

# Welcome to 2025: A Year in Preview



2025: A Year In Preview, February 5, 2025 | New York, NY  
Opening Remarks + Introductions 8:30 – 8:40 am



**Tamara Lundgren**

Chairman and Chief Executive Officer,  
Radius Recycling,  
Event Co-Chair

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2025: A Year In Preview, February 5, 2025 | New York, NY  
The Business Outlook for 2025 8:40 – 9:05 am



**Erin McLaughlin**

Senior Economist, ESF Center,  
The Conference Board

# C-Suite Outlook 2025

Seizing the Future: Adapting to a World of Rapid Change and Risk



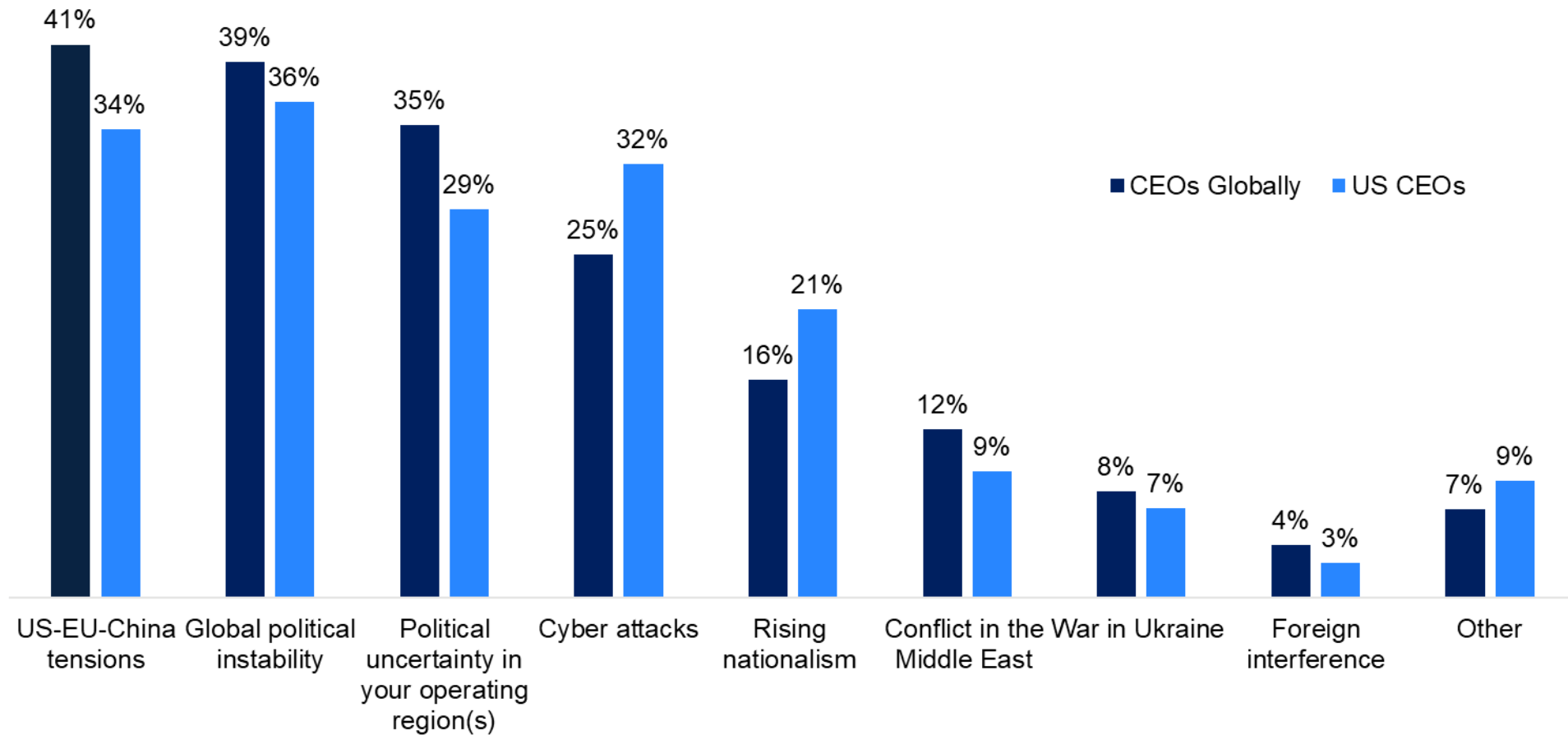
## About the C-Suite Outlook Survey 2025

- ✓ This is the 26<sup>th</sup> year for the survey.
- ✓ Span: November 7 to November 29, 2024
- ✓ Respondents: 1,722 C-Suite Executives and Board Members; 508 CEOs
- ✓ Regions: US, Europe, Japan, ASEAN, Latin America, China, India, Canada
- ✓ Sectors: Manufacturing, Finance, Other Services; and by Revenue
- ✓ Executives: CEOs, CFOs, CHROs, CMOs, ESG/CLO, Board, Other



# US CEOs cite geopolitical tensions, plus cyber and nationalism as external risks

Q. Select the external factors or issues that you think will have the greatest impact on your business in 2025: Geopolitical Risk

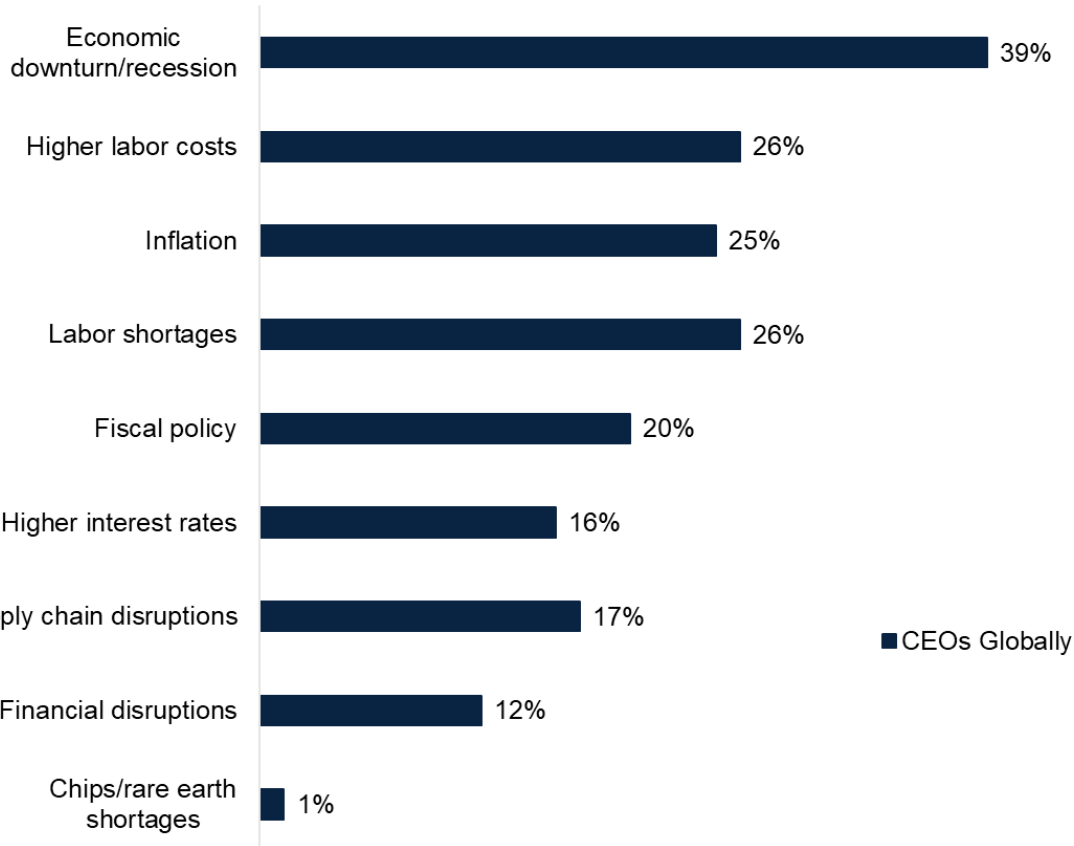


Source: The Conference Board C-Suite Outlook 2025

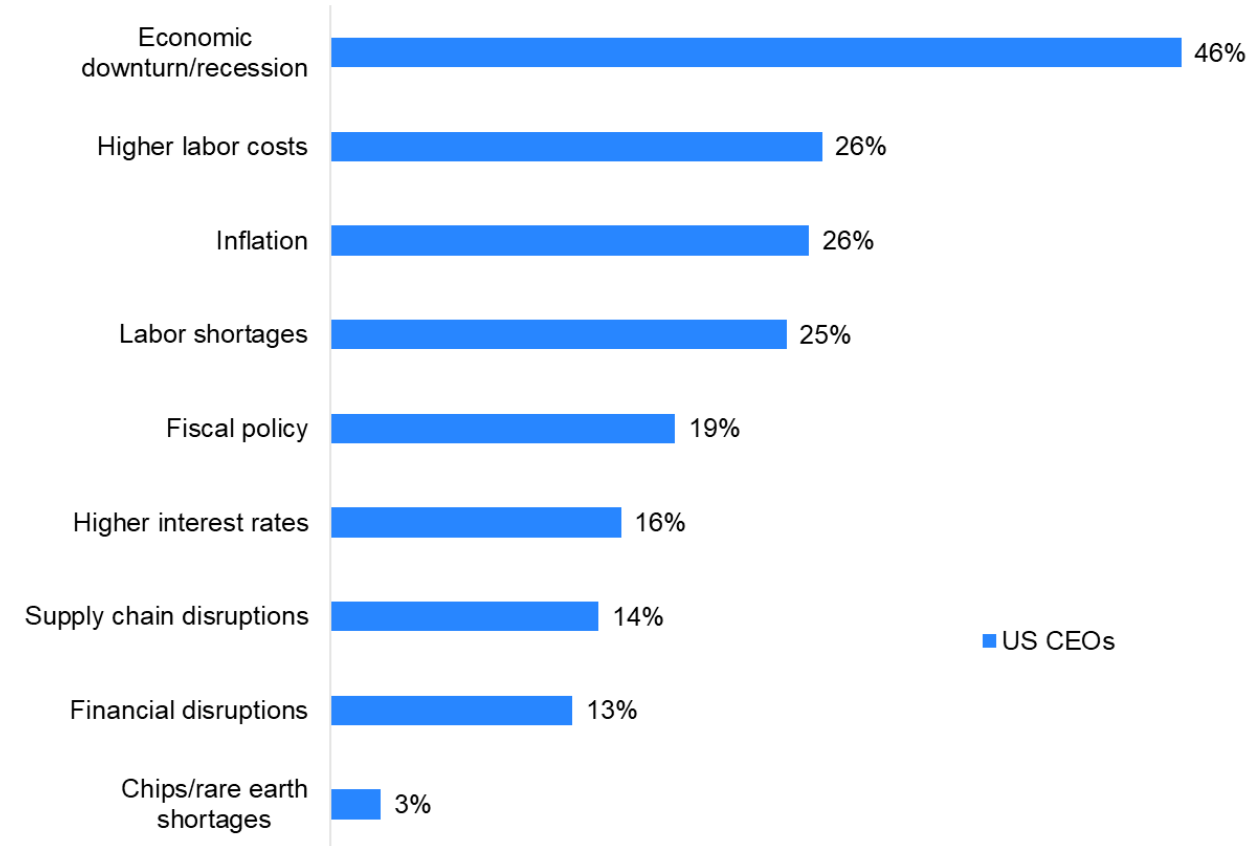


# US CEOs more concerned about economic weakness than CEO aggregate

Q. Select the external factors or issues that you think will have the greatest impact on your business in 2025: Economic conditions in your primary operating region



Q. Select the external factors or issues that you think will have the greatest impact on your business in 2025: Economic conditions in your primary operating region



Source: The Conference Board C-Suite Outlook 2025





# Derisking and diversification among top reasons for altering supply chains

**78.3%** of CEOs globally  
plan to alter their supply chains in the next 3-5 years



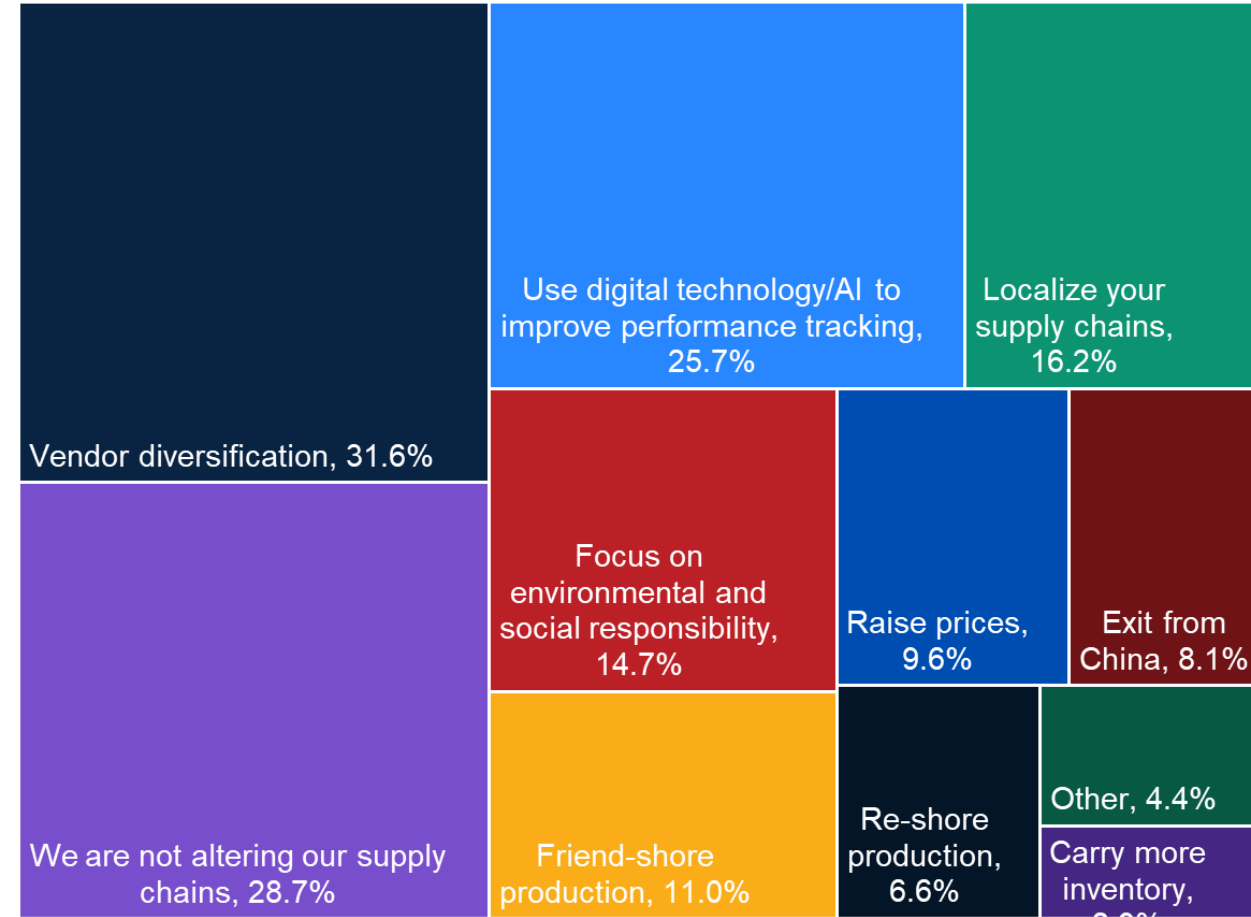
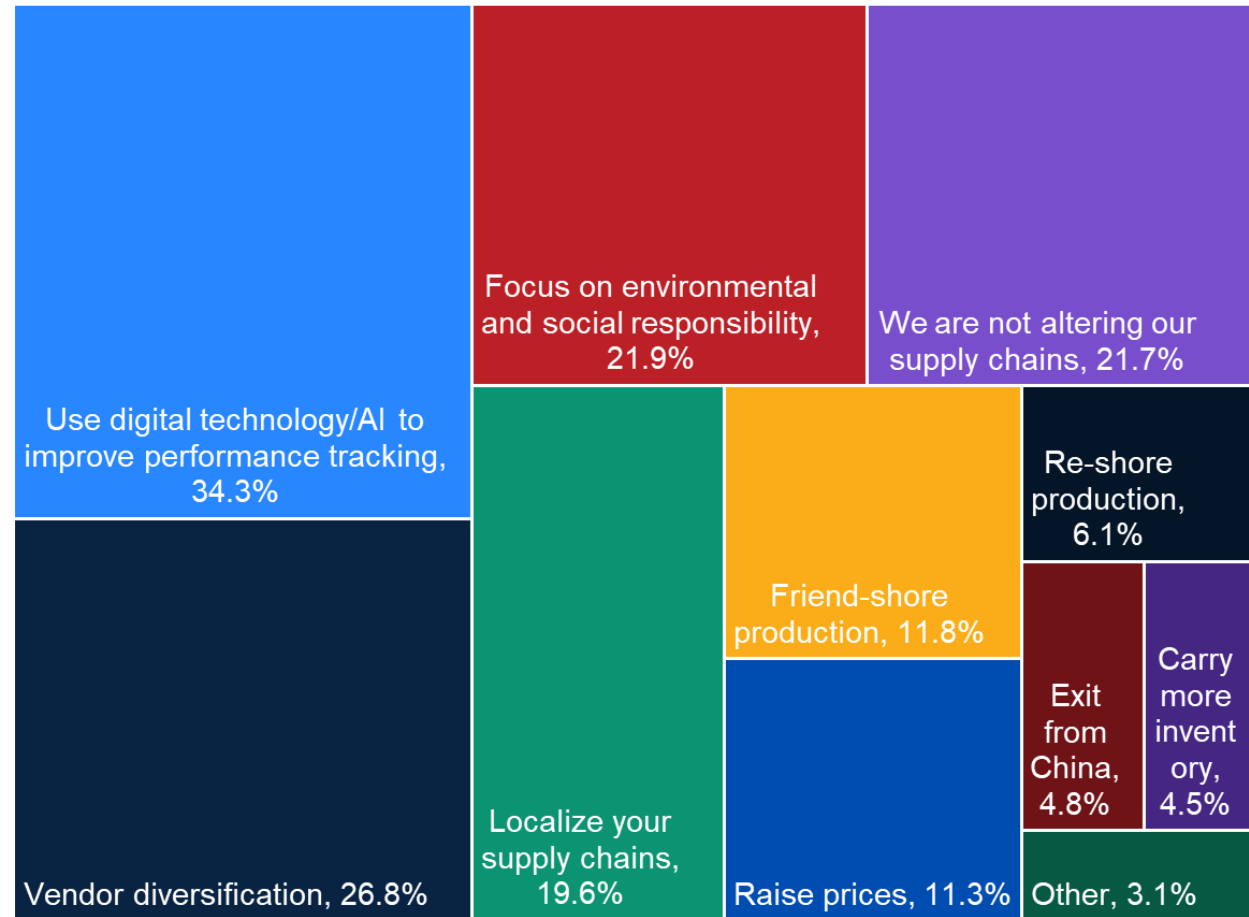
Source: The Conference Board® C-Suite Outlook 2025: Seizing the Future



# Global CEOs prefer AI for hardening supply chains, US CEOs diversification

Q. How will you change your supply chains over the next 3-5 years? CEOs Globally

Q. How will you change your supply chains over the next 3-5 years? US CEOs

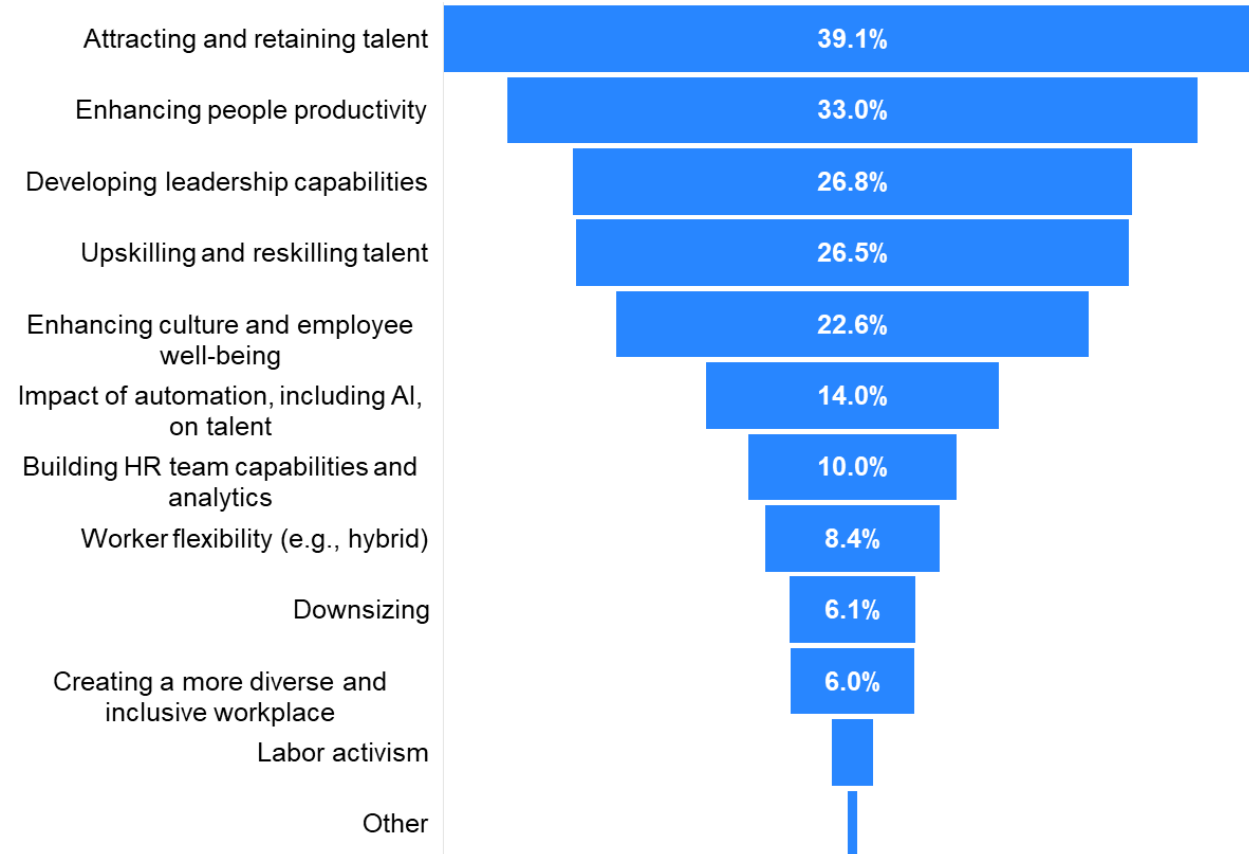


Source: The Conference Board C-Suite Outlook 2025

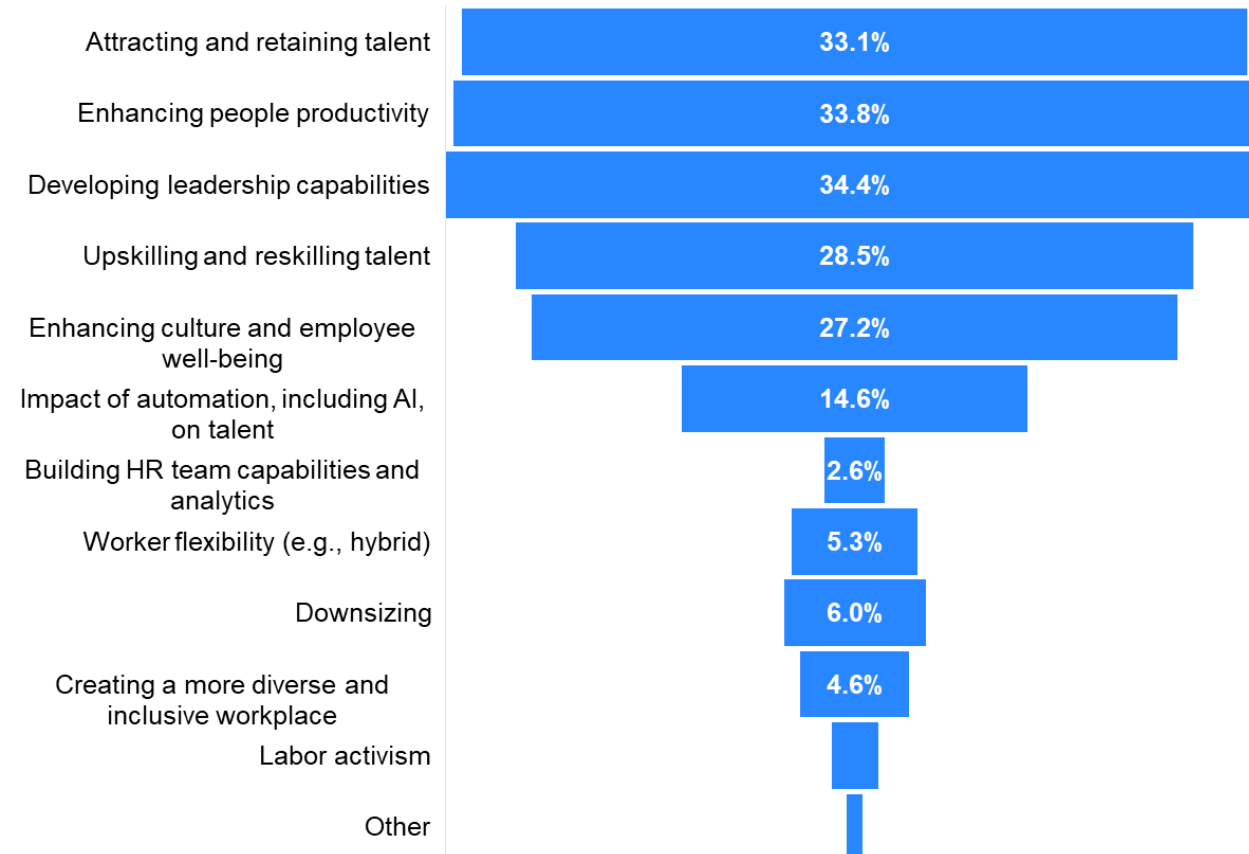


# Attracting and retaining talent, productivity, developing leaders matter for CEOs

Select the internal factors or issues that your company will focus on in 2025:  
Human Capital - CEOs Globally



Select the internal factors or issues that your company will focus on in 2025:  
Human Capital - US CEOs

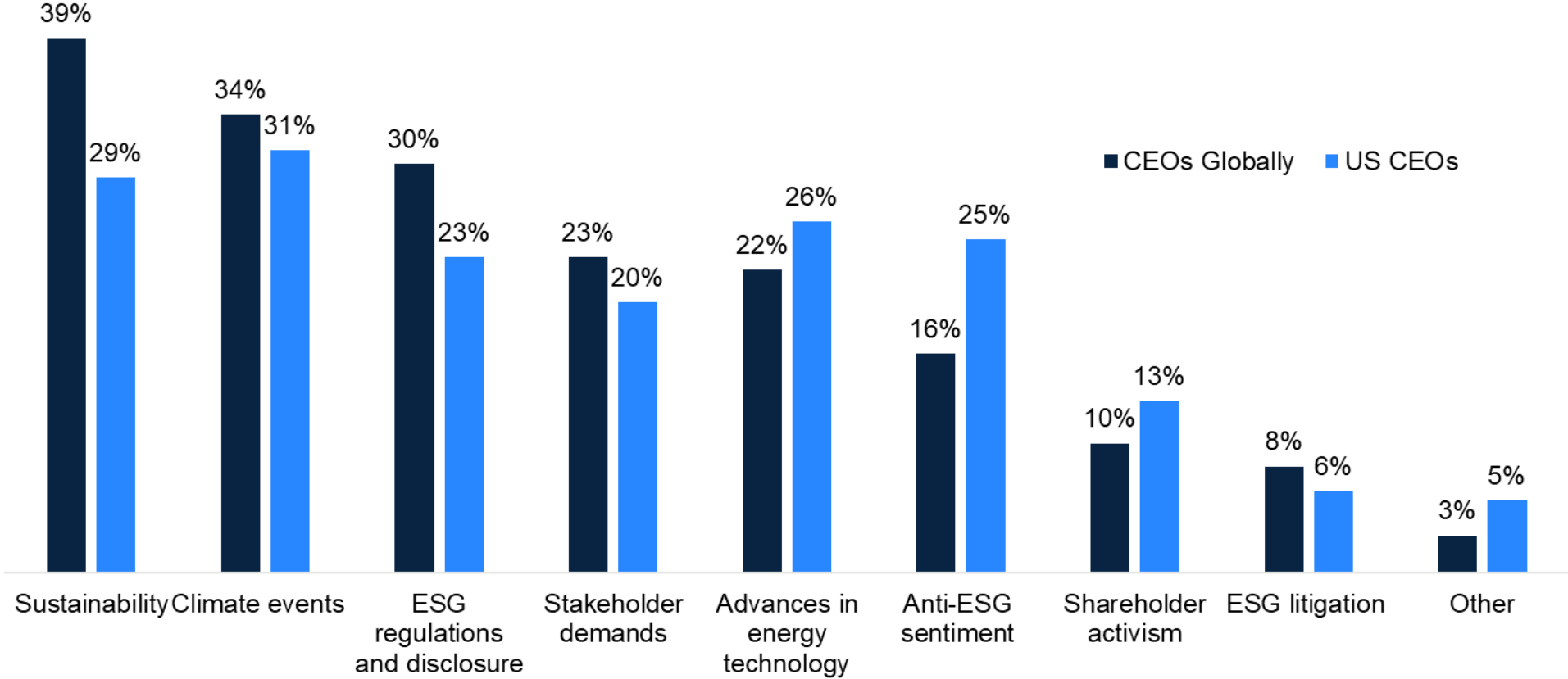


Source: The Conference Board C-Suite Outlook 2025



# US CEOs cite climate events, sustainability, energy tech, ESG backlash as concerns

Q. Select the external factors or issues that you think will have the greatest impact on your business in 2025: Environmental, Social & Governance (ESG)

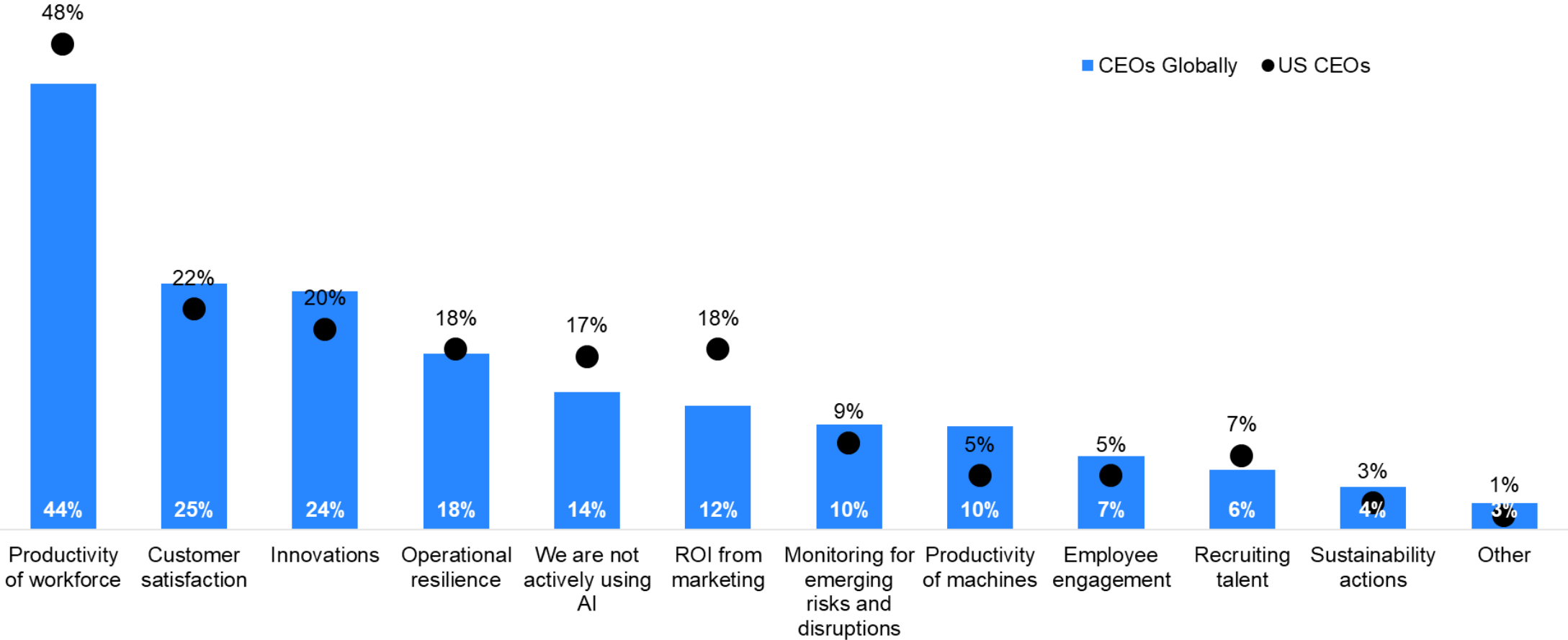


Source: The Conference Board C-Suite Outlook 2025



# CEOs cite increased labor productivity from AI adoption, especially US CEOs

Q. In which areas of your business do you see the biggest improvement as a result of the application of artificial intelligence (AI)?

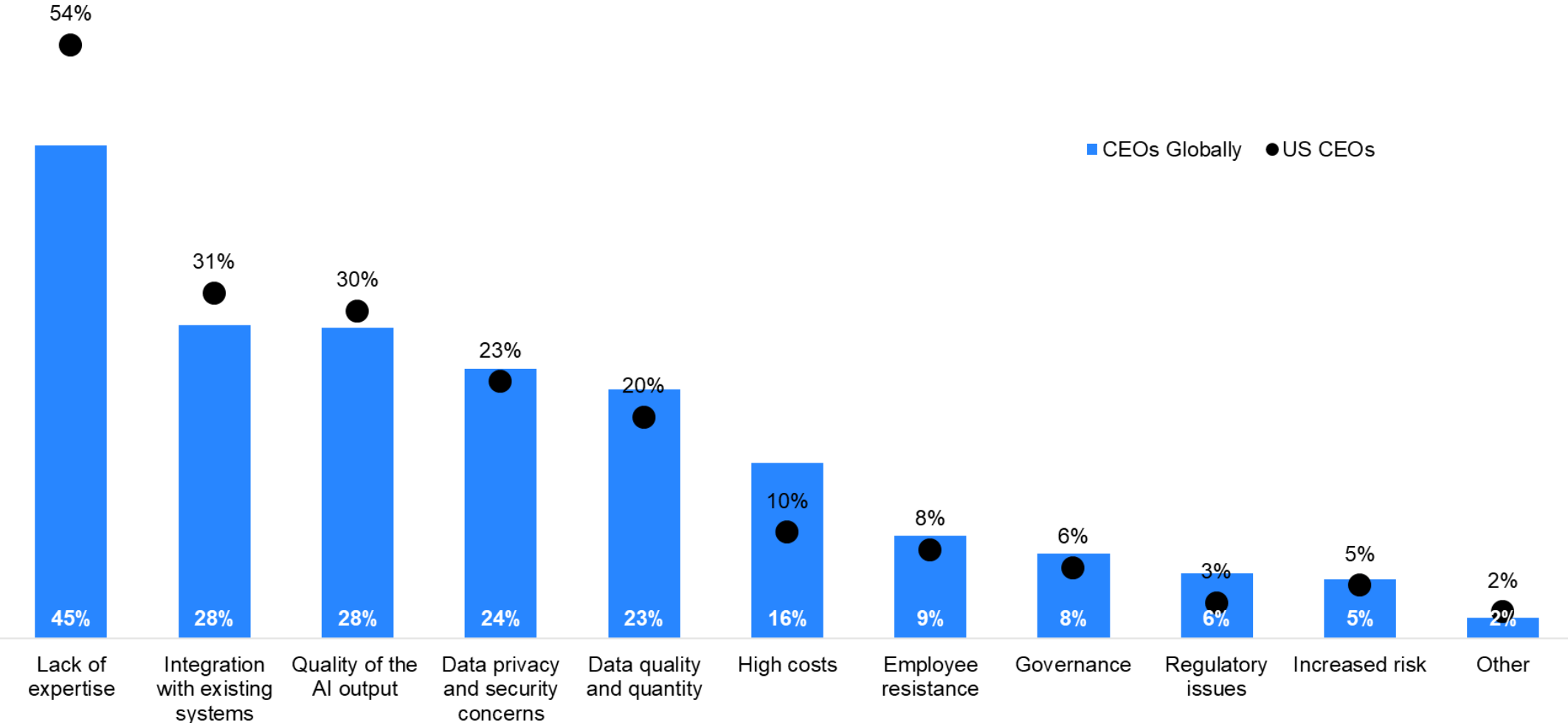


Source: The Conference Board C-Suite Outlook 2025



# Lack of AI experience is a major pain point for CEOs attempting to adopt AI

Q. What are the greatest challenges you have encountered with implementing AI?

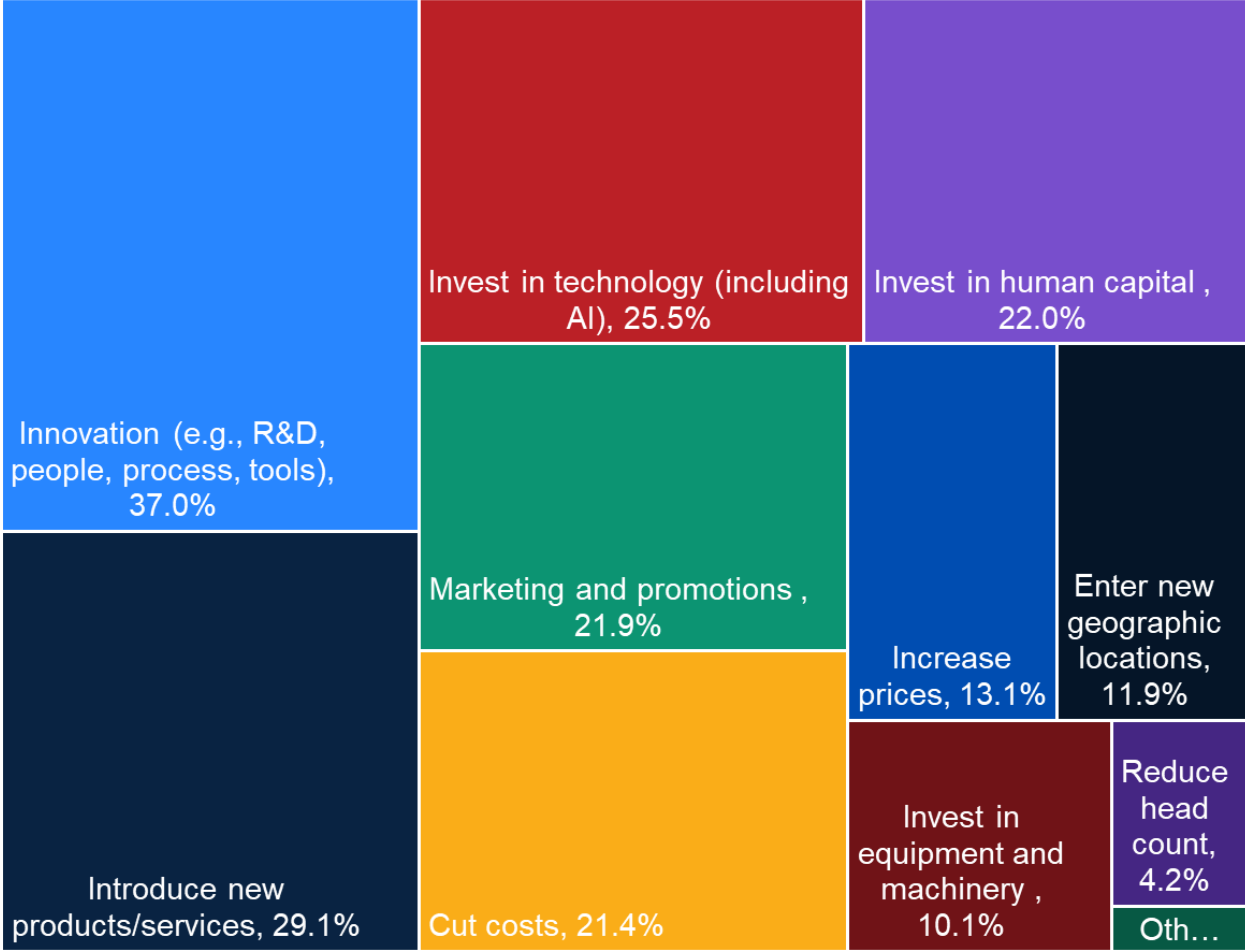


Source: The Conference Board C-Suite Outlook 2025

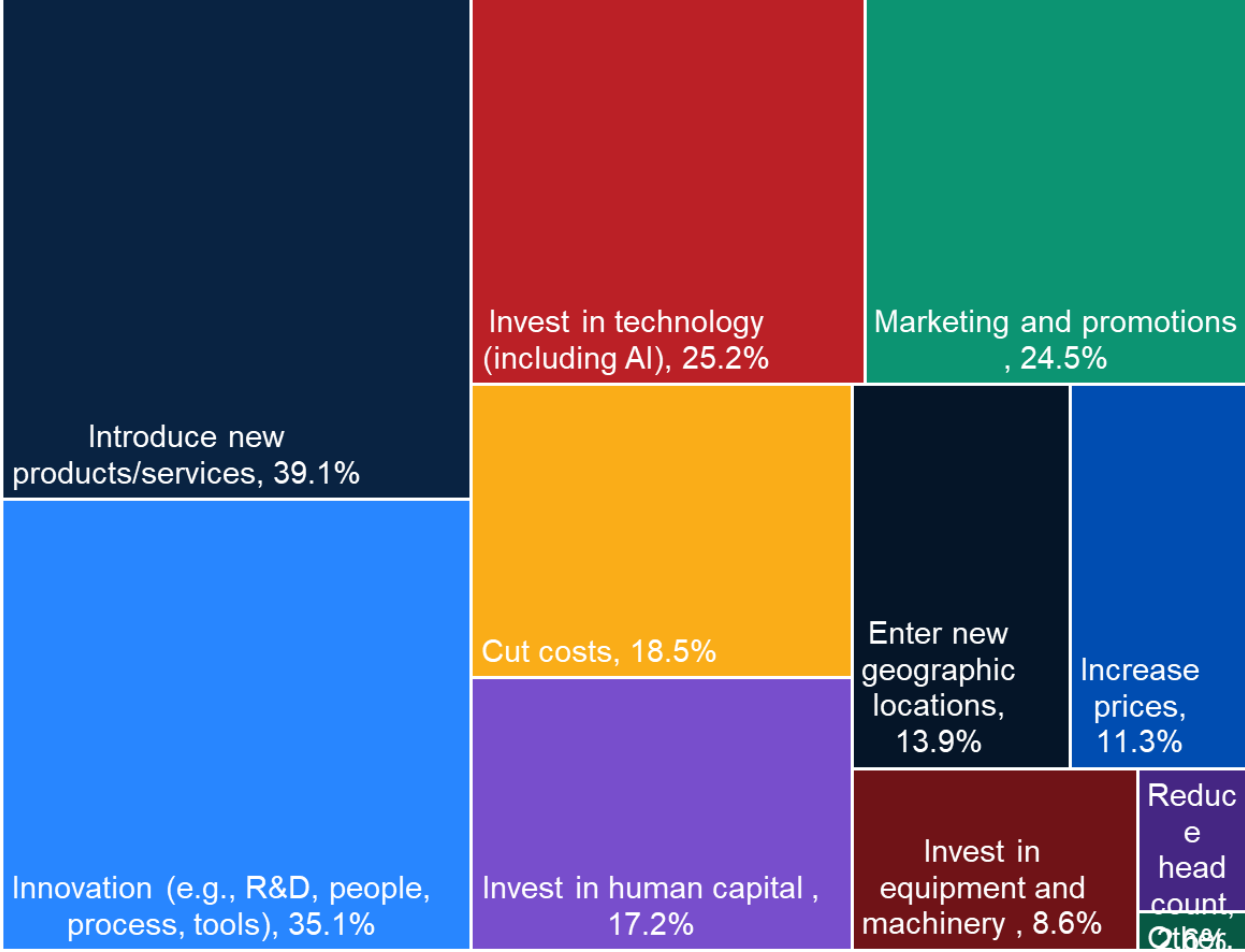


# CEOs are still focused on in 2025 growth despite numerous headwinds

Q. What are the top two priorities for growing profits in 2025?: CEOs globally



Q. What are the top two priorities for growing profits in 2025?: US CEOs

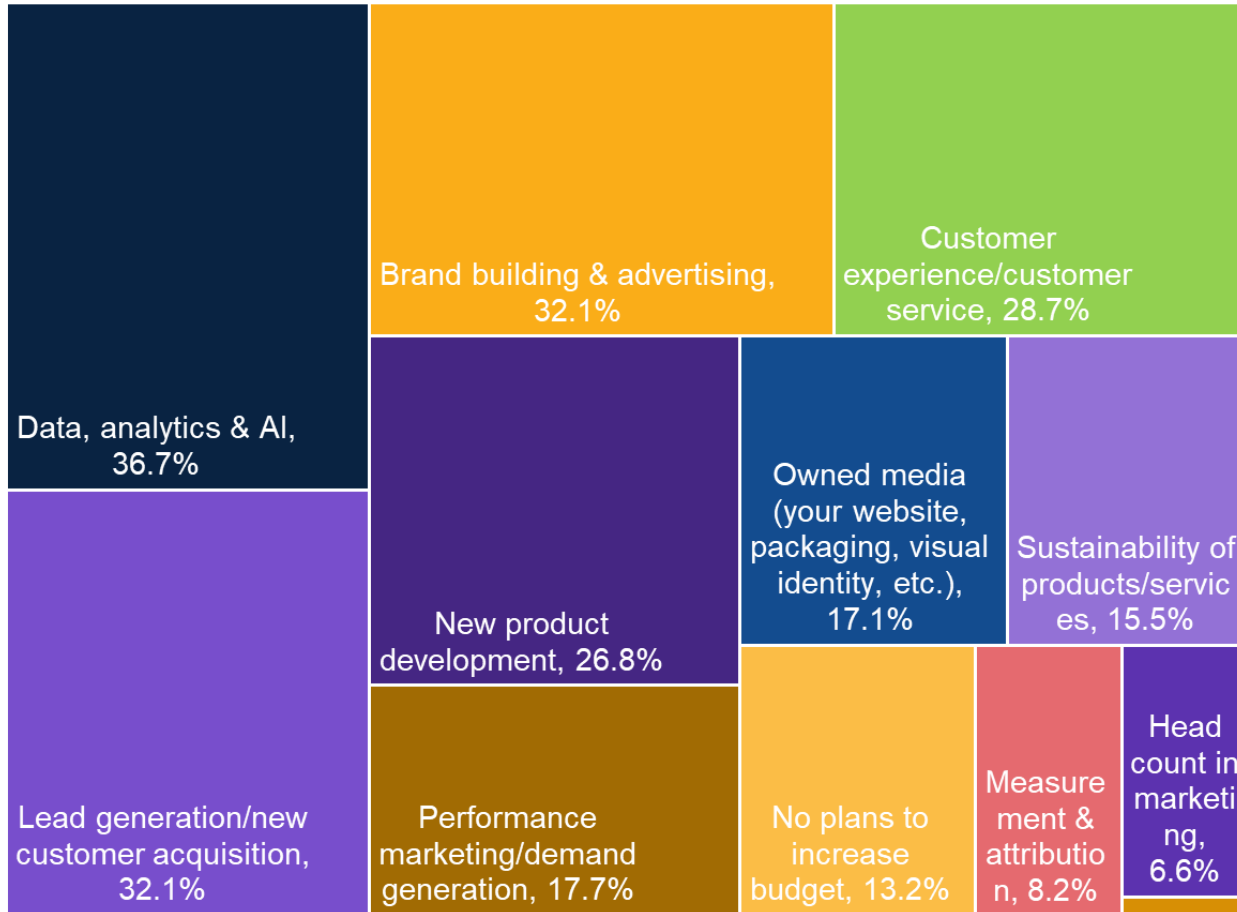


Source: The Conference Board C-Suite Outlook 2025

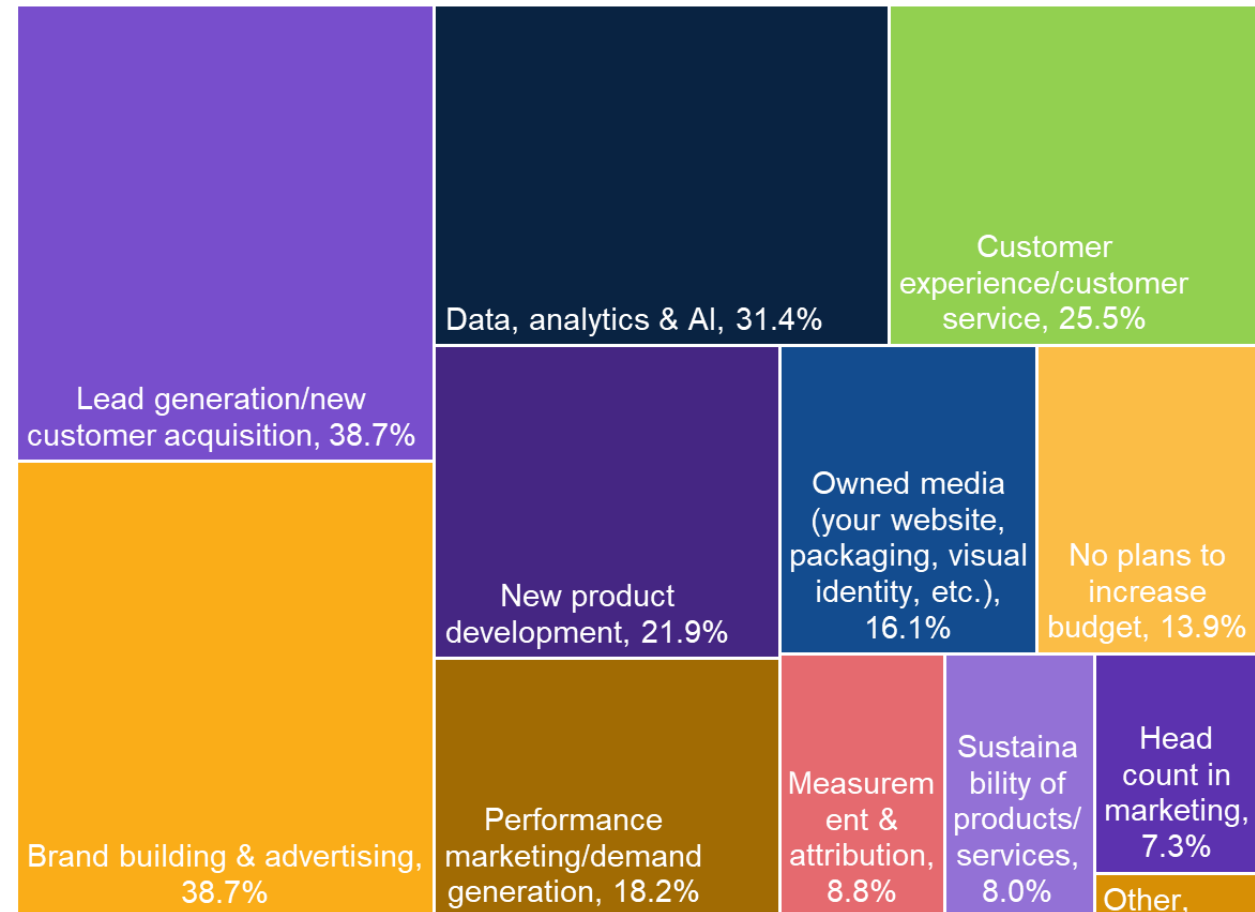


# CEOs see increasing marketing spend as a key mechanism for driving growth

Q. In which areas will your marketing budget increase by 10% or more?: CEOs globally



Q. In which areas will your marketing budget increase by 10% or more?: US CEOs



Source: The Conference Board C-Suite Outlook 2025







How are CEOs around the globe planning to navigate uncertainties in the year ahead?

THE CONFERENCE BOARD 

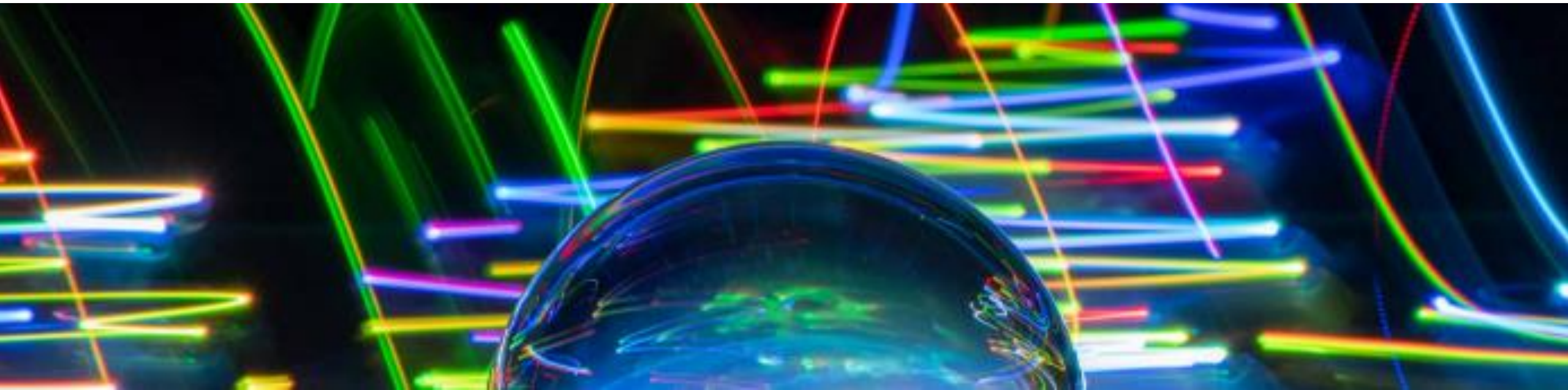
# C-SUITE OUTLOOK 2025

Seizing the Future: Adapting to a World of Rapid Change and Risk

[conference-board.org/c-suite-outlook](https://conference-board.org/c-suite-outlook)



[Read the Report »](#)

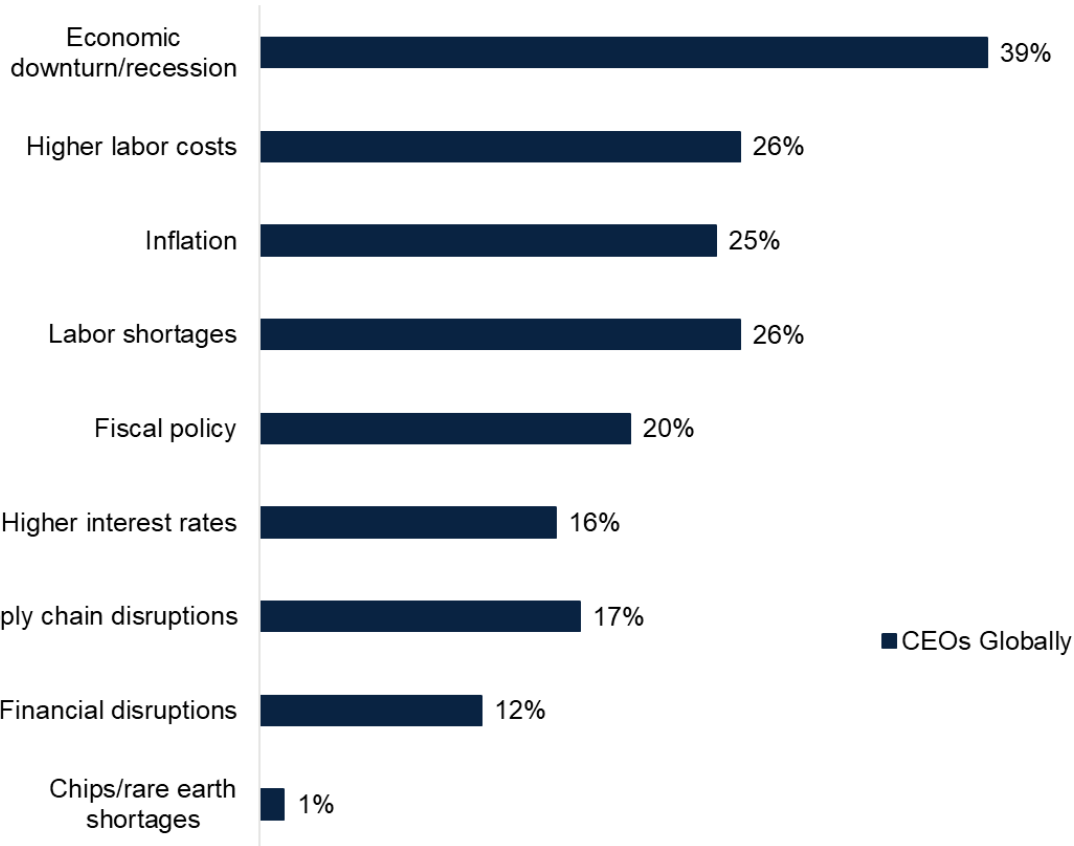


# **2025: A Year in Preview**

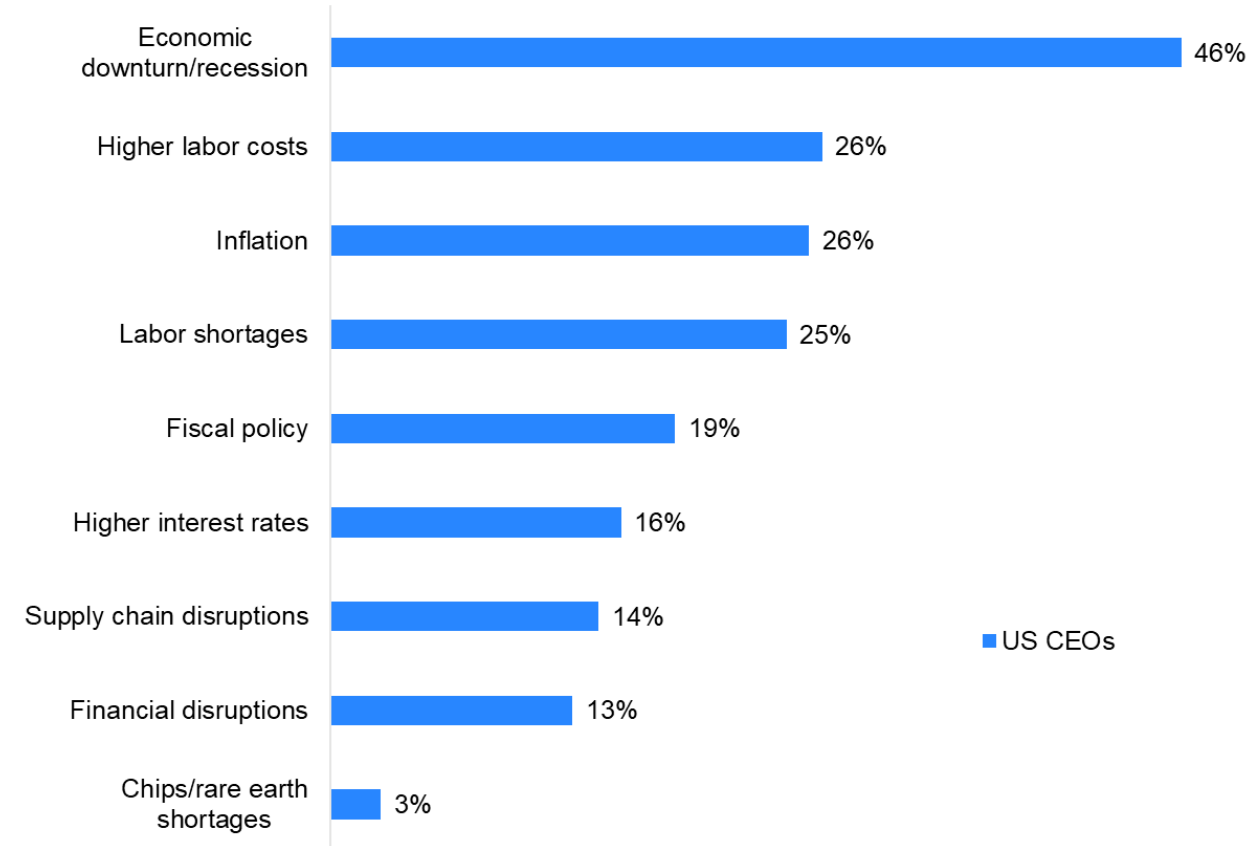
The Economy Ahead: A Conversation with  
The Richmond Federal Reserve's Tom Barkin

# US CEOs more concerned about economic weakness than CEO aggregate

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Source: The Conference Board C-Suite Outlook 2025



## 2025: A Year In Preview, February 5, 2025 | New York, NY

The Economy Ahead: A Conversation with the Richmond Federal Reserve's Tom Barkin 9:05 – 9:45 am



**Tom Barkin**

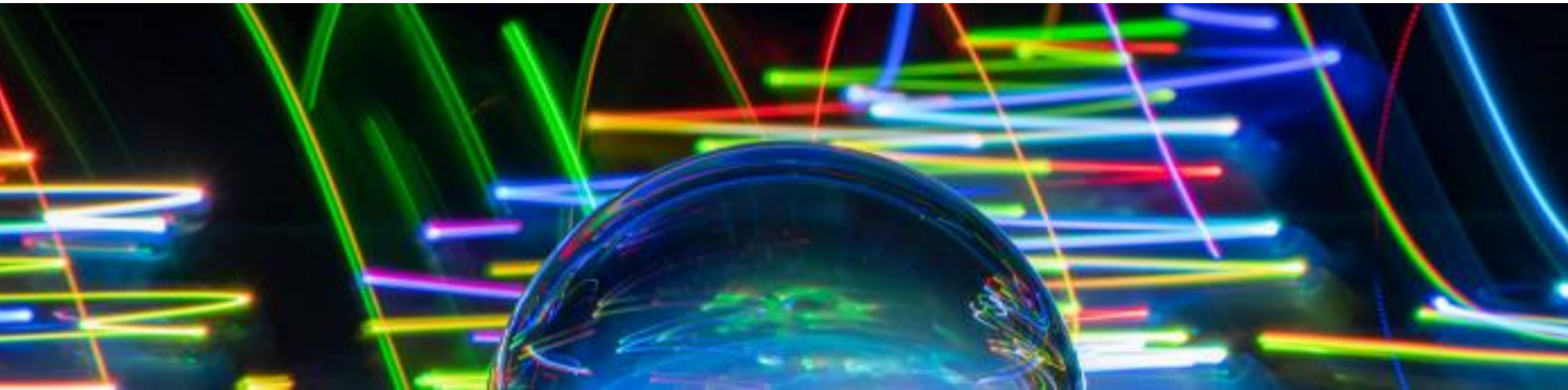
President and CEO,  
Federal Reserve Bank of Richmond



**Moderator: Tom McInerney**

President and CEO,  
Genworth Financial, Inc.,  
Event Co-Chair





# **2025: A Year in Preview**

Financial Markets: What Will the Coming Year Bring?

# US CEOs believe the US National Debt and deficits will have greatest impact

Q: Select the external factors or issues that you think will have the greatest impact on your business in 2025. (Policy and Globalization): CEOs globally



Q: Select the external factors or issues that you think will have the greatest impact on your business in 2025. (Policy and Globalization): US CEOs



Source: The Conference Board C-Suite Outlook 2025



## 2025: A Year In Preview, February 5, 2025 | New York, NY

Financial Markets: What Will the Coming Year Bring? 9:45 – 10:30 am



**Marc S. Cooper**

Chief Executive Officer,  
Solomon Partners



**Gaby Sulzberger**

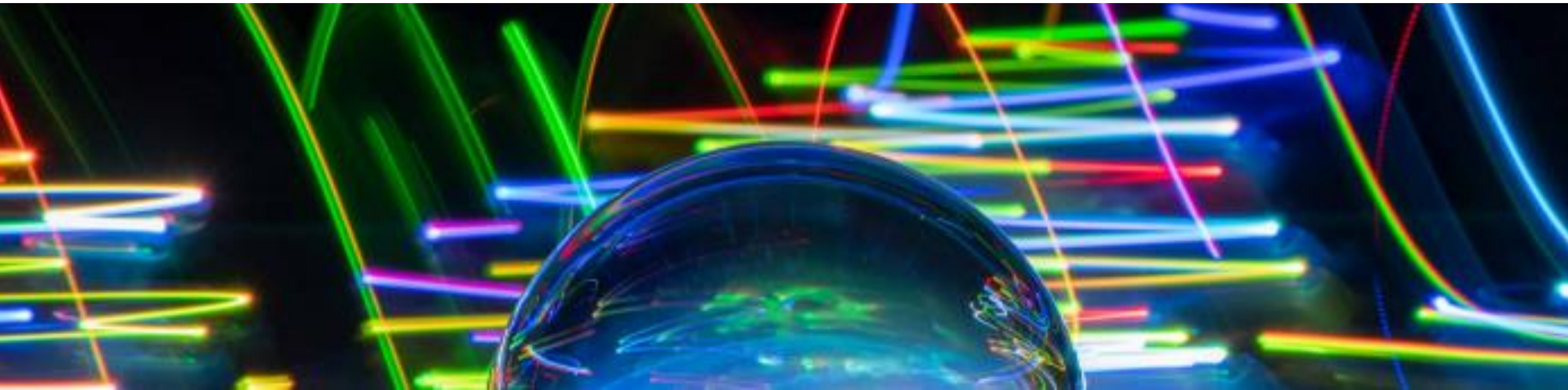
Partner,  
Centerbridge Partners, L.P.



**Moderator: Steve Odland**

President and CEO,  
The Conference Board





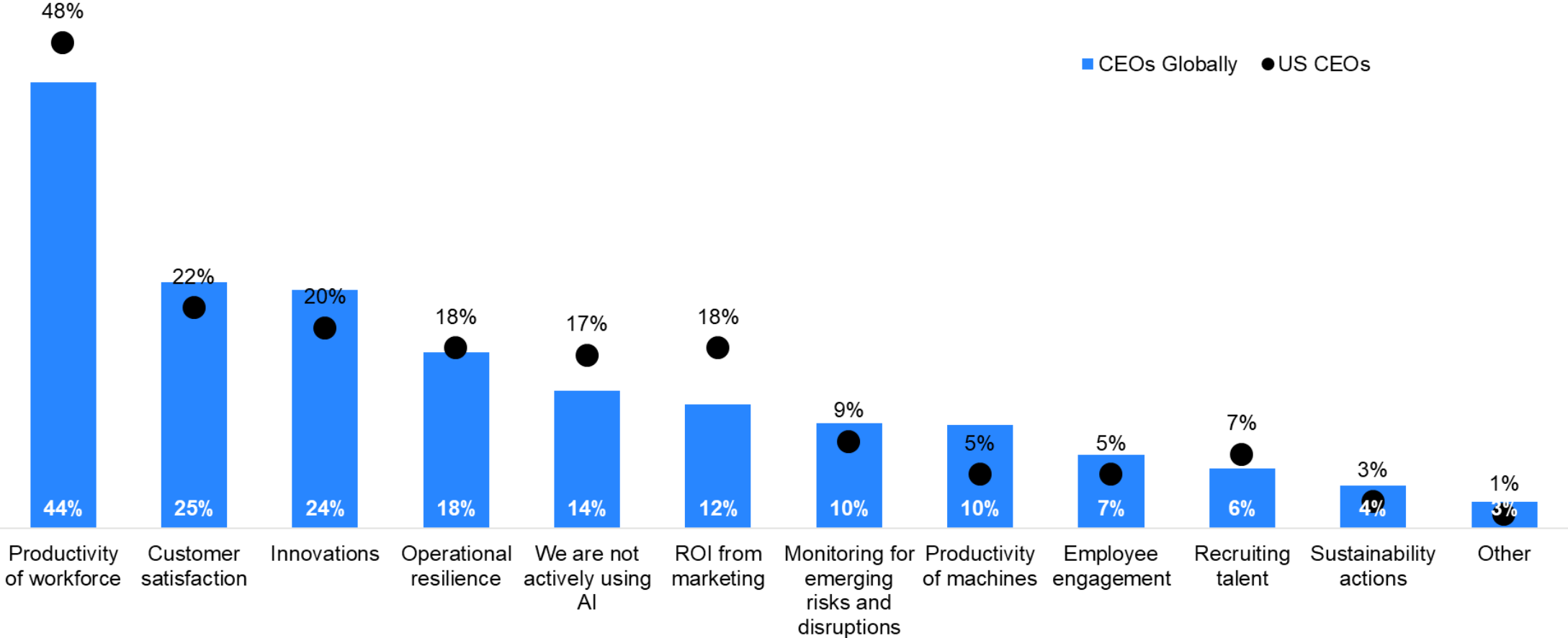
# **2025: A Year in Preview**

KEYNOTE: Artificial Intelligence



# CEOs cite increased labor productivity from AI adoption, especially US CEOs

Q. In which areas of your business do you see the biggest improvement as a result of the application of artificial intelligence (AI)?

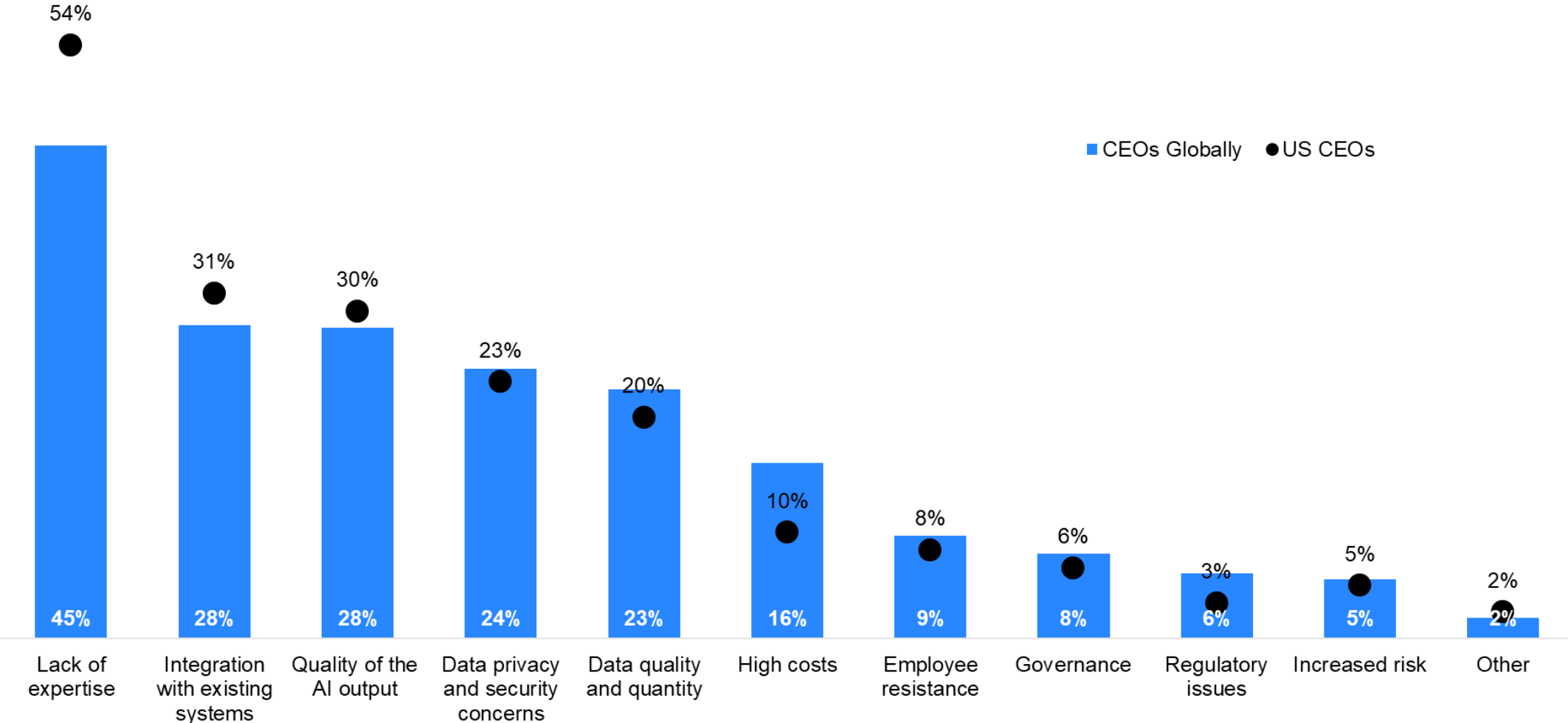


Source: The Conference Board C-Suite Outlook 2025



# Lack of AI experience is a major pain point for CEOs attempting to adopt AI

Q. What are the greatest challenges you have encountered with implementing AI?



Source: The Conference Board C-Suite Outlook 2025



## 2025: A Year In Preview, February 5, 2025 | New York, NY

KEYNOTE: Artificial Intelligence 10:30 – 11:20 am



**Arvind Krishna**  
Chairman and CEO,  
IBM

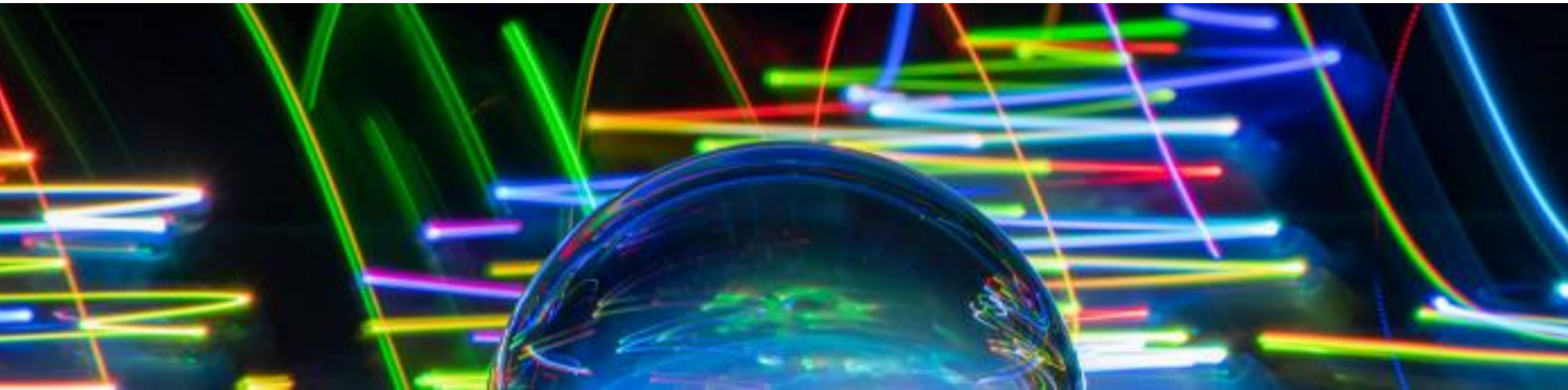


**Moderator: Ronald A. Williams**  
Chairman and CEO,  
RW2 Enterprises, LLC



Break  
11:20 am – 11:30 am



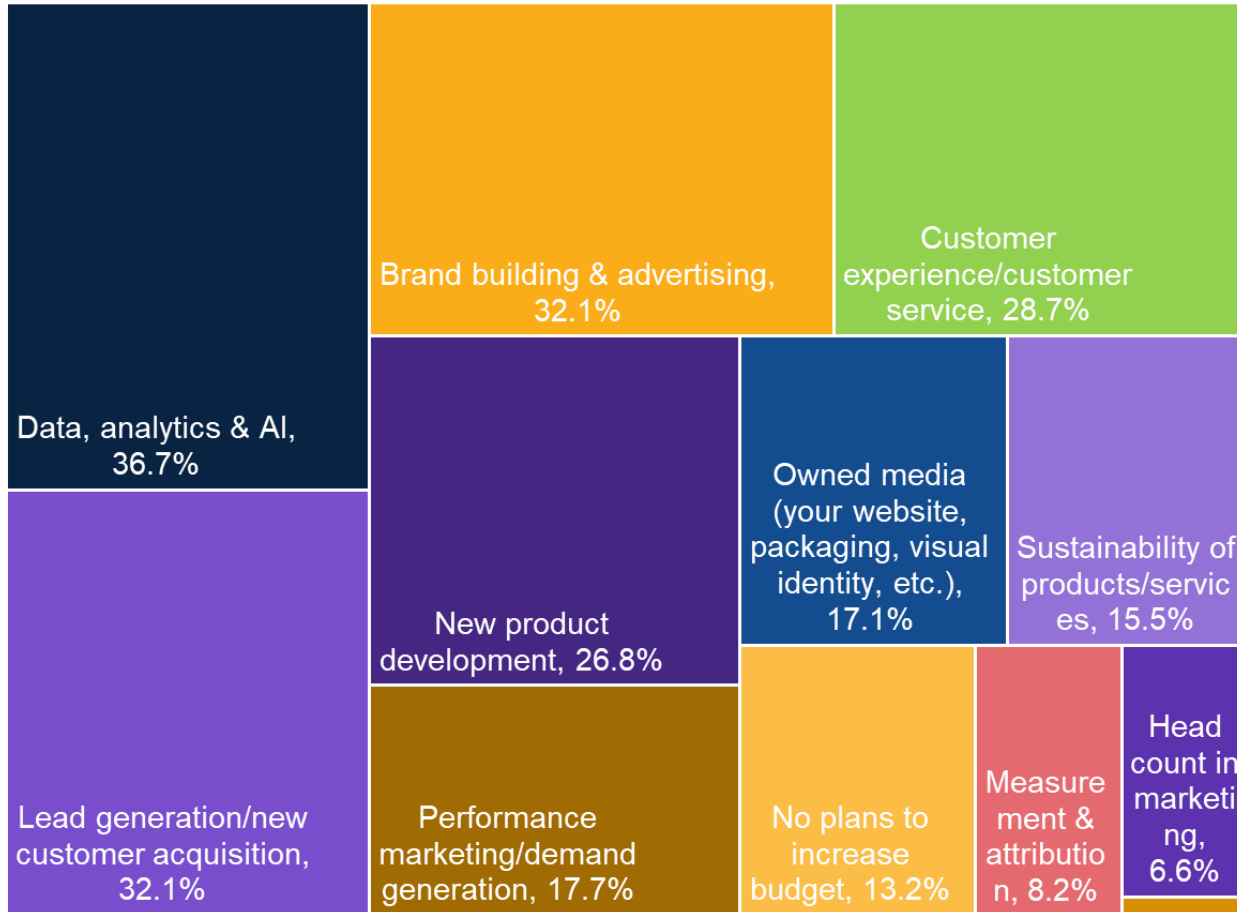


# **2025: A Year in Preview**

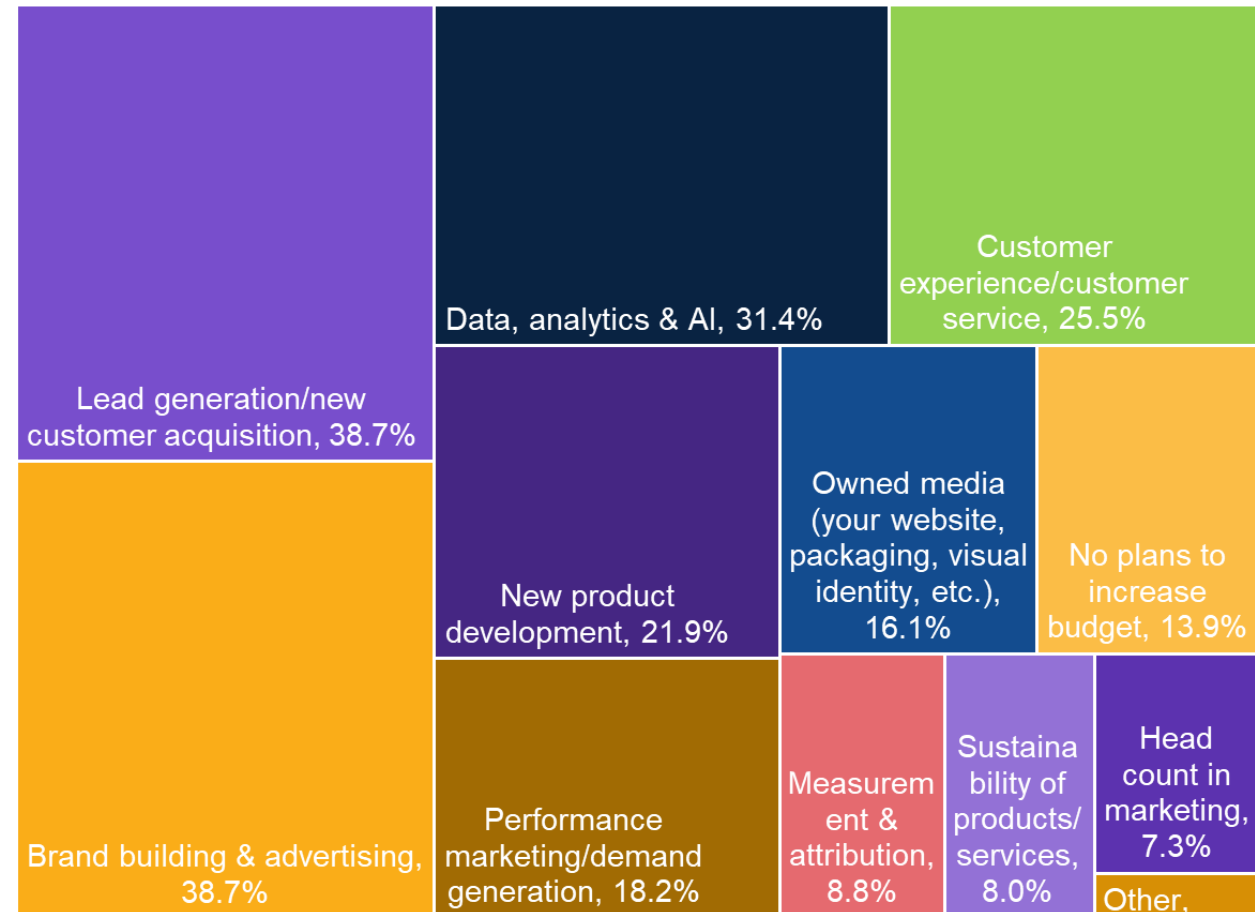
Global Consumers: How Will They Spend in 2025?

# CEOs see increasing marketing spend as a key mechanism for driving growth

Q. In which areas will your marketing budget increase by 10% or more?: CEOs globally



Q. In which areas will your marketing budget increase by 10% or more?: US CEOs



Source: The Conference Board C-Suite Outlook 2025



## 2025: A Year In Preview, February 5, 2025 | New York, NY

Global Consumers: How Will They Spend in 2025? 11:30 am – 12:00 pm



### Jonathon Nudi

Group President, Pet, International and North America Foodservice,  
General Mills



### Moderator: Kristie Vainikos Stegen

Chief Brand and Communications Officer,  
CoreLogic



2025: A Year In Preview, February 5, 2025 | New York, NY  
Morning Recap and Audience Reflection 12:00 pm – 12:15 pm



**Ivan Pollard**

Marketing & Communications  
Center Leader,  
The Conference Board

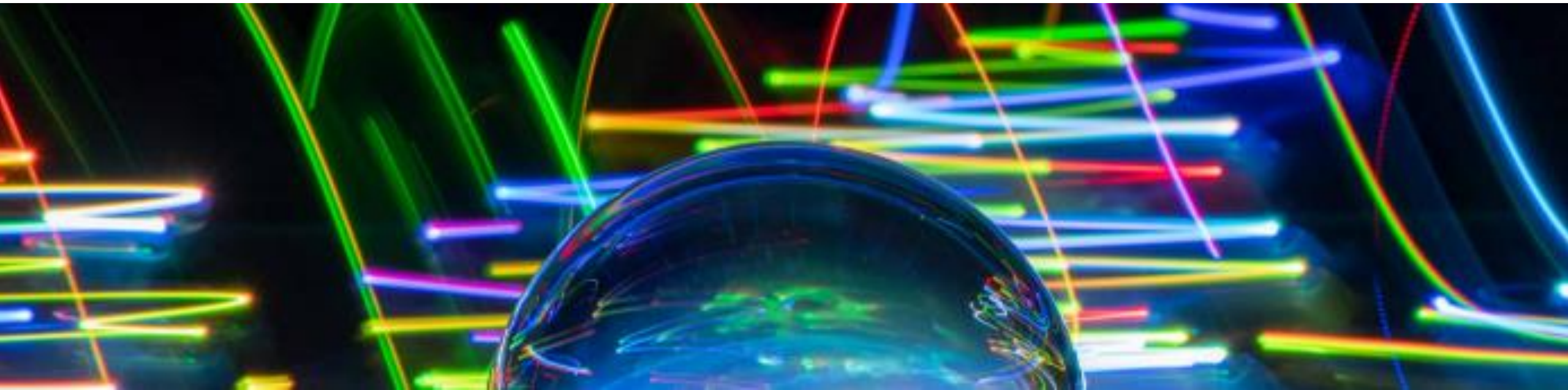




# Lunch

12:15 pm – 1:45 pm



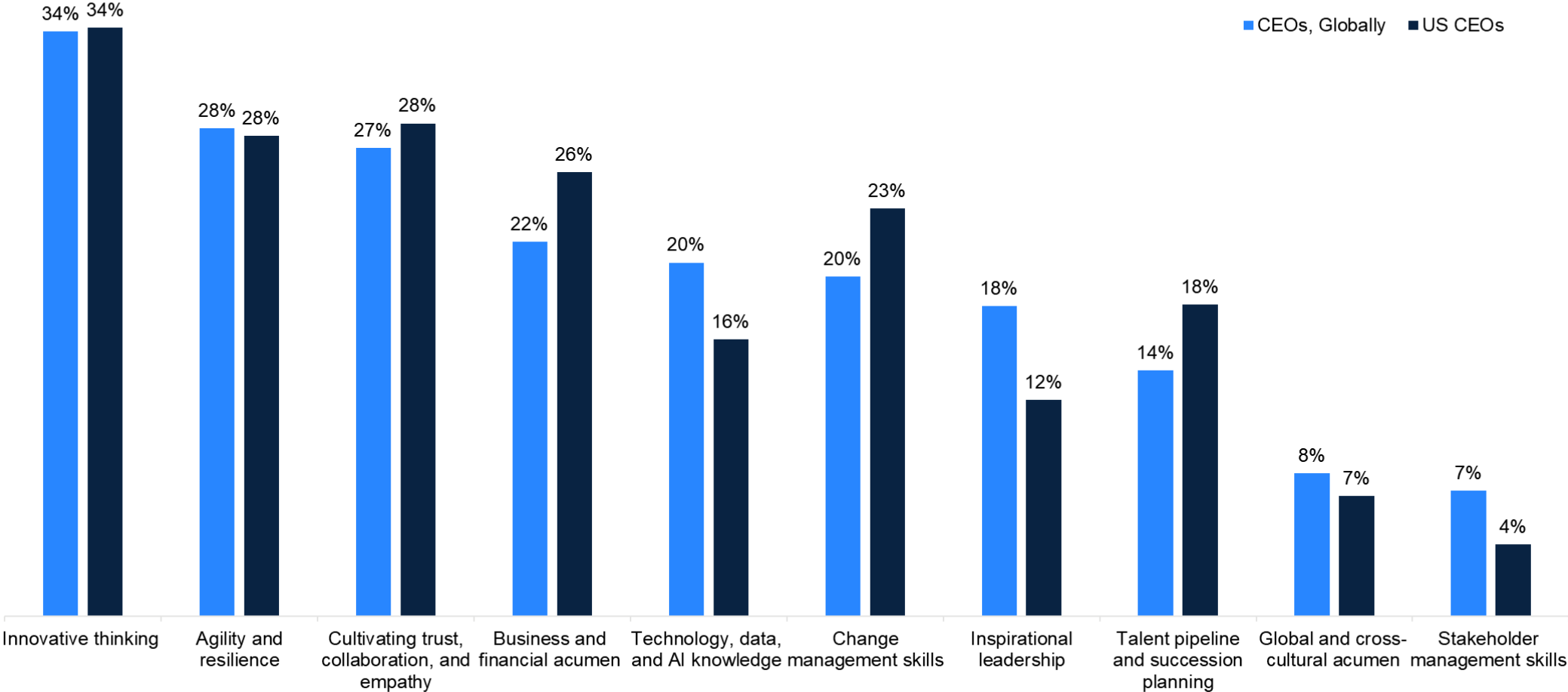


# **2025: A Year in Preview**

Talent, Leadership and Culture: What's Trending in 2025?

# CEOs seek future leaders who are innovative thinkers; other C-suite tech skills

Q: Which skills are most crucial for your top leaders to drive future growth?



Source: The Conference Board C-Suite Outlook 2025



## 2025: A Year In Preview, February 5, 2025 | New York, NY

Talent, Leadership and Culture: What's Trending in 2025? 1:45 – 2:30 pm



**Kyle Forrest**

US Human Capital Chief Marketing Officer,  
Deloitte



**Michael Griffiths**

National Organization Transformation Offering Leader, Human Capital,  
Deloitte



**Moderator: Diana Scott**

US Human Capital Center Leader,  
The Conference Board





# Preview: Human Capital Trends 2025

February 5, 2025

# Meet the team



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**Kyle Forrest**

Chief Marketing Officer

*US Human Capital  
Deloitte Consulting LLP*



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**Michael Griffiths**

Organization Transformation Offering Leader

*US Human Capital  
Deloitte Consulting LLP*

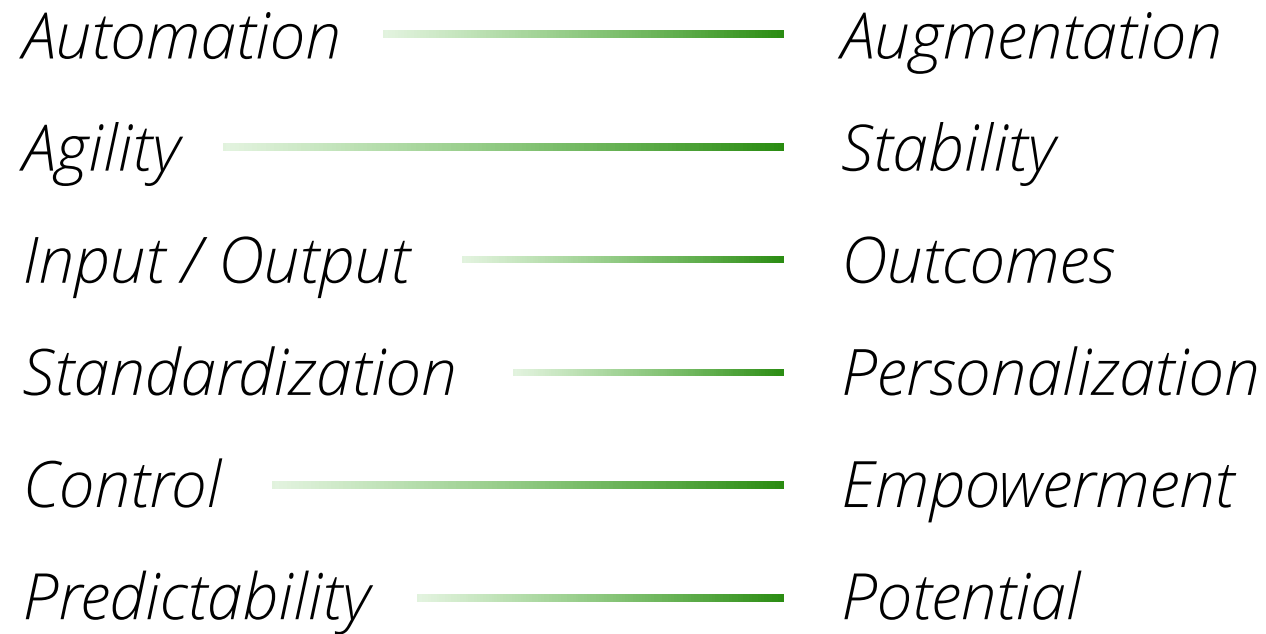


*TURNING **TENSIONS** INTO **TRIUMPHS**:*

*HELPING LEADERS TRANSFORM  
**UNCERTAINTY** INTO **OPPORTUNITY***



# TENSIONS







Success moving forward will require leaders to make tough choices across all these dimensions, setting clear visions and directions that balance business and human outcomes for their organizations.



*A look at our 2025 Global Human Capital Trends themes*

## **Work**

---

How do I ensure the right work is being done and in the optimal way?

### **Key questions**

- ▲ How do I unlock worker capacity and how should it be used?
- ▲ Is providing a stable identity and purpose for my workers as essential as creating agility for my business?

*A look at our 2025 Global Human Capital Trends themes*

# **Workforce**

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How do I access, develop and enable the necessary workforce?

## **Key questions**

- ▲ Why are my new hires not ready to contribute?
- ▲ Do I need to update our employee value proposition for an AI-powered world? And if so, how?
- ▲ How do I get value out of work *and* workforce technology?

*A look at our 2025 Global Human Capital Trends themes*

## **Organization and culture**

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Do I have the right organization and culture to enable human performance?

### **Key questions**

- ▲ Why doesn't performance management work?
- ▲ How can we motivate people to do what needs to be done?
- ▲ Do we still need managers, and if to, how should they spend their time?

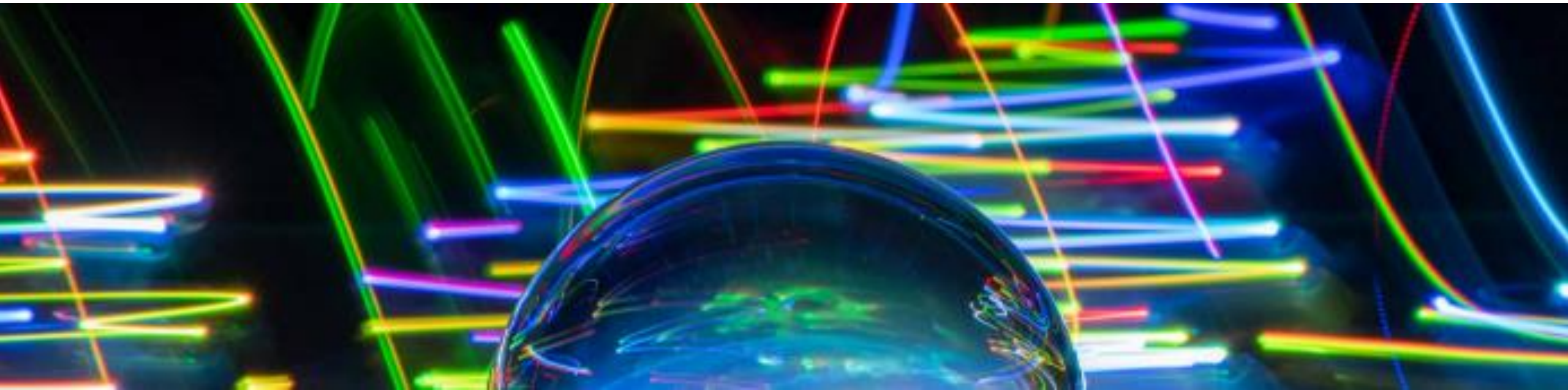


Thank you.

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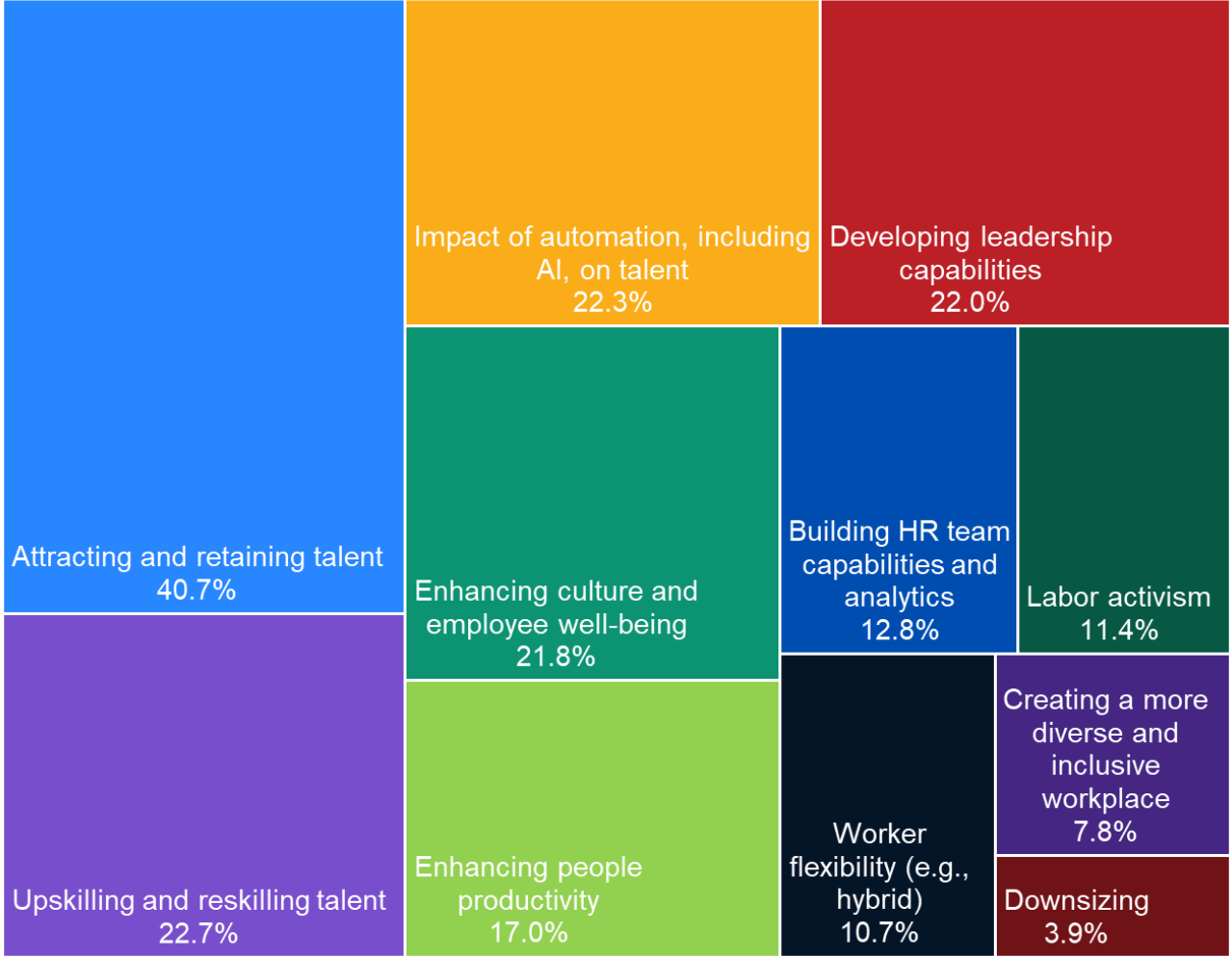
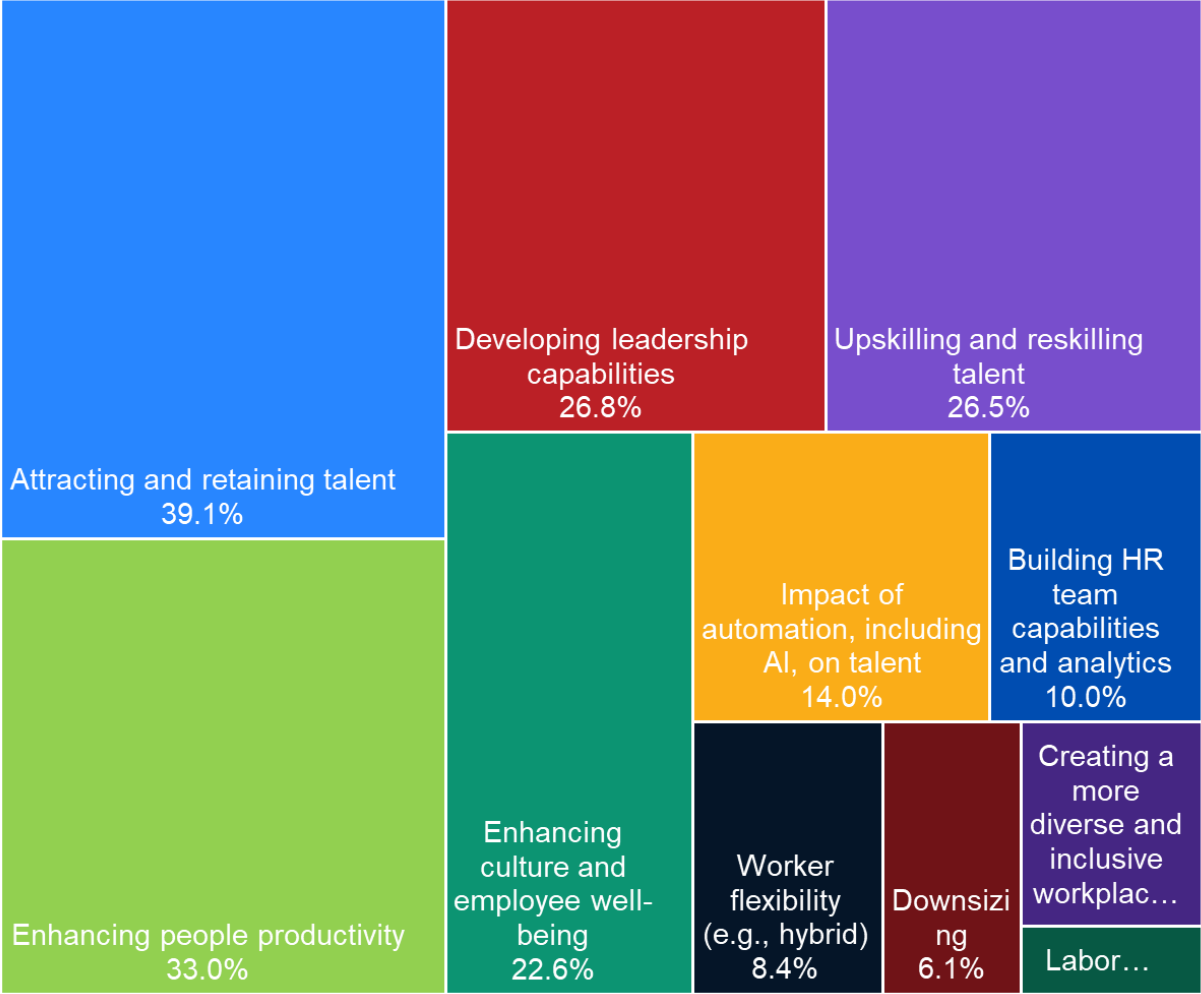
# **2025: A Year in Preview**

Sustaining Workforce Development Across  
the Continuum

# CEOs and CHROs agree on attracting and retaining talent, upskilling, and leadership development as major internal business objectives

Q: Select the internal factors or issues that your company will focus on in 2025 - Human capital: CEOs Globally

Q: Select the internal factors or issues that your company will focus on in 2025 - Human capital: CHROs Globally



Source: The Conference Board C-Suite Outlook 2025



## 2025: A Year In Preview, February 5, 2025 | New York, NY

Sustaining Workforce Development Across the Continuum 2:30 – 3:00 pm



**Marissa Geist**

Chief Executive Officer,  
Cielo



**Jessica Harrah**

Chief People Officer,  
KinderCare Learning Companies



**Moderator: Yolanda Seals-Coffield**

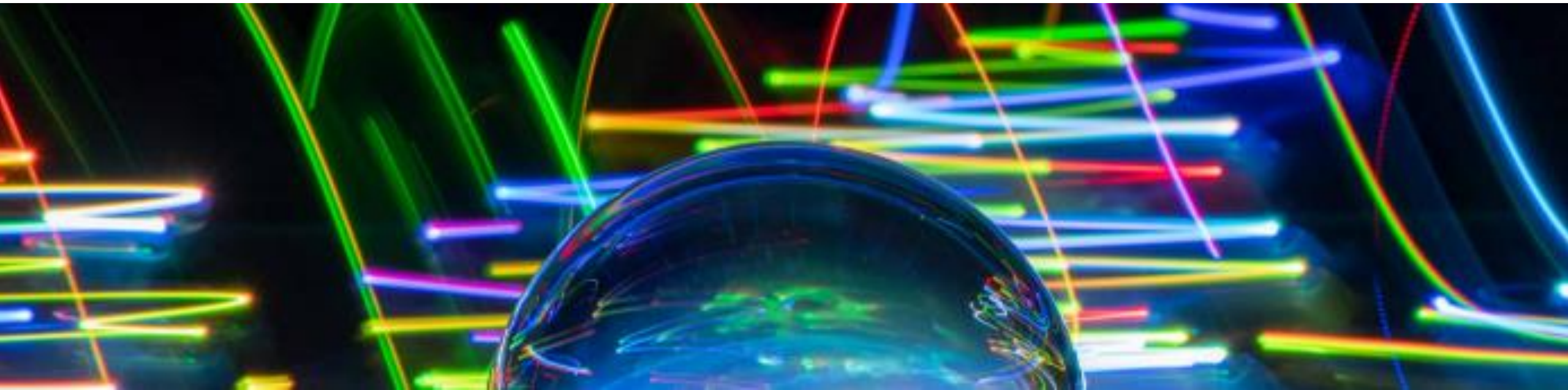
Chief People and Inclusion Officer,  
PwC





Break  
3:00 pm – 3:15 pm



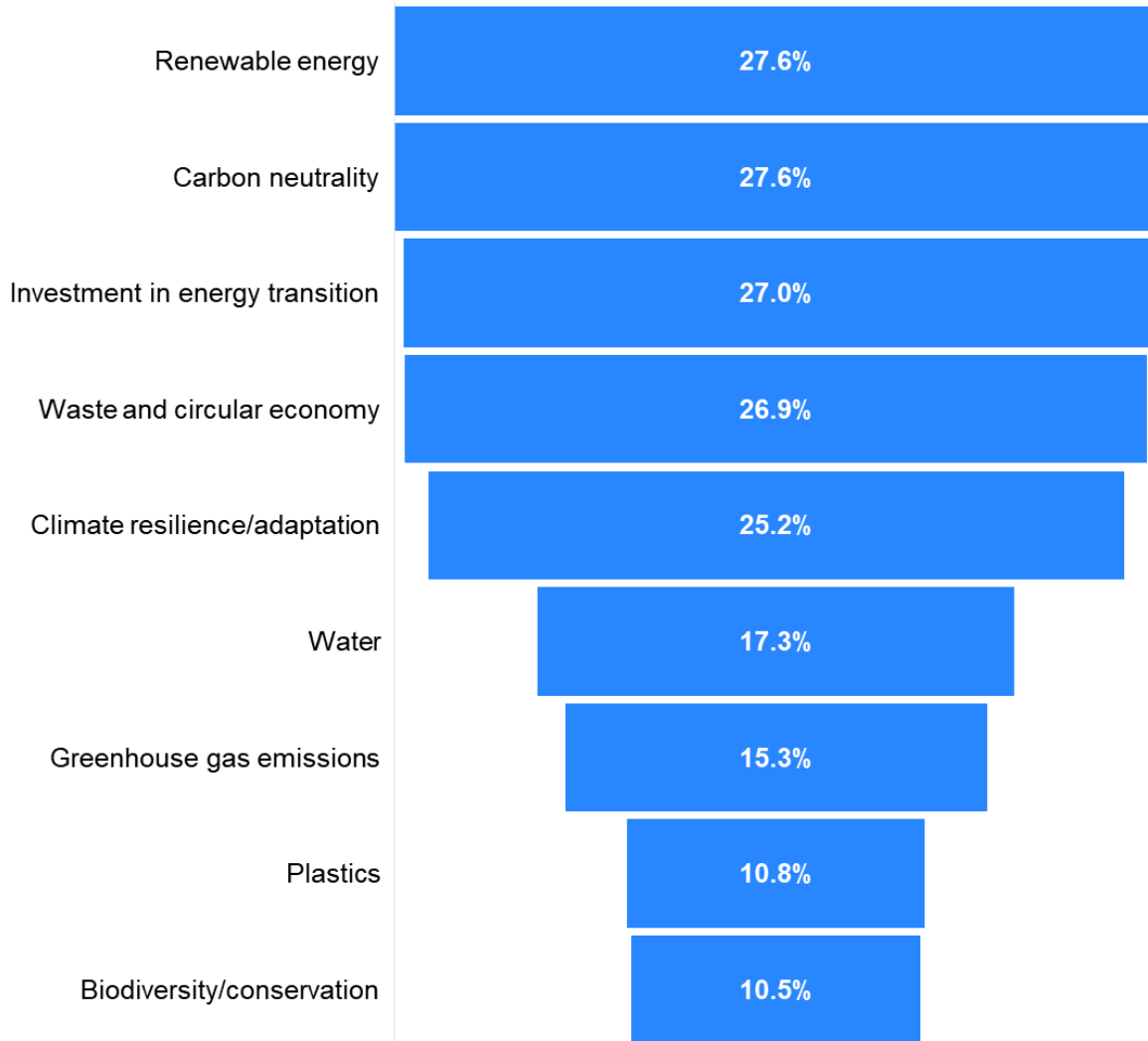


# 2025: A Year in Preview

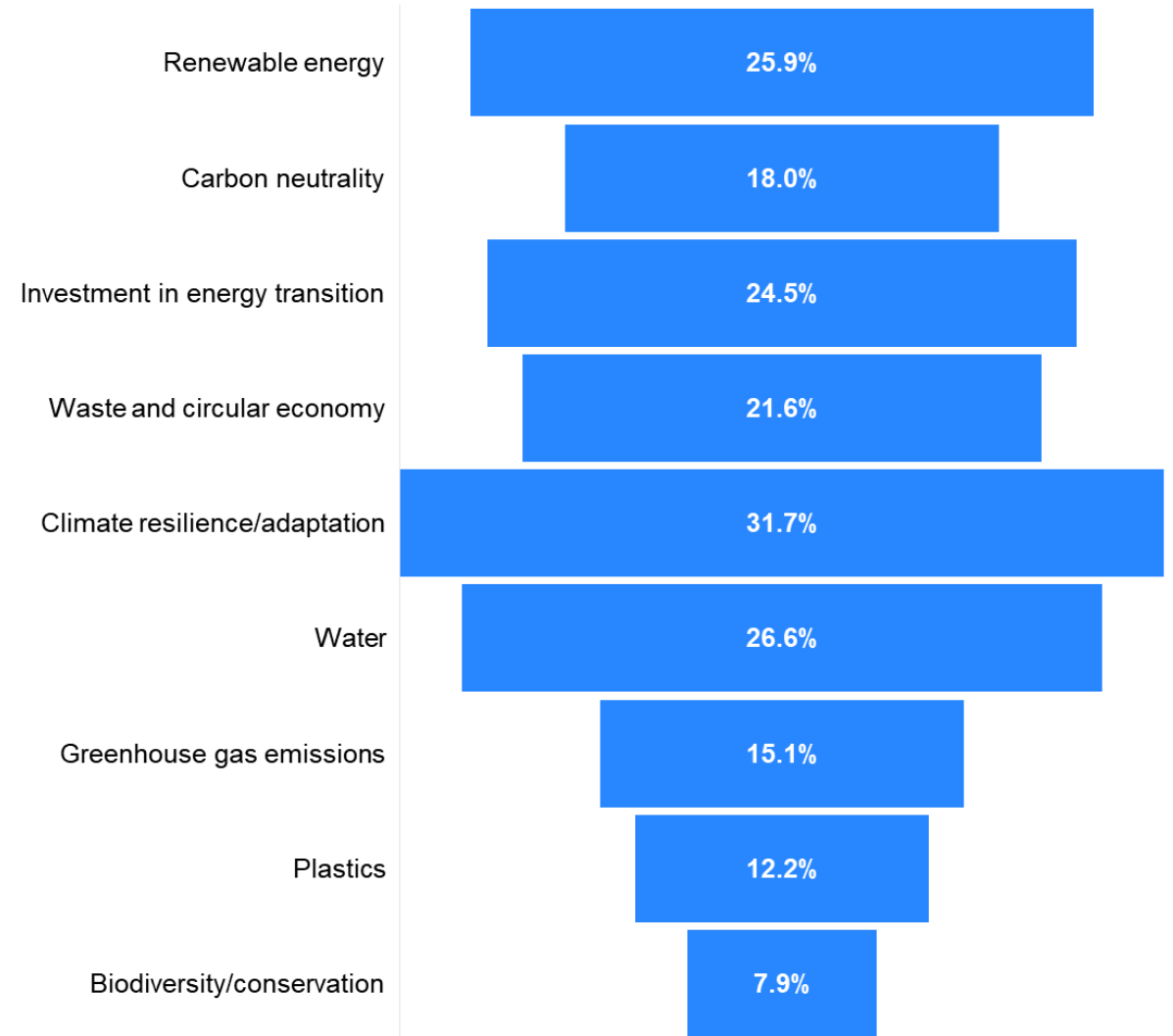
Global Energy Transition

# US CEOs largely concerned about climate resilience and adaptation

Q: Select the 2 highest environmental priorities for your organization:  
CEOs Globally



Q: Select the 2 highest environmental priorities for your organization:  
US CEOs



Source: The Conference Board C-Suite Outlook 2025



2025: A Year In Preview, February 5, 2025 | New York, NY  
Global Energy Transition 3:15 – 4:00 pm



**Douglas Peterson**

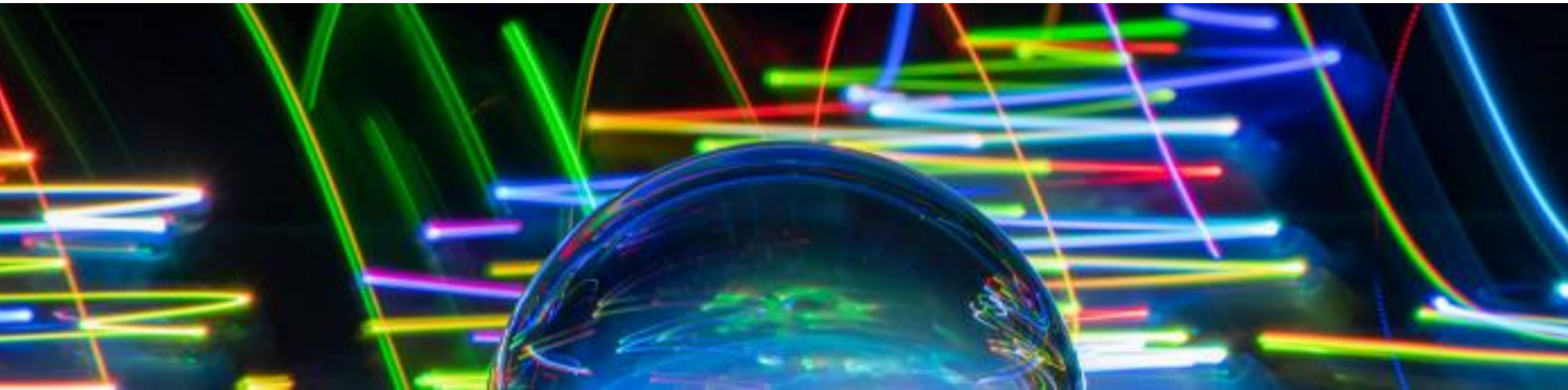
Senior Advisor, Former President & CEO,  
S&P Global



**Moderator: Tamara Lundgren**

Chairman and Chief Executive Officer,  
Radius Recycling,  
Event Co-Chair



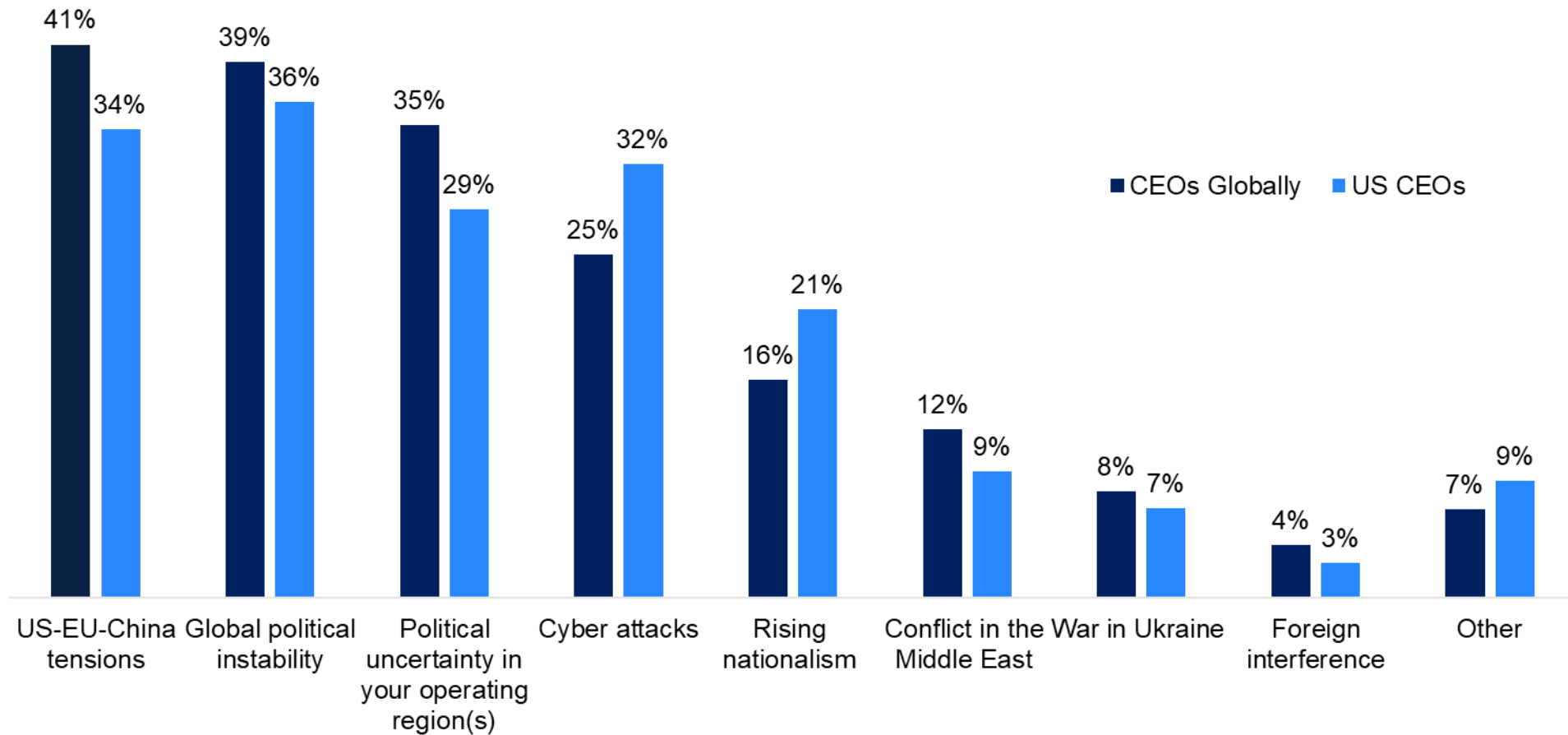


## **2025: A Year in Preview**

The Geopolitical Landscape: How Will You Navigate the Coming Year?

# US CEOs cite geopolitical tensions, plus cyber and nationalism as external risks

Q. Select the external factors or issues that you think will have the greatest impact on your business in 2025: Geopolitical Risk



Source: The Conference Board C-Suite Outlook 2025



# CEOs globally are most concerned about trade wars; US CEOs cyber attacks

Q: Which conflict-related geopolitical risks concern you the most when it comes to your business operations? CEOs Globally



Q: Which conflict-related geopolitical risks concern you the most when it comes to your business operations? US CEOs



Source: The Conference Board C-Suite Outlook 2025



## 2025: A Year In Preview, February 5, 2025 | New York, NY

### The Geopolitical Landscape: How Will You Navigate the Coming Year?

4:00 – 4:45 pm



**Thierry Betbeze**

Chief Executive Officer, Dassault Falcon Jet



**Gary D. Cohn**

Vice Chairman, IBM



**Nicole Hart**

Board Advisor & Former Chief Strategy Officer, Microsoft Security



**Moderator: David Young**

President, Committee for Economic Development, The Conference Board





2025: A Year In Preview, February 5, 2025 | New York, NY  
The Final Word 4:45 – 4:55 pm



**Tom McInerney**  
President and CEO,  
Genworth Financial, Inc.,  
Event Co-Chair



# Networking Reception

4:55 pm – 6:00 pm

