Rethinking Thought Leadership

Influencing decision-makers through evidence-based research
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 80 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.

www.oxfordeconomics.com/thought-leadership
Research techniques

Global surveys: We are experts at conducting and analyzing 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 critically shape our programs.

Social media and web analytics: Enrich 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.

Delivery formats

White papers, briefings, and think pieces: Our reports deliver fresh thinking, expert analysis, and case studies on a full array of business 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 executive programs: Build ongoing interaction with your clients through high-tech, high-touch executive programs.

www.oxfordeconomics.com/thought-leadership
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 80 economists, statisticians, and survey specialists, 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 do professional surveys that engage the market and get the results. We have the ability to field, analyze and present results in multiple formats - we can even turn a survey into meaningful 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 executive panels of multiple research alliance partners. As a result, we can ensure responses from executives targeted by industry, job title, country, and topic within just 3-4 weeks.

- **A respected, independent brand**: With ties to Oxford University, a reputation for objectivity, and the ability to translate questions into any language, our surveys receive high completion rates by executives.

![Survey respondents by industry and country](image)
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 renowned global brand with linkages to Oxford University and other parts of the global academic and NGO communities;
- 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.

Key actions for growth in the next 18-24 months

<table>
<thead>
<tr>
<th>Innovation</th>
<th>Marketing</th>
<th>Geographies</th>
<th>Technology</th>
<th>Strategy</th>
<th>Distribution</th>
<th>Supply chain</th>
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Case Study

Coca-Cola

Rethinking supply-chain fulfillment

The new intricacies related to global supply-chain fulfillment as well as the sweeping geographic expansion companies are carrying out puts a premium on HR managers who can find executives to manage complex problems across a challenging and culturally varied landscape. Coca-Cola, for instance, faces significant supply-chain needs that must constantly be addressed as it determines where to build new plants and align distribution centres.

Finding talented employees who can “think strategically and with a global perspective is not easy,” explains Libby Wanamaker, Global Director of Program Development for Coca-Cola. She notes that logistics personnel are among the hardest for her firm to recruit.

“Our supply-chain needs are pretty vast,” she says. “We operate in over 200 countries, manufacturing, delivering, and selling a large variety of beverages in each location. Given this scope, for us logistics is an imperative.”

In some fast-growing markets, like China, firms like Coca-Cola are forced to compete aggressively in order to retain the talent they’ve hired. In others, they must help develop an infrastructure of training that can create the talent to meet the firm’s future goals.

As a result, Coca-Cola believes that in the future it will need to consider partnerships with universities to develop its own pool of supply-chain experts. “We realize that we might have to become the educator to ensure we have access to the kind of talent we need,” Ms Wanamaker says.

As a company that operates in thousands of unique individual markets, but also...
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 established.

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 Wight, 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

Advisory panel for Digital Megatrends:
Bennett Ruiz, AVP, Global Segment Marketing, AT&T
Stuart Taylor, Principal Engineer, Cisco
Gary Greerwald, Digital Money and Mobile Payments Executive, Citi
Kevin Cox, Senior Director, SAP

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

Digital Megatrends 2015
The Role of Technology in the New Normal Market

A research summary written in cooperation with AT&T, Cisco, Citi and SAP
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 position it effectively against the competition.

- 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 such top media firms as Forbes and Bloomberg, and with organisations such as the UN Project Link, Knowledge@Wharton, and CIMA to build traffic and engagement.

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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 analyze 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.

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Saves components make up the Hay's Global Skills Index

- Education intensity
- Wage pressure in high-skill industries
- Wage pressure in low-skill industries
- Labour market participation
- Labour market flexibility
- Skilled unemployment
- Overall score

The strongest performers are those with a high concentration of high-skill industries, low wage pressure in high-skill industries, high access to skilled labor, and high overall scores. The weakest performers are those with low concentration of high-skill industries, high wage pressure in high-skill industries, low access to skilled labor, and low overall scores.

Performance

Source: Analysis of Oxford Economics, Moody's Economy.com, and Cambridge Econometrics data.

Figure 3-5. Metro Performance During Pre-Recession Period (1993–2007)

The strongest-performing metros in the pre-recession period could be found in emerging nations of Asia and Latin America, as well as in the American Southwest and Eastern Europe.

The weakest-performing metros were split among these same world regions, including many older industrial areas of the United States and Western Europe, as well as Japanese and Southeast Asian economies that experienced economic difficulties in the 1990s.

Labeled metro areas are the 15 top and bottom ranked performers.
White papers, Briefings, and Think Pieces

We are experts at analyzing the latest business issues through the prism of economics. That’s why our papers go well beyond simple reporting of facts and figures. Within 90 days, 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.

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Rethinking Risk in Financial Institutions
Making the CFO-CRO Partnership Work

Manufacturing Transformation Overview
Rethinking Risk in Financial Institutions
Making the CFO-CRO Partnership Work

Manufacturing Transformation
Achieving competitive advantage in a changing global marketplace

A report produced in partnership with PTC

www.oxfordeconomics.com/thought-leadership
SMEs innovate to differentiate

SMEs emphasize innovation … … to stand out in a world of empowered customers

- 51% say cost reduction and efficiency are key drivers of growth
- 56% say they are more customer focused than competitors
- 59% say they focus on transforming operations, not just improving them
- 49% say they have more visionary products and services
- 47% cite customer expectations, demand for innovation, and trends most affecting their business

SMEs: Equipped to Compete

Mobility is a change agent

- 60% say mobile technologies are transforming their business
- 25% say they benefit from business oriented product and service development
- 23% say they benefit from mobility enabled product and service development

More-profitable firms place more emphasis on innovation*

- Innovation has been the main benefit of adopting new technologies

Technology and differentiation

- Disciplining development with a focus on technology adoption
- Modern product management with a focus on technology differentiation
- Consumer behavior change and technology differentiation
- Retail innovation

* OXFORD ECONOMICS

Masters are better at recruiting, retaining and training staff

Not impeded by high compensation required by personnel with the necessary skills

- Masters: 85%
- Non-masters: 68%

Effective retention strategies or programs

- Masters: 76%
- Non-masters: 58%

Adequate personnel with the necessary skills

- Masters: 70%
- Non-masters: 68%

Effective recruitment strategies

- Masters: 64%
- Non-masters: 64%

Sufficient training programs

- Masters: 61%
- Non-masters: 49%
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.
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.

The service function is the top driver of competitive advantage for large firms

In the future, high-revenue firms (over $1.25 bn./year) believe that service will be the most important driver of competitive advantage.

Across firms of all sizes, service is only slightly behind R&D and manufacturing—and catching up fast.

<table>
<thead>
<tr>
<th>Service</th>
<th>R&amp;D/ engineering</th>
<th>Manufacturing</th>
<th>Supply chain</th>
<th>Sales &amp; marketing</th>
<th>Corporate management</th>
<th>IT</th>
</tr>
</thead>
<tbody>
<tr>
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<td>12.6%</td>
<td>11.6%</td>
<td>9.5%</td>
<td>8.4%</td>
</tr>
</tbody>
</table>

Now

In 3 years

Service   R&D/ engineering  Manufacturing  Supply chain  Sales & marketing  Corporate management  IT

Cross-functional/ corp. management

6.1% growth 12.7% growth 11.3% growth 13.3% growth 9.7% growth 9.3% growth 9.5% growth 8.3% growth 8.7% growth

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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.