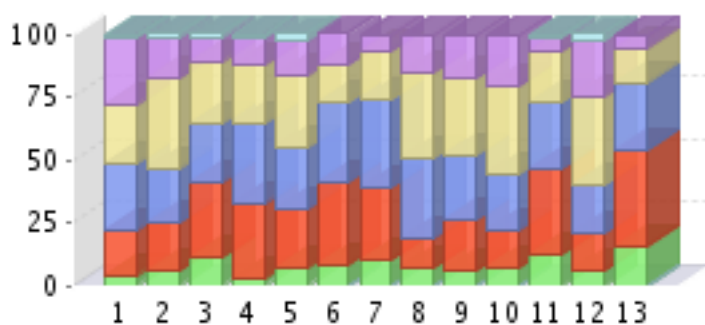


Multi-sponsor global risk briefing--Managing catastrophe risk

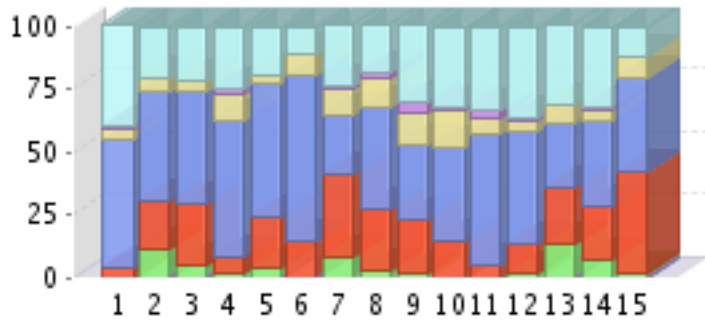
1. How significant a threat do the following risks pose to your company's global business operation today?
Rate on a scale of 1 to 5, where 1=Very high risk and 5=Very low risk.



	1	2	3	4	5	Don't know/Not applicable	Mean
1 Financing risk (difficulty raising finance)	4.17% (3)	18.06% (13)	26.39% (19)	23.61% (17)	26.39% (19)	1.39% (1)	3.54
2 Credit risk (risk of bad debt)	5.48% (4)	19.18% (14)	21.92% (16)	35.62% (26)	16.44% (12)	1.37% (1)	3.42
3 Market risk (risk that the market value of assets will fall)	10.96% (8)	30.14% (22)	23.29% (17)	24.66% (18)	9.59% (7)	1.37% (1)	2.96
4 Foreign exchange risk (risk that exchange rates may worsen)	2.74% (2)	30.14% (22)	31.51% (23)	23.29% (17)	10.96% (8)	1.37% (1)	3.14
5 Country risk (problems of operating in a particular location)	6.85% (5)	23.29% (17)	24.66% (18)	28.77% (21)	13.7% (10)	2.74% (2)	3.27
6 Regulatory risk (problems caused by new or existing regulations)	8.22% (6)	32.88% (24)	31.51% (23)	15.07% (11)	12.33% (9)	0% (0)	2.9
7 IT risk (eg, loss of data, outage of data centre)	9.72% (7)	29.17% (21)	34.72% (25)	19.44% (14)	6.94% (5)	0% (0)	2.85
8 Political risk (danger of a change of government)	6.85% (5)	12.33% (9)	31.51% (23)	34.25% (25)	15.07% (11)	0% (0)	3.38
9 Crime and physical security	5.48% (4)	20.55% (15)	26.03% (19)	30.14% (22)	17.81% (13)	0% (0)	3.34
10 Terrorism	6.94% (5)	15.28% (11)	22.22% (16)	34.72% (25)	20.83% (15)	0% (0)	3.47
11 Reputational risk (eg, events that undermine public trust in your products or brand)	12.33% (9)	34.25% (25)	26.03% (19)	20.55% (15)	5.48% (4)	1.37% (1)	2.77
12 Natural hazard risk (eg, hurricanes, earthquakes)	5.48% (4)	15.07% (11)	19.18% (14)	35.62% (26)	21.92% (16)	2.74% (2)	3.62
13 Human capital risks (eg, skills shortages, succession issues, loss of key personnel)	15.07% (11)	38.36% (28)	27.4% (20)	13.7% (10)	5.48% (4)	0% (0)	2.56

Response: 73

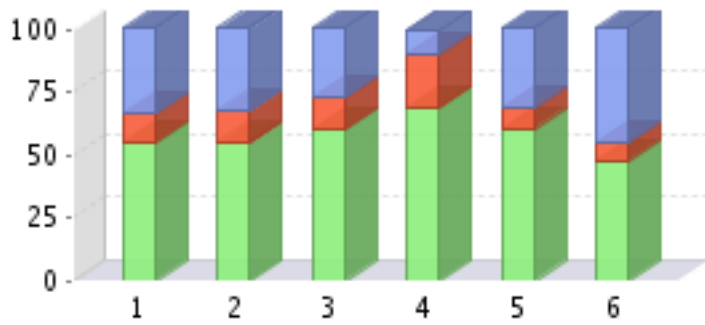
2. How has your organisation's assessment of risk in each of the following countries and regions changed over the last three months?



	Significant increase in risk	Slight increase in risk	No change	Slight decrease in risk	Significant decrease in risk	Don't know/Not applicable	Mean
1 Canada	0% (0)	4.23% (3)	50.7% (36)	4.23% (3)	1.41% (1)	39.44% (28)	4.21
2 US	11.11% (8)	19.44% (14)	43.06% (31)	5.56% (4)	0% (0)	20.83% (15)	3.26
3 France	4.35% (3)	24.64% (17)	44.93% (31)	4.35% (3)	0% (0)	21.74% (15)	3.36
4 Germany	1.41% (1)	7.04% (5)	53.52% (38)	11.27% (8)	1.41% (1)	25.35% (18)	3.8
5 UK	4.29% (3)	20% (14)	52.86% (37)	2.86% (2)	0% (0)	20% (14)	3.34
6 Other Western Europe	0% (0)	13.89% (10)	66.67% (48)	8.33% (6)	0% (0)	11.11% (8)	3.28
7 Russia	8.45% (6)	32.39% (23)	23.94% (17)	9.86% (7)	1.41% (1)	23.94% (17)	3.35
8 Other Eastern Europe	2.82% (2)	23.94% (17)	40.85% (29)	11.27% (8)	2.82% (2)	18.31% (13)	3.42
9 China	1.43% (1)	21.43% (15)	30% (21)	12.86% (9)	4.29% (3)	30% (21)	3.87
10 India	0% (0)	14.71% (10)	36.76% (25)	14.71% (10)	1.47% (1)	32.35% (22)	4
11 Japan	0% (0)	4.41% (3)	52.94% (36)	5.88% (4)	2.94% (2)	33.82% (23)	4.09
12 Rest of Asia-Pacific	1.45% (1)	11.59% (8)	44.93% (31)	4.35% (3)	1.45% (1)	36.23% (25)	4.01
13 Middle East	12.86% (9)	22.86% (16)	25.71% (18)	7.14% (5)	0% (0)	31.43% (22)	3.53
14 Latin America	7.35% (5)	20.59% (14)	33.82% (23)	4.41% (3)	1.47% (1)	32.35% (22)	3.69
15 Overall global risk	1.39% (1)	40.28% (29)	37.5% (27)	8.33% (6)	0% (0)	12.5% (9)	3.03

Response: 73

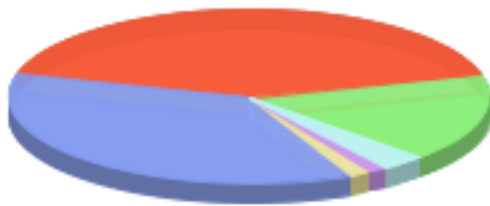
3. In each of the following regions, are the majority of risks to your business considered to be general (eg, likely to affect many other companies operating in the same location or industry) or specific (eg, relating to your company's internal systems, processes or people)?



	General	Specific	Not applicable/Don't know	Mean
1 Africa/Middle East	54.93% (39)	11.27% (8)	33.8% (24)	1.79
2 Asia Pacific	54.29% (38)	12.86% (9)	32.86% (23)	1.79
3 Eastern Europe	60% (42)	12.86% (9)	27.14% (19)	1.67
4 Western Europe	68.49% (50)	21.92% (16)	9.59% (7)	1.41
5 North America	60.56% (43)	8.45% (6)	30.99% (22)	1.7
6 Latin America	47.89% (34)	7.04% (5)	45.07% (32)	1.97

Response: 73

4. In the past three years, has the amount of time and resources devoted to catastrophe risk management in your organisation increased or decreased?

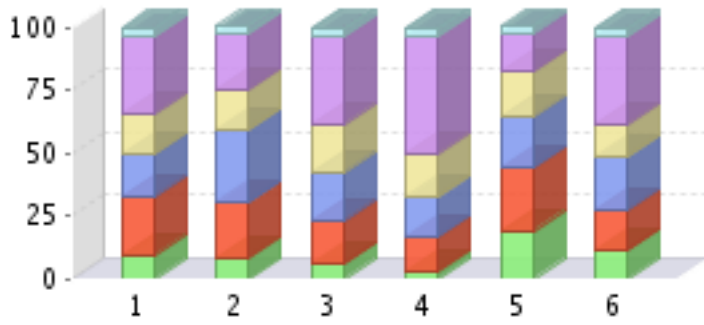


1 - Increased substantially	16.67% (12)	2 - Increased slightly	41.67% (30)
3 - Stayed the same	36.11% (26)	4 - Decreased slightly	1.39% (1)
5 - Decreased substantially	1.39% (1)	6 - Don't know	2.78% (2)

Mean: 2.38

Response: 72

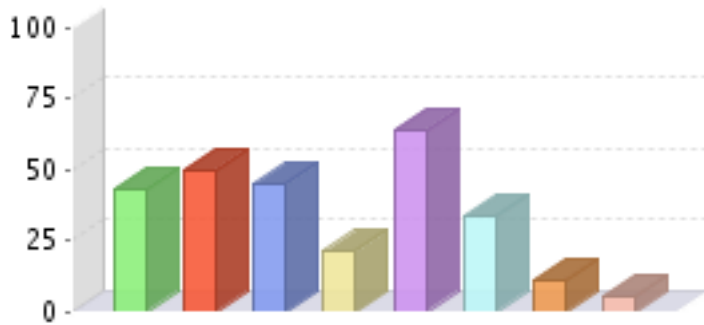
5. How significant does your organisation consider the following threats to be to your business?



	Very significant 1	2	3	4	Not significant 5	Don't know	Mean
1 Avian flu	9.59% (7)	23.29% (17)	16.44% (12)	16.44% (12)	30.14% (22)	4.11% (3)	3.47
2 Terrorism	8.22% (6)	21.92% (16)	28.77% (21)	16.44% (12)	21.92% (16)	2.74% (2)	3.3
3 Extreme weather event	5.48% (4)	17.81% (13)	19.18% (14)	19.18% (14)	34.25% (25)	4.11% (3)	3.71
4 Seismic activity	2.78% (2)	13.89% (10)	15.28% (11)	18.06% (13)	45.83% (33)	4.17% (3)	4.03
5 Power outage	19.18% (14)	24.66% (18)	20.55% (15)	17.81% (13)	15.07% (11)	2.74% (2)	2.93
6 War/major social unrest	10.96% (8)	16.44% (12)	20.55% (15)	13.7% (10)	34.25% (25)	4.11% (3)	3.56

Response: 73

6. Which of the following threats has your organisation considered as part of its risk management processes?



1 - Avian flu	43.06% (31)	2 - Terrorism	50% (36)
3 - Extreme weather event	44.44% (32)	4 - Seismic activity	20.83% (15)
5 - Power outage	63.89% (46)	6 - War/major social unrest	33.33% (24)
7 - None of the above	11.11% (8)	8 - Other, please specify	5.56% (4)

Response: 72

7. Which of the following statements best describes your company's current position on catastrophe risk management?

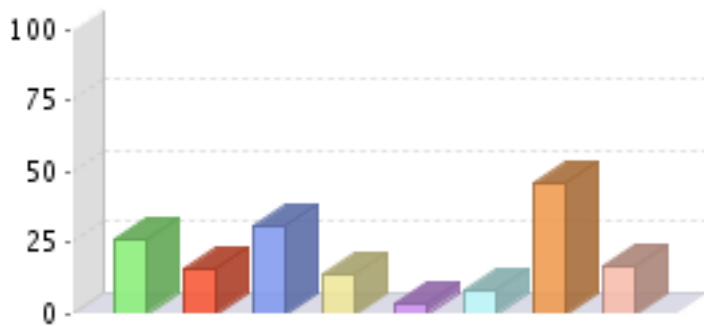


■ 1 - Preparing for high-impact/low probability events is seen as important and is something to which we devote significant time and resources.	26.03% (19)	■ 2 - We see preparation for high-impact/low probability events as important, but we lack time or resources to give it our full attention.	47.95% (35)
■ 3 - We do not consider preparation for high-impact/low probability events as a priority, and devote little or no attention to it.	26.03% (19)		

Mean: 2

Response: 73

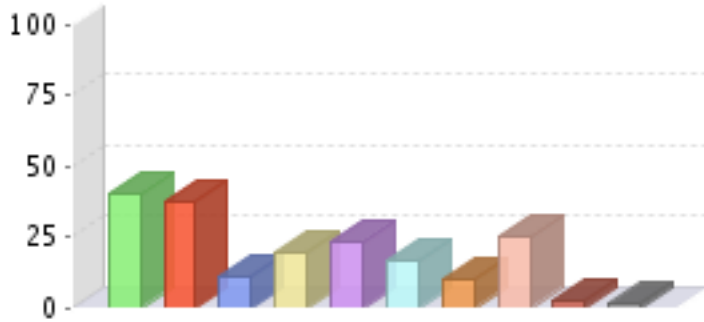
8. Have any of the following stakeholders exerted pressure on your organisation to improve its catastrophe risk management?



■ 1 - Shareholders and other investors	25.76% (17)	■ 2 - Ratings agencies	15.15% (10)
■ 3 - Insurance companies	30.3% (20)	■ 4 - Customers	13.64% (9)
■ 5 - Suppliers	3.03% (2)	■ 6 - Employees	7.58% (5)
■ 7 - Governments or regulatory bodies	45.45% (30)	■ 8 - Don't know	16.67% (11)

Response: 66

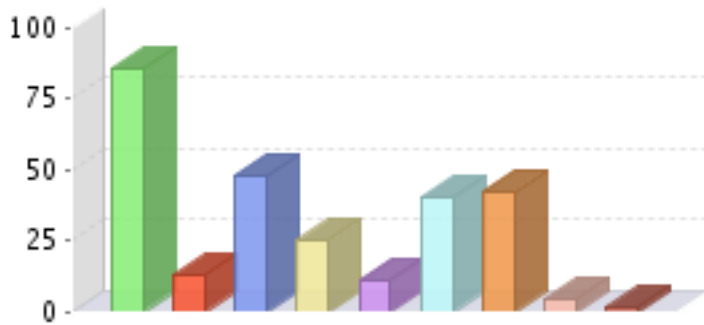
9. In the past three years, which of the following external bodies has your company consulted as part of its catastrophe risk planning?



1 - Risk consultants	40.28% (29)	2 - Insurance companies	37.5% (27)
3 - Emergency services	11.11% (8)	4 - Security consultants	19.44% (14)
5 - Lawyers/litigation experts	23.61% (17)	6 - Government agencies	16.67% (12)
7 - Suppliers	9.72% (7)	8 - None of the above	25% (18)
9 - Don't know	2.78% (2)	10 - Other, please specify	1.39% (1)

Response: 72

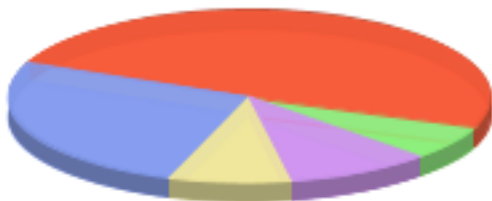
10. What do you see as being the most important priorities in the event of a catastrophe?



1 - Safety of employees	84.93% (62)	2 - Security of premises	12.33% (9)
3 - Continuity of IT systems	47.95% (35)	4 - Impact on bottom line	24.66% (18)
5 - Resilience of supply chain	10.96% (8)	6 - Maintaining contractual obligations	39.73% (29)
7 - Reputation of company	42.47% (31)	8 - Local communities	4.11% (3)
9 - Other, please specify	1.37% (1)		

Response: 73

11. What degree of confidence do you have that your company's insurance policies will provide adequate cover in the event of a major event or catastrophe?

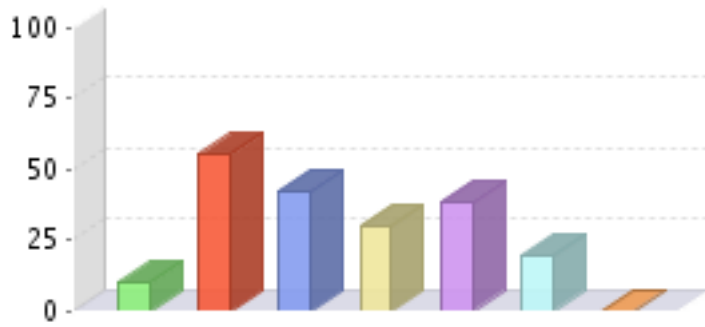


1 - Very high	6.85% (5)	2 - Fairly high	49.32% (36)
3 - Fairly low	26.03% (19)	4 - Very low	8.22% (6)
5 - Don't know	9.59% (7)		

Mean: 2.64

Response: 73

12. Which of the following tools does your organisation currently use to manage catastrophe risk?



1 - Catastrophe modelling	9.59% (7)	2 - Scenario planning	54.79% (40)
3 - Specialist training of employees (eg, crisis management)	42.47% (31)	4 - Simulations	30.14% (22)
5 - Active testing of disaster recovery plans	38.36% (28)	6 - None of the above	19.18% (14)
7 - Don't know	0% (0)		

Response: 73

13. How often does your company revise its catastrophe risk plans?

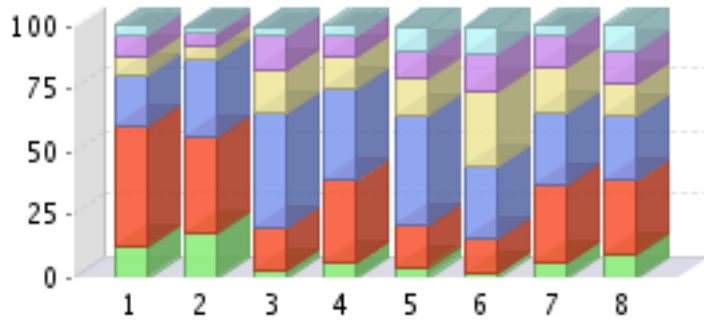


1 - More than once a year	9.59% (7)	2 - Once every year	32.88% (24)
3 - Once every 2-3 years	27.4% (20)	4 - We see it as a one-off exercise	5.48% (4)
5 - We do not have any catastrophe plans	20.55% (15)	6 - Don't know	2.74% (2)
7 - Other, please specify	1.37% (1)		

Mean: 3.08

Response: 73

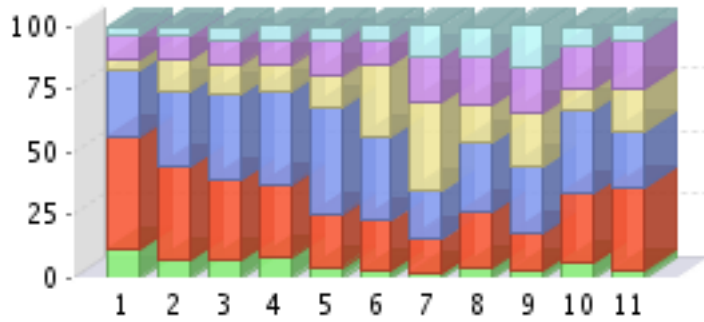
14. How would you rate your organisation's level of preparedness for catastrophe in the following departments?



	Very high 1	2	3	4	Very low 5	Don't know 6	Mean
1 Management team	12.33% (9)	47.95% (35)	20.55% (15)	6.85% (5)	8.22% (6)	4.11% (3)	2.63
2 IT	17.81% (13)	38.36% (28)	30.14% (22)	5.48% (4)	5.48% (4)	2.74% (2)	2.51
3 Human resources	2.78% (2)	16.67% (12)	45.83% (33)	16.67% (12)	13.89% (10)	4.17% (3)	3.35
4 Operations (including distribution and supply chain)	5.48% (4)	32.88% (24)	36.99% (27)	12.33% (9)	8.22% (6)	4.11% (3)	2.97
5 Customer service	4.11% (3)	16.44% (12)	43.84% (32)	15.07% (11)	10.96% (8)	9.59% (7)	3.41
6 Sales and marketing	1.37% (1)	13.7% (10)	28.77% (21)	30.14% (22)	15.07% (11)	10.96% (8)	3.77
7 Finance	5.48% (4)	31.51% (23)	28.77% (21)	17.81% (13)	12.33% (9)	4.11% (3)	3.12
8 Corporate communications/PR	9.59% (7)	28.77% (21)	26.03% (19)	12.33% (9)	13.7% (10)	9.59% (7)	3.21

Response: 73

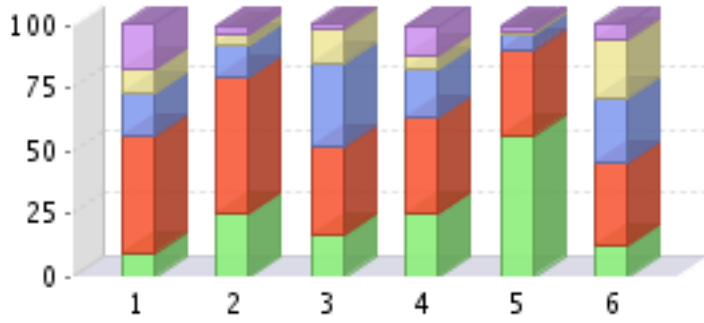
15. How successfully do you feel your organisation conducts the following aspects of catastrophe risk management?



	Very successfully 1	2	3	4	Not successfully 5	Don't know	Mean
1 Assessment of threats	10.96% (8)	45.21% (33)	26.03% (19)	4.11% (3)	9.59% (7)	4.11% (3)	2.68
2 Impact analysis	6.85% (5)	36.99% (27)	30.14% (22)	12.33% (9)	9.59% (7)	4.11% (3)	2.93
3 Determining roles and accountability	6.85% (5)	31.51% (23)	34.25% (25)	12.33% (9)	9.59% (7)	5.48% (4)	3.03
4 Setting of clear objectives and priorities	8.22% (6)	28.77% (21)	36.99% (27)	10.96% (8)	9.59% (7)	5.48% (4)	3.01
5 Collaboration between departments	4.23% (3)	21.13% (15)	42.25% (30)	12.68% (9)	14.08% (10)	5.63% (4)	3.28
6 Communication of plans to employees	2.82% (2)	19.72% (14)	33.8% (24)	28.17% (20)	9.86% (7)	5.63% (4)	3.39
7 Communication of plans to customers	1.37% (1)	13.7% (10)	19.18% (14)	35.62% (26)	17.81% (13)	12.33% (9)	3.92
8 Engagement with external agencies (eg, emergency services)	4.11% (3)	21.92% (16)	27.4% (20)	15.07% (11)	19.18% (14)	12.33% (9)	3.6
9 Collaboration with suppliers/value chain	2.74% (2)	15.07% (11)	26.03% (19)	21.92% (16)	17.81% (13)	16.44% (12)	3.86
10 Maintaining and updating plans	5.56% (4)	27.78% (20)	33.33% (24)	8.33% (6)	16.67% (12)	8.33% (6)	3.28
11 Actively testing plans and scenarios	2.82% (2)	32.39% (23)	22.54% (16)	16.9% (12)	19.72% (14)	5.63% (4)	3.35

Response: 73

16. Please indicate whether you agree or disagree with the following statements.



	Agree strongly	Agree slightly	Disagree slightly	Disagree strongly	Don't know	Mean
1 Our insurers would be likely to reduce premiums if we demonstrate good catastrophe risk management	9.59% (7)	46.58% (34)	16.44% (12)	9.59% (7)	17.81% (13)	2.79
2 Good catastrophe risk management can be a source of competitive advantage	25% (18)	54.17% (39)	12.5% (9)	4.17% (3)	4.17% (3)	2.08
3 By devoting time and resources to preparing for the big one, we risk losing sight of more immediate concerns	16.44% (12)	35.62% (26)	32.88% (24)	13.7% (10)	1.37% (1)	2.48
4 Preparing for avian flu requires a very different set of business continuity capabilities than we have developed for other threats	24.66% (18)	38.36% (28)	19.18% (14)	5.48% (4)	12.33% (9)	2.42
5 Catastrophe risk management is something that requires discussion at board level	56.16% (41)	34.25% (25)	5.48% (4)	1.37% (1)	2.74% (2)	1.6
6 We regularly test our scenario plans and disaster recovery plans	12.33% (9)	32.88% (24)	26.03% (19)	23.29% (17)	5.48% (4)	2.77

Response: 73

In which region are you personally located?

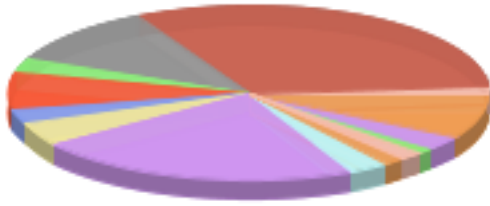


1 - Asia-Pacific	0% (0)	2 - Latin America	0% (0)
3 - North America	0% (0)	4 - Eastern Europe	6.85% (5)
5 - Western Europe	93.15% (68)	6 - Middle East & Africa	0% (0)

Mean: 4.93

Response: 73

What is your primary industry?



1 - Agriculture and agribusiness	1.37% (1)	2 - Automotive	0% (0)
3 - Chemicals	0% (0)	4 - Construction and real estate	0% (0)
5 - Consumer goods	2.74% (2)	6 - Education	0% (0)
7 - Energy and natural resources	8.22% (6)	8 - Entertainment, media and publishing	1.37% (1)
9 - Financial services	31.51% (23)	10 - Government/public sector	10.96% (8)
11 - Healthcare, pharmaceuticals and biotechnology	2.74% (2)	12 - IT and technology	6.85% (5)
13 - Logistics and distribution	2.74% (2)	14 - Manufacturing	4.11% (3)
15 - Professional services	21.92% (16)	16 - Retailing	2.74% (2)
17 - Telecoms	1.37% (1)	18 - Transportation, travel and tourism	1.37% (1)

Mean: 11.03

Response: 73

What are your company's global annual revenues in US dollars?

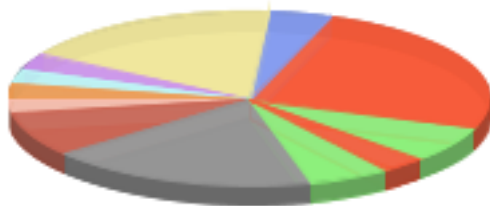


1 - \$500m or less	52.78% (38)	2 - \$500m to \$1bn	11.11% (8)
3 - \$1bn to \$5bn	13.89% (10)	4 - \$5bn to \$10bn	4.17% (3)
5 - \$10bn or more	18.06% (13)		

Mean: 2.24

Response: 72

What is your title?

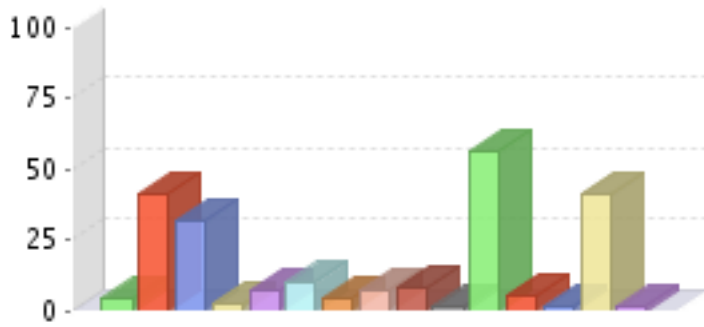


1 - Board member	6.94% (5)	2 - CEO/President/Managing director	25% (18)
3 - CRO	4.17% (3)	4 - CFO/Treasurer/Comptroller	18.06% (13)
5 - CIO/Technology director	2.78% (2)	6 - Other C-level executive	2.78% (2)
7 - SVP/VP/Director	2.78% (2)	8 - Head of Business Unit	2.78% (2)
9 - Head of Department	8.33% (6)	10 - Risk manager	18.06% (13)
11 - Other manager	5.56% (4)	12 - Other	2.78% (2)

Mean: 5.64

Response: 72

What are your main functional roles? Please choose no more than 3 functions.



1 - Customer service	4.11% (3)	2 - Finance	41.1% (30)
3 - General management	31.51% (23)	4 - Human resources	2.74% (2)
5 - Information and research	6.85% (5)	6 - IT	9.59% (7)
7 - Legal	4.11% (3)	8 - Marketing and sales	6.85% (5)
9 - Operations and production	8.22% (6)	10 - Procurement	1.37% (1)
11 - Risk	56.16% (41)	12 - R&D	5.48% (4)
13 - Supply-chain management	1.37% (1)	14 - Strategy and business development	41.1% (30)
15 - Other	1.37% (1)		

Response: 73

Do you have responsibility for, or influence over, strategic decisions on risk management in your company?

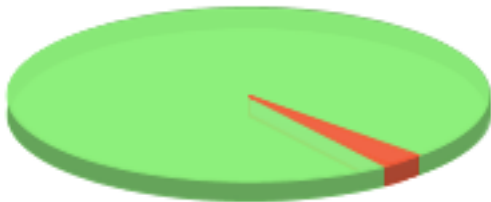


1 - Yes	100% (73)	2 - No	0% (0)
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Mean: 1

Response: 73

Do you wish to receive a free electronic copy of the survey results and analysis, when it is published?



1 - Yes	97.18% (69)	2 - No	2.82% (2)
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Mean: 1.03

Response: 71

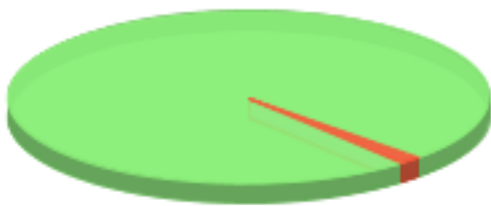
Do you wish to receive a gift book? (Click on each title for a brief overview.)



■ 1 - Yes, I would like to receive Guide to investment strategy from The Economist Books	54.17% (39)	■ 2 - Yes, I would like to receive Infectious Greed from Profile Books	26.39% (19)
■ 3 - Yes, I would like to receive Talk to the hand from Profile Books	19.44% (14)	■ 4 - No, I do not wish to receive a gift book	0% (0)

Mean: 1.65
Response: 72

Do you wish to be informed of future Economist Intelligence Unit surveys?



■ 1 - Yes	98.57% (69)	■ 2 - No	1.43% (1)
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Mean: 1.01
Response: 70



■ 1 - United Kingdom	35.21% (25)	■ 2 - Switzerland	11.27% (8)
■ 3 - Belgium	7.04% (5)	■ 4 - France	7.04% (5)
■ 5 - Netherlands	5.63% (4)	■ 6 - Portugal	4.23% (3)
■ 7 - Denmark	2.82% (2)	■ 8 - Germany	2.82% (2)
■ 9 - Greece	2.82% (2)	■ 10 - Other	21.13% (15)

Response: 71

Source



1 - SurveyPro	60.27% (44)	2 - GCD	8.22% (6)
3 - PRMIA	0% (0)	4 - RiskCenter	31.51% (23)

Mean: 2.03

Response: 73

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