness of Environmental Issues

"Very Serious," Average of 14 Countries,\* 1998–2016



## Large Companies Pay Their Fair Share of Taxes in Our Country

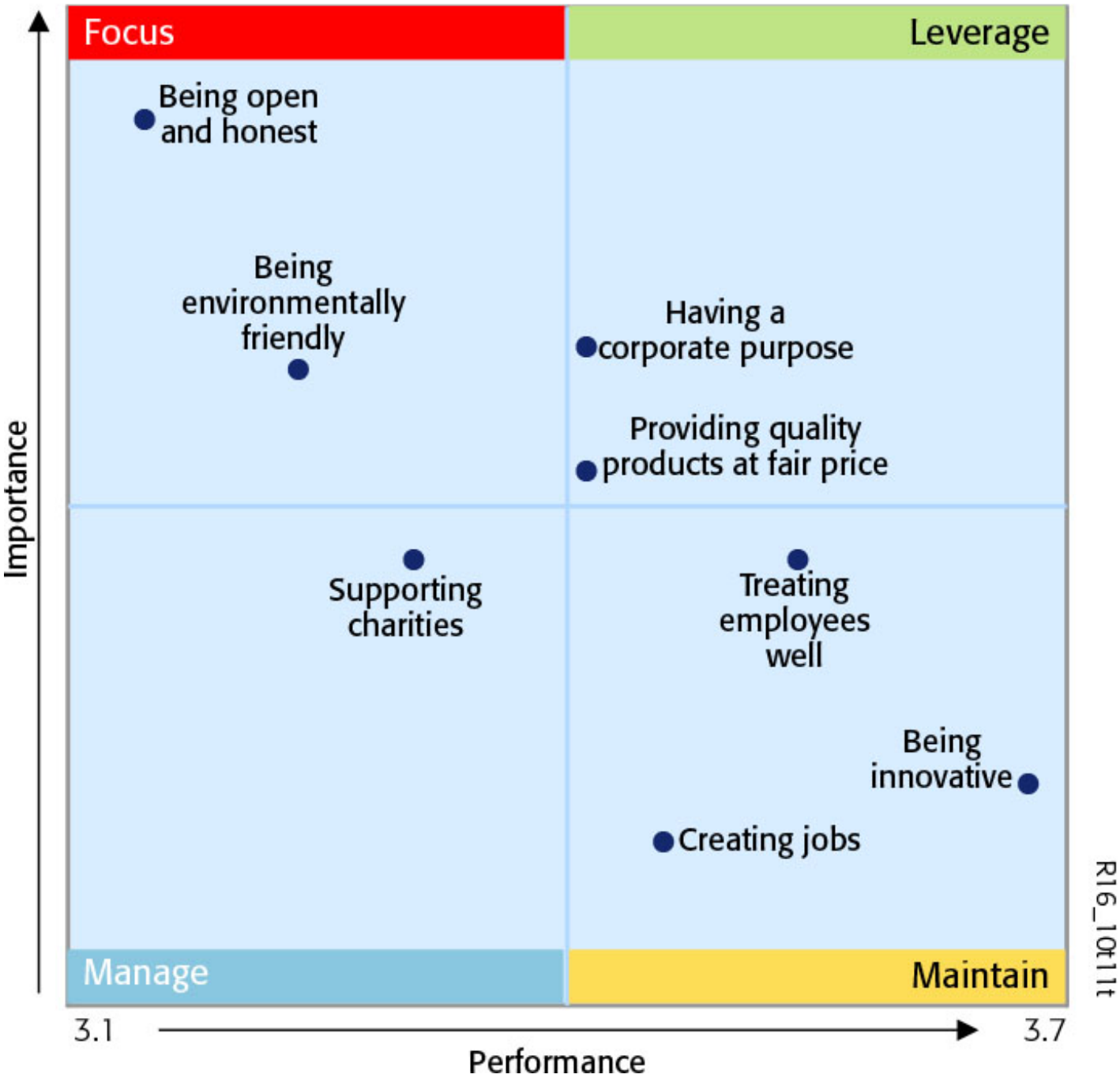
Agree (1+2), Average of 16 Countries,\* 2009–2015



# Transparency and Purpose Drive Trust

## Drivers of Trust

Performance vs Importance, All Companies, 2016





# TIME FOR *RECOGNIZED* LEADERSHIP

# Recognized Sustainability Leaders 1997 - 2016



1997

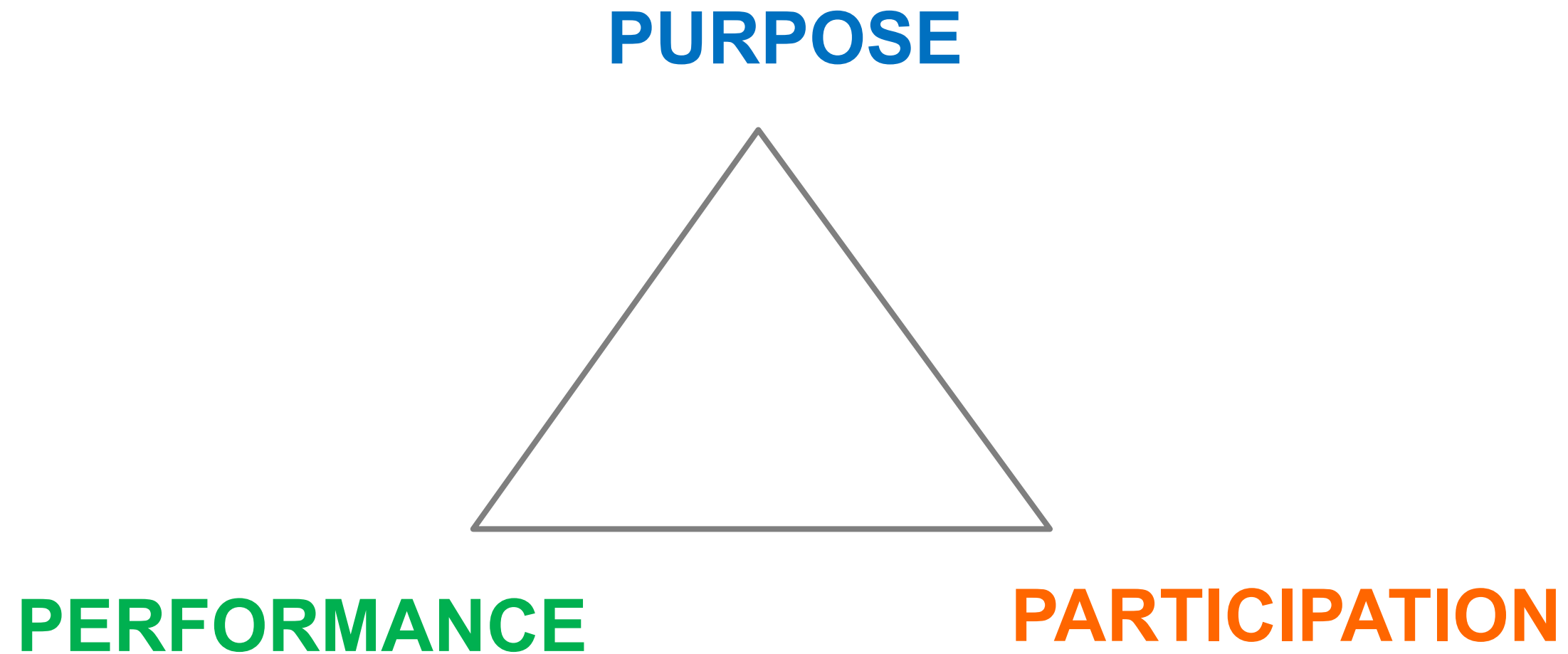
2004

2010

2016



# Three P's of 'Recognized Leadership'



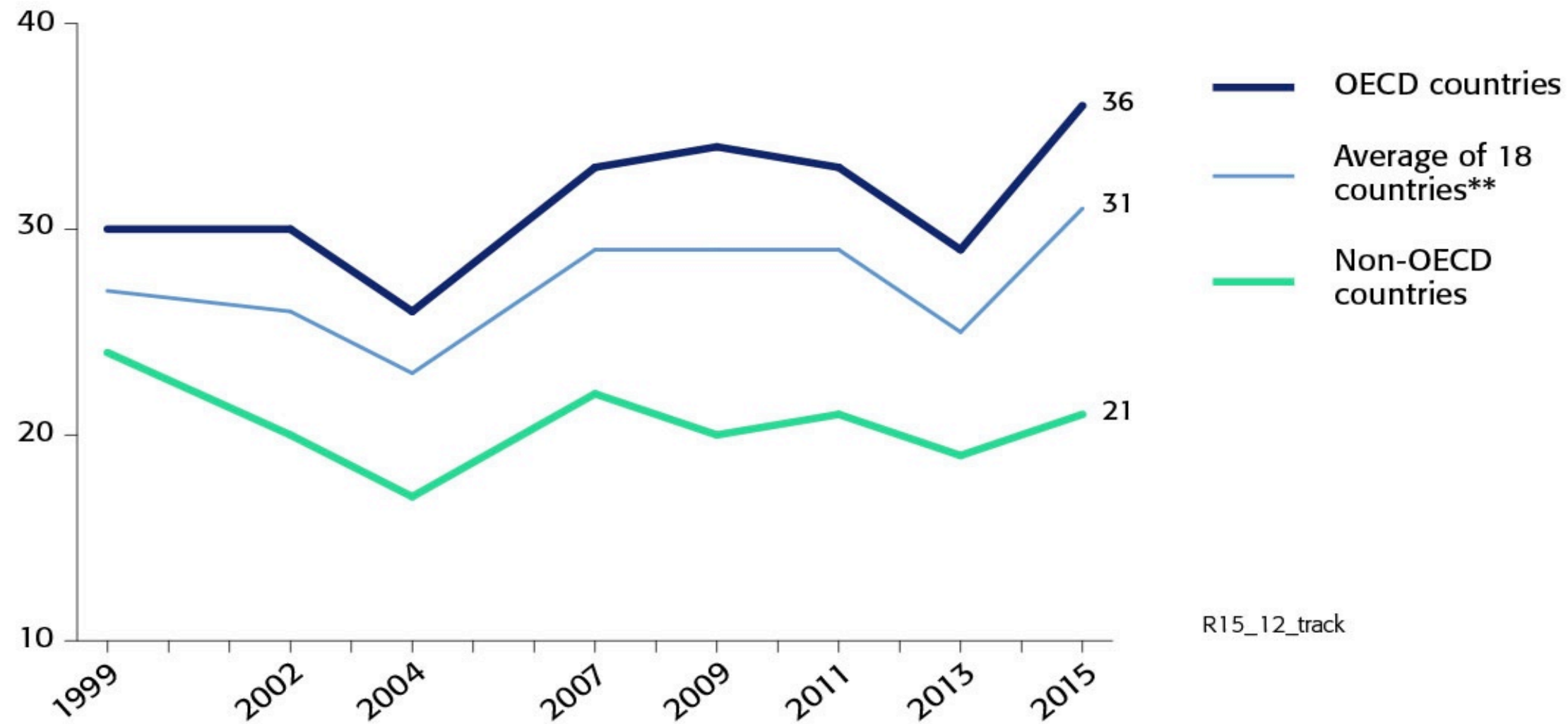
# CONSUMER ENGAGEMENT REMAINS A CHALLENGE



# Globally, 'Ethical Consumerism' at Highest Level Since Tracking Began in 1999

Have Rewarded Companies Seen as Socially Responsible

OECD vs Non-OECD Countries,\* 1999–2015



A close-up portrait of a young woman with long, wavy brown hair and dark-rimmed glasses. She is looking directly at the camera with a neutral expression. The background is a plain, light gray. In the top right corner, there is a yellow rectangular box containing the text 'MEET THE ASPIRATIONALS' in bold, dark blue capital letters. A thin yellow diagonal line runs from the bottom right corner towards the center of the image.

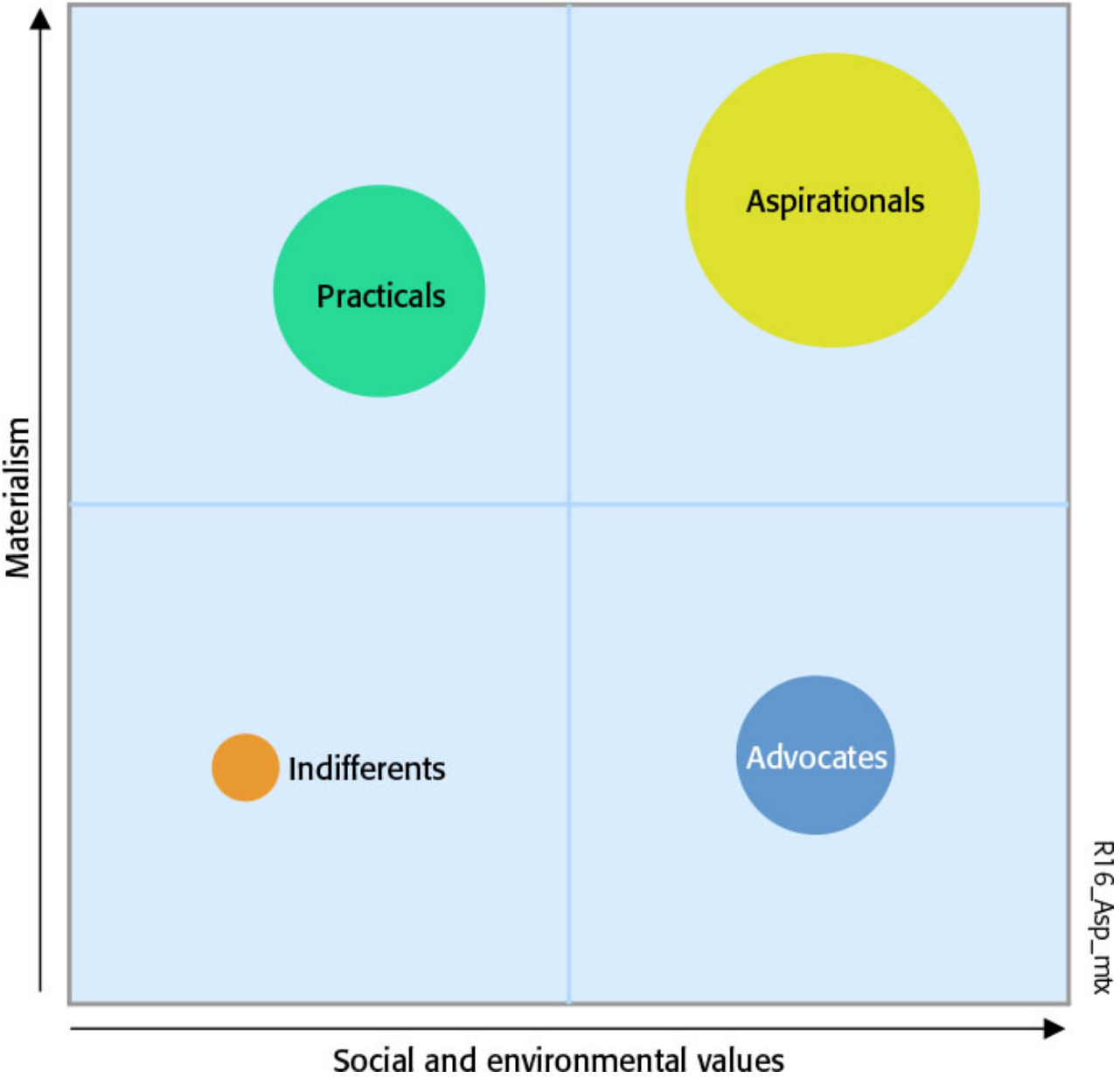
# **MEET THE ASPIRATIONALS**



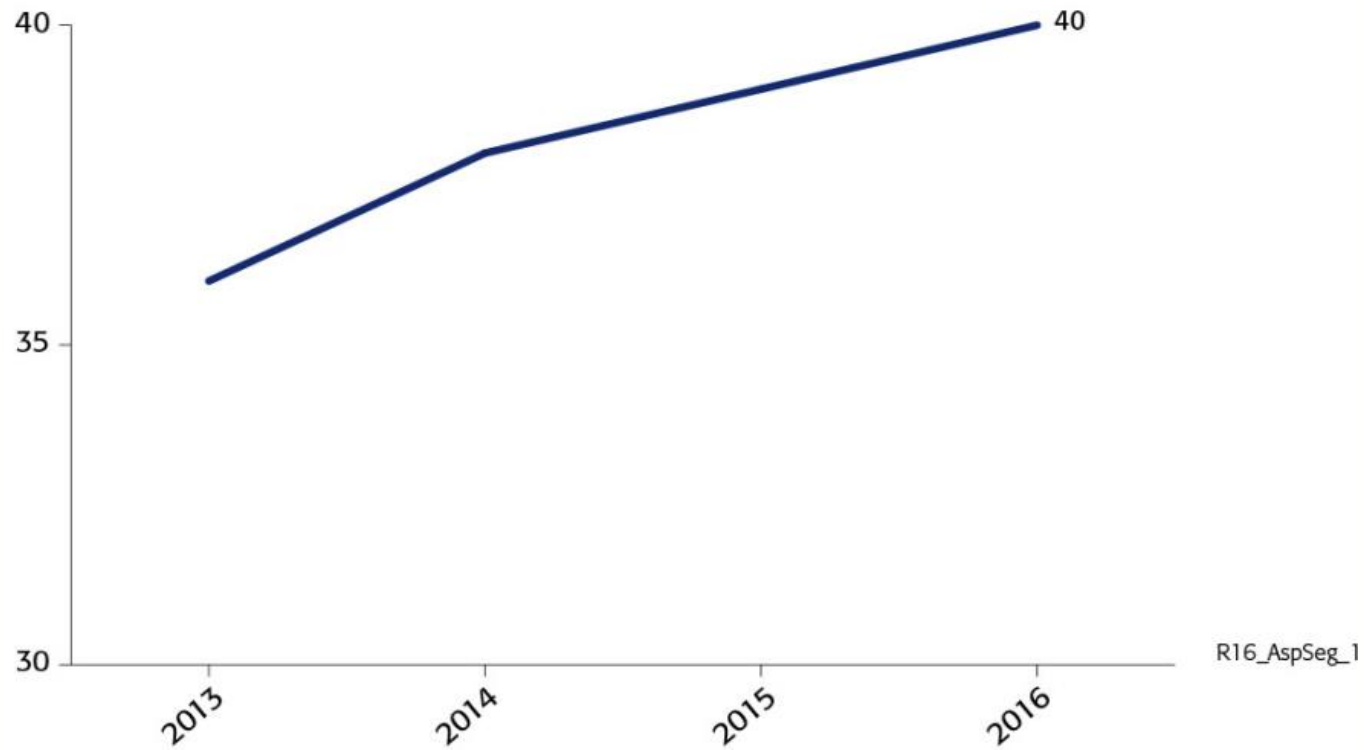
# An Engaged Consumer Segment



Consumer Segmentation  
Average of 21 Countries, 2016



Aspirationals Segment Size  
Average of 20 Countries Asked Each Year,\* 2013–2016

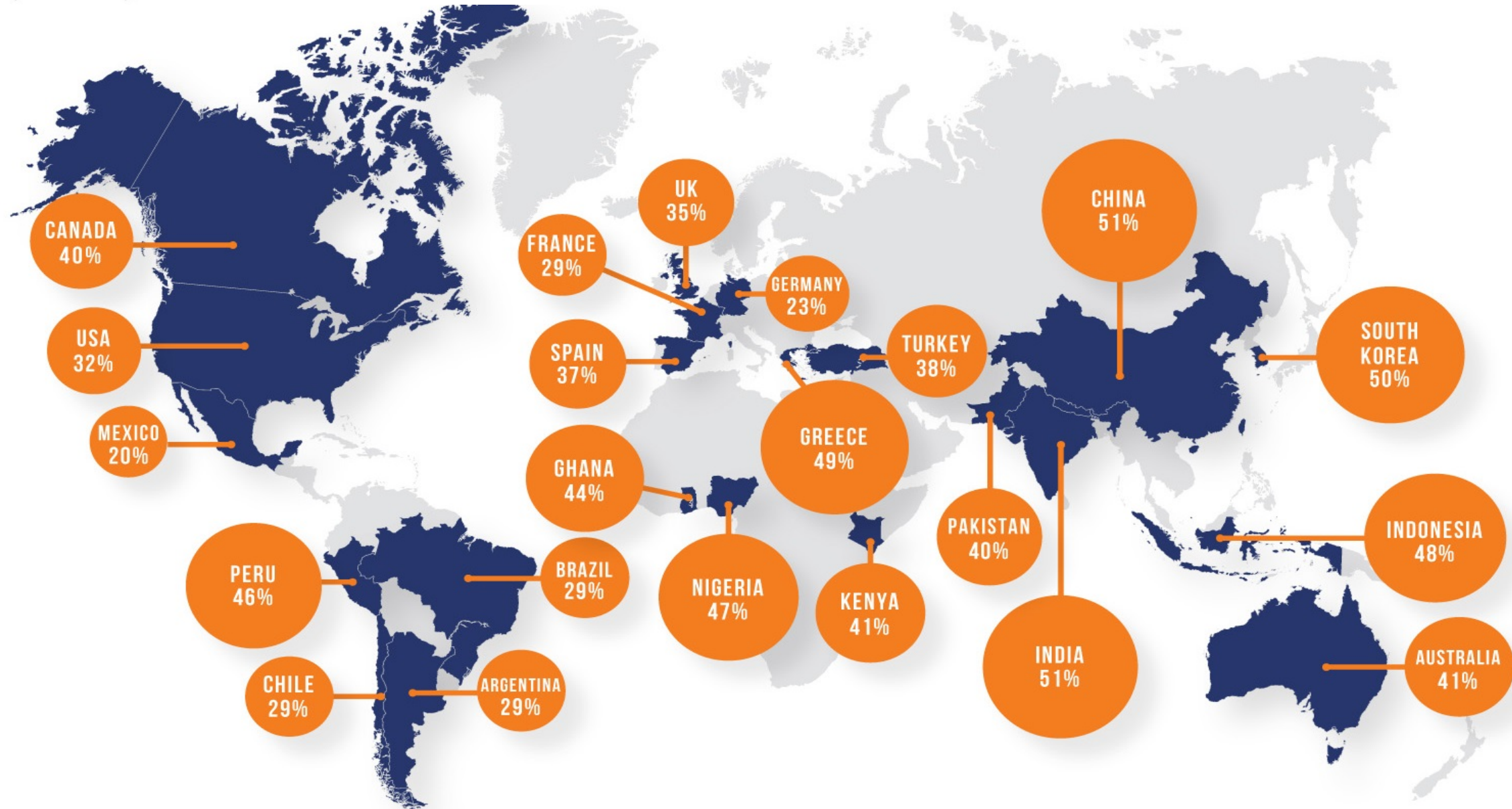


\*Includes Argentina, Australia, Brazil, Canada, Chile, China, France, Germany, Ghana, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Spain, Turkey, UK, and USA  
Not all countries were asked in all years.



# Aspirationals are everywhere

Percent of Population Who Are Aspirationals  
By Country, 2015



R15\_Asp\_map-data







A tropical beach scene with a clear blue sky, turquoise water, and a palm tree on the right. A semi-transparent blue rectangle is overlaid on the image, serving as a background for the text.

**NEED TO SELL THE BEACH**



**THANK YOU!**