Rethinking Thought Leadership

Influencing decision-makers through evidence-based research

July 2015
A true evidence-based thought leader

Founded in 1981 as a commercial venture with Oxford University business college, Oxford Economics is a world leader in global quantitative analysis and evidence-based thought leadership. We combine the analytical skills of our economists with the editorial and marketing expertise of our publishing team to deliver unique and groundbreaking thought leadership.

By drawing on a full array of quantitative and qualitative research methods, from global surveys and interviews to impact analysis and market forecasts, we create must-have decision-support for executives and policy-makers.

To maximize the value to your audience, we deliver our research through a blend of media, including white papers, case studies, infographics, interactive models, microsites, and executive programs.

www.oxfordeconomics.com/thought-leadership

What sets our thought leadership apart?

Evidence-based focus: out-of-the-box thinking to create truly innovative, evidence-based thought leadership that will set your organization apart.

World-class team: 10 thought leadership specialists supported by an in-house team of over 120 economists and a global network of experts.

Sophisticated models: for global forecasting, market sizing, scenario analysis, and economic impact.

Rich database: figures, forecasts, and analysis on 200 countries, 100 industrial sectors and 3,000 cities.

A distinctive brand: a globally recognized name without the editorial restrictions of a media company.
Research inputs

Global surveys: We are experts at conducting and analysing surveys for virtually any target demographic, across the C-suite, across any industry, in any country and any language.

Executive interviews and case studies: Our global network of experienced journalists gives us unparalleled access to corporate executives at the highest levels.

Advisory panels and peer interchange: High-level peer interchange sparks discussion and unique insights that shape our programs.

Social media research: Boost your results by using the latest web tools, such as social media hubs and sentiment analysis.

Quantitative and economic analysis: Our models can be used to validate findings, add insights, or provide a strong business case.

Research outputs

White papers, briefings, and think pieces: Reports deliver fresh thinking, expert analysis, and case studies on a full array of issues.

Charts, infographics, and dashboards: At-a-glance rankings and “charticles” tell the story visually to busy executives.

Analytical tools and models: Interactive tools for benchmarking, forecasting, and assessing business conditions and impacts.

Social and digital media: Thought leadership reinvented for the digital age, through videocasts, webinars, and social media.

Microsites and presentations: Build ongoing interaction through high-tech, high-touch executive programs.

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Global surveys

Our quantitative expertise enables us to conduct surveys that can support innovative thought leadership programs.

- **World-class survey team**: A leader in global quantitative analysis, Oxford has a dedicated team of survey specialists supported by over 120 economists, and statisticians, backed by a network of more than 500 analysts and researchers around the world that can perform on-the-ground analysis.

- **Unique analytical capabilities**: Our survey team knows how to conduct professional surveys that engage the market and get the results. We have the ability to field, analyse, and present results in multiple formats; and we can turn a survey into personalized, actionable thought leadership by presenting it as a benchmarking tool or a model.

- **Unparalleled access to global executives**: In addition to our own global client base, Oxford has unique access to the executive panels of multiple research alliance partners. As a result, we can often ensure responses from executives targeted by industry, job title, country, and topic within a few weeks.

- **A respected, independent brand**: Our surveys receive high completion rates by executives, given a reputation for objectivity, and the ability to translate questions into any language.
Executive interviews and case studies

Our thought leadership team regularly conducts interviews with key decision-makers from government, business, and other organizations to gain valuable qualitative insights into their views, strategies, and plans.

Interviews provide useful context to quantitative findings, give an inside look into corporate or government best practices, and enable a case study approach to the assessment of economic impact.

Our ability to conduct interviews rests on several key strengths:

- **A distinctive global brand** and a 30-year reputation for delivering objective and rigorous quantitative analysis;
- **Wide access to corporate decision-makers in over 800 client organizations**, financial institutions, government agencies, and trade associations; and
- **A world-class team of editors and journalists**, each with a rich set of local contacts and the capability to conduct interviews in the local language.

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**CASE STUDY: HUNTSMAN USES ERM TO ASSESS NEW OPPORTUNITIES**

Balancing risks and opportunities is a global undertaking at Huntsman Corporation, a manufacturer that sells to other large companies around the world from 80 sites in over 30 countries. “In many ways our business reflects the global key risk for us,” says Brian W. Merkley, global director, corporate risk exposure to various parts of the world and consider how fast we are

A decentralized approach to risk management, as founder and CEO believed managers should take ownership of risk. While Mr. Huntsman has been working over the past four years to adopt a more work, including formal risk assessments carried out periodically by Mr. Merkley typically joins meetings every fall with division conseils risks specific to those areas.

Assemble continuity plans at key overseas locations and audit proving the company’s ability to withstand a crisis. It has also at its disposal to sole-source suppliers. “Basically, ERM helps between all our divisions on a global scale and to quantify our exposure. “When you look at what happened in 2011—a massive quake and tsunami that hit Japan and...”

But Huntsman’s approach to managing its business risks also helps it to spot new opportunities—for example, by providing greater transparency within the company’s global operations. This helps to make the case for moving production from one region or country to another when circumstances change.

**Upgrading skills and consumer-centric analysis at AEON**

AEON Corp., one of Japan’s biggest retailers and mall operators, recognizes the need to locate new talent to more effectively build analytics capabilities, according to Jerry Black, the firm’s Senior Vice President.

Black says his company has embarked on an ambitious new effort to integrate all data streams the company receives, so it can tie together branding, marketing, product development, sourcing strategy for its private brands, data mining, and e-commerce, and use it to make smarter decisions. In fact, AEON recently reorganized its management structure to make its decisions more consumer-centric, he says. “Strategy isn’t what we want to do. Strategy is what the customer needs.”

But one of the biggest obstacles to moving rapidly to mine and exploit all the data the company receives is a shortage of technical talent available in Japan, Black says.

“It’s not so hard to figure out what people bought,” he says. “It’s harder to figure out why, and therefore what customers will buy in the future. The biggest challenge is around skill sets,” he notes.

What’s needed is a “combination of speed, technical skills, and HR skills. Finding people who are able to understand and develop tools for deep, predictive data modeling is where HR skills are lacking.” Relying just on training internal staff is not feasible. “You have to get the ball rolling with a few key external hires,” he says, “and use those people to accelerate development and training. Some of these are very specialized skills,” so hiring from outside is critical.

In the case of Japan, this also means changing HR practices to attract and retain specialists with a deep understanding of technical issues based on market rates and their capabilities, which requires a more flexible and responsive approach to HR and the development of people.
Advisory panels and peer interchange

Advisory panels and executive meetings are effective ways to gain insights into latest trends, exchange management viewpoints, benchmark corporate strategies, and provide input into research projects.

By drawing on our worldwide base of 800 clients and high-level contacts, Oxford Economics can organize thought leadership meetings of key decision-makers from business, government, and academia. Our panels typically focus on a single executive function, including CFOs, CIOs, CMOs, or CHROs, although cross-functional panels also can be assembled.

These meetings typically include 10 to 15 senior executives who come together in person in key cities such as New York, London, or Hong Kong, or via webinars or teleconference calls. We have organized meetings across a range of topics, such as digital megatrends, the economic outlook, talent management, innovation, and diversity.

Advisory panel for the Global Talent Program:
Ravin Jesuthasan, Global Practice Leader for Talent, Towers Watson
John Boudreau, Professor and Research Director, Center for Effective Organizations
Walter Hurdle, Global Chief Diversity Officer, AIG
Samira Kaderali, Vice President, Strategic Workforce Planning, American Express
Borwin Jung, Group Head of Leadership & Talent, British American Tobacco
Paul Wright, Global Diversity Special Projects Manager, Cummins
Libby Wanamaker, Global Director Program Development, Talent and Development, Coca-Cola
Paul Boyett, Director, Talent Management & Acquisition, Edison International
Rosine Plank-Brumback, Principal Specialist, Organization of American States

Select panel for Another Penny Saved:
Leonard Glynn, Managing Director, Policy, Putnam Investments
Kevin Cran, Head of Institutional Retirement, Bank of America Merrill Lynch
Peggy Ho, SVP and Chief of Staff, Legal & Government Relations, LPL Financial
Alison Hawkins, VP of Communications, Financial Service Roundtable
Aliya Wong, Executive Director, Retirement Policy US Chamber of Commerce
Gary Koenig, Director Economic Security, Public Policy Institute at AARP
Tracey Flaherty, SVP, Retirement Strategies, Natixis Global Associates

A report produced in collaboration with Towers Watson, AIG, American Express, British American Tobacco, the Center for Effective Organizations at the University of Southern California, Cummins, Coca-Cola, Edison International and the Organization of American States

Global Talent 2021
How the new geography of talent will transform human resource strategies

Another Penny Saved
The Economic Benefits of Higher US Household Saving
Social media research

We use social media as a research tool to gather the important insight and perspective that shapes our research programs. With this instrument, we can:

- Review and compare current thought leadership on the topic in the marketplace to distinguish our program and ensure it breaks new ground.
- Build a social media research hub to provide the foundation for a successful web research program.
- Engage the online community to gather fresh perspectives and insights from other executives and experts.
- Launch topic-specific Twitter feeds and other social media campaigns to connect with our target audience.
- Use the latest web tools to go beyond the edge of current thinking and find the key influencers and inflection points. We can perform sentiment analysis and forecasting to understand the latest opinions and emerging trends around a given topic.
- Partner with media firms, NGOs, and trade associations. We can draw on our relationships with top media firms, and with organisations such as the UN Project Link, Knowledge@Wharton, and CIMA to build traffic and engagement.

Workforce 2020

Building a strategic workforce for the future.

2020 Workforce new roundup

When using personality traits to hire does not work (Business Finance Weekly). Use of personality traits to evaluate job candidates is on the rise—but these tests may not be as effective, as some of the most popular tests are more likely to reflect how the candidate thinks at a certain time, rather than revealing enduring character traits. Another test may be less transparent, allowing candidates to choose the answers they think will be well-received by the company.

Social conscience to take priority in future workplace (Economist Times). According to a new study from PwC, strong corporate values will be hugely important in the future workplace. However, our survey suggests that social conscience does not stack up against compensation and bonuses.

Bonuses are making up a bigger and bigger percentage of companies’ payrolls (Washington Post). A recent bi-annual US Salary Increase survey shows that companies are giving more attention to the issue of bonuses and what changes need to be made in this area.

2020 Workforce survey

More workweek hours for French workers (SNR Money). A recent survey of French workers shows that they are working longer hours compared to their counterparts in other countries.

Workforce issues across the globe

Our survey shows that companies everywhere are struggling to find effective ways to deal with the workforce of the future. Yet there are variations in the way these workers rate different aspects of their workplace. We use the same survey to track progress and engage with employers globally.

For example, companies in Asia-Pacific are much more likely to say workforce issues drive strategy at the board level—but less likely to have confidence in leadership. Meanwhile, companies in North America struggle to find skilled talent and are not offering...
Quantitative and economic analysis

Oxford Economics has one of the largest macroeconomic and consultancy teams in the private sector, allowing us to go deeper and further than other economic advisory firms:

- **Detailed, insightful, and forward-looking analysis.** We analyse data by target industry sector or geography, and can build forecasting models and benchmarking tools.

- **Forecasts and market sizing.** Our global models provide a platform for creating visionary thought leadership on business and economic trends.

- **Scenario framing.** Our global economic and industry models provide the ideal framework to explore alternative scenarios and risk assessments.

- **Public policy research.** Our economic model provides a framework to assess the economic impact of macro policy proposals at a national and global level.

- **Economic impact analysis.** We assess the contribution of a sector, company, industry, or investment, gauge the effects of regulations and tax changes, and quantify the value of future markets and technologies.
White papers, Briefings, and Think Pieces

We are experts at analysing the latest business issues through the prism of economics. That’s why our papers go well beyond simple reporting of facts and figures. We can publish thought-provoking white papers on a diverse array of issues. We can publish under our brand, the client’s brand, or in partnership. Typically 15-20 pages in length, these papers can include the following elements:

- **An executive summary** highlighting key findings.
- **In-depth interviews** with senior executives.
- **Case studies and vignettes** from leading firms and organizations.
- **Engaging charts, tables, and graphics** to illustrate the key points of the research.
- **A press release** to help socialize key findings.
Charts, infographics, and dashboards

Our economists, editors, and designers work together to produce a variety of visually powerful elements to illustrate the findings of our research. Together, we can:

- Conceive and design infographics to enhance thought leadership papers and websites with provocative data and charts.
- Develop filtering tools that help executives assess key trends.
- Produce web-based dashboards to help executives track and benchmark performance.
- Provide data-rich charts and tables. Our reports and other research outputs include professionally designed charts and tables to give readers a clear understanding of trends, risks, and opportunities.

The cloud grows up

As companies head deeper into the cloud, the focus has shifted to the nuts and bolts of implementation...

2012

- 80% focusing consistent security
- 63% Compliance with regulations
- 39% Migrating in-house systems to the cloud
- 31% Scalability and redundancy of cloud services
- 17% Non-IT buyers signing non-disclosure agreements

Security concerns have gone from general to specific, pointing to deeper experience in cloud implementation.

- 77% Security of corporate data
- 69% Security of consumer data
- 39% Cost
- 32% Volatility & fluctuation of revenue
- 29% Migrating data securely
- 20% Ease of use
- 18% Security of APIs and interfaces
- 10% Cost

Businesses remain highly enthusiastic about the cloud—and have ambitious plans for the near future.

- 74% Cloud is essential to our business strategy
- 59% They view the cloud as an opportunity to shake up the way they work
- 61% They think of the cloud as a way of delivering new services

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Analytical tools and models

Oxford can incorporate a panoply of analytical and decision-support tools into your thought leadership program. Our quantitative expertise combined with our knowledge of business applications make us the ideal partner to meet your needs for the following analytical tools:

- **Global forecasting databanks and models.** We can build databanks and models to project country, industry, and city trends covering a range of variables, from broad macroeconomic forecasts to specifics on employment supply by industry, wealth by city, and market size for products.

- **World rankings and indices.** We have created rankings for an assortment of topics—from countries, industries, and cities to market conditions, business risks, income levels, and future trends.

- **Interactive benchmark tools.** Oxford can develop web-based interfaces that permit companies to benchmark trends, views, and practices against a range of performance metrics and peer segments.

- **Scenario mapping.** Our models deliver forecasts on how economic and industrial conditions would change under alternate scenarios.

- **Economic impact analysis.** Our models can quantify the impact of investments, projects, industries, technology, and even public policies.

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Social and digital media

Our team of experts have launched websites, curated content and produced online events for the best business media brands, such as Bloomberg, Thomson Reuters, Forbes, Harvard Business Review, and The Economist. With the skills and know-how to deliver a range of compelling digital content, we can:

- Write blogs and moderate debates. We can help you find a new audience, create interest in a recent project, and moderate online discussions and debates.
- Disseminate research findings. We are skilled in the use of social networks or more traditional channels.
- Film and produce professional videocasts. We work with our clients to develop the overall approach and script for the video.
- Present research results via live or pre-taped online broadcasts. Our economists and analysts are skilled public speakers and can discuss research findings with clients, executives, and members of the media.
- Cultivate and curate online communities. We work closely with our clients to target key audiences.

Workforce 2020

Building a strategic workforce for the future.

The leadership cliff

Posted on September 19, 2014 by Adrianna Gregory

Executives and employees agree that leadership in their organizations is lacking. Executives cite a lack of collaborative leadership as the number one impediment to achieving goals in today's workforce. Here are eight actions that leaders can take to help:

- Define clear objectives and strategies.
- Foster a culture of collaboration.
- Provide ongoing training and development.
- Recognize and reward success.
- Build a diverse and inclusive team.
- Encourage open communication.
- Lead by example.
- Embrace change and innovation.

Cloud news roundup

India's Prime Minister Narendra Modi has unveiled an ambitious plan to bring the cloud to every Indian citizen. The initiative—Mukoy.in—will store citizens' vital records (e.g., birth, death, marriage certificates) in a huge, easily-accessible digital locker.

China also has its eye on the cloud, initiating a cloud-computing program in its 13th Five Year Plan. The initiative lies with Chinese and foreign companies, including:

- Alibaba Cloud
- Tencent Cloud
- Huawei Cloud
- IBM Cloud
- Microsoft Azure
- Oracle Cloud
- Google Cloud

This research has been brought to you by:

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www.oxfordeconomics.com/thought-leadership
Microsites and presentations

Microsites draw together key research components into a valuable decision-support tool. Oxford Economics can develop targeted microsites and executive programs that extend the visibility and life of the research, driving greater overall value. Specifically, we help our clients:

- Conceive, design, and build targeted microsites aimed at generating interest and leads through innovative digital delivery. Microsites can provide content on a topic in general, or can provide actionable insight to executives.
- Provide compelling content on an ongoing basis. This includes reports, videos, online polling, interactive tools, and charts—virtually all of our deliverables can feed into an executive microsite.
- Identify and target an audience of key executives, policy-makers, and other stakeholders, and invite them to share their views, either through a microsite or at a live event.
- Produce in-person events, at your corporate offices or ours, or at a separate location.

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