

GROWTH OPPORTUNITIES

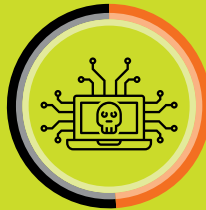
Executives can pull various levers to generate—and sustain—high performance.

OBSTACLES AND SOLUTIONS

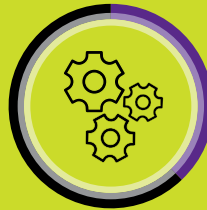
CEOs see common challenges on the horizon. Many want deep change to sustain success.

The #1 threat

to growth CEOs see is geopolitics—"a return to territorialism."

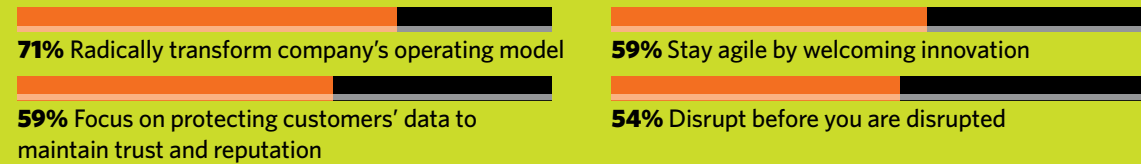


49% say becoming a victim of a cyberattack is inevitable.

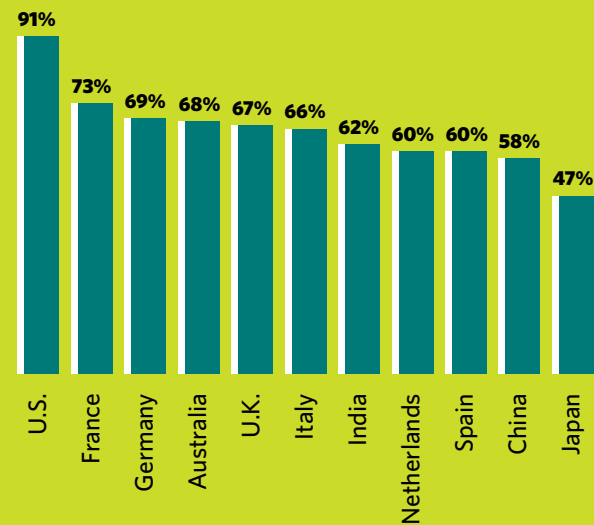


38% say they need to reposition the business to meet millennials' needs.

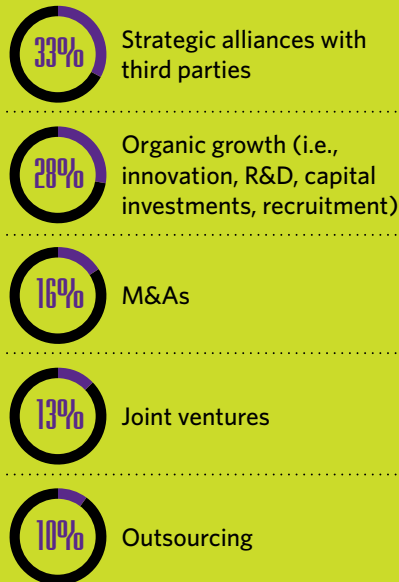
And CEOs have some big plans for sustaining success:



71% of CEOs overall are prepared to personally lead radical operating model transformation. But preparation levels vary by country:



Alliances are the top tactic for driving growth:



OFFICE UPGRADES

A business cannot thrive without engaged employees. Companies that invest in employee experience (EX) can see substantial benefits.

Three environments matter most to employees when it comes to EX:

- Cultural**
- Technological**
- Physical**

23%

of companies are progressing in all three areas.

6%

invest heavily in all of them.

Companies that invest heavily in EX are more likely to be recognized with good press compared to those that do not invest heavily:

28x

more often on *Fast Company's* list of Most Innovative Companies

2.1x

more often on *Forbes'* list of Most Innovative Companies

11.5x

more often on Glassdoor's Best Places to Work

And the benefits extend to balance sheets:

2.1x

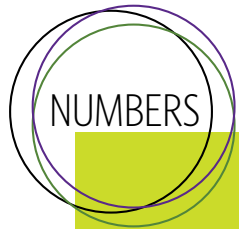
average revenue



4.2x

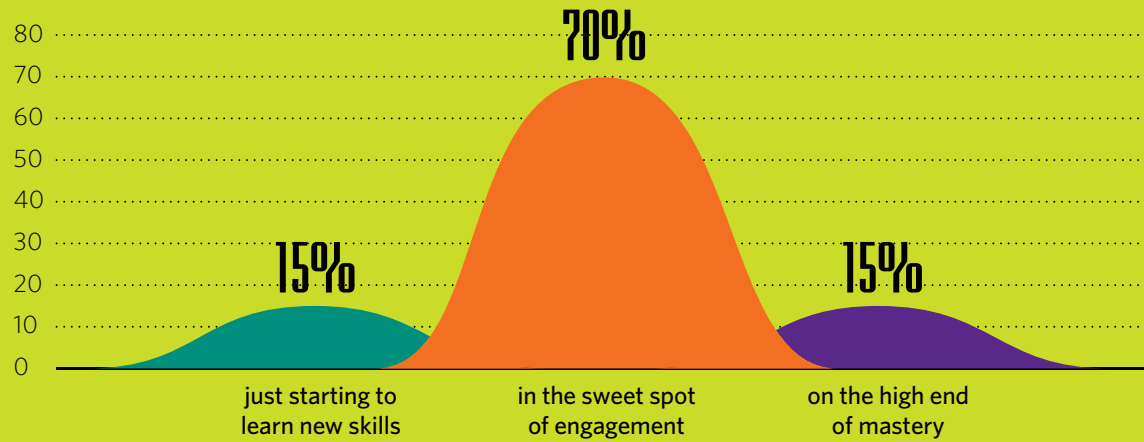
average profit





THE LEARNING CURVE

Opportunities to learn are opportunities for engagement. Managers can keep employees engaged by being mindful of where they are on skill spectrums. The optimal mix of people along any individual learning curve is:

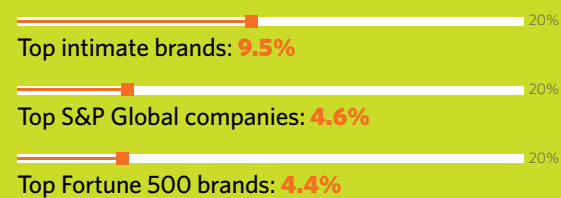


When an employee masters a new skill set, good managers sustain engagement by pushing him or her to jump to a new learning curve.

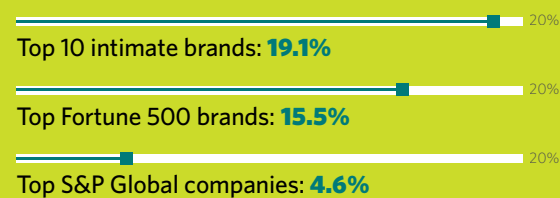
CUSTOMER CONNECTIONS

Branding matters. Companies that elicit strong emotional bonding from customers (sometimes called "intimate brands") see performance advantages.

Average revenue growth, 2007-2016:



Average profit growth, 2007-2016:



Top Intimate Brands

	United States	Mexico	United Arab Emirates
1.	Apple	Apple	Apple
2.	Amazon	Nike	Lexus
3.	BMW	Nissan	BMW
4.	Jeep	American Express	Mercedes
5.	Disney	Spotify	Toyota

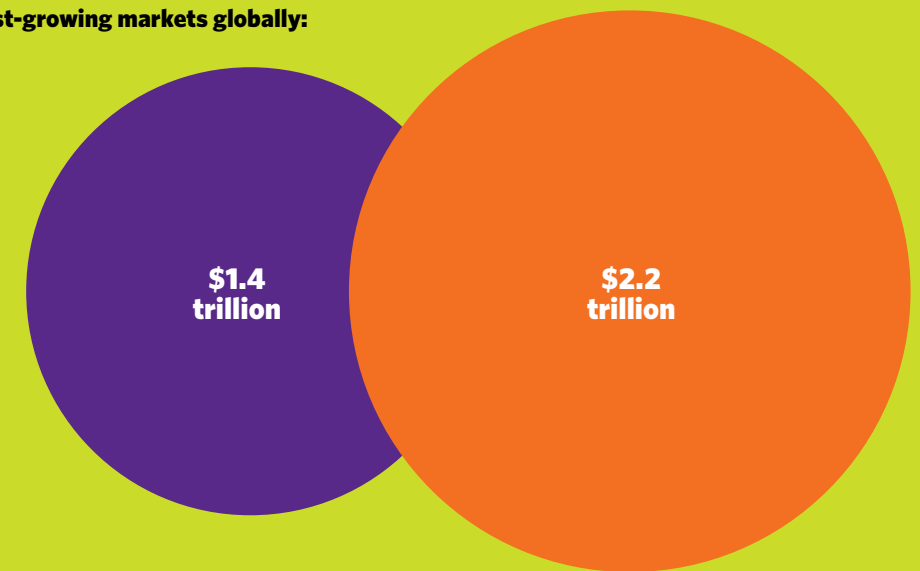
WINNING INDUSTRIES

Some sectors have real wind in their sails.

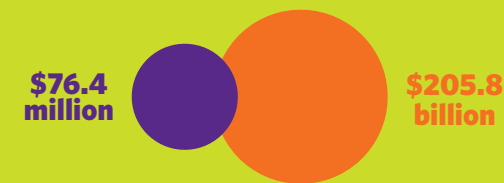
These are five of the fastest-growing markets globally:

● 2016 worth
● Estimated 2025 worth

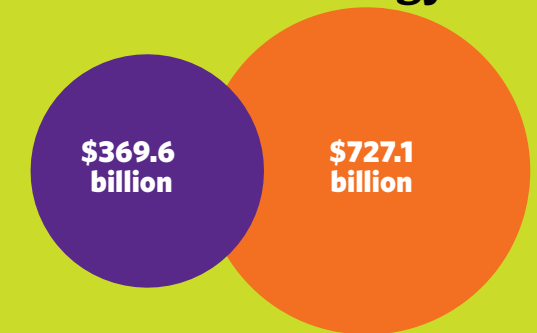
1. Renewable energy



2. Cybersecurity



3. Biotechnology



4. Virtual reality



5. Artificial intelligence



Sources: "Why the Millions We Spend on Employee Engagement Buy Us So Little," *Harvard Business Review*, 2017; "How to Lose Your Best Employees," *Harvard Business Review*, 2018; *Brand Intimacy Study 2018*, MBLM; *Growing Pains: 2018 Global CEO Outlook*, KPMG, 2018; "Top 5 of the Fastest-Growing Industries in the World," *World Finance*, 2018; *Renewable Energy Market Overview*, Allied Market Research, 2017; "Cyber Security Market to Reach US\$206 Bn by 2025," Persistence Market Research, 2017; *Biotechnology Market Analysis Industry Insights*, Grand View Research, 2017; *Virtual Reality Market Analysis Industry Insights*, Grand View Research, 2017; "Artificial Intelligence Market Worth \$169,411.8 Million by 2025," Allied Market Research, 2018